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EUROPEAN AVIATION OVERVIEW

23-29 Mar 2026

SUPPORTING EUROPEAN AVIATION

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02 April 2026

Headlines

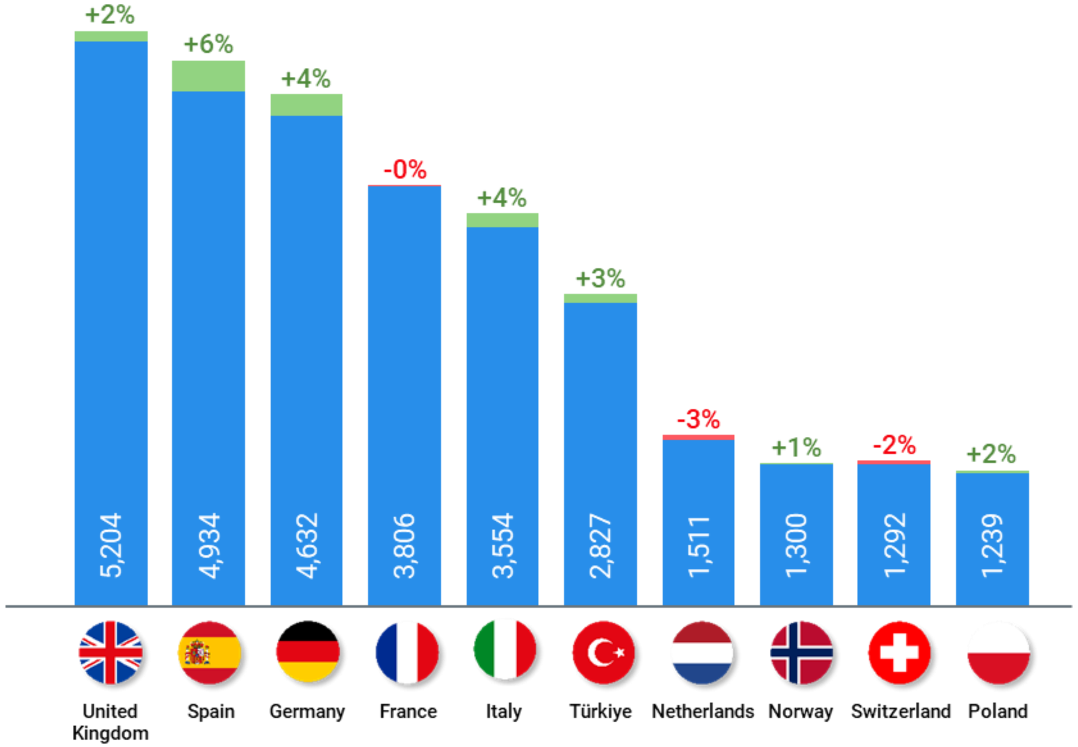
(Week 13, 23-29 Mar 2026)

- The network averaged 27,784 daily flights in Week 13, an increase of 2.5% from Week 12, and 2.0% higher than in 2025.
- Sunday 29 March marked the start of the 2026 summer schedules.
- Year-on-year traffic flows were up in all regions except between Europe and the Middle East, which remains heavily affected by the crisis with traffic down 51% compared to the same week in 2025.
- On average, the busiest 10 carriers improved their capacity by 2.2% compared to the previous week.
- At State level, the busiest 10 States saw their flights increase by 2.5% compared to the previous week.
- Network arrival and departure punctuality were 79.0% and 75.5%, lower than the equivalent week in 2025.
- En-route ATFM delays were up 54% compared to the previous week, with a daily average of around 17K delay minutes, 26% higher than in 2025. Total ATFM delay per flight was 0.1 min/flight (0.6 for en-route, and 0.5 for airports).
- ATC capacity/staffing was the top delay cause (73% 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, Seville, Barcelona and Reims.
- Jet fuel prices remain highly volatile as the Middle East conflict continues to disrupt global oil supplies. On 27 March, the average price reached $4.73/gallon, up 4% compared to two weeks earlier. Overall, jet fuel prices averaged $4.57/gallon in March 2026; this was twice as high as at the beginning of the year.

10 busiest States

Week 23-29 Mar 2026

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



Traffic situation

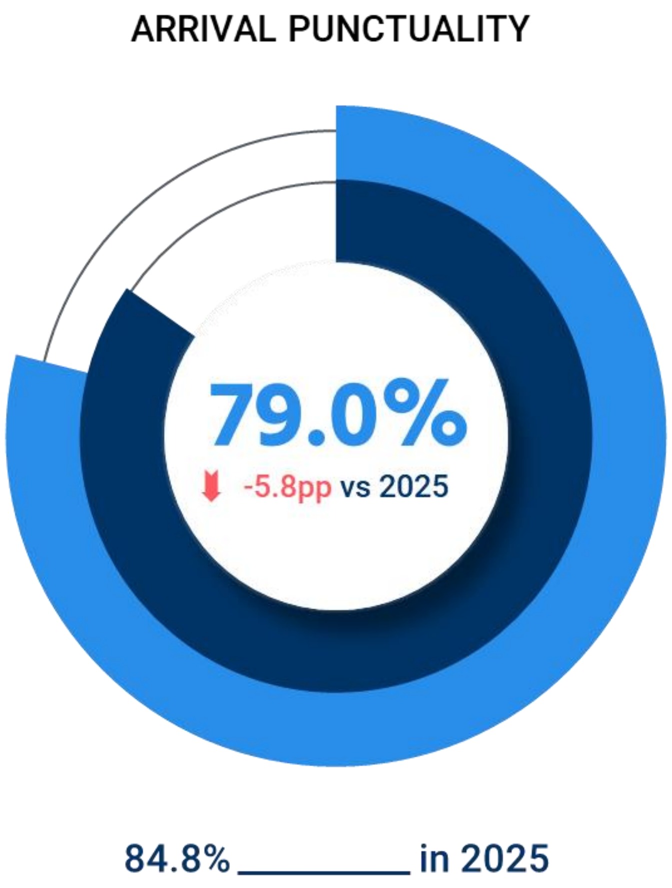
Average daily flights (including overflights)

