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EUROPEAN AVIATION OVERVIEW

26 Jan - 01 Feb 2026

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5 February 2026

Headlines

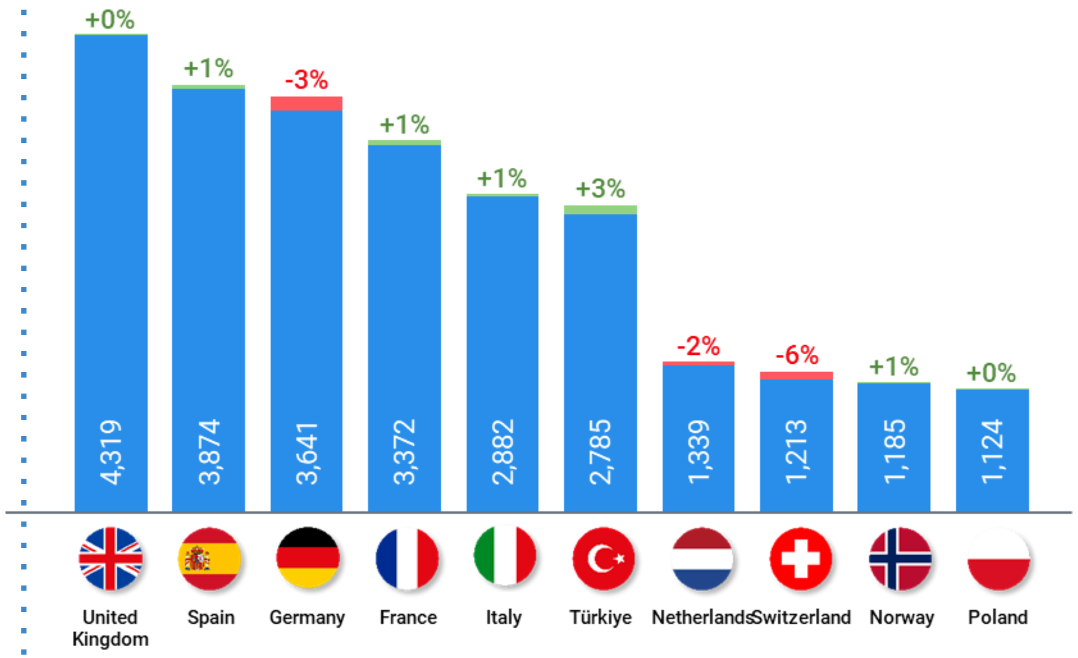
(Week 5, 26 Jan - 01 Feb 2026)

- The network recorded 24,588 average daily flights in Week 5, unchanged from Week 4, +2% vs 2025.
- On average, the busiest 10 carriers operated higher capacities (+1.7%) compared to Week 4.
- Meanwhile at State level, the top 10 States recorded 0.1% fewer flights compared to the previous week.
- Arrival and departure punctuality were 77.1% and 73.5%, worse than the same period last year.
- En-route ATFM delays were +4% compared to the previous week, with a daily average of around 5K delay minutes, -19% lower than 2025. Total ATFM delay per flight was 0.8 min/flight (0.2 for en-route, and 0.6 for airports).
- ATC capacity/staffing was the top delay cause (58% of all en-route ATFM delays), notably in Spain and Germany. Other factors were the second largest category (19%), mainly in Portugal, while ATC disruptions were the third largest cause (12%) driven primarily by a radar failure in Switzerland.
- The top contributing Area Control Centres to en-route ATFM delays (in mins per flight) were Geneva, Agadir, Lisbon, Sevilla and Canaries.
- The average jet fuel price closed at $2.29/gallon on 30 January, +4% vs two weeks earlier.

Top 10 busiest States

On week 26 Jan - 01 Feb 2026

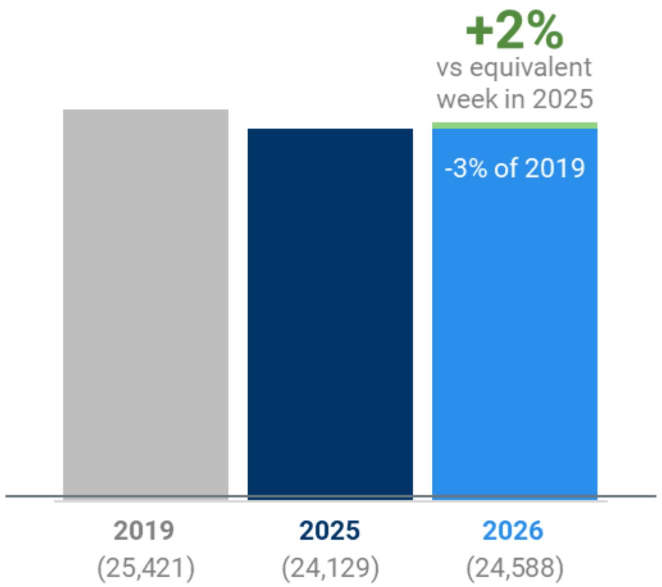
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

