

Observatoire des coûts de touchée

English abstract : Observatory Airport charges – 2025 Edition

Analysis and comparison of airport charges,
for an Airbus A320 operated by a low-cost carrier in 2025
(and versus an Airbus A320 operated by a traditional carrier)

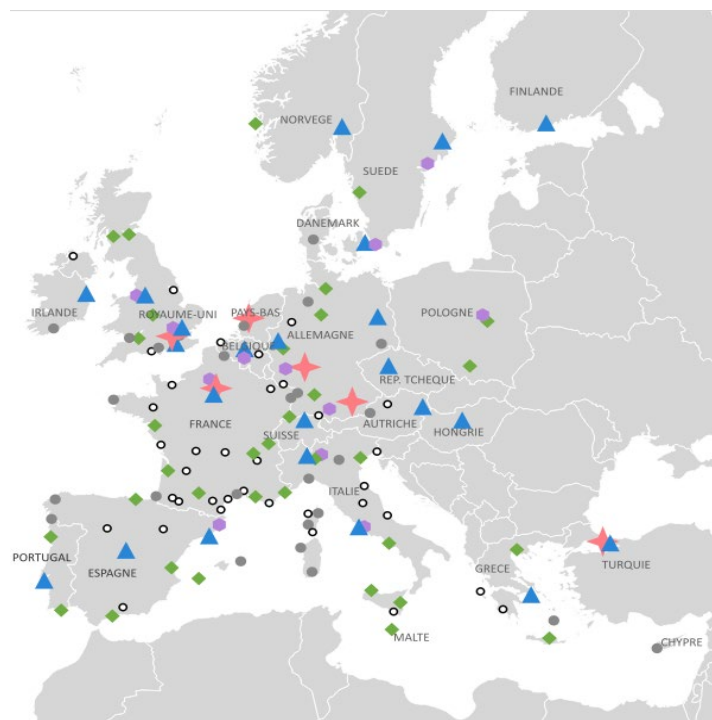
All of the airport charges observatory's public content can be viewed (in French) at the following link: <https://www.ecologie.gouv.fr/politiques-publiques/observatoire-couts-touchee>

Airport charges: methodology

The airport charges, for one aircraft rotation, are defined in this report as « all services invoiced in the form of taxes or charges to an airline for landing, ground movement, parking and take-off of the aircraft, and disembarkation and embarkation of passengers ». The scope of the report does not include ground handling services, which are subject to commercial contracts whose negotiated terms are not public. Air navigation charges are taken into account for terminal air traffic services (eg : RSTCA in France). En-route control charges are excluded.

In Europe, airport charges and the services they cover can differ from on airport to another. Airport charges are expressed in € (euros). Freight is excluded from the scope of the observatory.

Over 130 airports in 22 countries (including 19 in the European Union) are represented as follows



Executive summary

As in previous years, the competitive positioning of French airports varies depending on their category and the countries with which they are compared. Against a backdrop of uneven traffic recovery in 2025 across Europe (with a more dynamic recovery in southern Europe than in the north), the following key points can be noted:

- The average cost per passenger (weighted average per country) in 2025 is €41.7 for all airports in the panel (+€4.2 compared to 2023, an increase of +11%). The annual rate of increase was similar in 2024 (+€2, +5% compared to 2023) and 2025 (+€2.2, +5% compared to 2024) ;
- For French airports, the average cost per passenger in 2025 is €40.7 (+€7.2 compared to 2023, an increase of +21%). The annual rate of increase was very uneven between 2024 (+€0.9, +3% compared to 2023) and 2025 (+€6.3, +18% compared to 2024) ;
- Three countries (Denmark, the Netherlands and France) are experiencing a sharp rise in costs (above the European average between 2023 and 2025, which stands at +11%). The tax increases are affecting these three countries, including France, where solidarity rates (air transport tax known as « TSBA ») were revised from 1 March 2025. The increase in airport charges is particularly affecting the Netherlands;
- Significant differences emerged in 2025 between countries in terms of taxation: an air transport tax was introduced in Denmark but abolished in Sweden; there was a sharp increase in the TSBA in France, but discussions are underway in Germany to reduce the amount of air transport tax; abolition of the air transport tax in Hungary, created in 2022, but an increase in tax rates in the Netherlands, created in 2021, etc;
- The competitive positioning of all categories of French airports deteriorated in 2025 due to airport charges rising above the European average. For instance, French airports with fewer than 1 million passengers, some of which are highly dependent on traffic generated by low-cost carriers, often have higher costs than airports in southern European countries (42% higher on average), an issue that should be highlighted in the context of capturing north-south European tourist flows;
- Within the scope covered by this observatory, airports are increasingly taking environmental issues into account by adjusting certain charges and/or creating specific charges. This is the case in 13 of the 22 countries in the panel, representing 65 airports out of a total of 137. More than half of French airports (21 out of 33) have incorporated environmental charges, and all categories of airports (with the exception of low-cost airports) are represented.