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EUROCONTROL

EUROPEAN AVIATION OVERVIEW

09-15 Mar 2026

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19 March 2026

Headlines

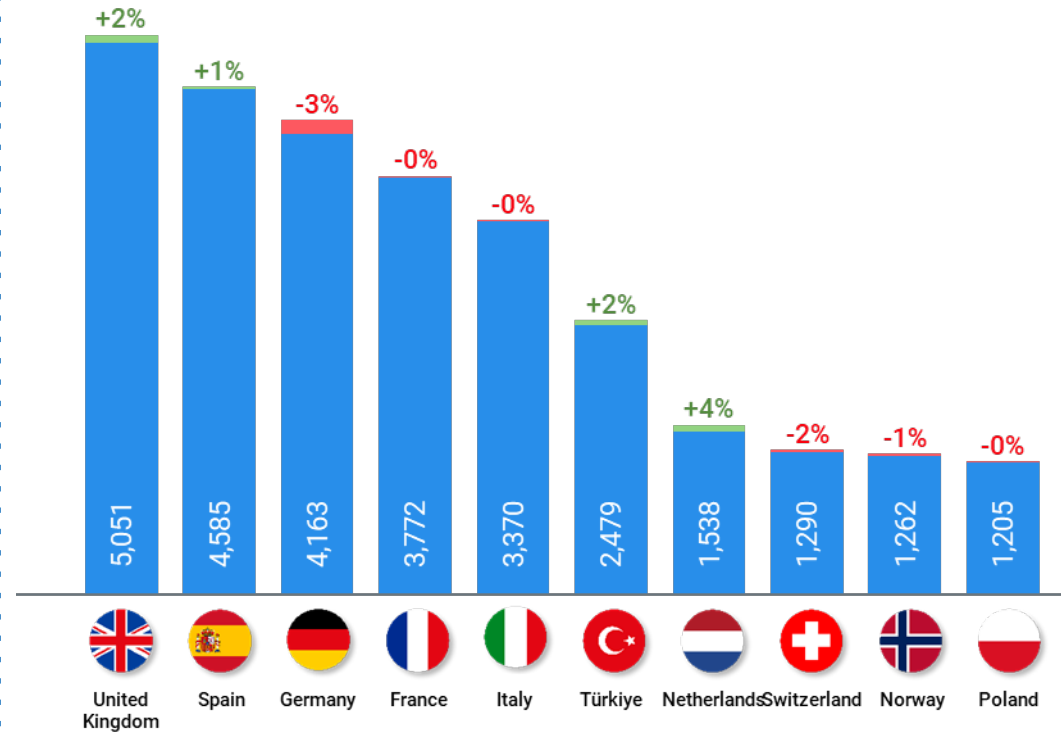
(Week 11, 09-15 Mar 2026)

- ✈ The network averaged 26,331 daily flights in Week 11, up 0.1% compared to Week 10, but with year-on-year growth stalling to just 0.8% higher than in 2025 as conflict in the Middle East has significantly affected global flight volumes.
- ✈ Year-on-year traffic flows are up in all regions except between Europe and the Middle East, which has declined massively, down 52% compared to the same week in 2025.
- ✈ On average, the busiest 10 carriers reduced their capacity by 0.8% compared to the previous week.
- ✈ At State level, the busiest 10 States saw their flights increase by 0.1% compared to the previous week.
- ✈ Network arrival and departure punctuality were 84.6% and 81.6%, better than the equivalent week in 2025.
- ✈ En-route ATFM delays were -4% compared to the previous week, with a daily average of around 8K delay minutes, +1% higher than in 2025. Total ATFM delay per flight was 0.8 min/flight (0.3 for en-route, and 0.5 for airports).
- ✈ ATC capacity/staffing was the top delay cause (79% of all en-route ATFM delays), notably in Spain and France.
- ✈ The Area Control Centres contributing most to en-route ATFM delays (in mins/flight) were Tel Aviv, Barcelona, Reims and Seville.
- ✈ Jet fuel prices have jumped as the Middle East conflict disrupts global oil supplies. The average jet fuel price closed at \$4.57/gallon on 13 March, +87% vs two weeks earlier, and reaching its highest level since the start of the Russian war of aggression against Ukraine in 2022.

10 busiest States

In week 09-15 Mar 2026

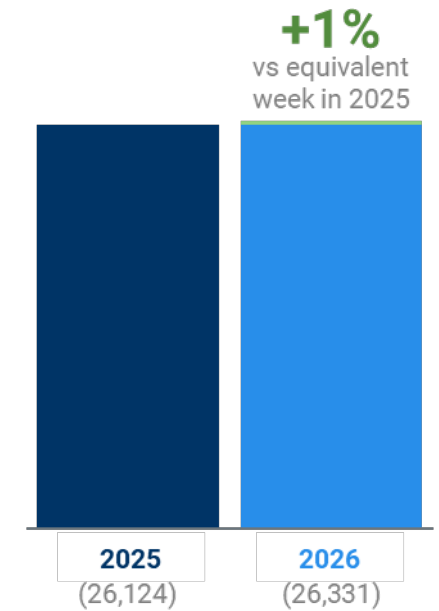
(all flights excl. overflights compared with the previous week)



Traffic situation

Average daily flights (including overflights)

Week 09-15 Mar 2026

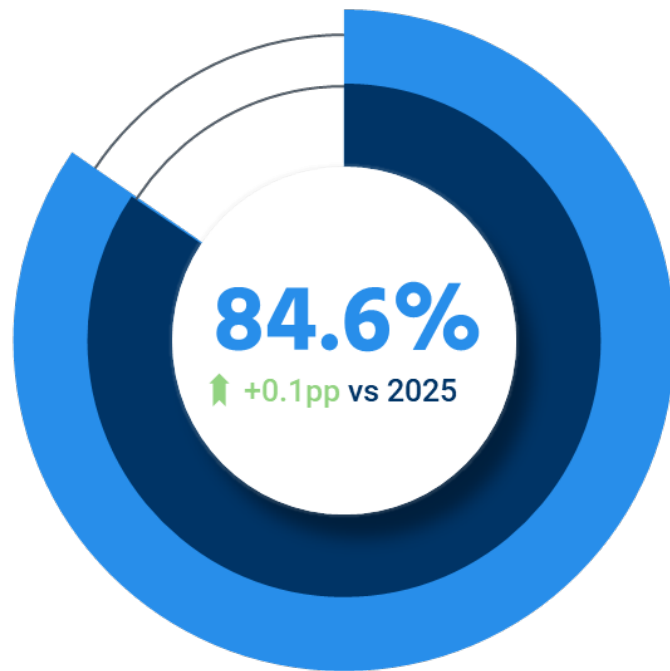


Arrival & departure punctuality

(all network scheduled flights)

