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# EUROCONTROL

EUROPEAN AVIATION OVERVIEW

23 Feb - 01 Mar 2026

SUPPORTING  
EUROPEAN  
AVIATION



EUROCONTROL



5 March 2026

# Headlines

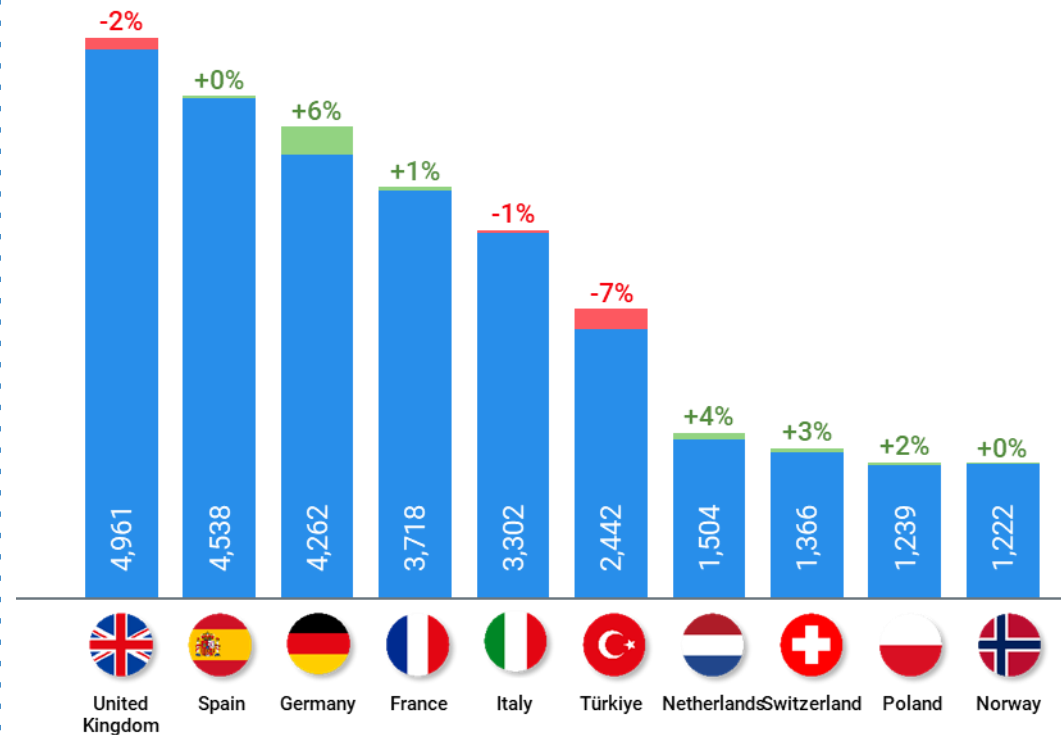
(Week 9, 23 Feb - 01 Mar 2026)

- ✈ The network averaged 26,421 daily flights in Week 9, down 0.3% compared to Week 8 and 1.7% higher than in 2025.
- ✈ On average the busiest 10 carriers reduced their capacity by -0.3% compared to the previous week.
- ✈ At the State level, the busiest 10 States saw their flights increase by 0.5% compared to the previous week.
- ✈ Following major airspace closures, the flow between Europe and the Middle East fell by 66% on 28 February and 1 March vs the same weekdays in 2025.
- ✈ Network arrival and departure punctuality were 84.5% and 80.5%, better than the equivalent week in 2025.
- ✈ En-route ATFM delays were -26% compared to the previous week, with a daily average of around 9K delay minutes, -15% lower than in 2025. Total ATFM delay per flight was 0.7 min/flight (0.33 for en-route, and 0.37 for airports).
- ✈ ATC capacity/staffing was the top delay cause (78% of all en-route ATFM delays), notably in France and Spain.
- ✈ The top contributing Area Control Centres to en-route ATFM delays (in mins per flight) were Reims, Barcelona, Seville, Skopje and Bremen.
- ✈ The average jet fuel price closed at \$2.45/gallon on 27 February, marking a 7% increase vs two weeks earlier and reaching its highest level since July 2024.

# 10 busiest States

In week 23 Feb - 01 Mar 2026

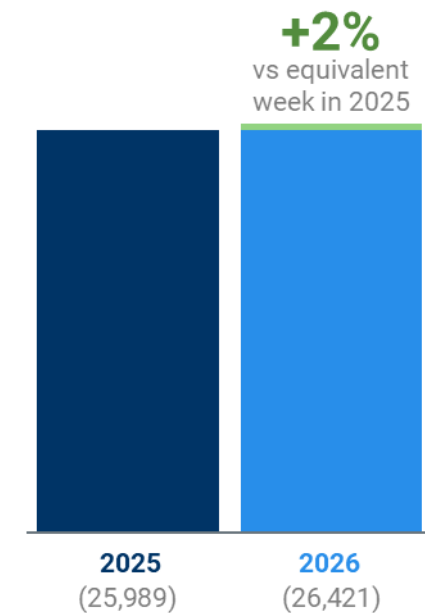
(all flights excl. overflights compared with the previous week)



# Traffic situation

Average daily flights (including overflights)

Week 23 Feb - 01 Mar 2026

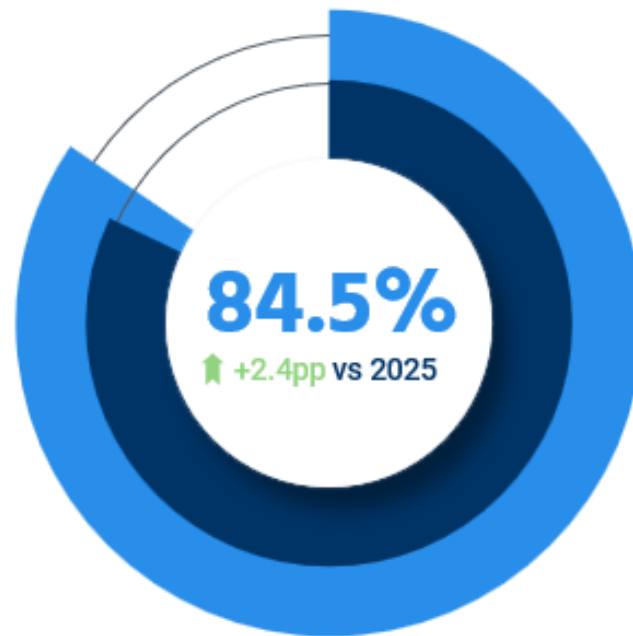


# Arrival & departure punctuality

(all network scheduled flights)