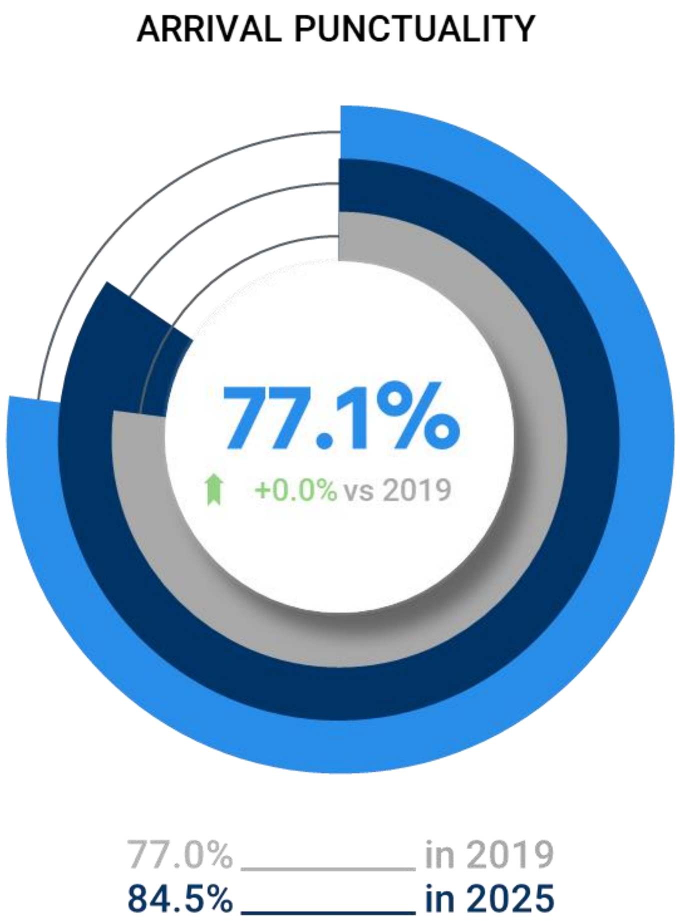
Week 26 Jan - 01 Feb 2026

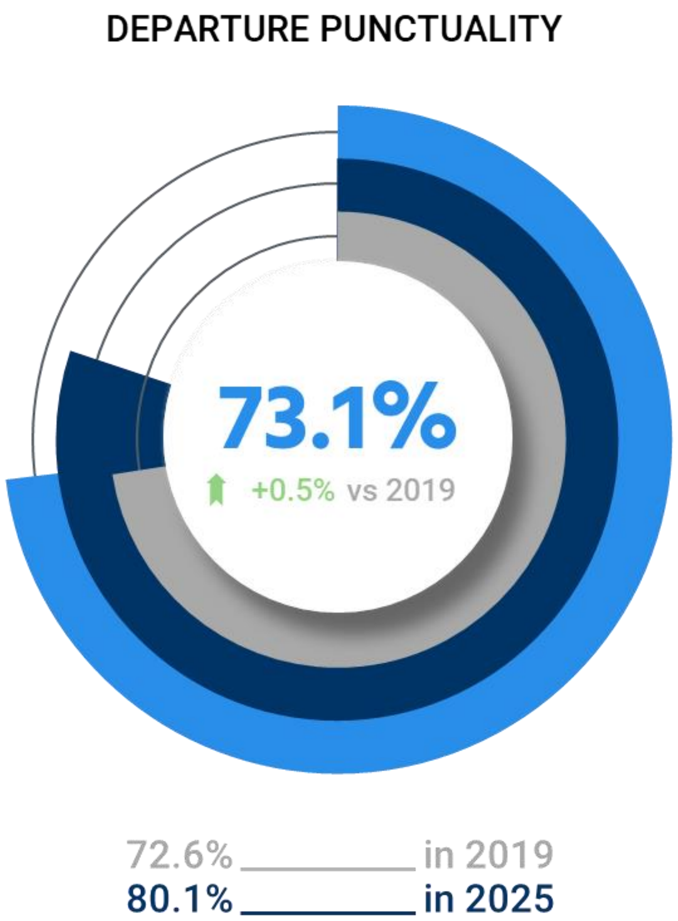


Arrival & departure punctuality

(all network scheduled flights)

Week 26 Jan - 01 Feb 2026





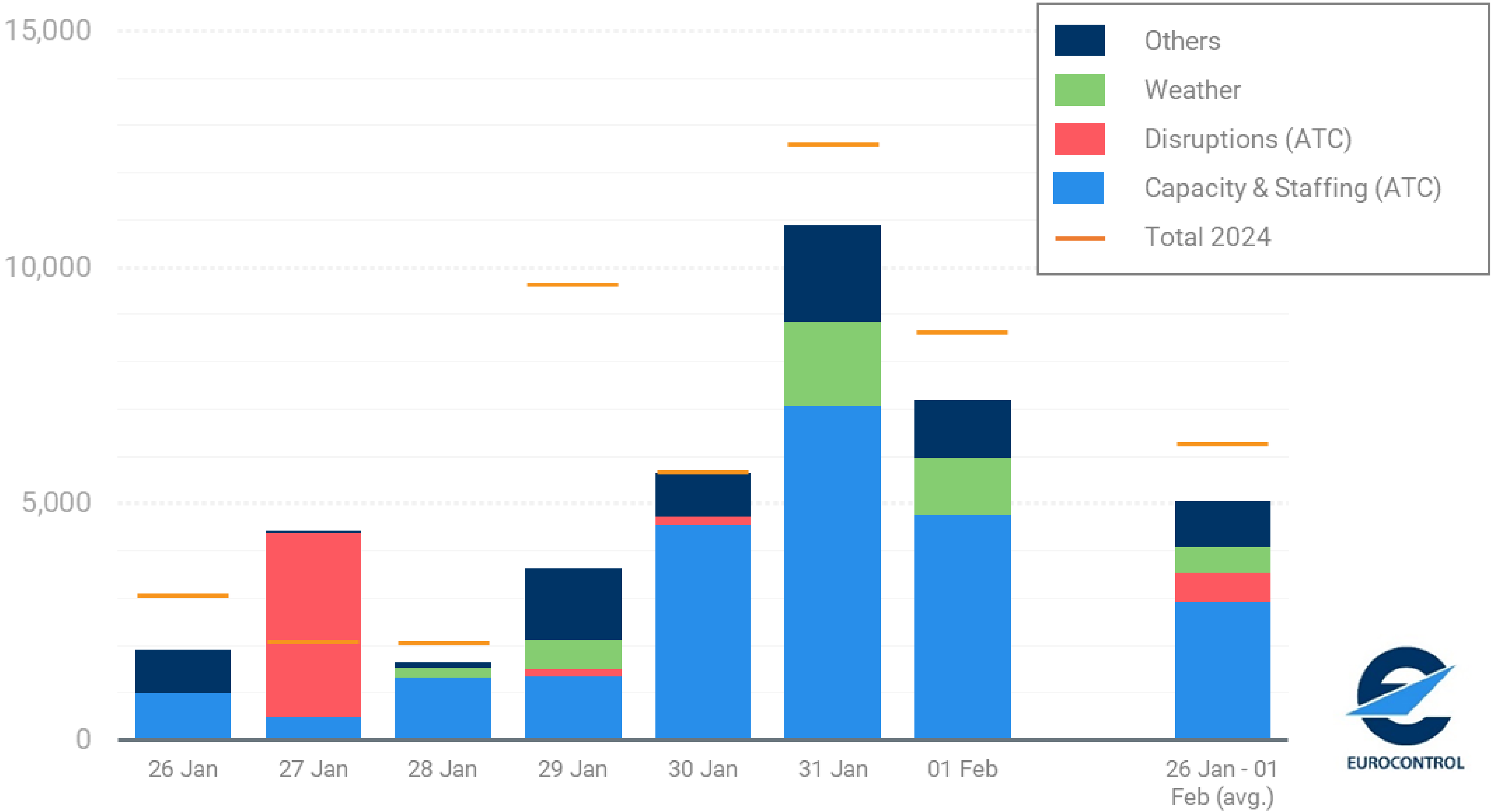
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- At network level, arrival punctuality (77.1%) was 7.4 pp lower than the equivalent week of 2025; departure punctuality (73.1%) was lower (-7pp).
- Copenhagen was affected by weather (high winds) resulting in single runway operations and high delays, notably on 1 February.
- Amsterdam Schiphol experienced delays due to low visibility on 28 January, 29 January saw a regulation due to airfield congestion following longer de-icing times for departing flights, as well as some lower impact daily aerodrome capacity regulations on other weekdays.
- Berlin Brandenburg suffered from an aerodrome services regulation on 26 January (parking congestion due to de-icing of departing aircraft).
- Storm Kristin affected Lisbon, with high delays for winds and low visibility recorded on 1 February.
- Madrid was affected by low visibility on 26 January and 1 February.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