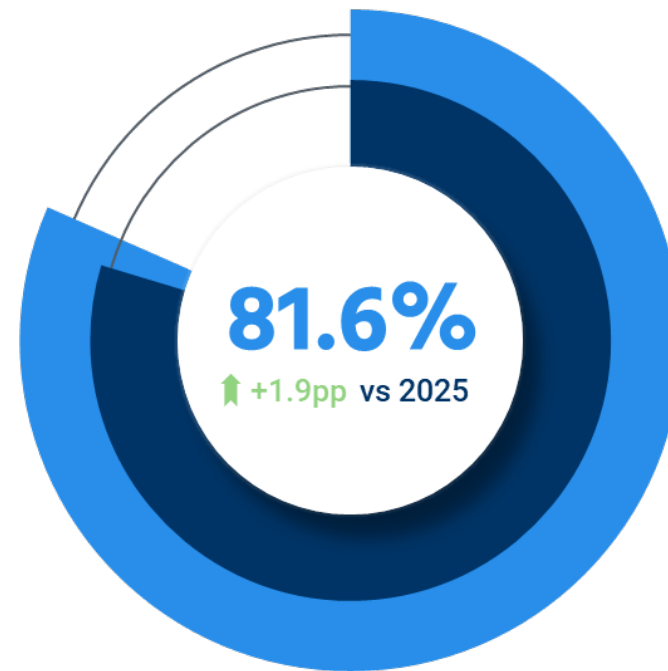
Week 09-15 Mar 2026

ARRIVAL PUNCTUALITY



84.5% _____ in 2025

DEPARTURE PUNCTUALITY



79.7% _____ in 2025



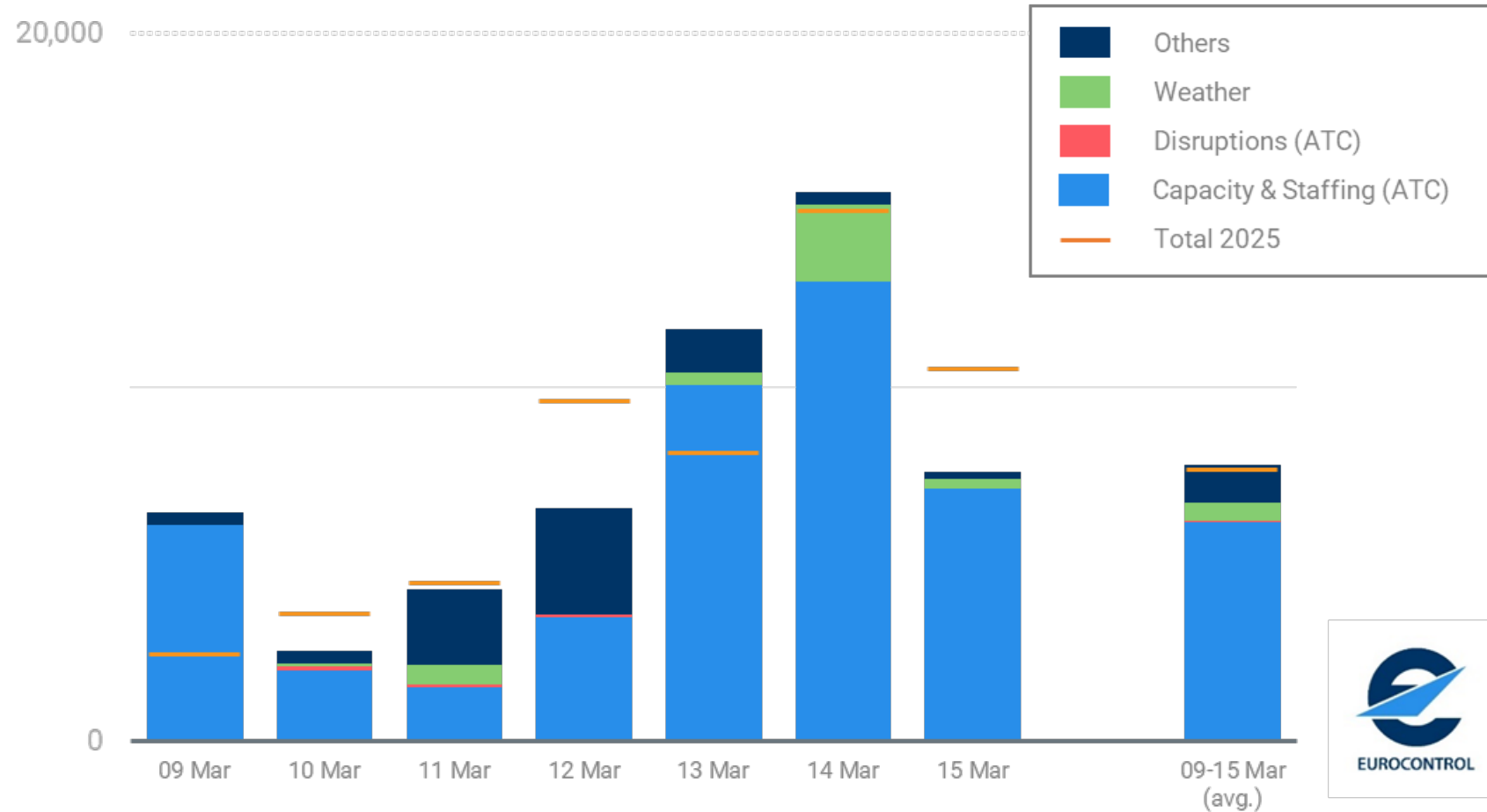
- ➔ Both arrival punctuality (84.6%) and departure punctuality (81.6%) were higher than in the same week of 2025, increasing by 0.1pp and 1.9pp respectively.
- ➔ The airports with the highest ATFM delay per flight were as follows:
- ➔ **Amsterdam Schiphol** experienced daily regulations due to high demand, work in progress and low visibility procedures at the beginning of the week.
- ➔ **London Gatwick** was affected by low visibility regulations on Monday and Tuesday, and by strong winds on Saturday.
- ➔ **Manchester** saw aerodrome capacity regulations for 4 days in Week 11 due to work in progress at the airport.
- ➔ **London Stansted** experienced weather regulations due to low visibility procedures on Monday and Tuesday.
- ➔ **Nice** was impacted by a combination of aerodrome capacity constraints, weather regulations due to convective activity, and ATC capacity regulations.

