AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

06-12 Apr 2026

SUPPORTING EUROPEAN AVIATION

EUROCONTROL

16 April 2026

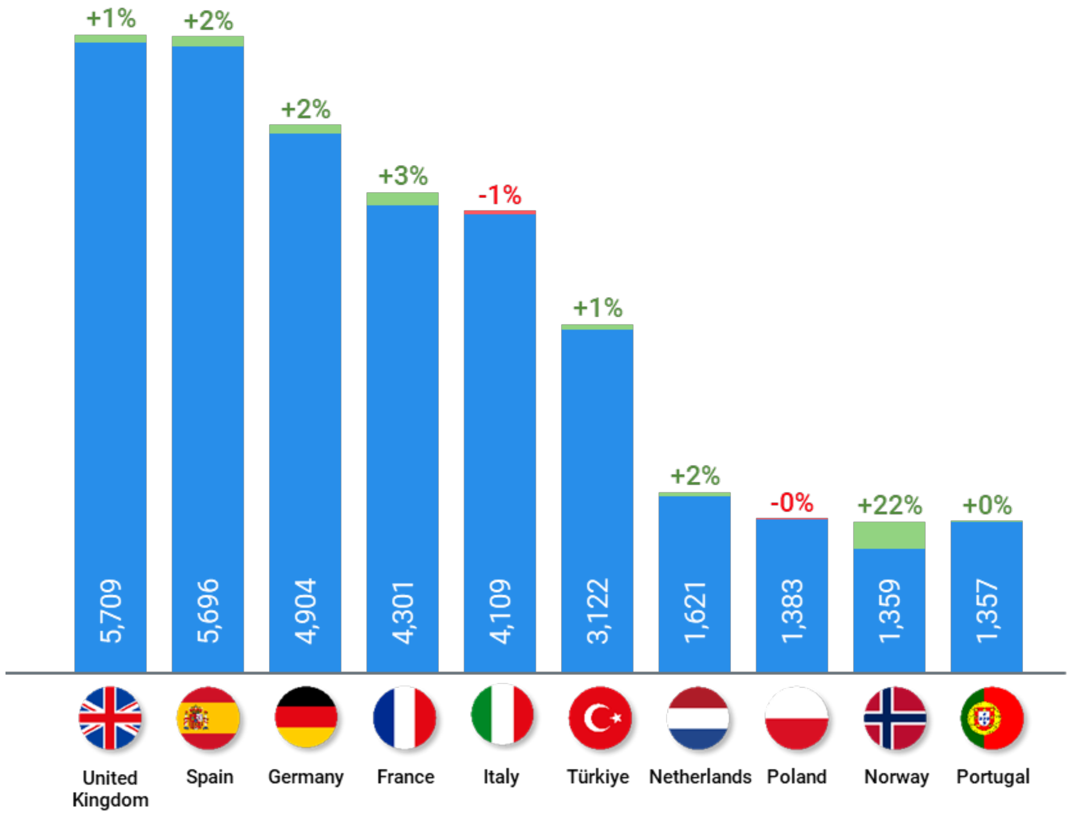
Headlines
(Week 15, 06-12 Apr 2026)

- The network averaged 30,236 daily flights in Week 15, up 2% from Week 14 but 2.0 % lower than in 2025.
- Year-on-year traffic increased across all regions except between Europe and the Middle East, which continues to be significantly impacted by the crisis with traffic down 54% compared to the same week in 2025.
- On average, the busiest 10 carriers reduced their capacity by 0.5% vs Week 14 primarily due to the cabin crew strike at Lufthansa on 10 April.
- At State level, the busiest 10 States saw their flights increase by 1.9% compared to the previous week.
- Network arrival and departure punctuality were 80.7% and 76.9%, higher than the equivalent week in 2025.
- En-route ATFM delays were up 36% compared to the previous week, with a daily average of around 25K delay minutes, 18% lower than in 2025. Total ATFM delay per flight was 1.3 min/flight (0.83 for en-route, and 0.44 for airports).
- ATC capacity/staffing was the top delay cause (78% 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 and Athens.
- Jet fuel prices continue to fluctuate as the ongoing Middle East conflict disrupts global oil supplies. On 10 April, the average price rose to $4.85/gallon, marking a 2.4% increase compared to two weeks earlier.
- EUROCONTROL billed €853 million in en-route charges in March 2026, representing a 1% decrease compared to March 2025. Both the average distance per flight and the average aircraft weight per flight declined by 2% year-on-year.