In minutes (total daily and 7-day average) in 2026

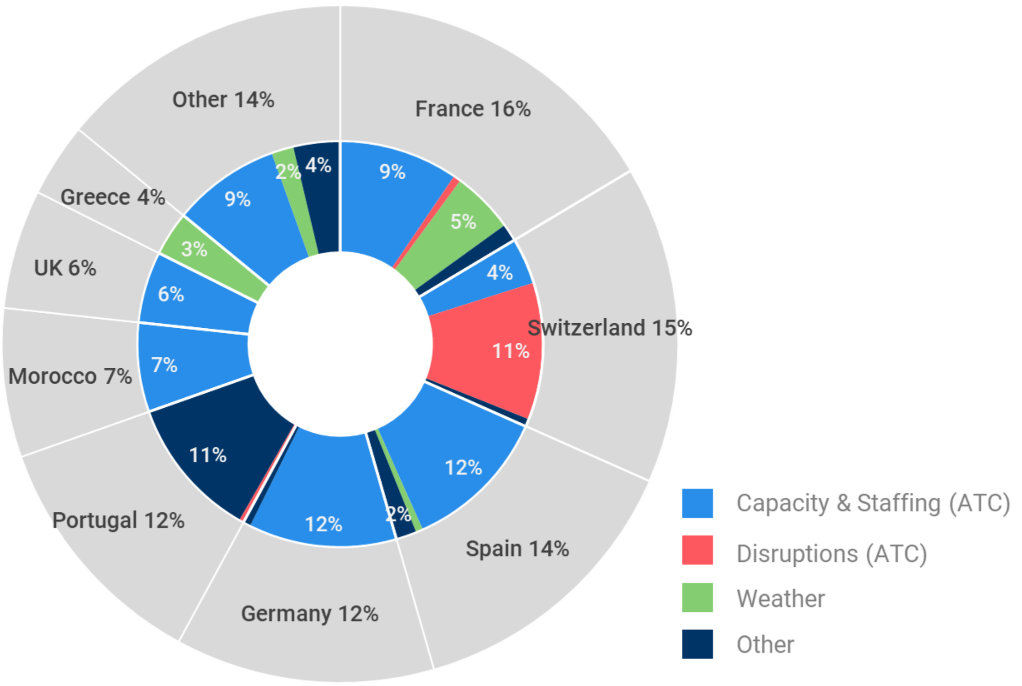


- Week 5 registered higher en-route ATFM delays compared to the previous week (+4%), with an average of 5,055 daily minutes; this was -19% lower than the same operational week in 2025.
- ATC capacity/staffing were responsible for 58% of all en-route ATFM delays (notably in Spain, Germany).
- Other factors accounted for 19% of all en-route ATFM delays (mainly Portugal).
- ATC disruptions accounted for 12% of all en-route ATFM delays, mainly affecting Switzerland due to a radar failure on 27 January.
- Weather accounted for 11% of all en-route ATFM delays, impacting France and Greece.
- There was 0.8 minute of total ATFM delay per flight in Week 5, made up of 0.2 min/flight en-route delay, and 0.6 min/flight airport delay.

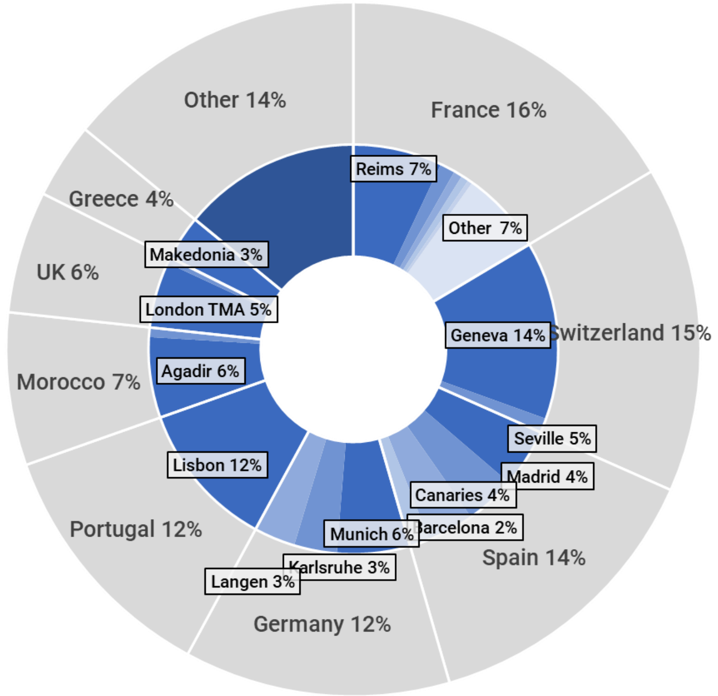
En-route ATFM delays per State per cause & per ACC