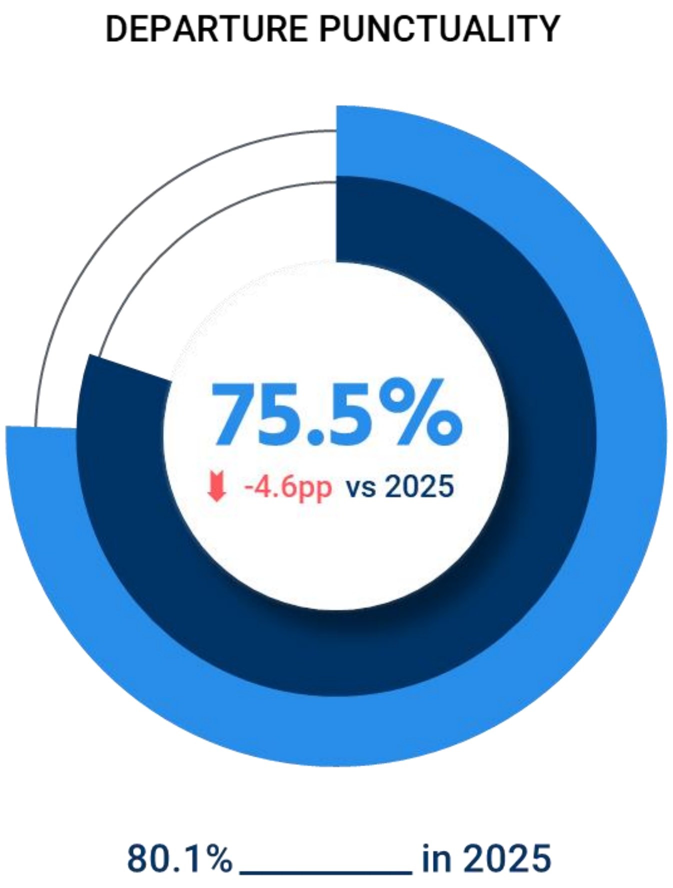
Week 23-29 Mar 2026

Arrival & departure punctuality

(all network scheduled flights)

Week 23-29 Mar 2026





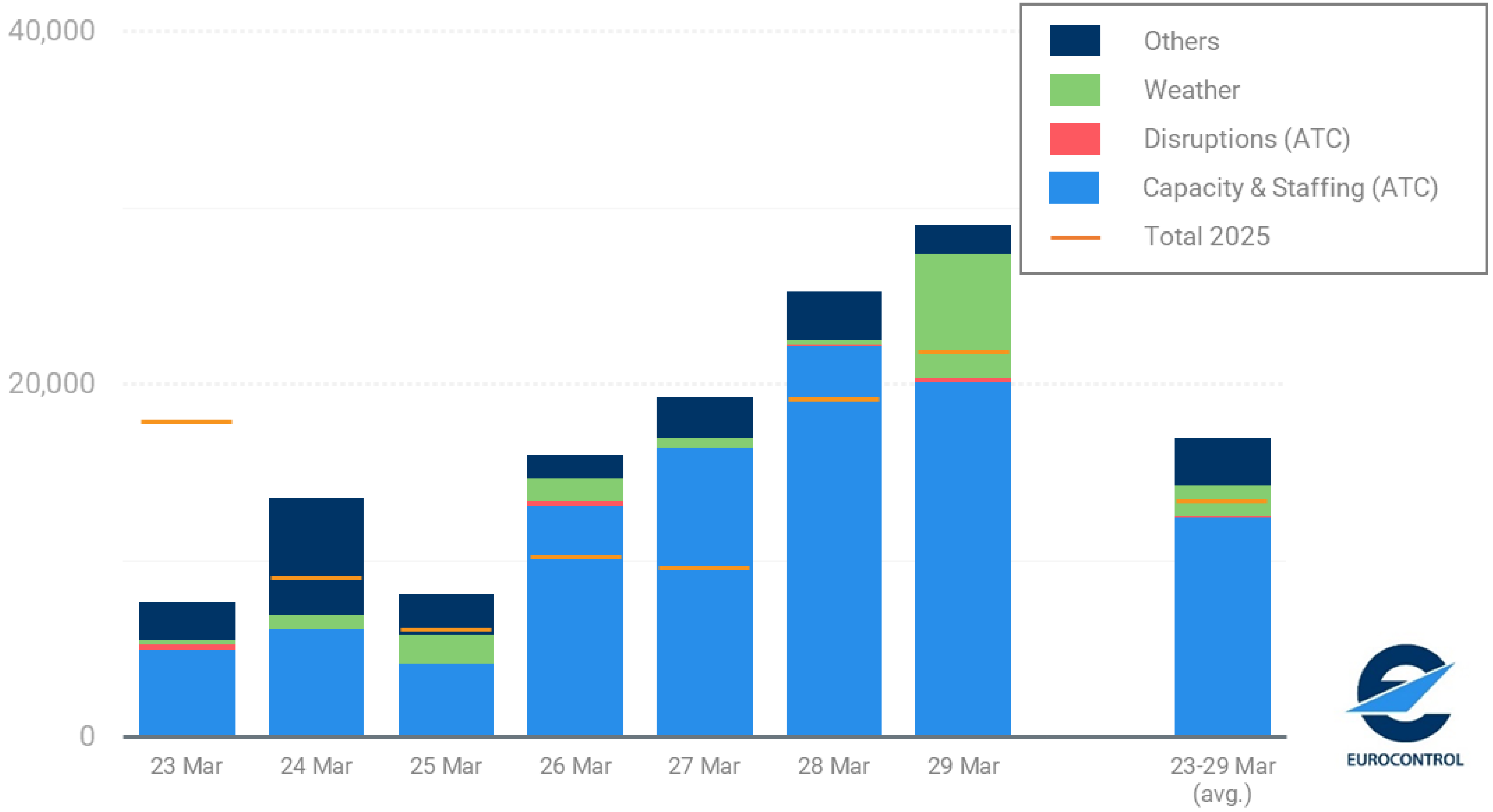
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Both arrival punctuality (79.0%) and departure punctuality (75.5%) were lower than the same week of 2025, decreasing by 5.8pp and 4.6pp respectively.
- The airports with the highest air traffic flow management (ATFM) delay per flight were as follows:
- Amsterdam, which saw delays due to aerodrome capacity and weather issues, with strong winds causing the highest delays on Wednesday and Thursday.
- Istanbul Sabiha Gökcen, which saw delays due to aerodrome capacity and weather (low visibility procedures and an associated low cloud base), with weather causing disruptions in the form of multiple diversions on Sunday.
- Athens, which continued to experience daily delays due to ATC capacity reasons, with weather (cumulonimbus clouds) also causing delays on Friday.
- Dublin, which experienced delays due to aerodrome capacity related to work in progress.
- Lisbon, which saw aerodrome capacity delays during the week, with the highest delays recorded on Monday.