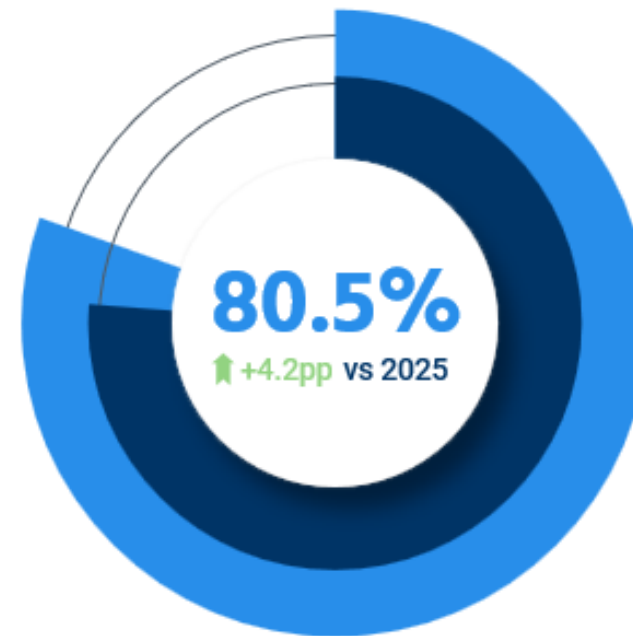
Week 23 Feb - 01 Mar 2026

## ARRIVAL PUNCTUALITY



82.1% \_\_\_\_\_ in 2025

## DEPARTURE PUNCTUALITY



76.2% \_\_\_\_\_ in 2025



- ✈ Both arrival punctuality (84.5%) and departure punctuality (80.5%) were higher than in the same week of 2025, increasing by 2.4pp and 4.2pp respectively.

The airports with the highest ATFM delay per week were as follows:

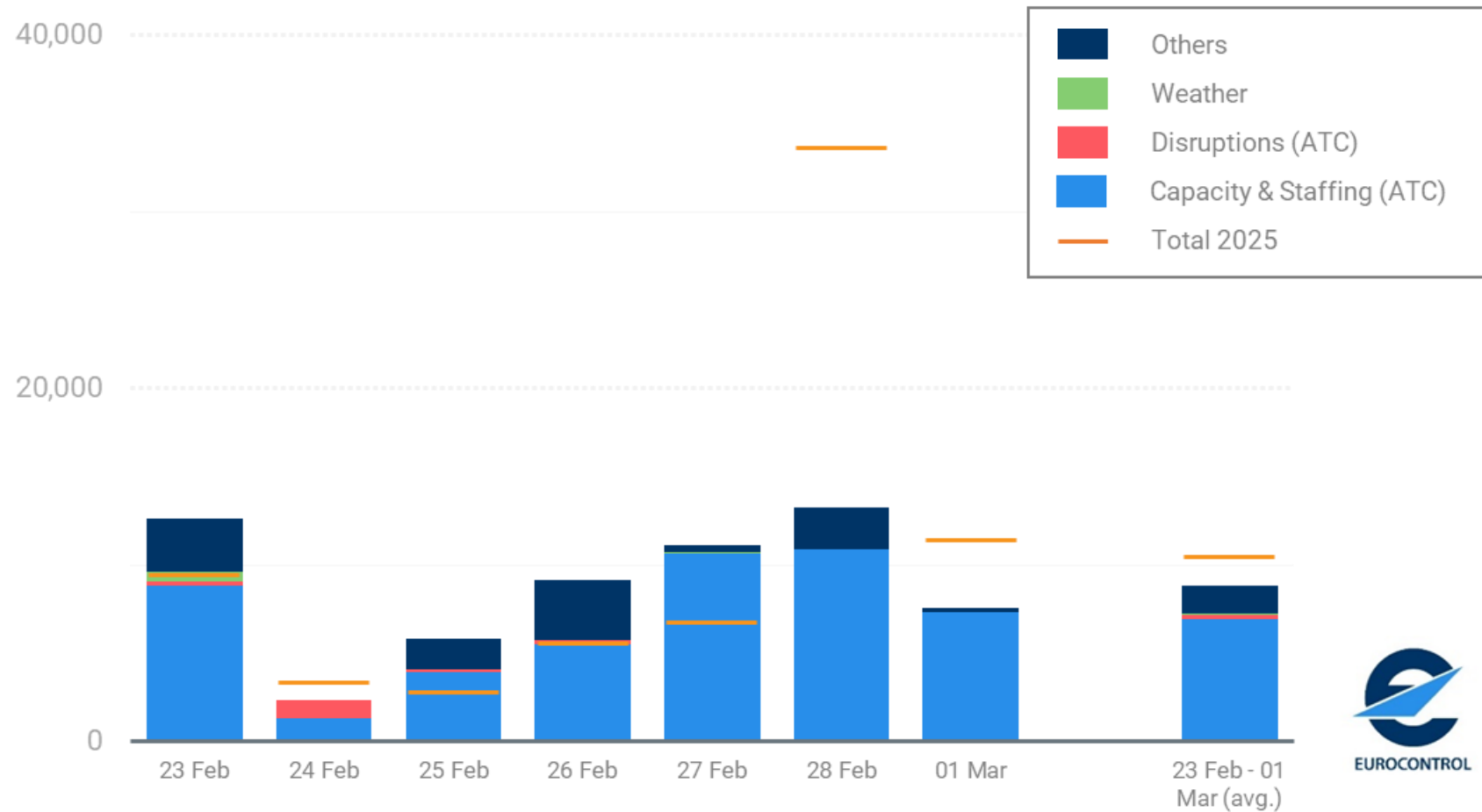
- ✈ **Manchester** suffered from daily airport capacity regulations due to work in progress on a taxiway and a forecasted low visibility procedure on 23 February.
- ✈ **Amsterdam** experienced a combination of weather (caused by strong winds and low visibility procedures) and aerodrome capacity regulations due to high demand.
- ✈ **Barcelona** also experienced weather-related regulations due to fog and low visibility procedures.
- ✈ **Nice** suffered from ATC capacity regulations.
- ✈ **Athens** was subject to daily ATC capacity regulations, with the highest delays recorded on 27 February.

