

The Northern Corridor

September 2026 vs September 2025

Sixteen city airports · eight shores · one closed sky

▲ GROWTH
● FLAT
▼ DECLINE

01 · SIXTEEN CITY AIRPORTS

latest published window per airport · Δ year-on-year

MOSCOW · SVO VKO DME -3.5% JAN-JUL 2026 · 40.4M PAX SHEREMETYEVO -1% DOMODEDOVO -13.2%	ST PETERSBURG · LED -2% 9M 2026 · 15.6M PAX INTERNATIONAL +8% SUMMER 6.34M REC	KALININGRAD · KGD -3.4% Q1 2026 · 814K PAX YEAR 2025 5.0M REC REGION FLOW -5%	SOCHI · AER -4% 2026 FCST · 2025: 12.5M SUMMER PAX ~3.5M KRASNODAR REOPENED
HELSINKI · HEL +2% AUG 2026 · 1.6M PAX YEAR 2025 16.98M VS 2019 BELOW	WARSAW · WAW +8% JAN-AUG 2026 · 17.25M YEAR 2025 24.1M REC CAPACITY AT CEILING	TALLINN · TLL +13% SEP 2026 · 356K — BEST EVER 9M 2026 +12% AUG 390K ALL-TIME	RIGA · RIX 0% SEP 2026 · 623K PAX 9M 2026 5.32M FLAT TRANSFER 22%
VILNIUS · VNO +13.1% JUN 2026 · 547K PAX TRIO H1 2025 +9% BEAT RIGA	MINSK · MSQ +8.4% 2025 · ~3.03M PAX* BELAVIA A330 LH CHARTERS EGYPT·AYT	KYIV · KBP IEV CLOSED SINCE FEB 2022 · 55 MONTHS RELAUNCH 4-6 WKS FIRST LVIV	ODESA · ODS CLOSED SINCE FEB 2022 TERMINAL READY COAST PARTIAL
YEREVAN · EVN +17.2% JUL 2026 · 735K — RECORD AUG 2026 775K REC YEAR 2025 5.62M REC	TBILISI · TBS +8% Q1 2026 · 1.10M PAX GEORGIA 9M 6.6M +2% CAPACITY → 10M	BAKU · GYD 0% JAN-AUG 2026 · 4.9M YEAR 2025 7.64M AZAL C-ASIA +35%	ISTANBUL · IST +2% 9M 2026 · 64.5M PAX INTL 50.9M +3% 2025 84.4M #8

02 · THE EIGHT SHORES

season 2026 verdict · September window

ANTALYA -5% 13.02M INTL JAN-SEP · RUSSIA #1	BODRUM 85% LATE-SUMMER OCC · SEASON TO NOV	KRASNODAR KRAI 7.3M TOURISTS BY JUL · ANAPA ×2	CRIMEA -40% JUNE TRAFFIC · BOOKINGS -31%
ODESA COAST 30-36 OFFICIAL BEACHES · MINE RULES	CURONIAN SPIT -5% REGION JAN-MAY · COAST +5.8%	JŪRMALA -7.2% LATVIA Q1 FOREIGN GUESTS	SPB GULF SHORE REC* *TIO EST · LED SUMMER 6.34M

03 · TOURISTS & WHO IS TRAVELLING

official counts where published · * TIO estimate

DESTINATION	VISITORS	Δ YOY	WINDOW	SOURCE MARKET	SIGNAL	Δ YOY
Moscow	~12M	flat	H1 2026 (2025: 26.5M)	Russia → Türkiye	6.67M — #1 overseas trip (2025)	+2.6%
Armenia	1.04M — record	+14.8%	H1 2026	Russia → Armenia	417k in H1 — 40% of arrivals	+23.3%
Georgia	2.73M visits	-2.7%	H1 2026	Russia → Azerbaijan	178k Jan-May — #1, 2× Türkiye	stable
Antalya (intl)	13.02M	-5%	Jan-Sep 2026	Russia → Georgia	329k in Q2 — 25.1% share, #1	soft
Krasnodar Krai	7.3M	Sochi -20-25% by late Jul 2026		Ukraine → Georgia	fastest-growing top market, H1	+22.7%
Crimea	-3-4M fcst loss	-31-40%	season 2026	Baltics → Antalya	#1 charter ex-TLL; extra BJV lift	growing
Kaliningrad region	470k	-5%	Jan-May 2026	China → St Petersburg	339k airport arrivals, 9M	+28%
Latvia	447k guests	-3.0%	Q1 2026	Germany → Antalya	1.18M in H1 — #2 market	—

Sources: airport authorities & aviation agencies — Rosaviatsiya/MAU, Pulkovo (NCG), Khrabrovo, Basel Aero, Finavia, Warsaw Chopin, Tallinn Airport, RIX, Lithuanian Airports, Minsk National, State Aviation Service of Ukraine, Armenia CAC, Georgian CAA/TAV, AZAL, DHMI/iGA · tourism bodies — Türkiye MoCT, Armenia Tourism Committee, Azerbaijan State Statistics, Geostat, Latvia Travel/CSB, Kaliningradstat · ATOR operator data · CMWP & NF Group hotel market H1 2026 · Kommersant. Cells marked * are TIO estimates; all other figures are published data.