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

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



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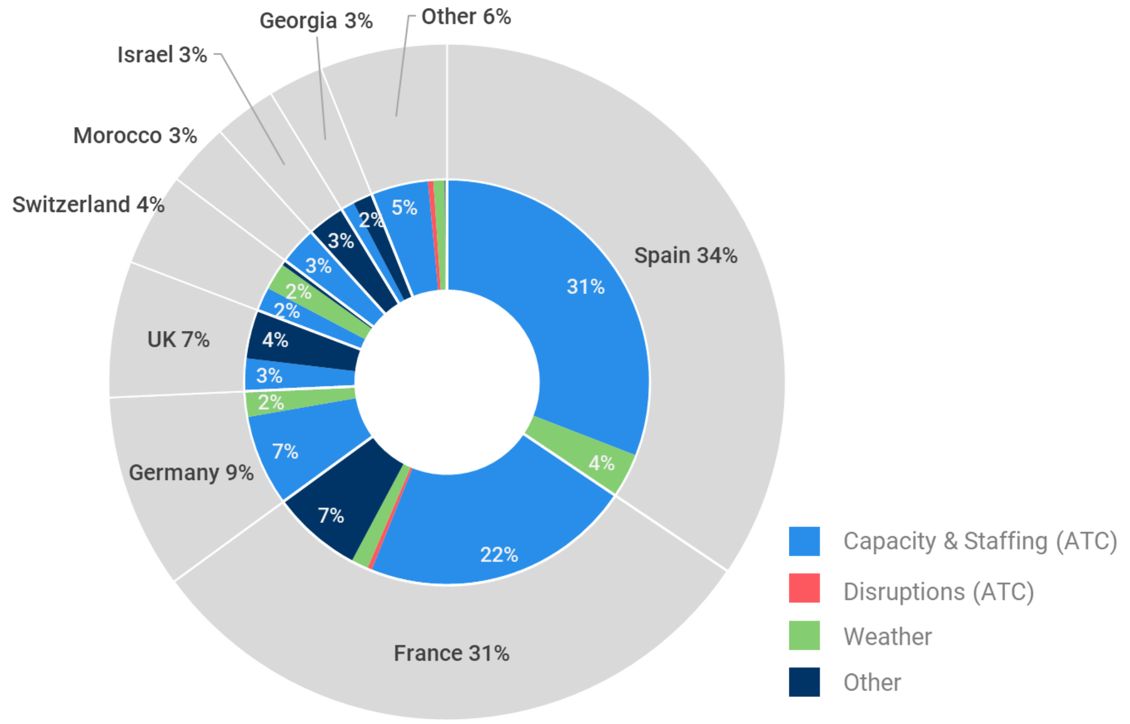
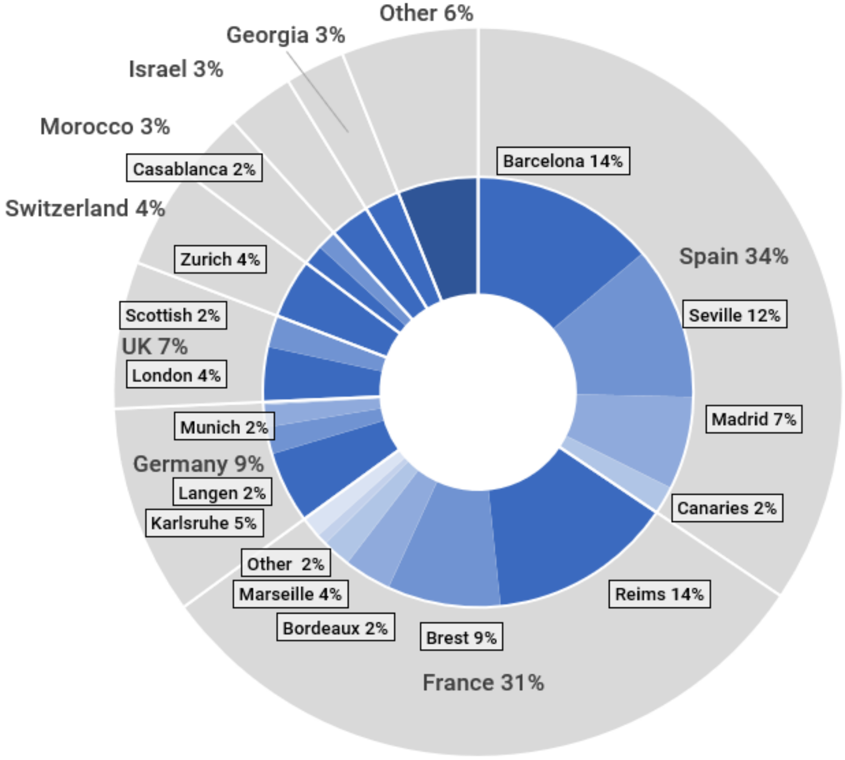
- Week 13 saw a 54% increase in en-route ATFM delays compared to the previous week, with an average of 16,982 minutes per day. Delays were 26% higher than during the same operational week in 2025.
- ATC capacity/staffing were responsible for 73% of all en-route ATFM delays (notably in Spain and France).
- Other factors accounted for 16% of all en-route ATFM delays, affecting France, the UK, Israel and Georgia (the latter two impacted by the Middle East crisis).
- Weather accounted for 10% of all en-route ATFM delays, most impacting Spain, Germany, Switzerland and France.
- There were 1.1 minutes of total ATFM delay per flight in Week 13, made up of 0.6 min/flight en-route delay, and 0.5 min/flight airport delay, an increase of 30% compared to the previous week.