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

# En-route ATFM delays

## Delays per cause (EUROCONTROL area)

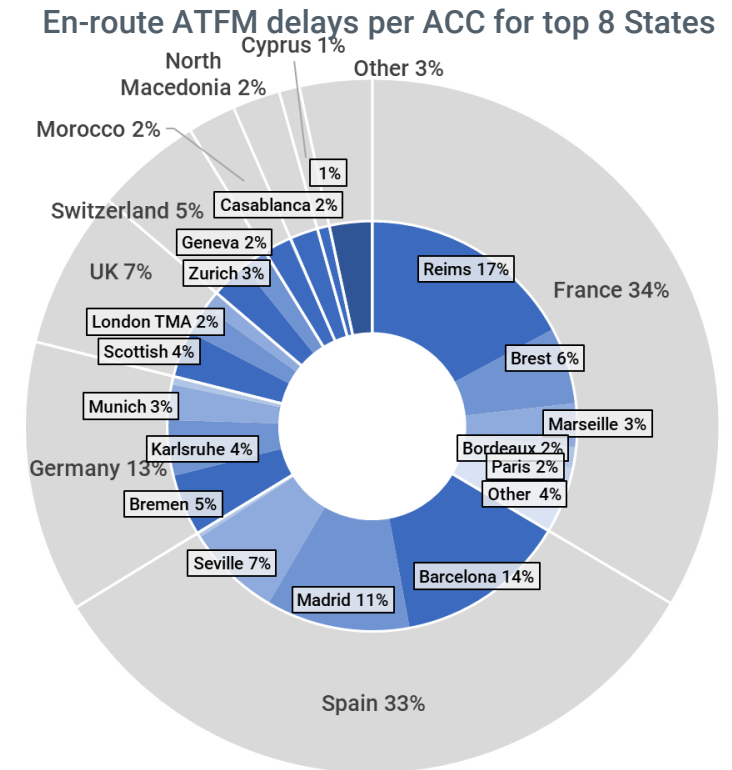
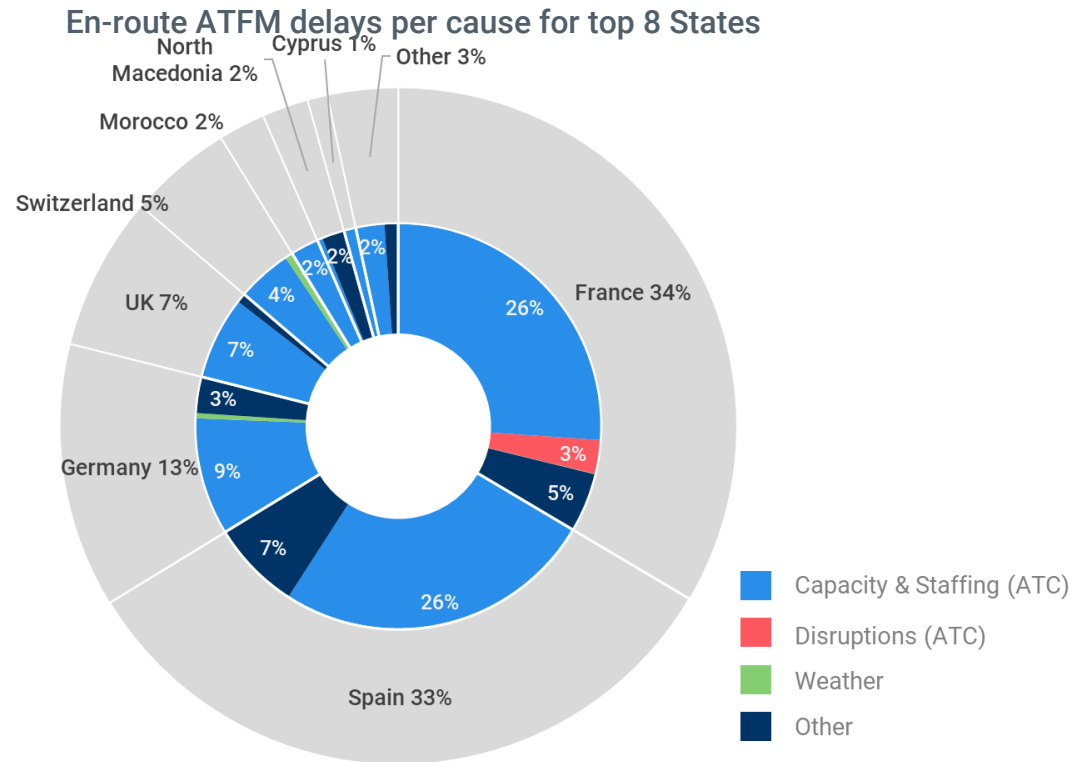
In minutes (total daily and 7-day average) in 2026



- ✈ Week 9 saw a 26% reduction in en-route ATFM delays compared to the previous week, with an average of 8,844 minutes per day. Delays were also 15% lower than during the same operational week in 2025.
- ✈ **ATC capacity/staffing** were responsible for 78% of all en-route ATFM delays (notably in France and Spain and, to a lesser extent, Germany).
- ✈ **Other factors** accounted for 18% of all en-route ATFM delays, impacting Spain, France and Germany.
- ✈ **ATC disruption** accounted for 3% of all en-route ATFM delays, impacting France (an ATC equipment issue affecting Nantes sectors).
- ✈ There were 0.7 minute of total ATFM delay per flight in Week 9, made up of 0.33 min/flight en-route delay, and 0.37 min/flight airport delay, a decrease of 16% compared to the same week in 2025.

# En-route ATFM delays per States, per cause & per ACC

Week 23 Feb - 01 Mar 2026













- ✈ France accounted for 34% of en-route ATFM delays, mainly attributed to Reims ACC (17%) and Brest ACC (6%), and primarily due to ATC capacity & staffing (26%).
- ✈ Spain made up 33% of en-route ATFM delays, mainly attributed to Barcelona ACC (14%), Madrid ACC (11%) and Seville ACC (7%). The primary causes were ATC capacity & staffing (26%) and Other factors (7%).
- ✈ Germany accounted for 13% of en-route ATFM delays, attributed to Bremen ACC (5%) Karlsruhe ACC (4%) and Munich (3%), and largely due to ATC capacity & staffing (9%).
- ✈ The UK generated 7% of en-route ATFM delays, almost entirely attributed to ATC capacity & staffing (+7%).