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)

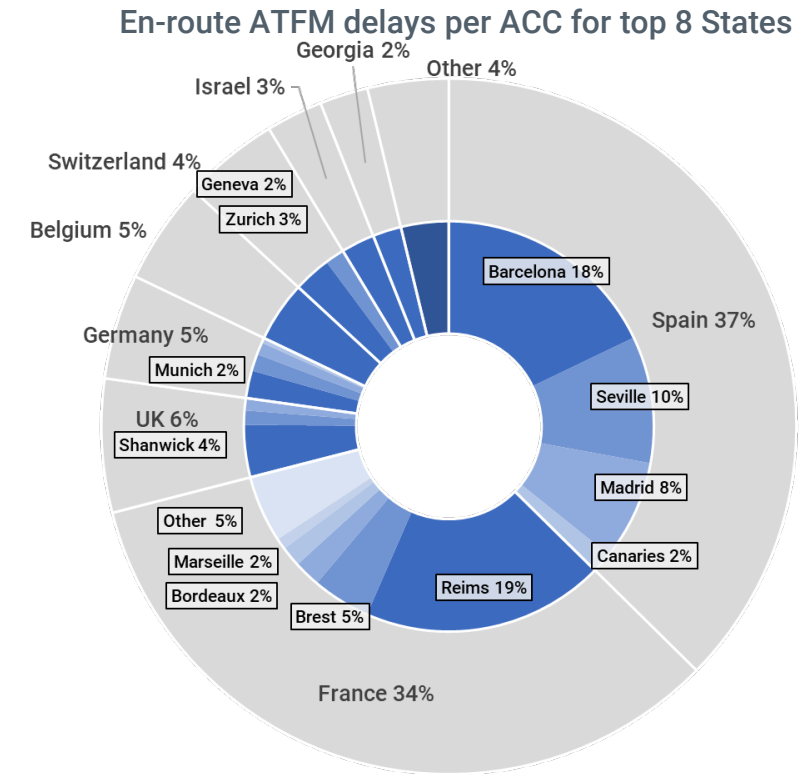
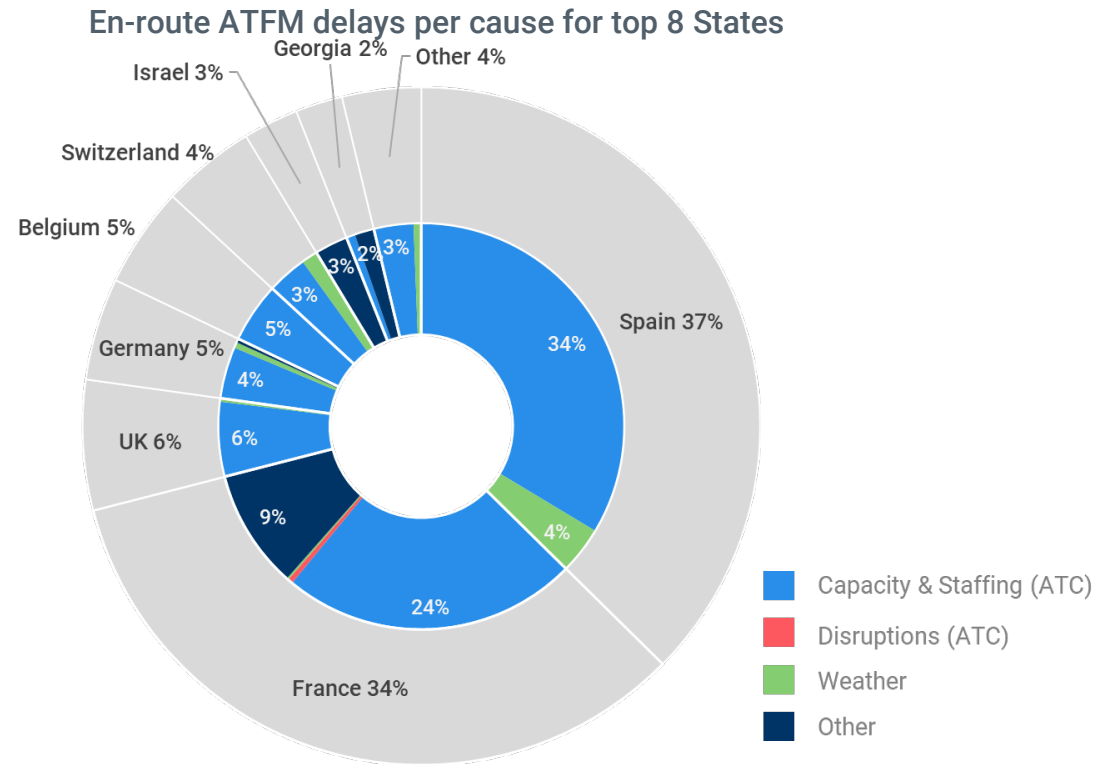
In minutes (total daily and 7-day average) in 2026



- ✈ Week 11 saw a 4% reduction in en-route ATFM delays compared to the previous week, with an average of 7,808 minutes per day. Delays were 1% higher than during the same operational week in 2025.
- ✈ **ATC capacity/staffing** were responsible for 79% of all en-route ATFM delays (notably in Spain and France).
- ✈ **Other** factors accounted for 14% of all en-route ATFM delays, impacting France (due to the 4-FLIGHT system upgrade), Israel and Georgia (both impacted by the Middle East conflict).
- ✈ **Weather** accounted for 6% of all en-route ATFM delays, most impacting Spain, Switzerland and Germany.
- ✈ There were 0.8 minute of total ATFM delay per flight in Week 11, made up of 0.3 min/flight en-route delay, and 0.5 min/flight airport delay, an increase of 17% compared to the same week in 2025.