Top 10 busiest States

On week 06-12 Apr 2026

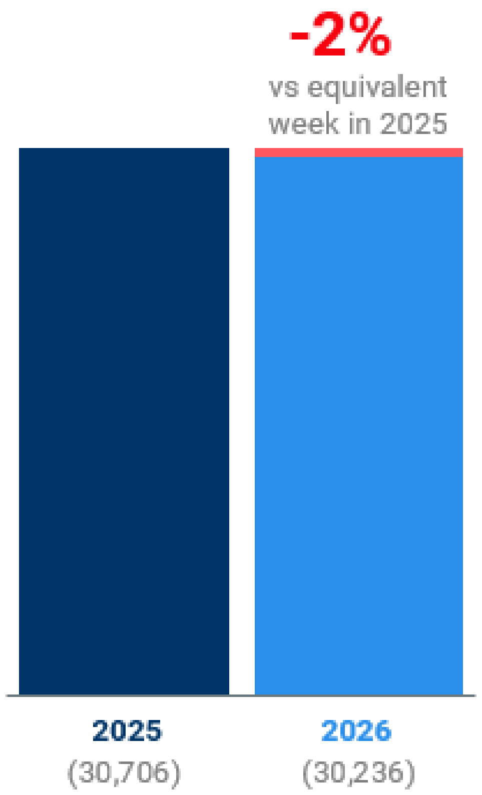
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 06-12 Apr 2026

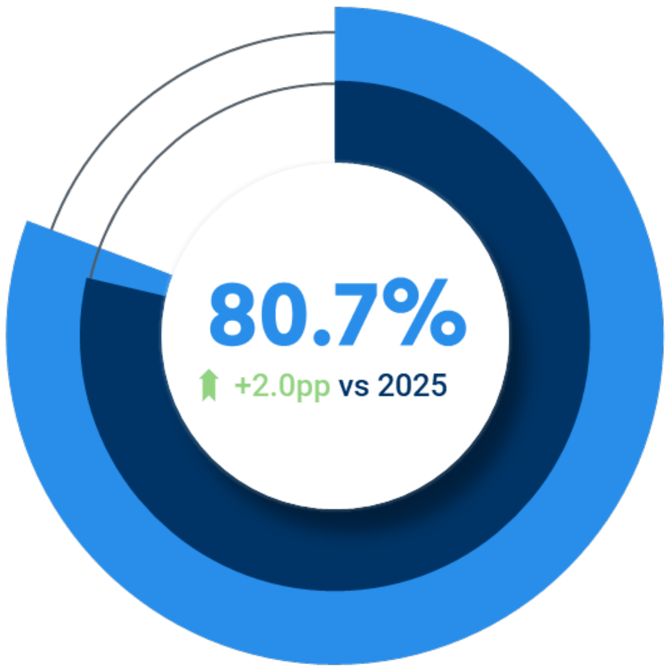


Arrival & departure punctuality

(all network scheduled flights)