# Busiest 10 States

## Departures and arrivals

Week 23 Feb - 01 Mar 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	 United Kingdom	4,961	-2%	↓ -0%
2.	 Spain	4,538	+0%	↑ +3%
3.	 Germany	4,262	+6%	↑ +8%
4.	 France	3,718	+1%	↓ -1%
5.	 Italy	3,302	-1%	↑ +4%
6.	 Türkiye	2,442	-7%	↓ -5%
7.	 Netherlands	1,504	+4%	↓ -1%
8.	 Switzerland	1,366	+3%	↑ +3%
9.	 Poland	1,239	+2%	↑ +15%
10.	 Norway	1,222	+0%	↓ -3%











[See all States](#)



- ✈ The busiest 10 States, in aggregate, recorded 0.5% more departure and arrival flights in Week 9 compared to the previous week.
- ✈ Türkiye recorded the largest week-on-week decrease (-7%), driven mainly by a reduction in domestic flights, but further affected by geopolitical tensions in the Middle East (in particular lower traffic flows with Saudi Arabia, the UAE and Iraq).
- ✈ Germany recorded the largest week-on-week increase (+6%) driven by robust domestic flows as well as higher flows to/from Austria. The Netherlands saw a 4% increase, with higher flows to/from the UK. Switzerland increased by 3%, reflecting higher domestic flows and to/from Germany.
- ✈ Compared to 2025, five of the busiest 10 States recorded growth in arrival and departure flights, led by Poland (+15%), Germany (+8%), Italy (+4%), Spain and Switzerland (each +3%). However, the remaining five States posted declines, ranging from -0% in the UK to -5% in Türkiye.

# Busiest 10 aircraft operators

Week 23 Feb - 01 Mar 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	
1.	 Ryanair Group	2,726	+0%	↑	+8%
2.	 easyJet Group	1,534	-3%	↑	+5%
3.	 Turkish Airlines Group	1,380	-6%	↓	-1%
4.	 Air France Group	978	-1%	↑	+3%
5.	 Lufthansa Airlines	972	+5%	↑	+4%
6.	 Wizz Air Group	849	-1%	↑	+8%
7.	 KLM Group	821	+7%	↓	-1%
8.	 British Airways Group	813	+0%	↑	+0%
9.	 SAS Group	686	-3%	↑	+12%
10.	 Vueling	568	+6%	↓	-2%

- ➔ The busiest 10 aircraft operators, in aggregate, recorded a marginal decrease in flights (-0.3%) compared to the previous week.
- ➔ Five airline groups reduced capacity compared to the previous week of 2026: Turkish Airlines Group (-6%), easyJet Group and SAS Group (each -3%), and Air France Group and Wizz Air Group (each -1%).
- ➔ The main increases compared to the previous week were recorded for:
- ➔ KLM Group (+7%): increases mainly on the flows Netherlands ↔ UK and, to a lesser extent, Netherlands ↔ Germany.
- ➔ Vueling Group (+6%): increases mainly on domestic flows within Spain.
- ➔ Lufthansa Airlines (+5%): growth primarily driven by increased domestic flights within Germany.
- ➔ Compared to 2025, seven of the busiest 10 aircraft operators recorded higher flight volumes, led by the SAS Group (+12%), Ryanair Group and Wizz Air Group (each +8%), easyJet Group (+5%), Lufthansa Airlines (+4%), Air France Group (+3%) and British Airways Group (+0%). In contrast, Vueling (-2%) as well as the KLM and Turkish Airlines Groups (each -1%) all recorded lower flight volumes.

[See top 40 airlines](#)



# Europe's 6 largest airline groups

Week 23 Feb - 01 Mar 2026 (average daily flights)

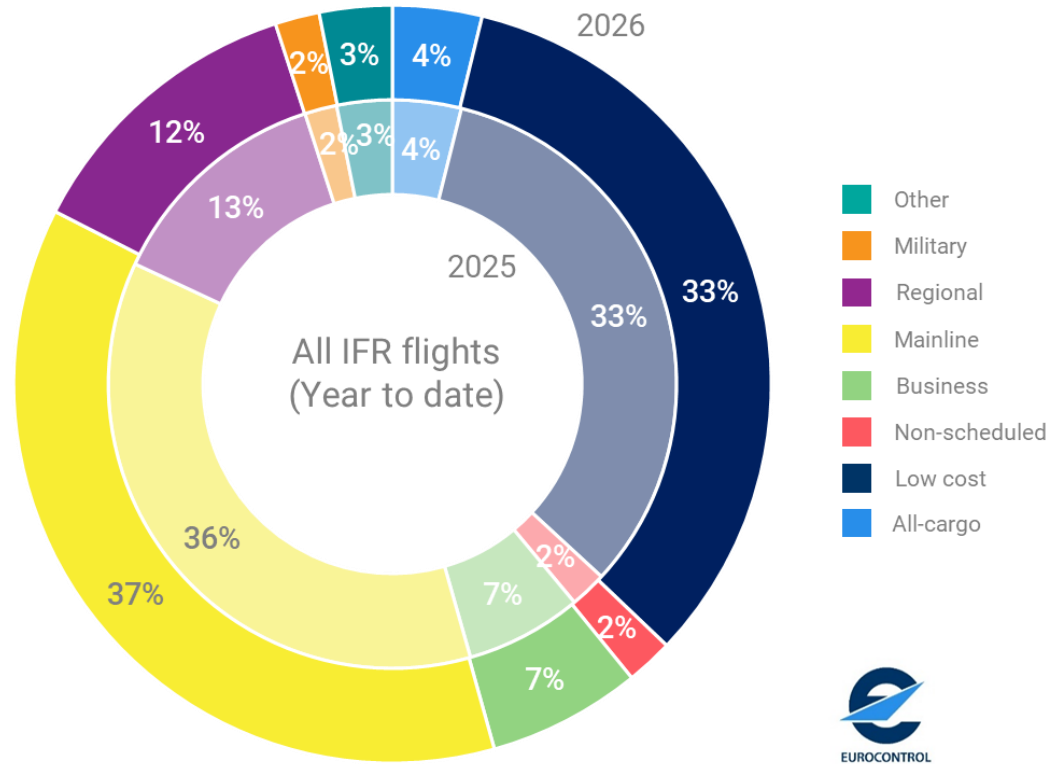
No.	Aircraft operator	Average daily flights	% prev week	% prev year	
1.	Ryanair Group	2,726	+0%	↑	+8%
2.	Lufthansa Group	2,332	+5%	↑	+2%
3.	IAG Group	2,134	+1%	↓	-2%
4.	Air France-KLM Group	1,799	+2%	↑	+1%
5.	easyJet Group	1,534	-3%	↑	+5%
6.	Turkish Airlines Group	1,380	-6%	↓	-1%



- 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 higher number of flights (+0.5%) compared to the previous week.
- Four groups increased their capacity compared to the previous week, ranging from +1% for IAG to +5% for Lufthansa, while two reduced capacity: Turkish Airlines Group (-6%) and easyJet Group (-3%).
- Compared to 2025, only two groups operated fewer flights; Turkish Airlines (-1%) and IAG (-2%). All other groups recorded increases, with Ryanair up 8%, easyJet up 5%, Lufthansa up 2% and Air France-KLM up 1%.