Week 26 Jan - 01 Feb 2026

En-route ATFM delays per cause for top 8 States

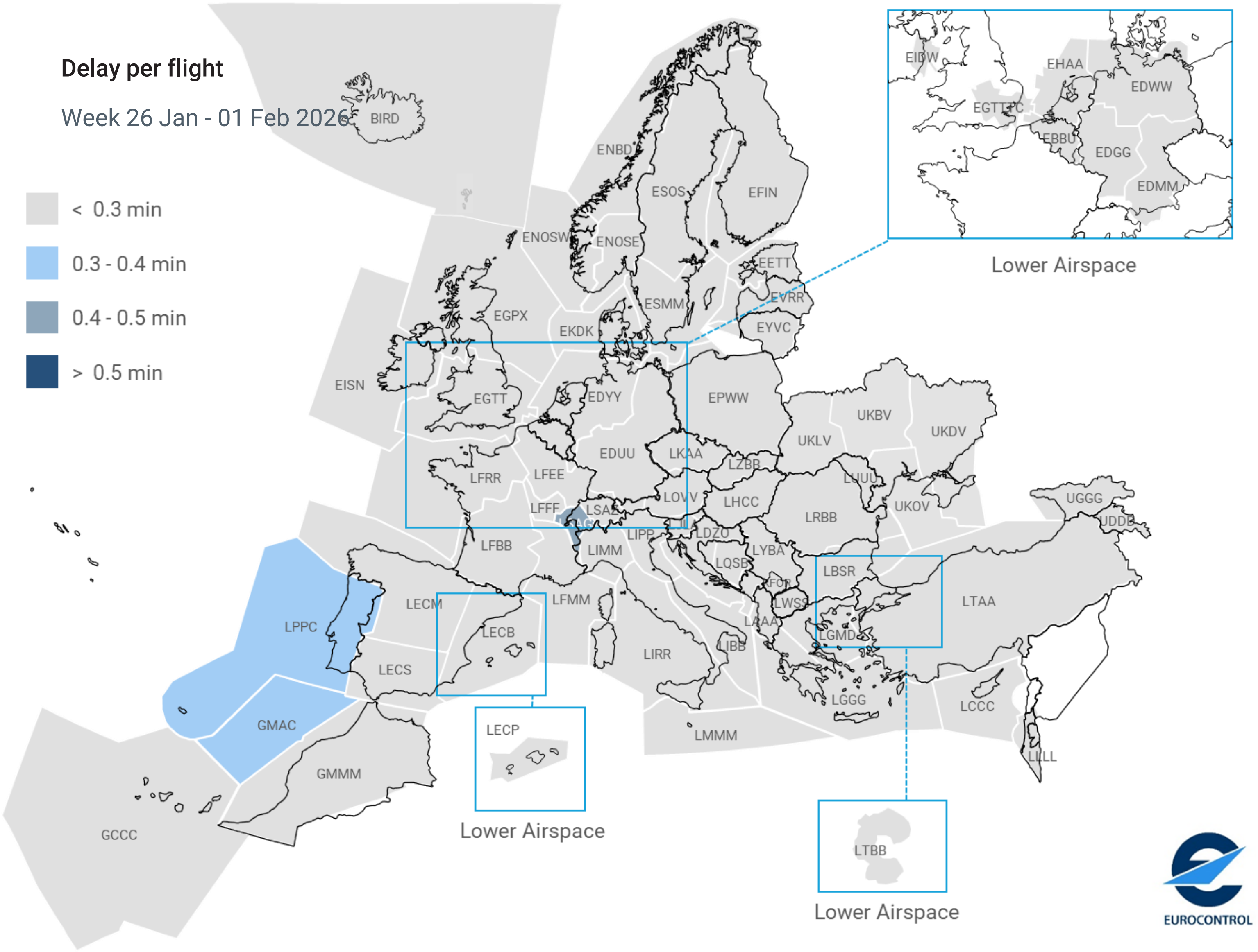


En-route ATFM delays per ACC for top 8 States



- France accounted for 16% of en-route ATFM delays, mainly attributed to Reims ACC (7%) and Other (7%) and primarily due to Capacity & Staffing (9%) and Weather (5%).
- Switzerland made up 15% of en-route ATFM delays, mainly attributed to Geneva ACC and driven by ATC disruptions (11%).
- Spain accounted for 14% of en-route ATFM delays attributed to Sevilla ACC (5%), Canaries ACC (4%) and Madrid ACC (4%) and owing mainly to Capacity & Staffing (12%).

En-route ATFM delayed flights per Area Control Centre



In Week 5, three ACCs recorded en-route ATFM delays between 0.3 and 0.5 minute/flight: Geneva ACC (0.50 minute/flight), Agadir ACC (0.39 minute/flight) and Lisbon ACC (0.35 minute/flight).

The top contributing ACCs in terms of en-route ATFM delay minutes per flight were as follows:

- Geneva ACC airspace was unavailable on Tuesday morning due to an ATC equipment failure (radar failure). The ACC also experienced ATC capacity delays from Friday to Sunday.
- Agadir ACC was impacted by ATC capacity delays over the weekend.
- Lisbon ACC upper sectors were combined and regulated due to ATC equipment issues (frequency issues) from Thursday until Sunday.
- Seville ACC faced ATC capacity delays throughout the week (with traffic +7% vs 2025 levels) and weather delays on Wednesday.
- Canaries ACC experienced ATC capacity delays on Wednesday, Friday and Saturday.

Busiest 10 States

Departures and arrivals

Week 26 Jan - 01 Feb 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	4,319	+0%	-2%
2.	Spain	3,874	+1%	+1%
3.	Germany	3,641	-3%	-4%
4.	France	3,372	+1%	+2%
5.	Italy	2,882	+1%	+2%
6.	Türkiye	2,785	+3%	+7%
7.	Netherlands	1,339	-2%	-6%
8.	Switzerland	1,213	-6%	+2%
9.	Norway	1,185	+1%	+2%
10.	Poland	1,124	+0%	+8%

See all States

- The busiest 10 States, in aggregate, recorded -0.1% fewer flights in Week 5 compared to the previous week.
- Three of these States saw week-on-week decreases in arrivals and departures: Switzerland (-6%), Germany (-3%) and the Netherlands (-2%), driven primarily by a weaker domestic flow.
- The largest week-on-week increase was observed in Türkiye (+3%) led by stronger domestic flights and increased flows with Saudi Arabia.
- Compared to 2025, seven States recorded increases in arrival and departure flights, led by Poland (+8%) and Türkiye (+7%), while three States saw declines ranging from -2% in the UK to -6% in the Netherlands.