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

Week 23-29 Mar 2026



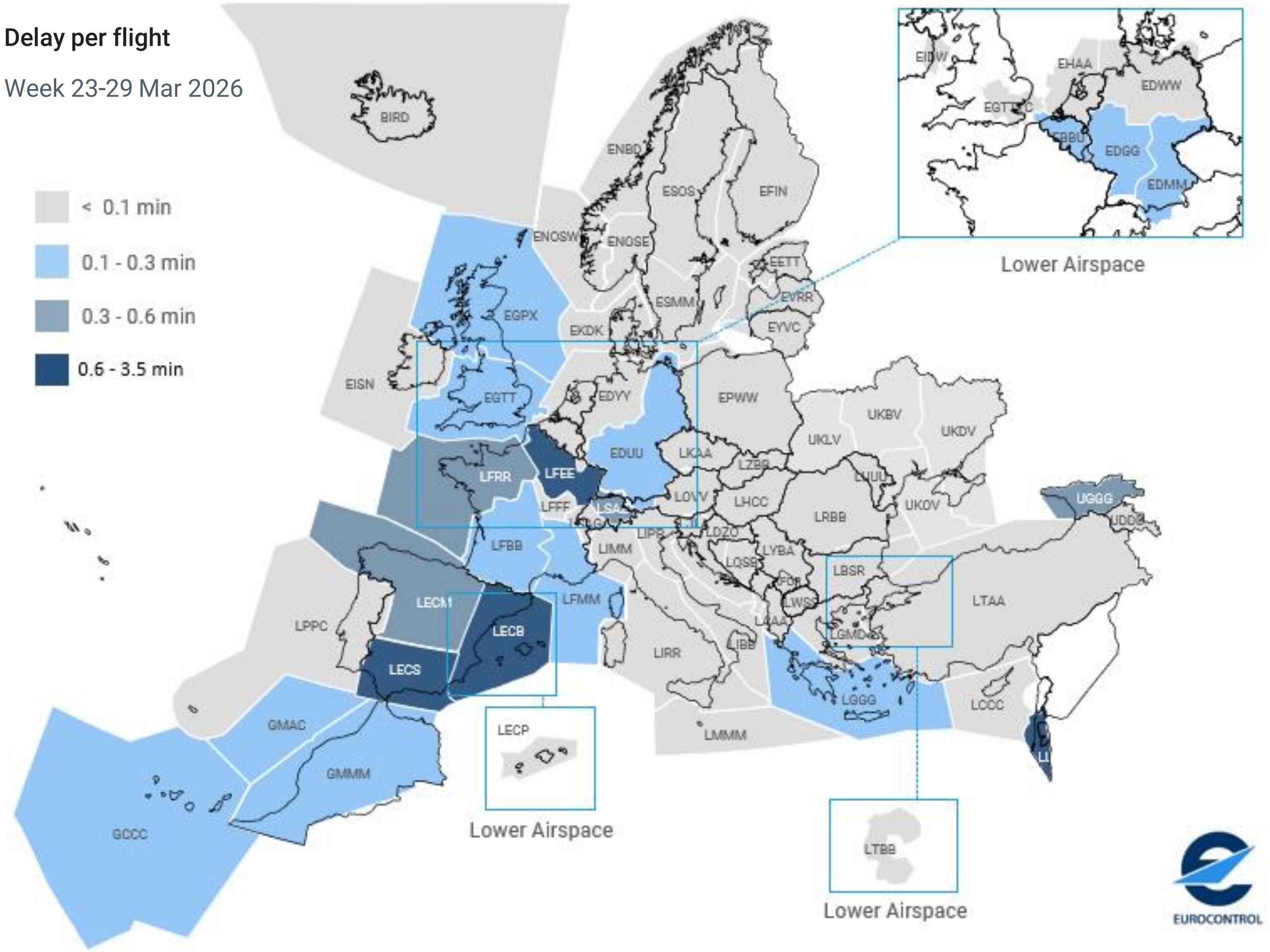


- Spain accounted for 34% of en-route ATFM delays, mainly linked to Barcelona ACC (14%), Seville ACC (12%), and Madrid ACC (7%), and primarily due to ATC capacity & staffing (31%).
- France represented 31% of en-route ATFM delays, primarily attributed to Reims ACC (14%), Brest ACC (9%), and Marseille ACC (4%). The primary cause was ATC capacity & staffing (22%).
- Germany generated 9% of en-route ATFM delays, mainly attributed to Karlsruhe ACC (5%), and due to ATC capacity & staffing (7%) and weather (2%).
- The UK accounted for 7% of en-route ATFM delays, mainly attributed to London ACC (4%), and due to Other causes (4%) and ATC capacity & staffing (3%).
- Switzerland contributed 4% of en-route ATFM delays, entirely attributed to Zurich ACC, and due to ATC capacity & staffing (2%) and weather (2%).

En-route ATFM delayed flights per area control centre (ACC)

Delay per flight

Week 23-29 Mar 2026



In Week 13, five ACCs recorded en-route ATFM delays between 0.5 and 3.5 min/flight: Tel Aviv (3.48 min/flight), Seville (1.22 min/flight), Barcelona (0.87 min/flight), Reims (0.87 min/flight) and Tbilisi (0.52 min/flight).

Tel Aviv ACC continued to be highly impacted by the ongoing Middle East crisis.

Seville ACC experienced ATC capacity delays throughout the week (with traffic +12% versus 2025), with some staffing delays on Monday and Tuesday.

Barcelona ACC also experienced ATC capacity delays throughout the week (with traffic +9% versus 2025), with additionally weather delays (owing to cumulonimbus clouds) on Sunday.

Reims ACC faced a combination of ATC capacity and staffing delays throughout the week, particularly over the weekend. This was compounded by weather delays on Sunday. An ATM system upgrade also generated some delays on Tuesday and Wednesday.

Tbilisi ACC was mostly impacted by the Middle East crisis, in particular on Saturday. It also experienced small ATC capacity delays throughout the week.

Busiest 10 States

Departures and arrivals

Week 23-29 Mar 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	5,204	+2%	+3%
2.	Spain	4,934	+6%	+6%
3.	Germany	4,632	+4%	+4%
4.	France	3,806	-0%	-2%
5.	Italy	3,554	+4%	+7%
6.	Türkiye	2,827	+3%	+5%
7.	Netherlands	1,511	-3%	-2%
8.	Norway	1,300	+1%	+1%
9.	Switzerland	1,292	-2%	+1%
10.	Poland	1,239	+2%	+9%

See all States

- The busiest 10 States collectively recorded a 2.5% increase in departure and arrival flights in Week 13 compared to the previous week with seven States recording more flights week-on-week.
- Spain recorded the largest week-on-week increase (+6%), mainly driven by strong domestic flows and increased flows to/from the UK and Germany. Italy and Germany saw traffic up 4% rise, respectively reflecting stronger domestic flows and to/from the UK and Germany, and stronger flows with Türkiye and Spain. Türkiye posted a 3% increase owing to higher flows to/from Germany, Saudi Arabia and the UK.
- By contrast, traffic decreased to the Netherlands (-3% owing to fewer domestic flights and to/from the UK and Austria) and to Switzerland (-2%, reflecting weaker domestic flows and fewer flights to/from the UK), while traffic in France was marginally lower.
- Compared to 2025, eight of the busiest 10 States recorded growth in arrival and departure flights. The increases were led by Poland (+9%), Italy (+7%), Spain (+6%), Türkiye (+5%), Germany (+4%), the UK (+3%) and Norway and Switzerland (each +1%). However, France and the Netherlands recorded a decrease of 2% each.

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Busiest 10 aircraft operators

Week 23-29 Mar 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	2,894	+3%	+4%
2.	easyJet Group	1,583	+2%	+7%
3.	Turkish Airlines Group	1,491	-2%	+3%
4.	Lufthansa Airlines	1,047	+5%	-7%
5.	Air France Group	998	+3%	+4%
6.	Wizz Air Group	912	+7%	+15%
7.	KLM Group	839	-1%	+1%
8.	British Airways Group	818	+1%	-1%
9.	SAS Group	747	+2%	+10%
10.	Vueling	584	+4%	+0%

See top 40 airlines

- The busiest 10 aircraft operators collectively recorded a 2.2% increase in flights in Week 13 compared to the previous week.
- Only two airline groups recorded week-on-week declines: **Turkish Airlines** (-2%) due to weaker domestic flights, and **KLM** (-1%), mainly driven by fewer flights between the Netherlands and Austria.
- The main increases compared to the previous week were recorded by **Wizz Air Group** (+7%) owing to increases in flows Italy ↔ Spain, Italy ↔ Albania, Germany ↔ Romania and Italy ↔ Romania. **Lufthansa Airlines** (5%) followed benefiting from higher domestic flows within Germany and increases in the Italy ↔ Germany flow. **Vueling** saw a 4% increase owing to its domestic flow within Spain along with an increase in Spain ↔ UK. **Ryanair Group** recorded a 3% increase with traffic up Spain ↔ UK, Spain domestic, Spain ↔ Germany. Finally, the **Air France Group** also recorded a 3% increase, driven by stronger domestic flows within France and with North Africa.
- Compared to 2025, eight of the 10 busiest aircraft operators recorded higher flight volumes. Growth was led by the Wizz Air Group (+15%) followed by the SAS Group (+10%), easyJet Group (7%), Air France and Ryanair Groups (each +4%), Turkish Airlines Group (+3%), and KLM Group (+1%). In contrast, Lufthansa Airlines (-7%) and British Airways Group (-1%) reported lower flights.