# Market segments in the EUROCONTROL network

Average share of total flights (year to date)



No.	Market segment	Avg. flights	% prev week	% prev year
1.	Mainline	9,179	-3%	↑ +0%
2.	Low Cost	9,017	-1%	↑ +3%
3.	Regional	3,346	+3%	↓ -0%
4.	Business	1,785	+1%	↑ +1%
5.	Other	1,069	+25%	↑ +26%
6.	All-cargo	947	-4%	↓ -5%
7.	Military	620	+12%	↑ +23%
8.	Non-Scheduled	473	-11%	↓ -19%

✈ Since the beginning of the year, the largest market segment (Mainline) has had a 37% share, up 1pp compared to the same period in 2025. The second largest segment (Low-cost) at 33% has remained unchanged year-on-year. The share of the Regional segment has declined by 1pp to 12%, while the Business Aviation, All-Cargo and Non-scheduled segments have remained unchanged at 7%, 3% and 2% respectively.

✈ Among passenger flights, only the Regional segment recorded growth compared to the previous week, up 3%, while Non-scheduled declined by 11%, Mainline by 3% and Low-cost by 1%. All-cargo was down by 4% whereas Business aviation was up by 1%. The 12% increase in the Military segment was linked to the outbreak of conflict in the Middle East as from 28 February.

✈ Compared to 2025, Low-cost is +3%; Mainline (+0%) and Regional (-0%) remained stable; while Non-scheduled decreased by 19%. All-cargo fell by 5% and Business aviation rose by 1%.

# Busiest 10 airports

Week 23 Feb - 01 Mar 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,303	-5%	↓ -5%
2.	Amsterdam	1,261	+4%	↓ -2%
3.	London Heathrow	1,254	-2%	↓ -2%
4.	Paris Charles de Gaulle	1,215	-2%	↓ -1%
5.	Madrid Barajas	1,186	+1%	↑ +5%
6.	Frankfurt	1,104	+3%	↓ -2%
7.	Barcelona	919	+2%	↑ +1%
8.	Munich	786	+3%	↑ +32%
9.	Rome Fiumicino	729	-1%	↓ -7%
10.	Zurich	686	+1%	↑ +5%

[See top 40 airports](#)



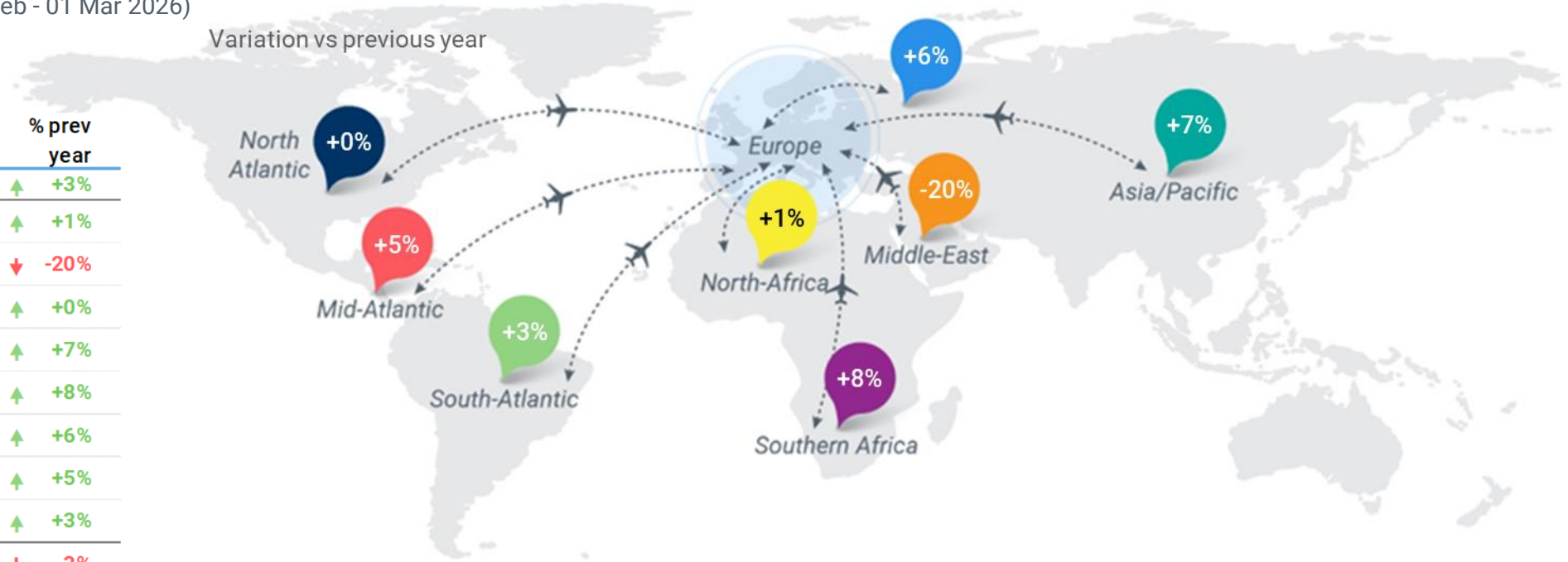
- ✈ The busiest 10 airports, in aggregate, recorded 0.2% more flights compared to the previous week.
- ✈ The conflict in the Middle East was the primary factor behind week-on-week declines at Istanbul (-5%), London Heathrow (-2%), Paris CDG (-2%), and Rome Fiumicino (-1%), driven by numerous flight cancellations on flows to and from the region.
- ✈ The largest increases compared to the previous week were recorded at:
  - ✈ Amsterdam (+4%): increases mainly in its flows with the UK.
  - ✈ Frankfurt and Munich (each +3%): increases in domestic flights within Germany, and mainly for Lufthansa Airlines.
  - ✈ Barcelona (+2%): increases in domestic flows along with flows with Germany and France, and mainly for Vueling.
- ✈ Compared to 2025, four of the busiest 10 airports handled more flights, led by strong growth at Munich (+32%), followed by Madrid Barajas (+5%), Zurich (+5%) and Barcelona (+1%). Traffic declined at the remaining airports however, ranging from -1% at Paris CDG to -7% at Rome Fiumicino.