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

Week 09-15 Mar 2026













- ✈ Spain accounted for 37% of en-route ATFM delays, mainly linked to Barcelona ACC (18%), Seville ACC (10%), and Madrid ACC (8%), and primarily due to ATC capacity & staffing (34%).
- ✈ France represented 34% of en-route ATFM delays, primarily attributed to Reims (19%) and Brest ACC (5%). The primary cause was ATC capacity & staffing (24%).
- ✈ The UK accounted for 6% of en-route ATFM delays, mainly attributed to Shanwick ACC (4%), and due to ATC capacity & staffing (6%).
- ✈ Germany generated 5% of en-route ATFM delays, largely attributed to ATC capacity & staffing (4%).
- ✈ Belgium contributed 5% of en-route ATFM delays, which was entirely attributed to ATC capacity & staffing (5%).

Busiest 10 States

Departures and arrivals

Week 09-15 Mar 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	 United Kingdom	5,051	+2%	↑ +0%
2.	 Spain	4,585	+1%	↑ +2%
3.	 Germany	4,163	-3%	↑ +5%
4.	 France	3,772	-0%	↑ +0%
5.	 Italy	3,370	-0%	↑ +4%
6.	 Türkiye	2,479	+2%	↑ +3%
7.	 Netherlands	1,538	+4%	↓ -2%
8.	 Switzerland	1,290	-2%	↑ +2%
9.	 Norway	1,262	-1%	↓ -1%
10.	 Poland	1,205	-0%	↑ +11%











[See all States](#)



- ✈ The busiest 10 States collectively recorded a slight 0.1% increase in departure and arrival flights in Week 11 compared to the previous week.
- ✈ The Netherlands recorded the largest week-on-week increase (+4%), mainly driven by higher flows to/from the UK, Switzerland and France. Türkiye saw a 2% increase owing to strong domestic flows, although this was partly offset by lower flows to the Middle East. The UK also recorded a 2% rise owing to increased traffic to/from Ireland, the UAE and the Netherlands.
- ✈ Germany recorded the largest week-on-week decrease (-3%), mainly driven by weaker domestic flows. Switzerland recorded a 2% decline, reflecting both reduced domestic traffic and fewer flights to/from the UK and Germany.
- ✈ Compared to 2025, eight of the busiest 10 States recorded growth in arrival and departure flights. The increases were led by Poland (+11%), Germany (+5%), Italy (+4%), Türkiye (+3%), and Spain and Switzerland (each +2%). However, the Netherlands recorded a 2% decrease, while Norway was down by 1%.

Busiest 10 aircraft operators

Week 09-15 Mar 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	
1.	 Ryanair Group	2,774	-0%	↑	+3%
2.	 easyJet Group	1,554	+0%	↑	+7%
3.	 Turkish Airlines Group	1,401	+4%	↑	+7%
4.	 Air France Group	959	-1%	↑	+3%
5.	 KLM Group	836	+3%	↑	+1%
6.	 Lufthansa Airlines	816	-16%	↓	-15%
7.	 British Airways Group	814	+2%	↓	-1%
8.	 Wizz Air Group	808	-0%	↑	+4%
9.	 SAS Group	742	+2%	↑	+12%
10.	 Vueling	549	-3%	↓	-4%

[See top 40 airlines](#)



- ✈ The busiest 10 aircraft operators collectively recorded a 0.8% decline in flights in Week 11 compared to the previous week.
- ✈ Five airlines/airline groups reduced capacity compared to Week 10. Among them, Lufthansa Airlines (-16%) saw the largest decline, mainly on domestic flows within Germany, while Vueling (-3%) reduced capacity mainly on domestic flows within Spain and on the UK ↔ France flow.
- ✈ The main increases compared to the previous week were recorded by Turkish Airlines Group (+4%) mainly driven by domestic flows within Türkiye, and KLM Group (+3%) owing to increases in the Netherlands ↔ UK and Netherlands ↔ Germany flows.
- ✈ Compared to 2025, seven of the busiest 10 aircraft operators recorded higher flight volumes, led by the SAS Group (+12%), Turkish Airlines Group (+7%), easyJet Group (+7%), Wizz Air Group (+4%), Ryanair Group (+3%), Air France Group (+3%) and KLM Group (+1%). Conversely, Lufthansa Airlines (-15%), Vueling (-4%) and British Airways Group (-1%) recorded lower flight volumes.