Europe’s 6 largest airline groups

Week 23-29 Mar 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	2,894	+3%	+4%
2.	Lufthansa Group	2,532	+5%	-2%
3.	IAG Group	2,200	+3%	-0%
4.	Air France-KLM Group	1,837	+1%	+3%
5.	easyJet Group	1,583	+2%	+7%
6.	Turkish Airlines Group	1,491	-2%	+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 combined week-on-week increase in flights of 2.3%.
- Only the Turkish Airlines Group posted a decrease of 2%, mainly due to weaker domestic flows in Week 13 vs Week 12.
- Five airline groups increased capacity compared to Week 12. Lufthansa (+5%) recorded the largest rise, followed by Ryanair (+3%), mainly driven by growth in the Spain ↔ UK flow and domestic flights within Spain. IAG also posted a 3% increase, while easyJet saw a 2% rise supported by its UK ↔ Spain flow.
- Compared to 2025, Lufthansa (-2%) and IAG (-0%) operated fewer flights. All other groups recorded increases, led by easyJet (+7%), followed by Ryanair (+4%), and both Air France-KLM and Turkish Airlines (each +3%).

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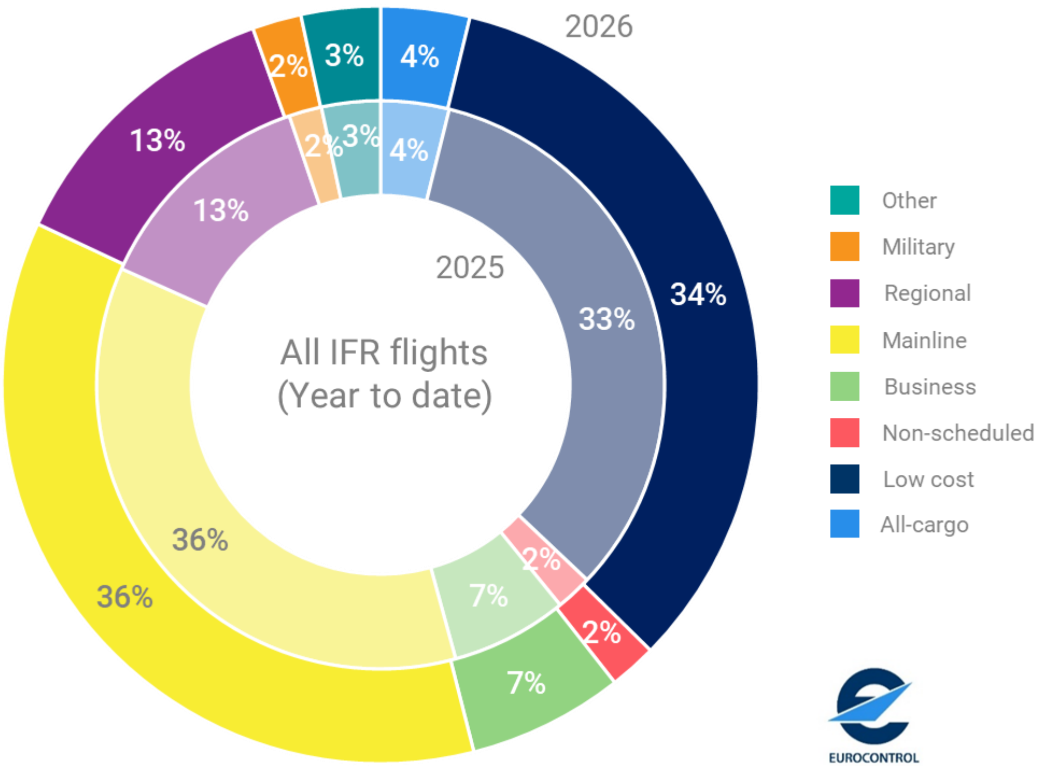
Market segments in the EUROCONTROL network

Average share of total flights (year to date)



No.	Market segment	Avg. flights	% prev week	% prev year
1.	Mainline	9,590	+3%	-1%
2.	Low Cost	9,560	+4%	+5%
3.	Regional	3,455	+2%	-2%
4.	Business	1,879	+1%	+7%
5.	Other	1,034	-11%	+1%
6.	All-cargo	1,033	+1%	-0%
7.	Military	673	-1%	+24%
8.	Non-Scheduled	572	+8%	+7%

- In the year to date, virtually all segments are showing the same market share as in 2025 (with rounding). The largest market segment (Mainline) accounts for 36% of the market, followed by Low cost just behind on 34% and up 1 percentage point. The remainder are unchanged: Regional on 13%, Business aviation on 7%, All-cargo on 4% and Non-scheduled on 2%.
- Week-on-week, however, the Non-scheduled segment grew by 8% supported by a surge in flights between Türkiye and the Middle East, including a number of repatriation flights. Mainline and Low cost increased by 3% and 4% respectively, while Regional was up 2%. Business aviation and All-cargo each grew by 1%.
- Compared to 2025, the Non-scheduled segment has increased by 7% and Low-cost by 5%, whereas Mainline and Regional have declined by 1% and 2% respectively. Business aviation rose by 7% whereas All-cargo remained broadly unchanged.

Busiest 10 airports

Week 23-29 Mar 2026 (average daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,436	+2%	+1%
2.	Amsterdam	1,280	-0%	-1%
3.	London Heathrow	1,266	+1%	-2%
4.	Paris Charles de Gaulle	1,261	+2%	-1%
5.	Madrid Barajas	1,230	+3%	+6%
6.	Frankfurt	1,191	+3%	+0%
7.	Barcelona	964	+3%	+4%
8.	Munich	833	+3%	-2%
9.	Rome Fiumicino	820	+3%	+0%
10.	Copenhagen	725	+5%	+15%