# Traffic flows

(average daily departure/arrival flights for Week 23 Feb - 01 Mar 2026)

Variation vs previous year

Region	Average daily flights	% prev week	% prev year
<b>Intra-Europe</b>	<b>20,279</b>	↑ +2%	↑ +3%
Europe ↔ North-Africa	1,284	↓ -4%	↑ +1%
Europe ↔ Middle-East	1,115	↓ -25%	↓ -20%
Europe ↔ North Atlantic	1,030	↓ -0%	↑ +0%
Europe ↔ Asia/Pacific	937	↓ -0%	↑ +7%
Europe ↔ Southern Africa	353	↓ -0%	↑ +8%
Europe ↔ Other Europe	232	↑ +4%	↑ +6%
Europe ↔ Mid-Atlantic	215	↑ +2%	↑ +5%
Europe ↔ South-Atlantic	209	↑ +0%	↑ +3%
<b>Non Intra-Europe</b>	<b>5,374</b>	↓ -7%	↓ -3%



- ✈ Intra-European traffic saw 20,279 daily flights on average during Week 9, +2% vs the previous week. Intercontinental flows amounted to 5,374 daily flights on average, -7% vs the previous week.
- ✈ The top intercontinental flows were between Europe and North Africa, followed by flights to/from the Middle East, North America and Asia/Pacific.
- ✈ The highest increase compared to the previous week was recorded in Other Europe (+4%) driven mainly by the flow Türkiye ↔ Russian Federation. In contrast, the highest decrease was recorded for the Middle East (-25%) following regional airspace closures linked to the conflict in the Middle East.
- ✈ With the exception of European and Middle East flows (-20%), all intercontinental flows recorded more flights than in 2025. The strongest growth was observed between Europe and Southern Africa (+8%), followed by Asia/Pacific (+7%), Other Europe (+6%), Mid-Atlantic (+5%), South Atlantic (+3%) and North Africa (+1%).
- ✈ The flow between Europe and the Middle East fell by 66% on 28 February and 1 March vs the same weekdays in 2025.

# Top 10 long-haul country pairs

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

Week 23 Feb - 01 Mar 2026

No.	Country pair	Average daily flights	% prev week		% prev year
1.	UK ↔ US	231	-5%	↓	-11%
2.	Germany ↔ US	143	+8%	↑	+16%
3.	France ↔ US	91	+2%	↓	-8%
4.	Netherlands ↔ US	62	-7%	↓	-3%
5.	Spain ↔ US	54	-1%	↑	+0%
6.	Egypt ↔ Russia	53	+5%	↑	+25%
7.	UAE ↔ UK	53	-26%	↓	-22%
8.	India ↔ UK	50	-7%	↑	+3%
9.	Ireland ↔ US	48	+2%	↑	+4%
10.	Italy ↔ US	42	-5%	↑	+18%

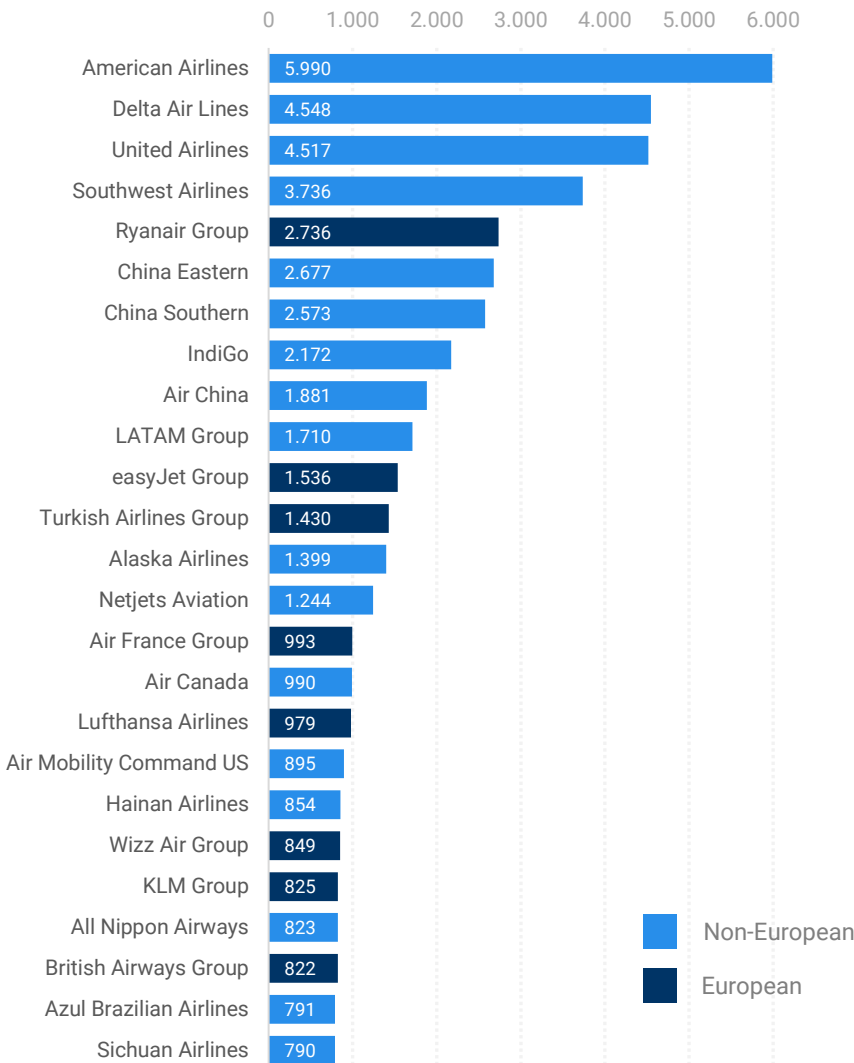
- ➔ Seven of the top 10 long-haul country pairs involved the US, with the largest three being US ↔ UK, US ↔ Germany and US ↔ France.
- ➔ The non-US long-haul flows within the top 10 were between Egypt ↔ Russia (overflying the network) UAE ↔ UK and India ↔ UK.
- ➔ Compared to the previous week, six long-haul flows declined, most notably UAE ↔ UK (-26%), Netherlands ↔ US (-7%), India ↔ UK (-7%), UK ↔ US (-5%), Italy ↔ US (-5%) and Spain ↔ US (-1%). The largest increases were in Germany ↔ US (+8%) and Egypt ↔ Russia (+5%).
- ➔ Compared to the same week of 2025, six of the top 10 long-haul flows posted positive growth, led by Egypt ↔ Russia (+25%), Italy ↔ US (+18%), Germany ↔ US (+16%). In contrast, four flows declined namely UAE ↔ UK (-22%), UK ↔ US (-11%), France ↔ US (-8%) and Netherlands ↔ US (-3%).