Busiest 10 aircraft operators

Week 26 Jan - 01 Feb 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	2,282	+4%	+1%
2.	Turkish Airlines Group	1,538	+2%	+8%
3.	easyJet Group	985	+3%	+3%
4.	Air France Group	932	+1%	+5%
5.	Wizz Air Group	849	+0%	+7%
6.	Lufthansa Airlines	843	-1%	-9%
7.	British Airways Group	765	-1%	-3%
8.	KLM Group	740	-2%	-4%
9.	SAS Group	688	+7%	+21%
10.	Pegasus	578	+3%	+10%

See top 40 airlines

- The busiest 10 aircraft operators collectively operated 1.7% more flights than in the previous week.
- Three airline groups reduced capacity compared to the previous week of 2026: KLM Group (-2%), British Airways Group (-1%) and Lufthansa Airlines (-1%).
- The main increases compared to the previous week were recorded for:
  - SAS Group (+7%): increases mainly on the domestic flows in Sweden and Norway.
  - Ryanair Group (+4%): increases mainly on the domestic routes in Italy, flows Italy ↔ Spain and Spain ↔ UK.
- Compared to 2025, seven of the busiest 10 aircraft operators recorded higher flight volumes led by SAS Group (+21%), Pegasus (+10%), Turkish Airlines Group (+8%), Wizz Air Group (+7%), Air France Group (+5%), easyJet Group (+3%) and Ryanair Group (+1%).

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Europe's 6 largest airline groups

Week 26 Jan - 01 Feb 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	2,282	+4%	+1%
2.	Lufthansa Group	1,982	+1%	-5%
3.	IAG Group	1,974	-0%	-3%
4.	Air France-KLM Group	1,672	-0%	+1%
5.	Turkish Airlines Group	1,538	+2%	+8%
6.	easyJet Group	985	+3%	+3%

- The 6 largest European airline groups – i.e. aggregating the constituent members of the Lufthansa, IAG and AFR-KLM groups to join the Ryanair, easyJet and Turkish Airlines groups from the previous slide, in aggregate, recorded a slightly lower number of flights (-1.0%) compared to the previous week.
- Four of the six largest airline groups increased capacity compared to the previous week, ranging from +1% for Lufthansa to +4% for Ryanair, while traffic levels at the IAG and Air France-KLM Groups slightly reduced capacities.
- Compared to 2025, four airline Groups operated more flights with growths ranging from +1% for Ryanair Group and Air France-KLM Group to +8% for Turkish Airlines. Lufthansa Group and IAG Group recorded declines of -5% and -3% respectively.

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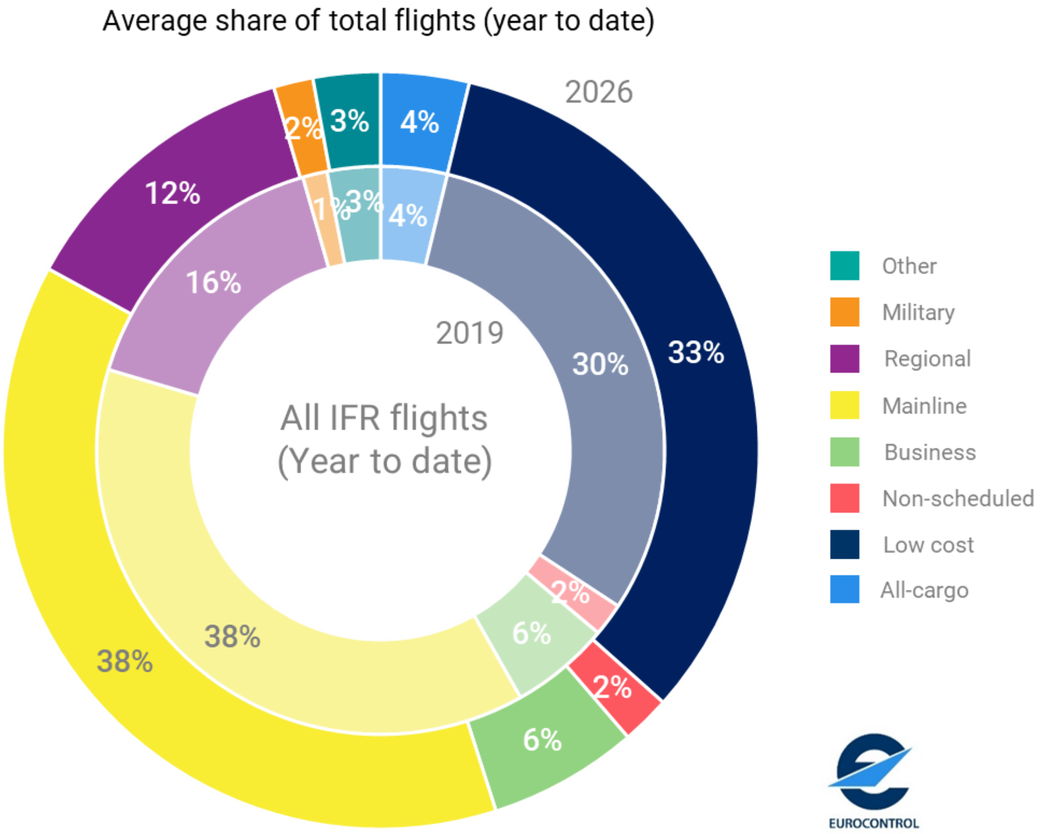
Market segments in the EUROCONTROL Network



No.	Market segment	Avg. flights	% prev week	% prev year
1.	Mainline	9,215	-0%	+4%
2.	Low Cost	7,685	+2%	+2%
3.	Regional	3,177	-0%	-2%
4.	Business	1,685	-5%	+1%
5.	All-cargo	1,055	+4%	+5%
6.	Other	733	-16%	-13%
7.	Non-Scheduled	543	+15%	+9%
8.	Military	502	-3%	+1%

- Since the beginning of the year, the largest market segment (Mainline) had a 38% share, similar to the same period in 2019. The second largest segment (Low-cost) at 33% has gained 3pp compared to 2019. The Regional market share has shrunk by 4pp to 12%, while All-cargo has a comparable market share at 4%.
- Over the previous week, three market segments recorded growth rates: Non-scheduled (+15%), All-cargo (+4%) and Low-cost (+2%). The other segments declined, led by Other (-16%), Business aviation (-5%) and Military (-3%).
- Compared to 2019, Regional was the only segment below pre-pandemic levels (-12%). All other segments recorded double-digit increases, ranging from +16% (Low-cost) to +33% (All-cargo) with Mainline (+1%) marginally above 2019.