See top 40 airports

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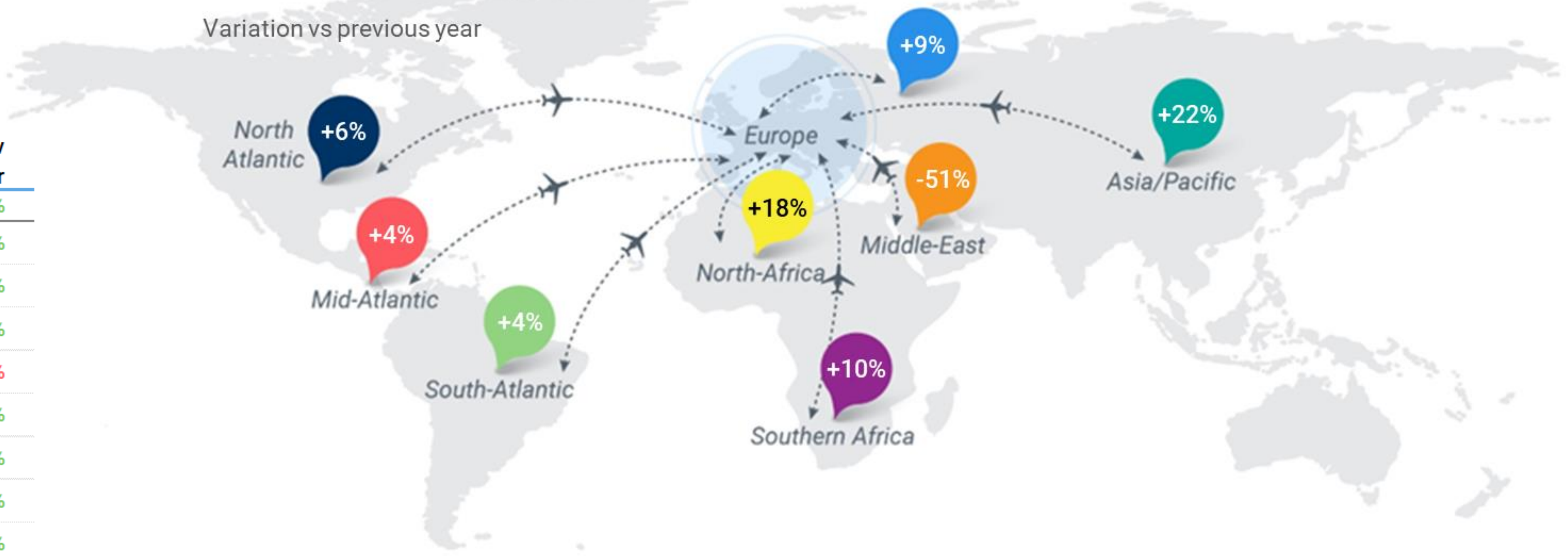
- The busiest 10 airports together saw a 2.3% increase in Week 13 compared to the previous week.
- Only Amsterdam saw no change, remaining stable vs Week 12.
- The largest increase was recorded at Copenhagen (+5%), owing mainly to its flows with Italy, Spain, France, Germany and Greece.
- Five airports each recorded a 3% increase: Madrid (driven by strong domestic flows within Spain), Frankfurt (supported by robust domestic flows within Germany), Barcelona (boosted by solid domestic flows within Spain), Munich (growth on its flows with Türkiye and Italy) and Rome Fiumicino (growth on its flows with Spain).
- Compared to 2025, four of the busiest 10 airports are handling more flights, led by particularly strong growth at Copenhagen (+15%), followed by Madrid Barajas (+6%), Barcelona (+4%), and Istanbul (+1%). Frankfurt and Rome Fiumicino remain stable. Traffic has declined by 2% at Munich and London Heathrow, and by 1% at Amsterdam and Paris CDG.

Traffic flows

Week 23-29 Mar 2026 average daily departure/arrival flights

Region	Average daily flights	% prev week	% prev year
Intra-Europe	21,599	+2%	+4%
Europe ↔ North-Africa	1,420	+8%	+18%
Europe ↔ North Atlantic	1,221	+4%	+6%
Europe ↔ Asia/Pacific	1,118	+2%	+22%
Europe ↔ Middle-East	707	+8%	-51%
Europe ↔ Southern Africa	344	-1%	+10%
Europe ↔ Other Europe	260	+5%	+9%
Europe ↔ South-Atlantic	206	+1%	+4%
Europe ↔ Mid-Atlantic	196	-1%	+4%
Non Intra-Europe	5,472	+4%	-3%



- Intra-European traffic saw 21,599 daily flights on average during Week 13, a 2% increase vs the previous week. Intercontinental flows amounted to 5,472 daily flights on average, +4% vs the previous week.
- The top intercontinental flows were between Europe and North Africa, followed by flights to/from North America and Asia/Pacific.
- Week on week, the North Africa flow increased by 8% owing to stronger Germany ↔ Egypt and Morocco ↔ France flows. The Middle East also saw an 8% increase, although flight levels remained well below normal levels. Notably, flows between Türkiye ↔ Saudi Arabia rose significantly compared to the previous week. Other Europe (Russia/Belarus) saw a 5% increase mainly owing to higher Russia ↔ Türkiye flows. Meanwhile, flows between Europe and North America have risen by 4%, driven by stronger UK ↔ US flows. Small increases in flows were recorded between Europe and Asia/Pacific (+2%), South America (+1%), whereas flows dipped to Southern Africa and to Central America/Caribbean (both -1%).
- Compared to 2025, with the exception of the flow to the Middle East (-51%), all intercontinental flows recorded more flights than in 2025, as indeed has intra-Europe (+4%). The strongest growth was observed between Europe and Asia/Pacific (+22%) followed by North Africa (+18%) and Southern Africa (+10%).

Top 10 long-haul country pairs

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

Week 23-29 Mar 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	272	+6%	+2%
2.	Germany ↔ US	172	+1%	+13%
3.	France ↔ US	109	+3%	+0%
4.	Netherlands ↔ US	69	+1%	-1%
5.	Spain ↔ US	67	+4%	+16%
6.	Ireland ↔ US	66	+6%	+22%
7.	Egypt ↔ Russia	63	-0%	+33%
8.	Italy ↔ US	63	+1%	+10%
9.	India ↔ UK	50	-3%	+5%
10.	China ↔ Germany	48	+5%	+16%

- Seven 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 remaining three non-US long-haul flows were between Egypt ↔ Russia (overflying the network), India ↔ UK, and China ↔ Germany.
- Compared to the previous week, eight long-haul flows saw increases, led by UK ↔ US and Ireland ↔ US (each +6%), China ↔ Germany (+5%), Spain ↔ US (+4%), France ↔ US (+3%), Germany ↔ US (+1%), Netherlands ↔ US (+1%), and Italy ↔ US (+1%). The India ↔ UK flow saw a decrease of 3%, while Egypt ↔ Russia remained stable.
- Compared to the same week in 2025, nine of the top 10 long-haul flows recorded growth, led by Egypt ↔ Russia (+33%), Ireland ↔ US (+22%), Spain ↔ US (+16%), China ↔ Germany (+16%), Germany ↔ US (+13%), Italy ↔ US (+10%), India ↔ UK (+5%), and UK ↔ US (+2%), France ↔ US remained stable. Only the Netherlands ↔ US (-1%) flow has declined.