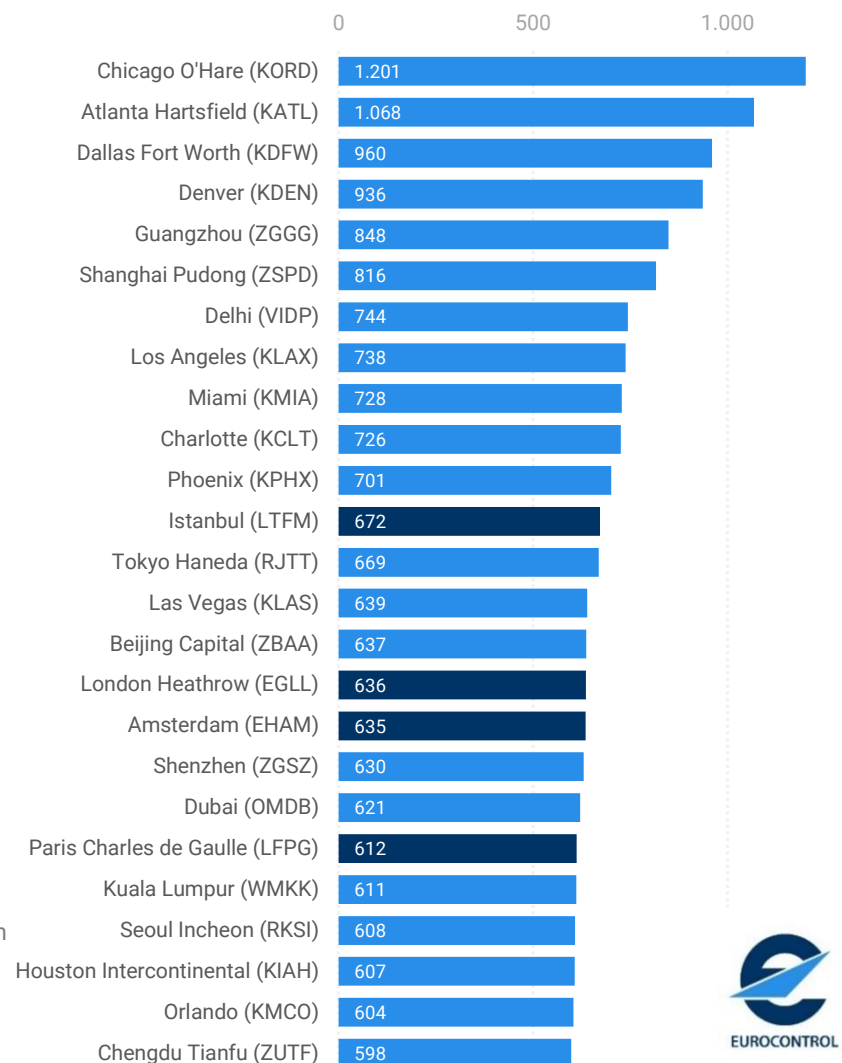
# Top 25 global aircraft operators and airport departures

(average daily departure flights) (Week 23 Feb - 01 Mar 2026)

## Top 25 global aircraft operators



## Top 25 global airports



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.
- ✈️ Among them only one airline appeared in the global top 10: Ryanair (5th), unchanged from two weeks earlier.
- ✈️ Seven more European carriers made the top 25, starting with easyJet Group (11th), Turkish Airlines (12th), Air France Group (15th), Lufthansa Airlines (17th), Wizz Air Group (20th), KLM Group (21st) and British Airways Group (23rd).
- ✈️ **Airports:** Four European airports ranked among the top 25 in terms of global airport departures in Week 9, one more than in Week 7 (Amsterdam).
- ✈️ No European airport made it into the top 10 in Week 9: Istanbul was highest in 12th (down from 11th in Week 7), followed by London Heathrow in 16th, Amsterdam in 17th and Paris CDG in 20th (up from 22nd in Week 7).
- ✈️ 7/10 of the busiest airports are American, with China a distant second on 2, and India 1.