Busiest 10 airports

Week 26 Jan - 01 Feb 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,447	+1%	+4%
2.	London Heathrow	1,235	-1%	-1%
3.	Paris Charles de Gaulle	1,167	+2%	+4%
4.	Amsterdam	1,151	-0%	-4%
5.	Madrid Barajas	1,120	+0%	+4%
6.	Frankfurt	1,003	-1%	+0%
7.	Barcelona	787	+1%	+0%
8.	Istanbul Sabiha Gokcen	746	+2%	+10%
9.	Munich	699	-1%	-5%
10.	Rome Fiumicino	686	+0%	-4%

[See top 40 airports]

- The busiest 10 airports, in aggregate, remained stable week-on-week (+0.2% more flights compared to the previous week).
- All but four airports (Munich, Frankfurt, Amsterdam and London Heathrow) expanded capacity compared to the previous week.
- The largest increases compared to the previous week were recorded at:
  - Paris CDG (+2%): increases mainly on its flows with Spain and the United States for Air France Group and SAS Group.
  - Istanbul Sabiha Gökcen (+2%): increases on the domestic flow for Pegasus and Turkish Airlines.
- Compared to 2025, six of the busiest 10 airports handled more flights led by significantly strong growth at Sabiha Gökcen (+10%), but also at Istanbul, Paris CDG and Madrid, each with a growth rate of 4%.

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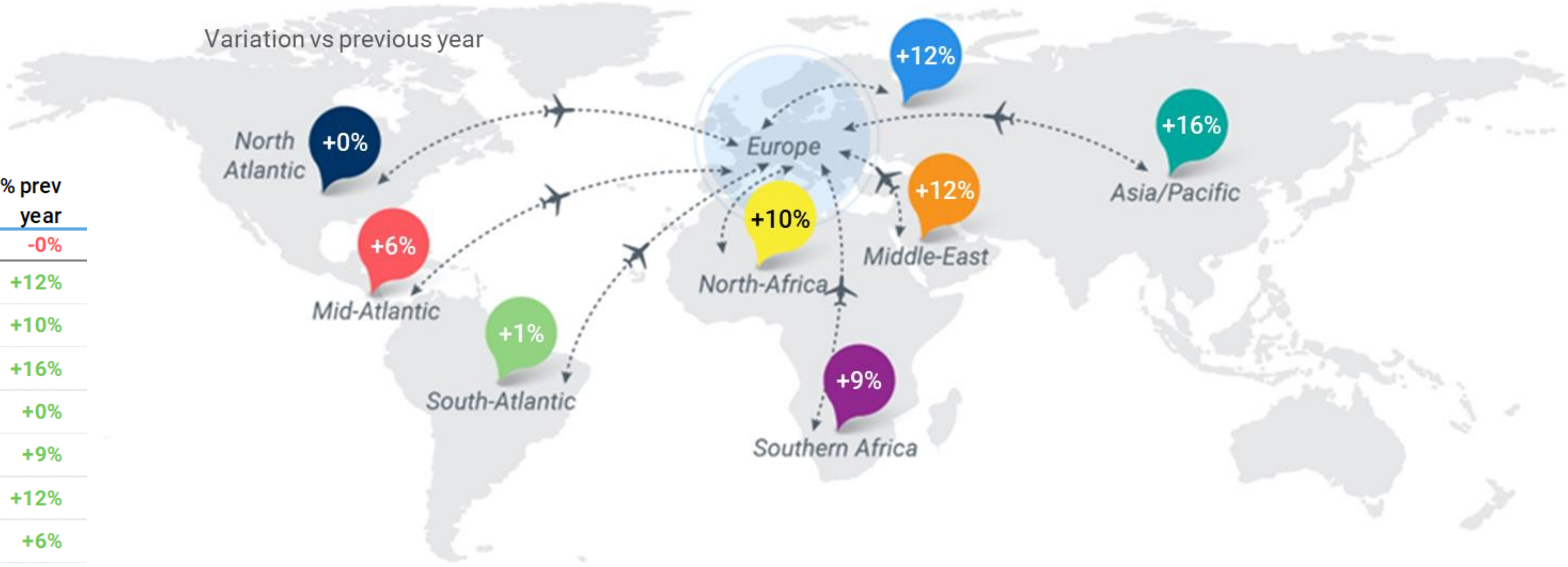
Traffic flows

(average daily departure/arrival flights for week 26 Jan - 01 Feb 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	18,050	+0%	-0%
Europe ↔ Middle-East	1,566	+3%	+12%
Europe ↔ North-Africa	1,206	+1%	+10%
Europe ↔ Asia/Pacific	983	-1%	+16%
Europe ↔ North Atlantic	936	-2%	+0%
Europe ↔ Southern Africa	353	-1%	+9%
Europe ↔ Other Europe	222	-2%	+12%
Europe ↔ Mid-Atlantic	212	-1%	+6%
Europe ↔ South-Atlantic	206	-1%	+1%
Non Intra-Europe	5,682	+0%	+9%



- Intra-European traffic saw 18,050 daily flights on average last week, unchanged vs the previous week. Intercontinental flows amounted to 5,682 daily flights on average, unchanged vs the previous week.
- The top intercontinental flows were between Europe and the Middle East, followed by to/from North Africa, Asia/Pacific, and North Atlantic.
- The highest increases compared to the previous week were recorded for Middle-East (+3%) and North-Africa (+1%). To be noted the decrease on North Atlantic vs previous week and stability vs previous year (see next slide).
- All intercontinental flows except with the Middle-East and North-Africa recorded fewer flights than in 2025.

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)

Week 26 Jan - 01 Feb 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	224	-3%	-5%
2.	Germany ↔ US	116	-1%	-3%
3.	France ↔ US	86	-2%	-1%
4.	UAE ↔ UK	70	+0%	+10%
5.	Netherlands ↔ US	62	+5%	-4%
6.	Germany ↔ UAE	55	-2%	+20%
7.	India ↔ UK	52	-2%	+9%
8.	Egypt ↔ Russia	49	-4%	+38%
9.	Spain ↔ US	48	-4%	+1%
10.	Russia ↔ UAE	48	+7%	+2%

- Five of the top 10 long-haul country pairs involved the US, with the largest three being US ↔ UK, US ↔ Germany and US ↔ France.
- The non-US long-haul flows within the top 10 were between UAE ↔ UK, Germany ↔ UAE India ↔ UK, Egypt ↔ Russia and Russia ↔ UAE (i.e. overflying the network).
- Compared to the previous week, seven long-haul flows declined, most notably Spain ↔ US (-4%), Egypt ↔ Russia (-4%) and UK ↔ US (-3%). The largest increases were recorded on Russia ↔ UAE (+7%) and Netherlands ↔ US (+5%).
- Compared to 2025, all but four of the top 10 long-haul flows posted positive growth, led by Egypt ↔ Russia (+38%), Germany ↔ UAE (+20%), UAE ↔ UK (+10%) and India ↔ UK (+9%).