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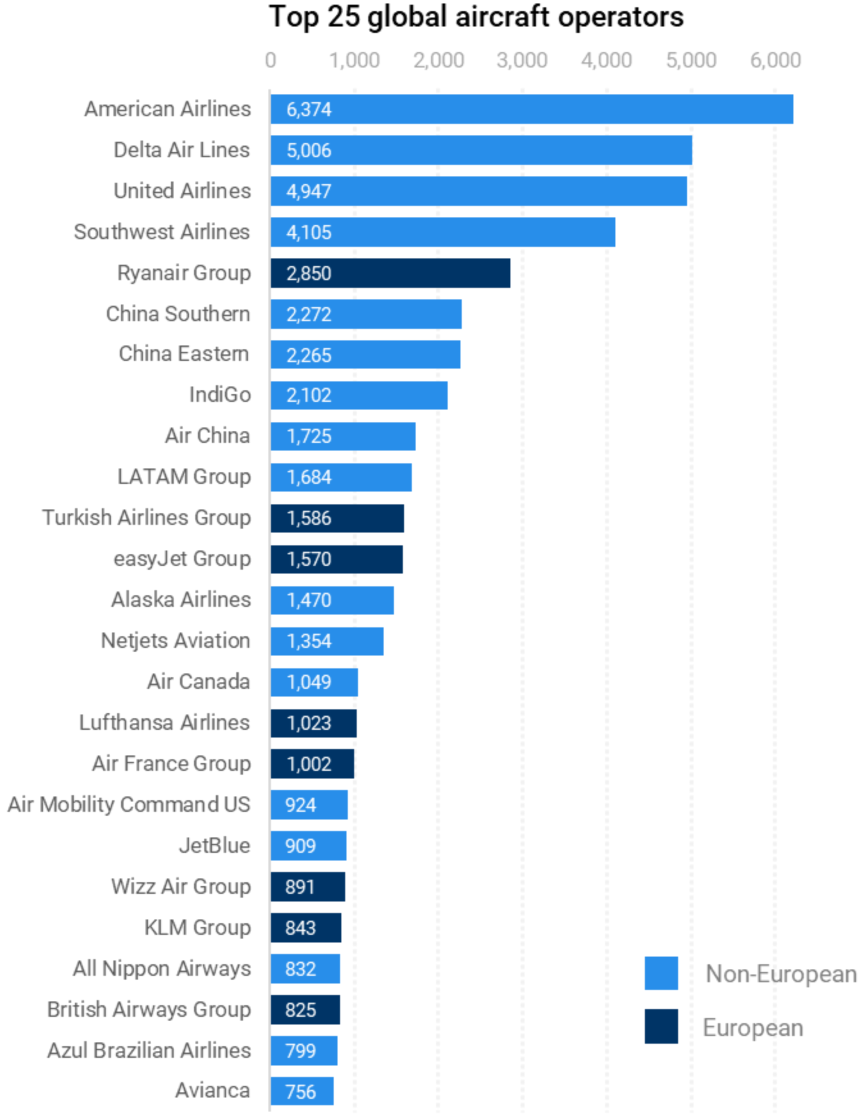
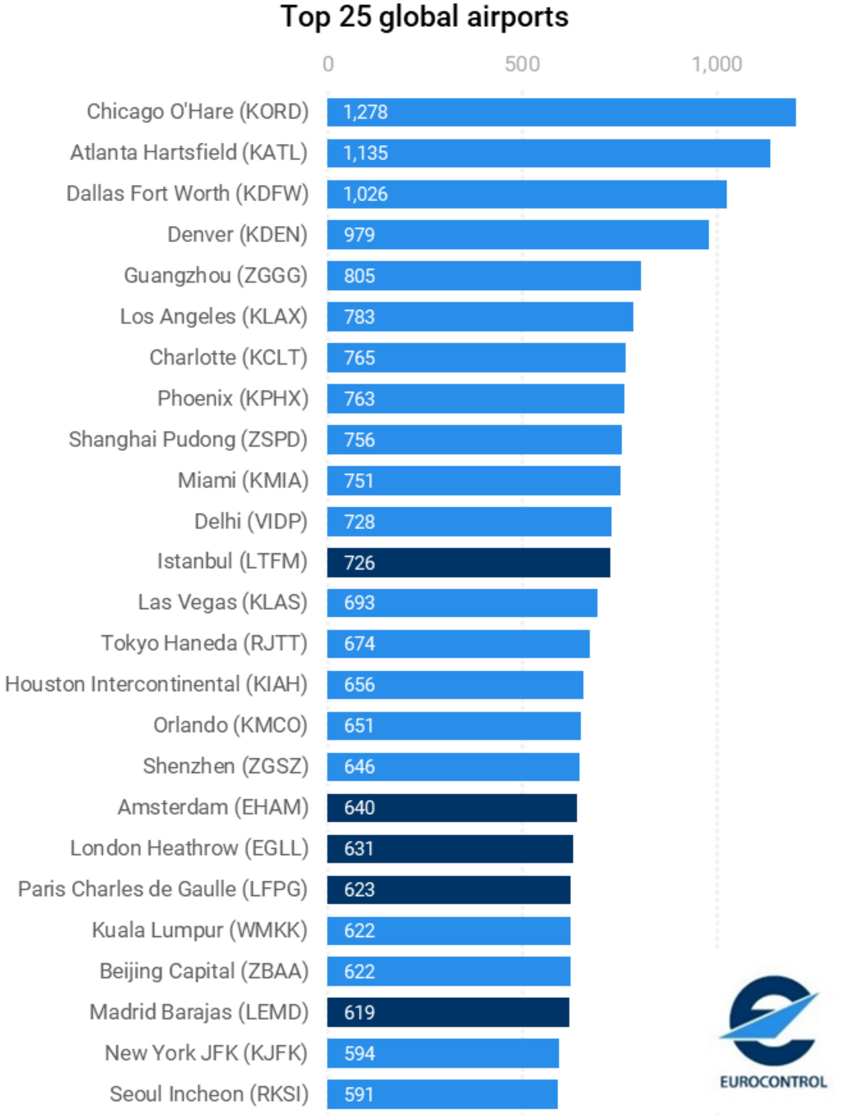
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 23-29 Mar 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, with one – Ryanair - in the global top 10 in 5^{th} place, unchanged from two weeks earlier.
- Seven more European carriers made the top 25, starting with Turkish Airlines Group (11th), easyJet Group (12th), Lufthansa Airlines (16th), Air France Group (17th), Wizz Air Group (20th), KLM Group (21st), and the British Airways Group (23rd).
- Airports: Five European airports ranked among the top 25 in terms of global airport departures in Week 13, unchanged compared to Week 11.
- No European airport made it into the top 10 in Week 13: Istanbul was highest in 12th (up from 14th in Week 11), followed by Amsterdam in 18th, London Heathrow in 19th, Paris CDG in 20th and Madrid Barajas in 23rd.
- 8/10 of the busiest airports were American; the remaining 2 were Chinese (Guangzhou and Shanghai-Pudong).

Jet fuel price (Europe)