# Jet fuel price (Europe)

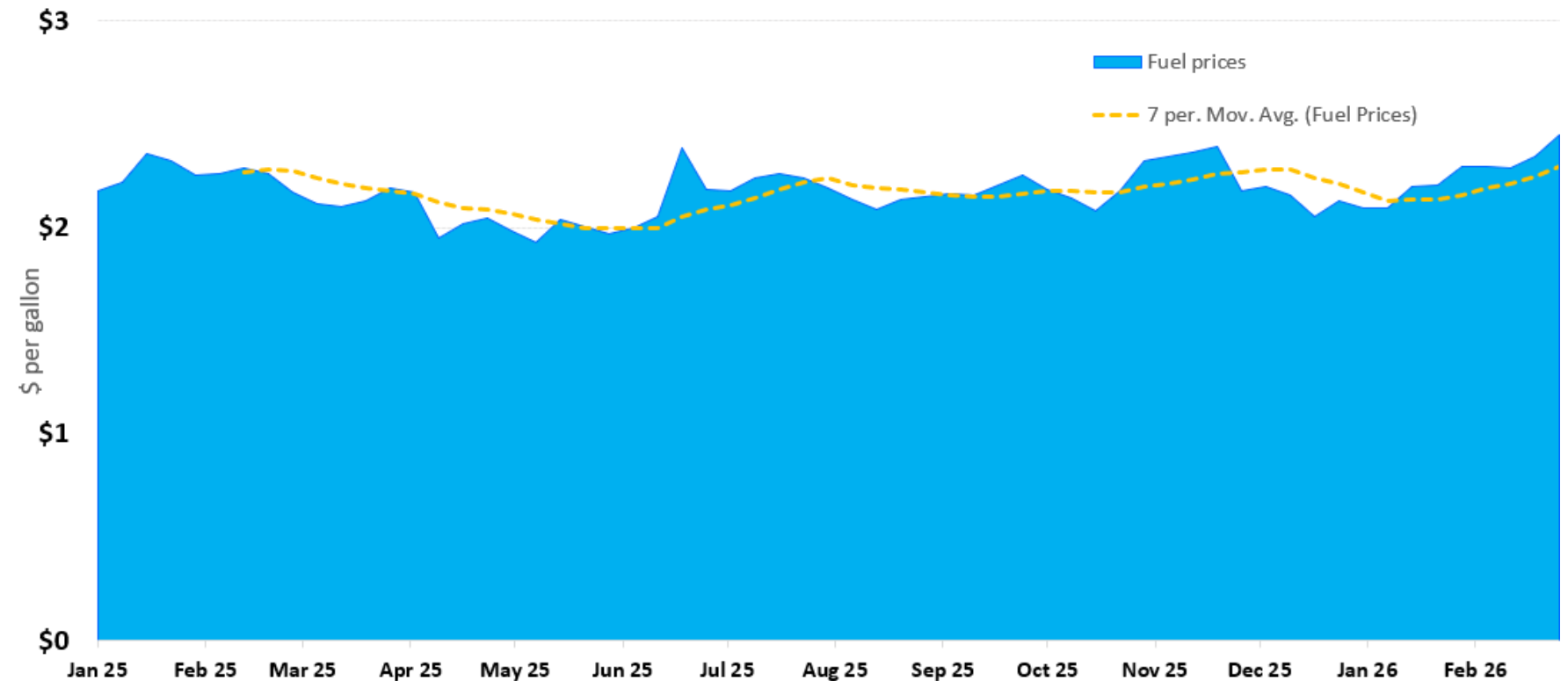
Week 23 Feb - 01 Mar 2026

27 Feb 2026  
avg fuel price:

**\$2.45** /gallon

**+7%**  
vs. \$2.29 /gallon  
on 13 Feb 2026

Source: IATA/Platts

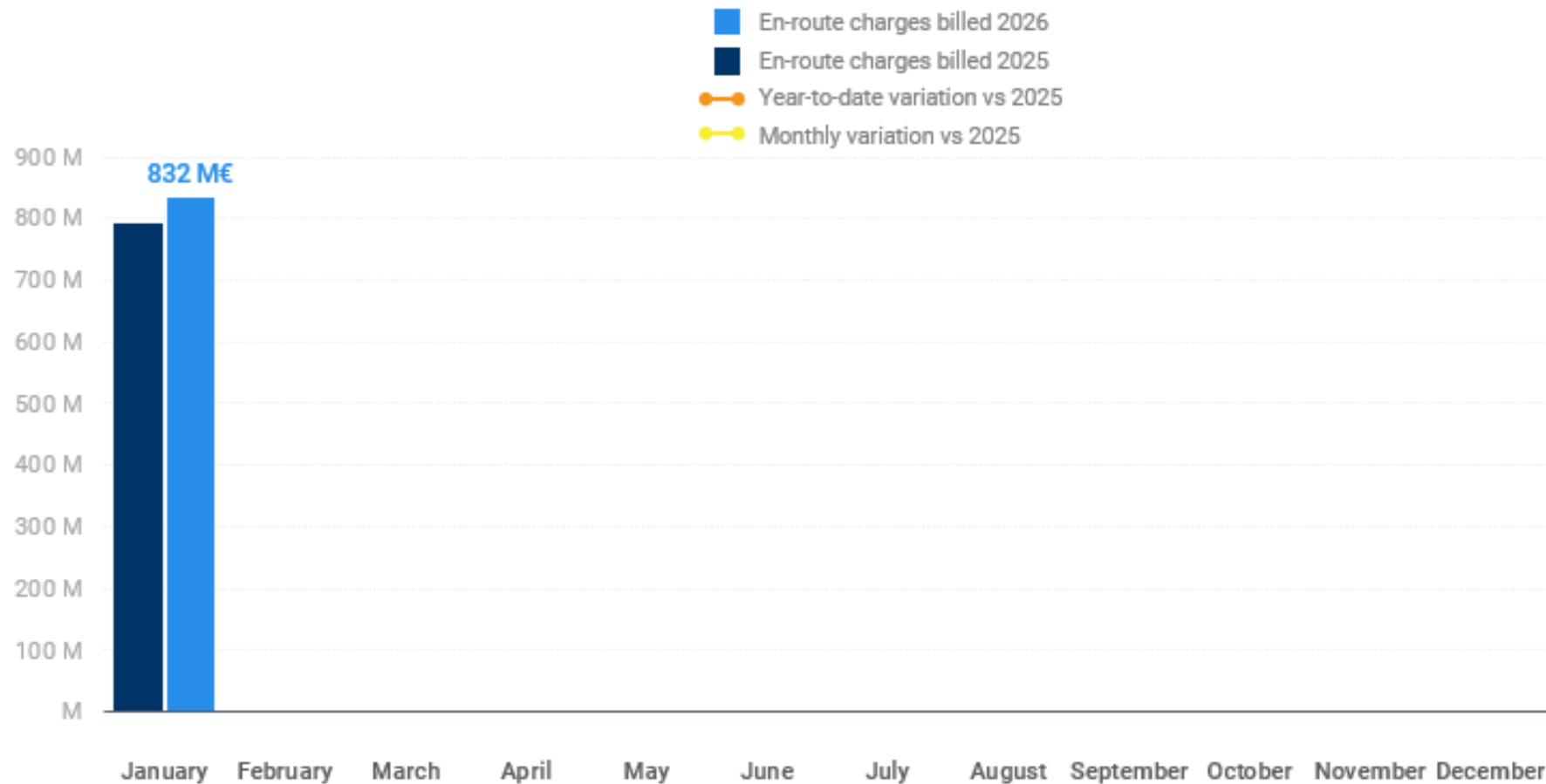


Source: IATA/Platts

- The average jet fuel price closed at \$2.45/gallon on 27 February, marking a 7% increase vs two weeks earlier and reaching its highest level since July 2024.
- 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.
- At their 1 March meeting, OPEC+ members agreed to increase oil production by 206,000 barrels/day beginning in April 2026.

# En-route air navigation charges for the EUROCONTROL area (2026)

Year-to-date amount billed: 832 M€ (+5% vs 2025)



- At the network level, 832 M€ was billed for January 2026, which represents +5% vs January 2025.
- These changes were driven by the evolution of unit rates and of traffic characterised by the volumes of traffic (+2.2% in January 2026 vs January 2025), the average distance flown (+3%) and the average weight of each aircraft (+1%).



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/](http://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.
3. EUROCONTROL "Our Data" Portal:  
[www.eurocontrol.int/our-data/](http://www.eurocontrol.int/our-data/)  
 This webpage provides an overview of key charts and publications related to European aviation performance.
4. Rolling Seasonal Plan:  
<https://www.eurocontrol.int/publication/european-network-operations-plan-2026-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.



## SUPPORTING EUROPEAN AVIATION



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