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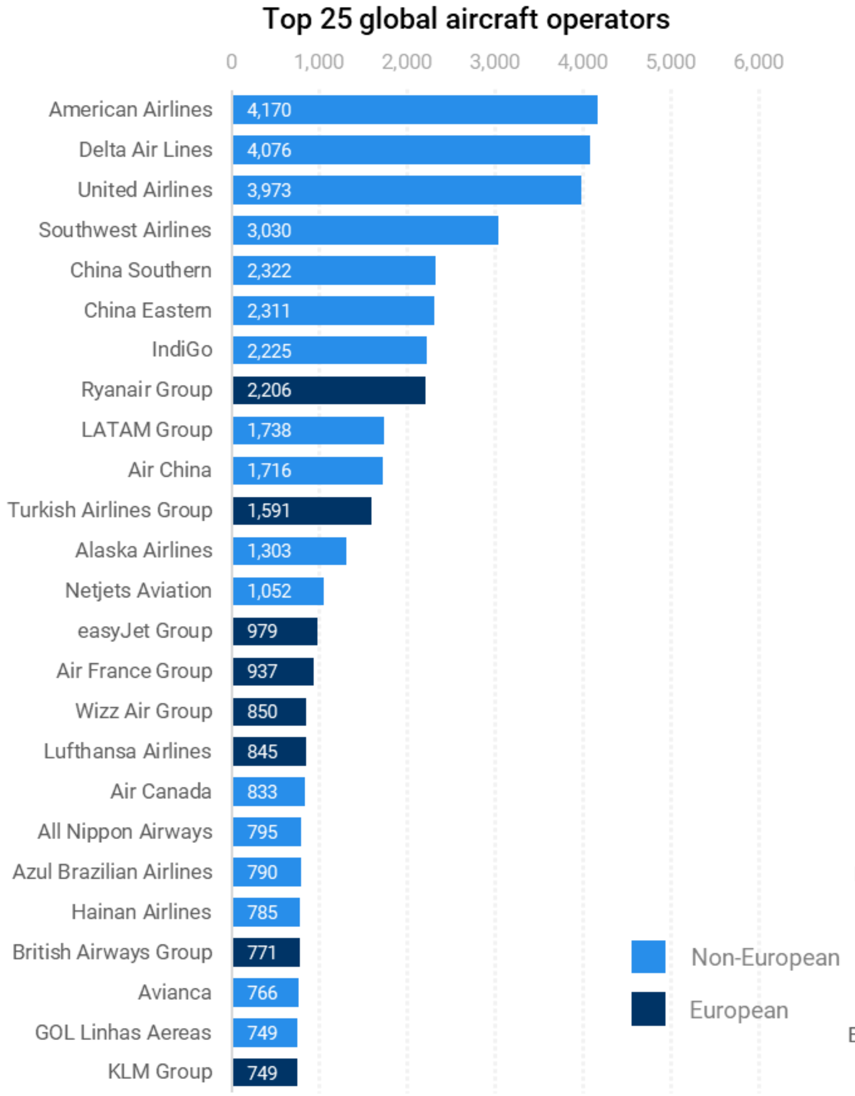
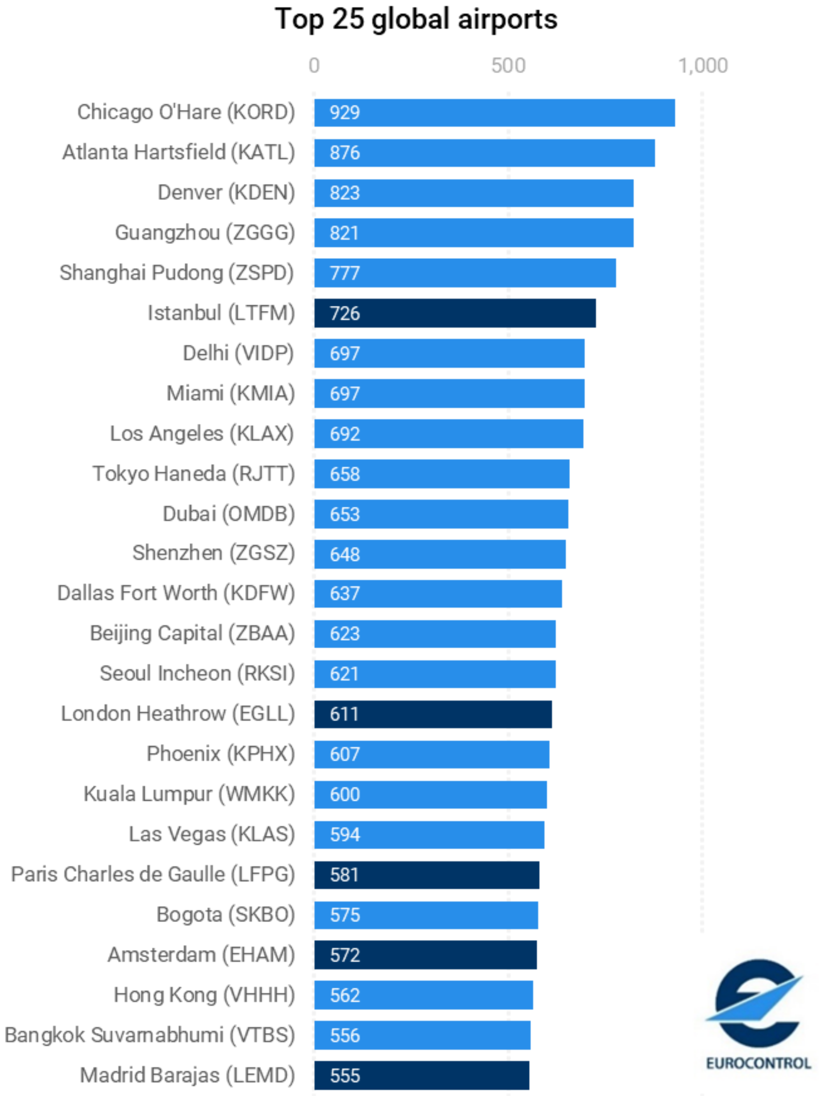
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 26 Jan - 01 Feb 2026)**





Source: Flightradar24 Historical Global Utilisation data

- Aircraft operators: Over the last week, eight European aircraft operators were ranked in the top 25 global aircraft operators.
- Of those, one group makes it into the global top 10: Ryanair (8th).
- Seven more European carriers made the top 25, starting with Turkish Airlines Group (11th), easyJet Group (14th), Air France Group (15th), Lufthansa Airlines (17th), Wizz Air Group (18th), British Airways Group (21st) and KLM Group (24th).