Week 23-29 Mar 2026

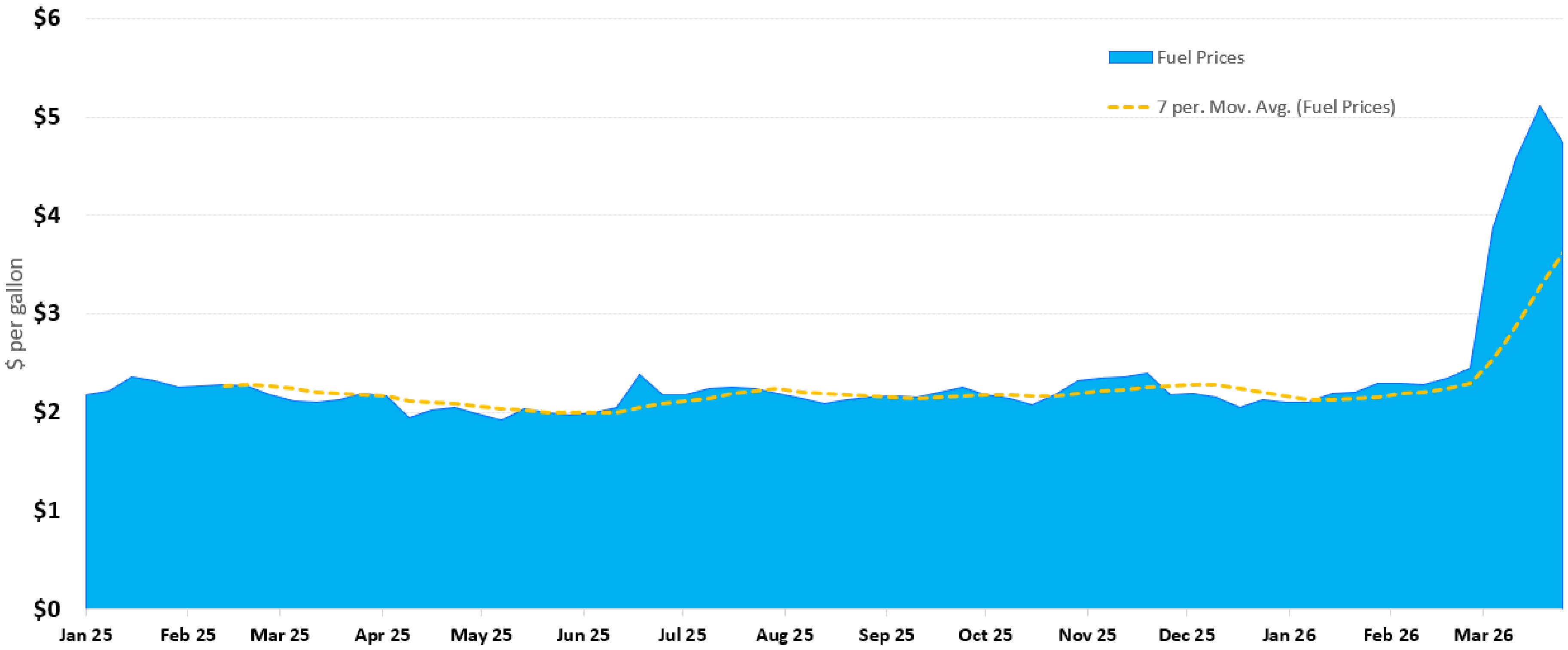
27 Mar 2026
avg fuel price:

$4.73 /gallon

+4%

vs. $4.57 /gallon
on 13 Mar 2026

Source: IATA/Platts

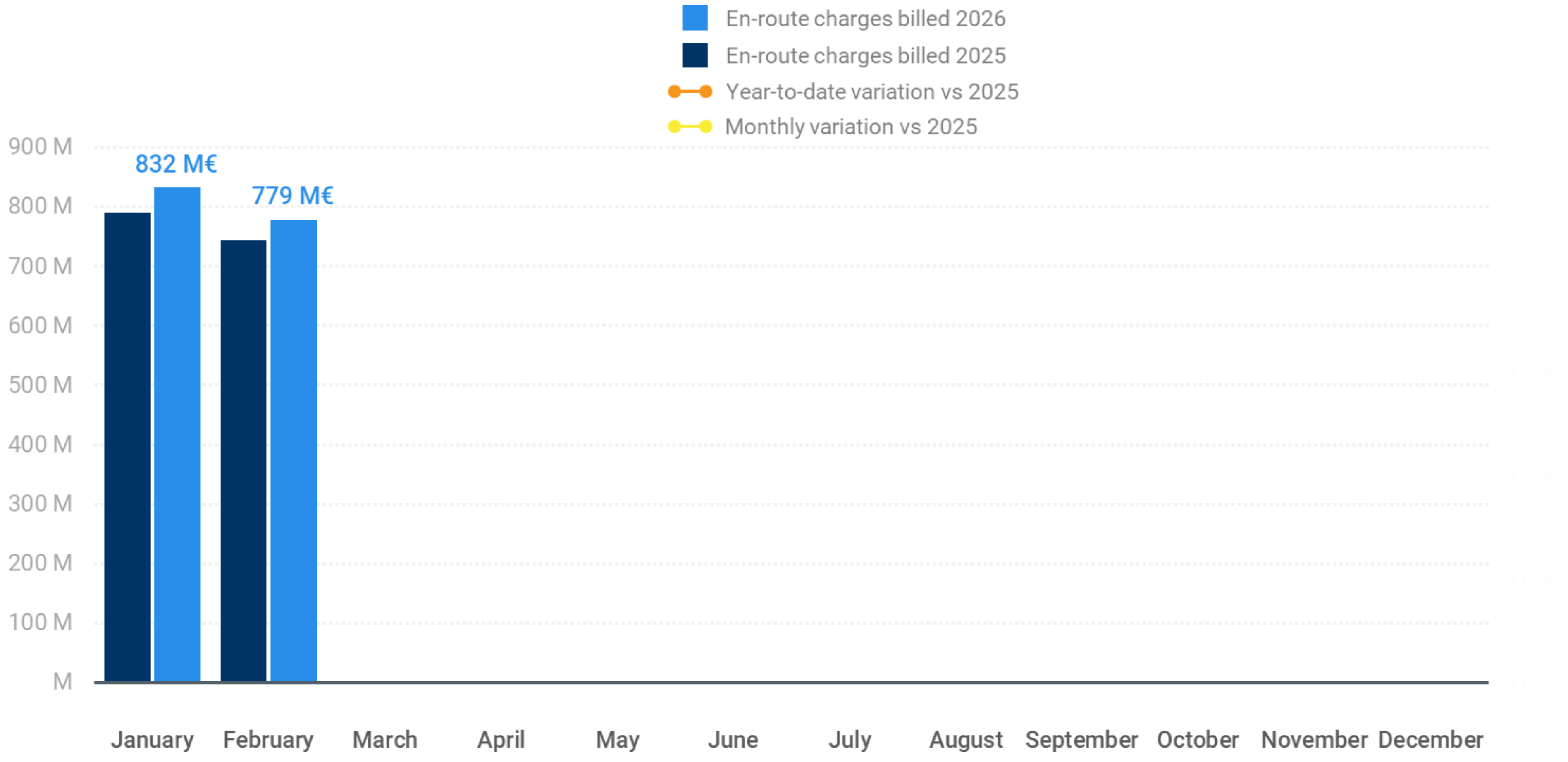


Source: IATA/Platts

- Jet fuel prices remained highly volatile as the Middle East crisis continues to disrupt global oil supplies. On 27 March, the average price reached $4.73/gallon, up 4% compared to two weeks earlier. Overall, jet fuel prices averaged $4.57/gallon in March 2026; this was twice as high as at the beginning of the year.
- 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, the 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 crisis.

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

Year-to-date amount billed: 1,611 M€ (+5% vs 2025)



- At network level, 779M€ was billed for February 2026, which represents +5% compared to February 2025.
- These changes were driven by the evolution of unit rates and of traffic characterized by the volumes of traffic, (+2% in February 2026 vs February 2025), the average distance flown (+2%) and the average weight of each aircraft (+1%).
- On a year-to-date basis, EUROCONTROL has billed 1,611M€, which is 5% higher than in 2025.

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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:
   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.

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