Europe's 6 largest airline groups

Week 09-15 Mar 2026 (average daily flights)

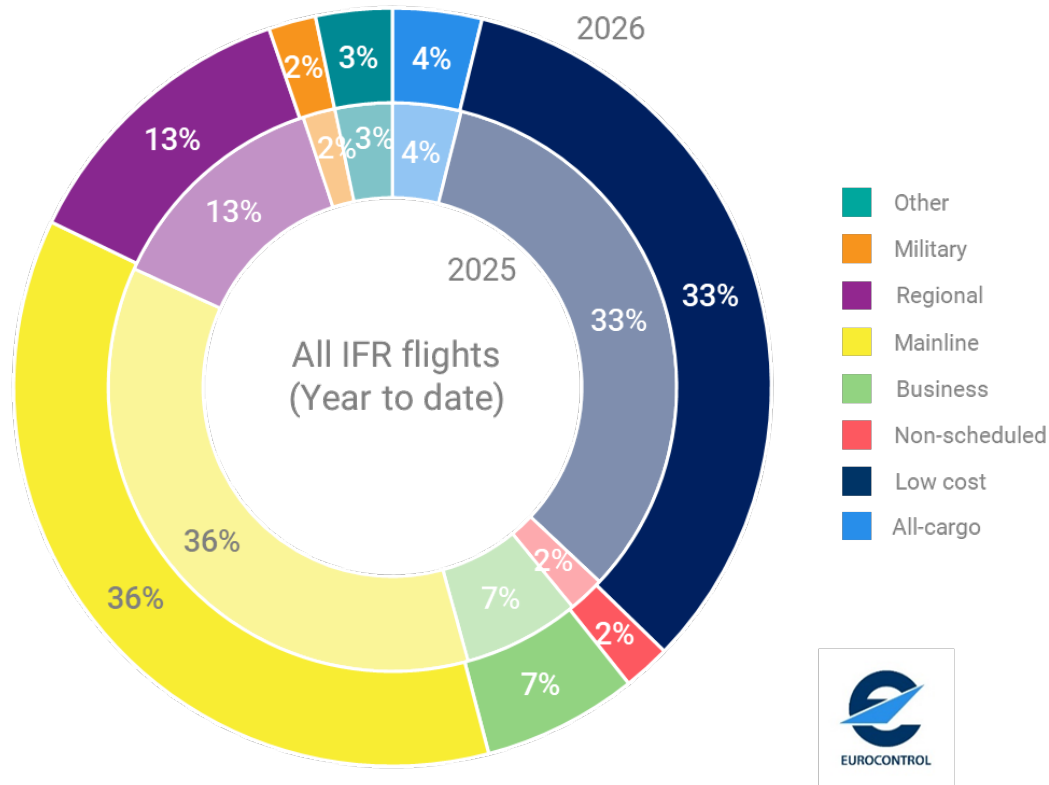
No.	Aircraft operator	Average daily flights	% prev week	% prev year	
1.	Ryanair Group	2,774	-0%	↑	+3%
2.	Lufthansa Group	2,200	-7%	↓	-5%
3.	IAG Group	2,147	+0%	↓	-2%
4.	Air France-KLM Group	1,795	+1%	↑	+2%
5.	easyJet Group	1,554	+0%	↑	+7%
6.	Turkish Airlines Group	1,401	+4%	↑	+7%



- ➔ 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 (-0.8%) compared to the previous week.
- ➔ Four groups increased their capacity compared to Week 10: Turkish Airlines (+4%), Air France-KLM (+1%), and IAG and easyJet remained stable. In contrast, Lufthansa declined by 7% while Ryanair remained stable (-0%).
- ➔ Compared to 2025, only Lufthansa (-5%) and IAG (-2%) operated fewer flights. All other groups recorded increases, led by Turkish Airlines and easyJet (each +7%), followed by Ryanair (+3%) and Air France-KLM (+2%).

Market segments in the EUROCONTROL network

Average share of total flights (year to date)



No.	Market segment	Avg. flights	% prev week	% prev year
1.	Low Cost	8,992	+0%	↑ +2%
2.	Mainline	8,922	+1%	↓ -3%
3.	Regional	3,401	+1%	↓ -1%
4.	Business	1,833	+1%	↑ +4%
5.	All-cargo	1,013	+4%	↓ -1%
6.	Other	973	-11%	↑ +6%
7.	Military	683	+5%	↑ +36%
8.	Non-Scheduled	526	-11%	↑ +0%

- ➔ Since the beginning of the year, the largest market segment, Mainline, accounted for 36% of flights, followed by the Low-cost segment with a 33% share. The Regional segment represented 13%, while Business aviation accounted for 7%, All-cargo 4% and Non-scheduled 2%. All segment shares have remained unchanged compared to 2025.
- ➔ The Mainline and Regional segments each recorded a 1% increase vs Week 10, while Low-cost remained stable. The Non-scheduled segment declined however by 11%, while the All-cargo and Business aviation segments increased by 4% and 1% respectively.
- ➔ Compared to 2025, Low-cost was up +2%, Mainline and Regional down (-3% & -1%), and Non-scheduled remained stable. Business aviation rose by 4% while All-cargo fell by 1%.

Busiest 10 airports

Week 09-15 Mar 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	
1.	Istanbul	1,322	+3%	↑	+2%
2.	Amsterdam	1,271	+3%	↓	-2%
3.	London Heathrow	1,251	+2%	↓	-1%
4.	Paris Charles de Gaulle	1,230	+1%	↓	-1%
5.	Madrid Barajas	1,192	+1%	↑	+5%
6.	Frankfurt	1,018	-8%	↑	+0%
7.	Barcelona	912	-1%	↑	+2%
8.	Rome Fiumicino	791	+1%	↓	-3%
9.	Munich	737	-5%	↑	+1%
10.	Copenhagen	687	+1%	↑	+12%

- ✈ The busiest 10 airports collectively recorded the same flight volumes as the previous week.
- ✈ The largest decreases compared to the previous week were recorded at Frankfurt (-8%) and Munich (-5%), mainly due to reductions in domestic flights within Germany, and mostly for Lufthansa Airlines.
- ✈ The largest increases were recorded at Istanbul (+3%) owing mainly to its domestic flow within Türkiye as well as flows with the UAE and the Russian Federation, and mainly for Turkish Airlines. Amsterdam also recorded a 3% increase, mainly due to growth on its flows with the UK. London Heathrow posted a 2% increase, partly reflecting stronger flows with the UAE, the US and India.
- ✈ Compared to 2025, six of the busiest 10 airports handled more flights, led by strong growth at Copenhagen (+12%), followed by Madrid Barajas (+5%), Istanbul (+2%) and Barcelona (+2%). Traffic declined at the remaining airports however, ranging from -1% at Paris CDG to -3% at Rome Fiumicino.