- Airports: Over the last week, four European airports made the top 25 in terms of global airport departures.
- Istanbul was the only European airport to make the top 10 (9th), followed by London Heathrow (16th), Amsterdam (21st), Paris CDG (23rd).
- The top 10 global airports continued to be dominated by the US with 7/10 being American. China is a distant second with 2 airports.

Jet fuel price (Europe)

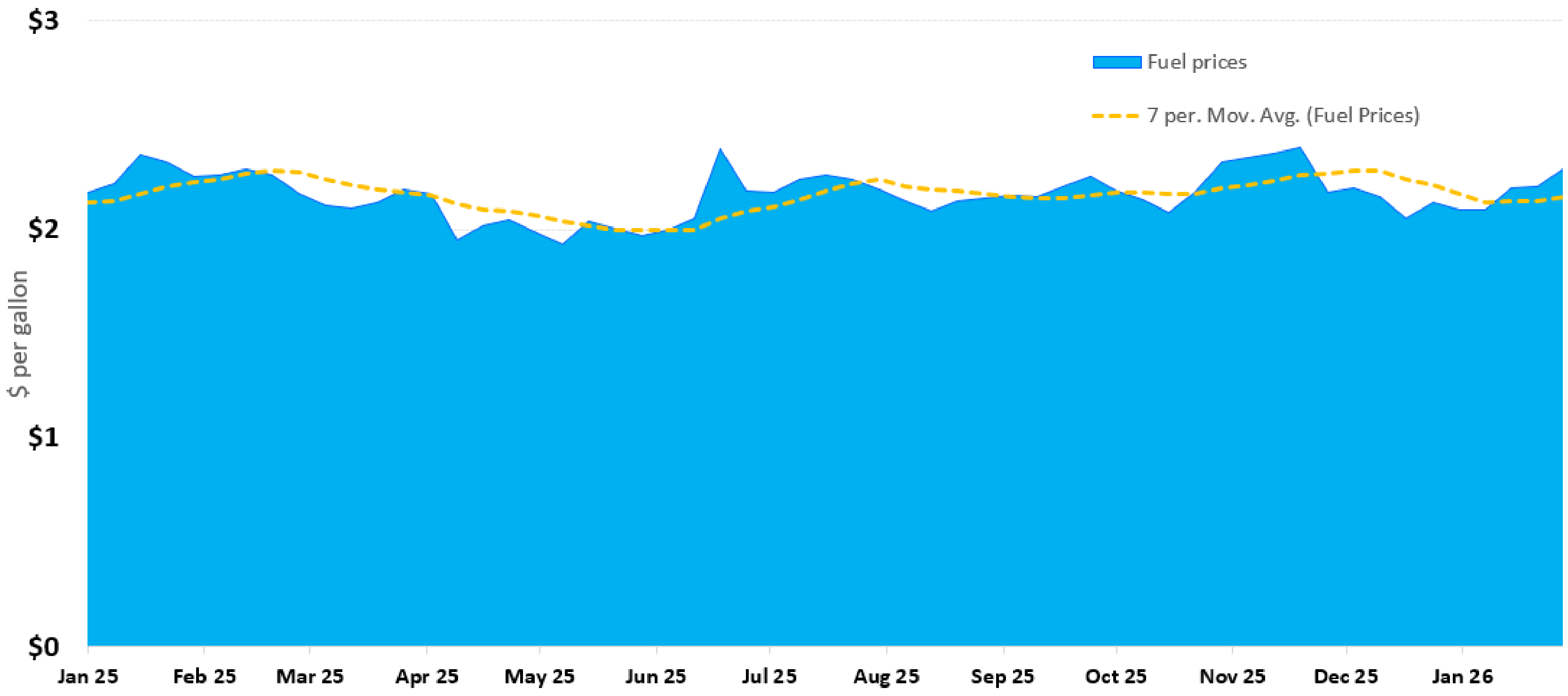
Week 26 Jan - 01 Feb 2026

30 Jan 2026
avg fuel price:

$2.29 /gallon

+4%
vs. $2.20 /gallon
on 16 Jan 2026

Source: IATA/Platts



Source: IATA/Platts

- The average price of jet fuel closed at $2.29/gallon on 30 January 2026, 4% higher than two weeks ago.
- Context: In 2025, the eight OPEC+ countries shifted their strategy from defending prices through cuts to gradually increasing oil output. From mid-2025 onward, the group began unwinding earlier production curbs with phased monthly supply increases, responding to weaker demand growth and rising non-OPEC supply. Jet fuel prices in 2025 were generally lower or more stable than in 2024.
- At the OPEC+ meeting on 1 February, the group agreed to keep production increases unchanged for January through March 2026, a decision driven by seasonal demand weakness and geopolitical uncertainty.

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To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 8:45 CET for the first item) and every Friday for the last item:

1. EUROCONTROL Aviation Intelligence Portal:
   www.eurocontrol.int/Economics/
   This dashboard provides daily performance data on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and the largest airline operators.

2. EUROCONTROL Data App: Available at Android Play and Apple Store.
   This app provides daily performance data on Day+1 at network level and top stakeholders.

Google Play

Apple Store

3. EUROCONTROL "Our Data" Portal:
   www.eurocontrol.int/our-data/
   This webpage provides an overview of key charts and publications related to European aviation performance.

4. Rolling Seasonal Plan:
   www.eurocontrol.int/publication/european-network-operations-plan-2025-rolling-seasonal-plan
   This Rolling Seasonal Plan covers a rolling six or eight-week period. It plays a major role in helping European aviation by providing key actors with the global view they need to plan effectively.

For more information please contact aviation.intelligence@eurocontrol.int