[See top 40 airports](#)

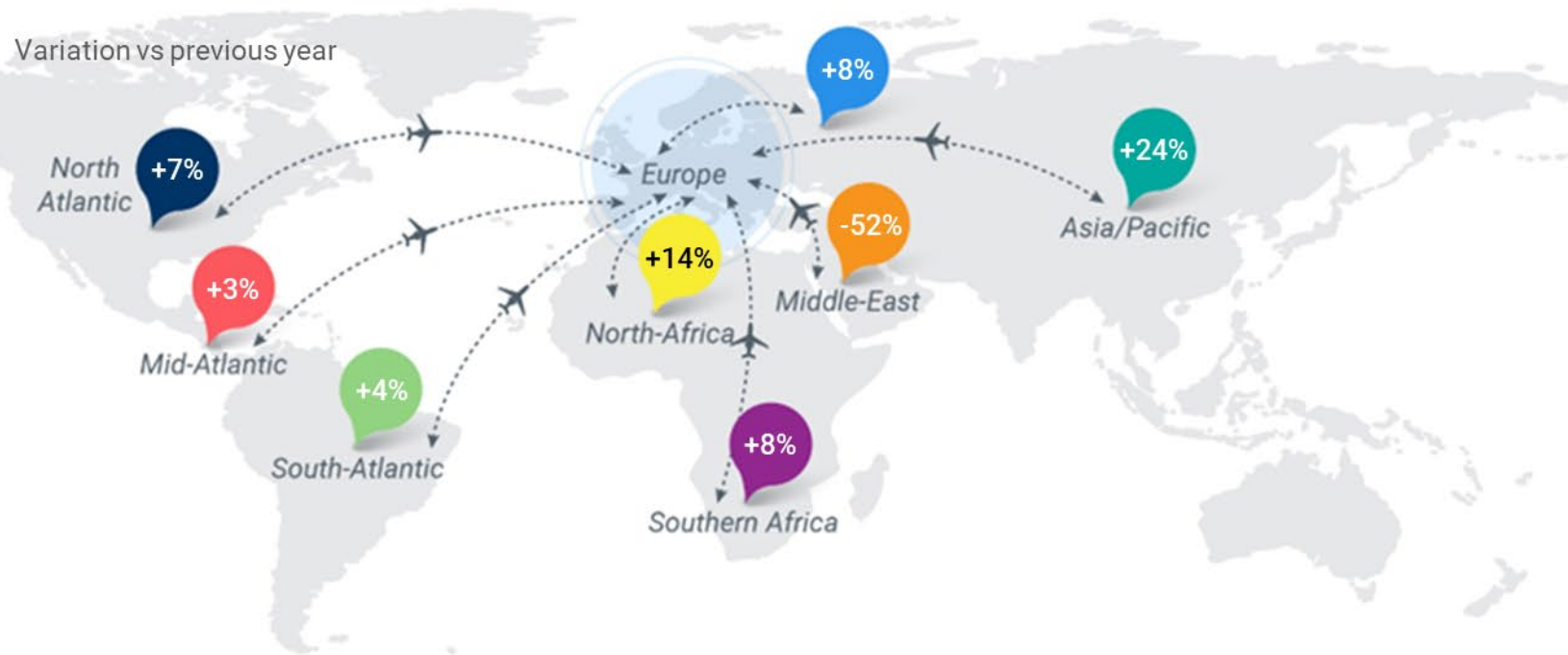


Traffic flows

(average daily departure/arrival flights for week 09-15 Mar 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	20,590	↓ -0%	↑ +3%
Europe ↔ North-Africa	1,277	↓ -5%	↑ +14%
Europe ↔ North Atlantic	1,156	↑ +3%	↑ +7%
Europe ↔ Asia/Pacific	1,090	↑ +6%	↑ +24%
Europe ↔ Middle-East	624	↑ +7%	↓ -52%
Europe ↔ Southern Africa	345	↓ -2%	↑ +8%
Europe ↔ Other Europe	250	↑ +2%	↑ +8%
Europe ↔ South-Atlantic	205	↓ -1%	↑ +4%
Europe ↔ Mid-Atlantic	202	↓ -3%	↑ +3%
Non Intra-Europe	5,148	↑ +1%	↓ -3%

Variation vs previous year



- ✈ Intra-European traffic saw 20,590 daily flights on average during Week 11, remaining stable compared to the previous week. Intercontinental flows amounted to 5,148 daily flights on average, +1% vs the previous week.
- ✈ The top intercontinental flows were between Europe and North Africa, followed by flights to/from North America and Asia/Pacific.
- ✈ The Middle East recorded the strongest week-on-week increase (+7%), partly driven by the flow UAE ↔ UK (mostly repatriation flights operated by Emirates and Etihad) and Israel ↔ Germany (mostly military flights), but with flights globally far short of normal levels. This was followed by Asia/Pacific (+6%), supported mainly by India ↔ UK flows, as well as China ↔ UK, China ↔ Germany and China ↔ Georgia. The flow between Europe and North America rose by 3% driven by stronger UK ↔ US and Italy ↔ US flows.
- ✈ With the exception of European and Middle East flows (-52%), all intercontinental flows recorded more flights than in 2025. The strongest growth was observed between Europe and Asia/Pacific (+24%) followed by North Africa (+14%), Southern Africa (+8%) and Other Europe (+8%).

Top 10 long-haul country pairs

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

Week 09-15 Mar 2026

No.	Country pair	Average daily flights	% prev week		% prev year
1.	UK ↔ US	264	+6%	↑	+3%
2.	Germany ↔ US	155	+3%	↑	+22%
3.	France ↔ US	102	+2%	↓	-2%
4.	Netherlands ↔ US	68	-3%	↓	-1%
5.	Egypt ↔ Russia	64	+3%	↑	+44%
6.	Ireland ↔ US	62	-2%	↑	+17%
7.	Spain ↔ US	62	+1%	↑	+11%
8.	Italy ↔ US	58	+21%	↑	+3%
9.	India ↔ UK	53	+9%	↑	+14%
10.	Türkiye ↔ US	44	+1%	↑	+9%

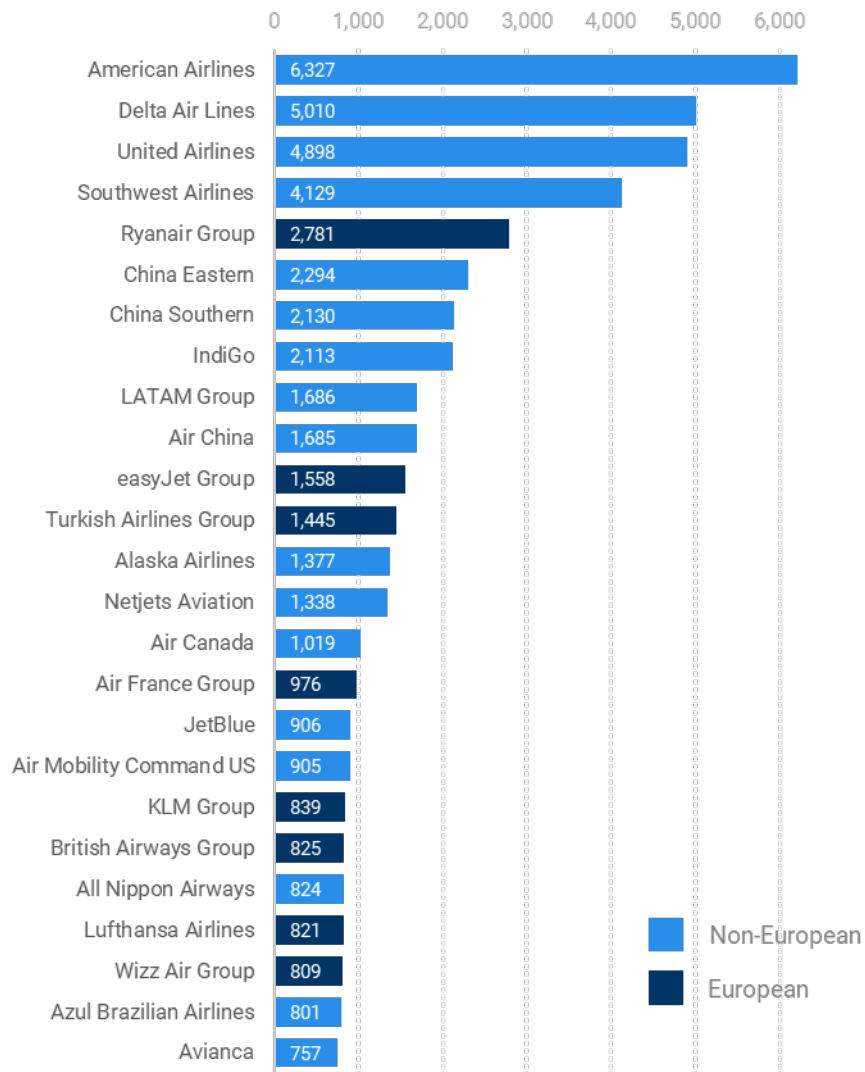
- ➔ Eight of the top 10 long-haul country pairs involved the US, with the largest three being the US ↔ UK, US ↔ Germany and US ↔ France.
- ➔ The non-US long-haul flows within the top 10 were between Egypt ↔ Russia (overflying the network) and India ↔ UK.
- ➔ Compared to the previous week, eight long-haul flows saw increases, led by Italy ↔ US (+21%), partly driven by a rise in military flights. This was followed by India ↔ UK (+9%), UK ↔ US (+6%), Germany ↔ US (+3%), Egypt ↔ Russia (+3%), France ↔ US (+2%), Spain ↔ US (+1%) and Türkiye ↔ US (+1%). In contrast, traffic declined on the Netherlands ↔ US (-3%) and Ireland ↔ US (-2%) flows.
- ➔ Compared to the same week of 2025, eight of the top 10 long-haul flows recorded growth, led by Egypt ↔ Russia (+44%), Germany ↔ US (+22%), Ireland ↔ US (+17%) and India ↔ UK (+14%). Two flows declined: France ↔ US (-2%) and Netherlands ↔ US (-1%).



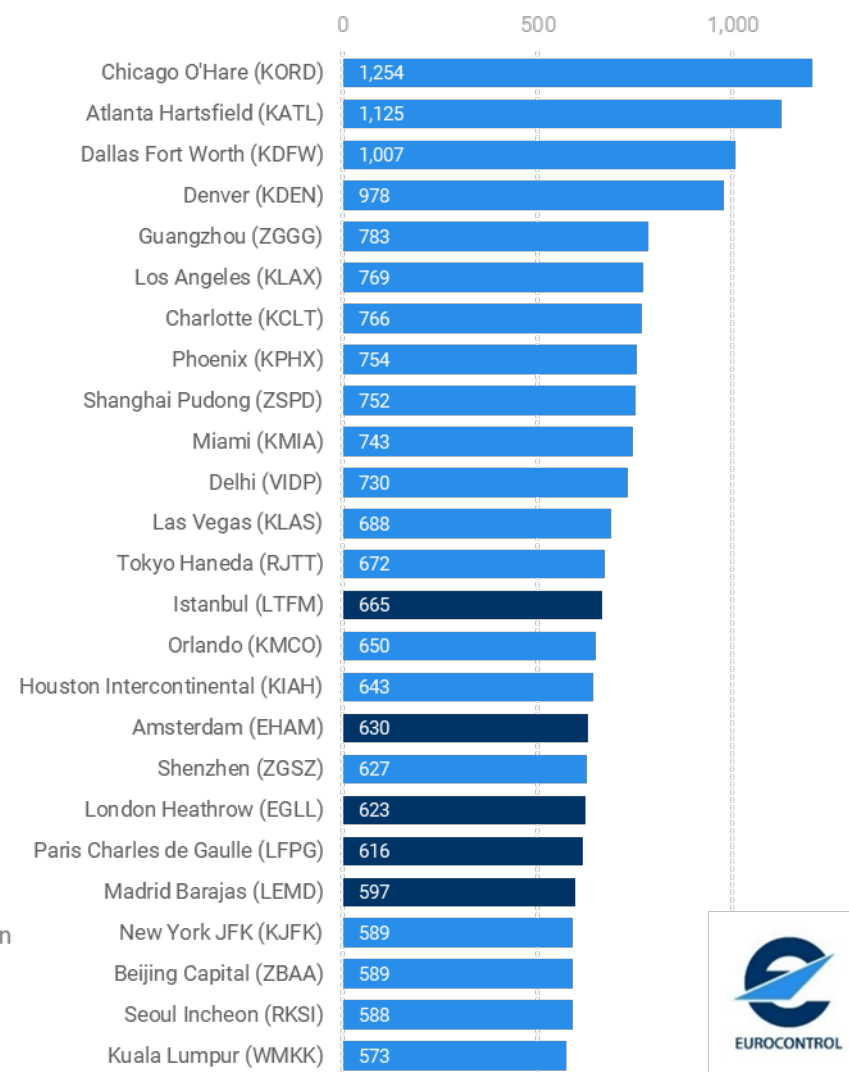
Top 25 global aircraft operators and airport departures

(average daily departure flights) (Week 09-15 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 (16th), KLM Group (19th), British Airways Group (20th), Lufthansa Airlines (22nd), and Wizz Air Group (23rd).
- ✈️ **Airports:** Five European airports ranked among the top 25 in terms of global airport departures in Week 11, one more than in Week 9 (Madrid Barajas).
- ✈️ No European airport made it into the top 10 in Week 11: Istanbul was highest in 14th (down from 12th in Week 9), followed by Amsterdam in 17th, London Heathrow in 19th, Paris CDG in 20th and Madrid Barajas in 21st.
- ✈️ 8/10 of the busiest airports were American (up 1 compared with Week 9), while China ranked a distant second with 2 airports. India has dropped out of the top 10 vs two weeks earlier.

Jet fuel price (Europe)

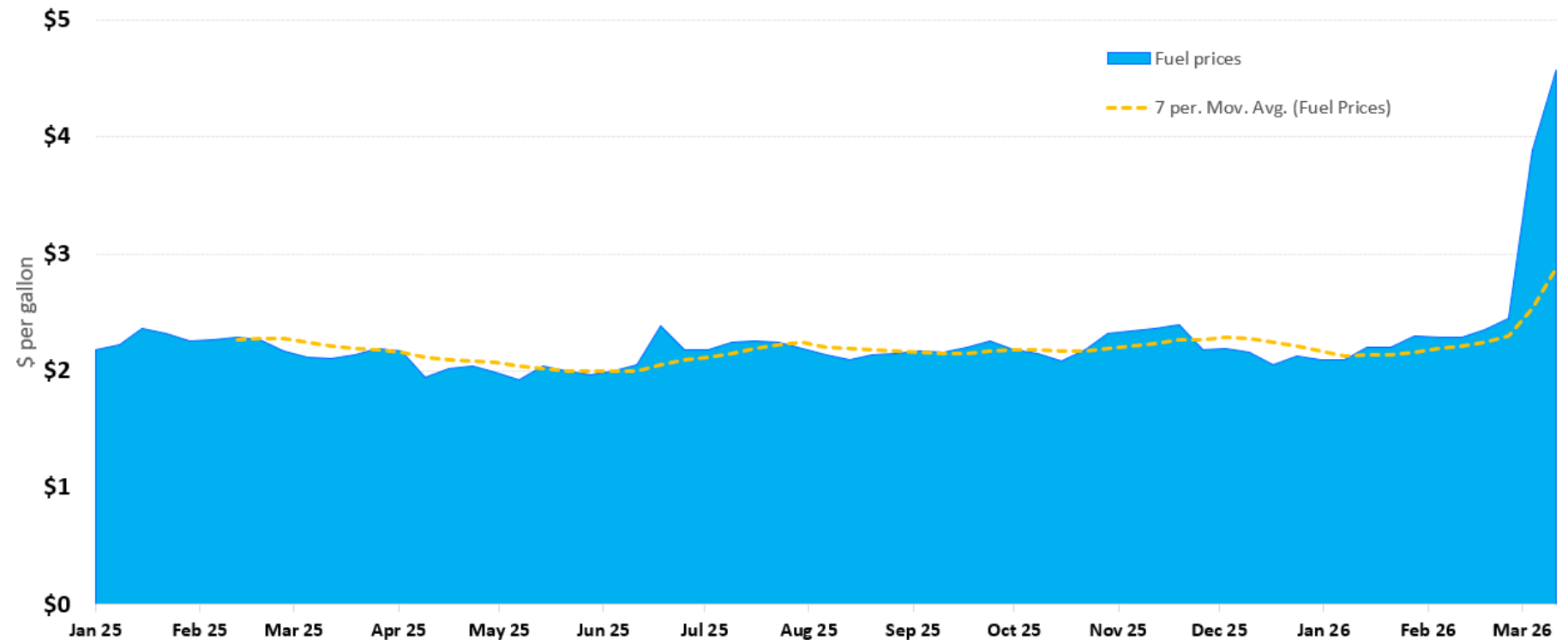
Week 09-15 Mar 2026

13 Mar 2026
avg fuel price:

\$4.57 /gallon

+87%
vs. \$2.45 /gallon
on 27 Feb 2026

Source: IATA/Platts



Source: IATA/Platts

- ➔ Jet fuel prices have soared as the Middle East conflict disrupts global oil supplies. The average jet fuel price closed at \$4.57/gallon on 13 March, marking an 87% increase vs two weeks earlier. However, this remains below the peak of over \$5 per gallon recorded at the start of the Russian war of aggression against Ukraine in February 2022.
- ➔ 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.
- ➔ On 11 March, member states of the International Energy Agency approved a coordinated release of 400 million barrels from their emergency reserves to help stabilise global oil markets in response to the significant supply disruptions triggered by the Middle East conflict.

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.
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:
<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.



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