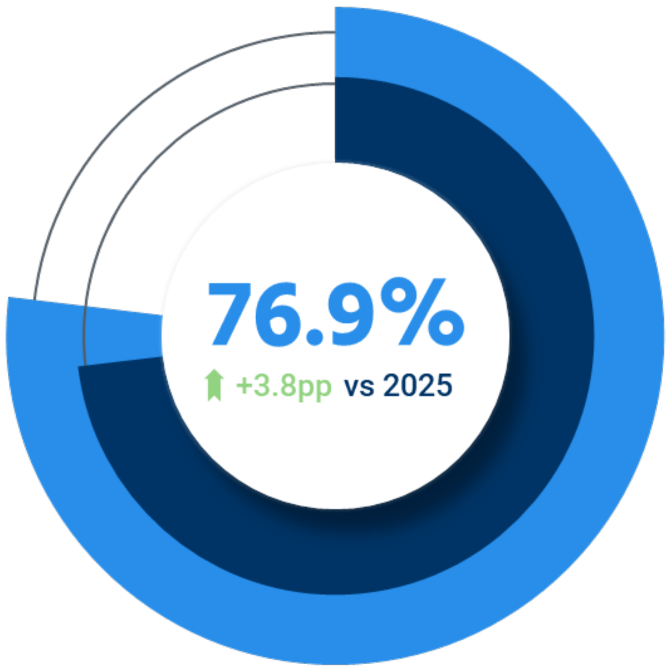
Week 06-12 Apr 2026

ARRIVAL PUNCTUALITY



78.7% ________ in 2025

DEPARTURE PUNCTUALITY



73.1% ________ in 2025

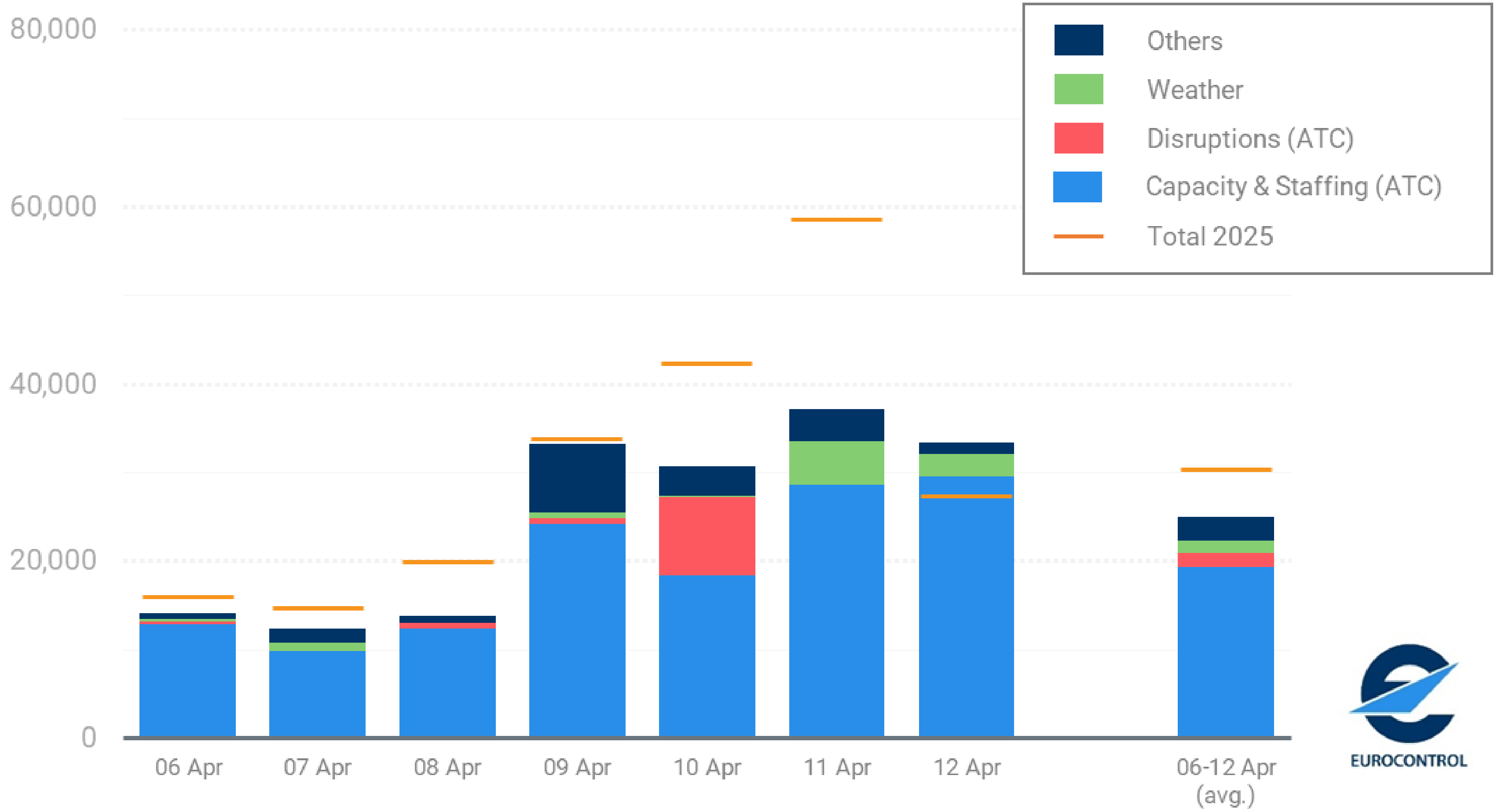
- Both arrival punctuality (80.7%) and departure punctuality (76.9%) were higher than the same week of 2025, increasing by 2.0pp and 3.8pp respectively.
- The airports with the highest air traffic flow management (ATFM) delay per flight were as follows:
- Athens saw daily ATC capacity regulations, with high delays recorded on Thursday due to single runway operations following an aircraft incident.
- Copenhagen suffered from weather delays (Storm Dave) with the airport experiencing high winds on Tuesday.
- Nice was affected by daily ATC capacity regulations.
- Dublin experienced weather (high winds) regulations on Friday and Saturday.
- Lisbon was also affected by weather during the week, with high delays recorded due to cumulonimbus clouds, thunderstorms and high winds on Tuesday and Wednesday.

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)

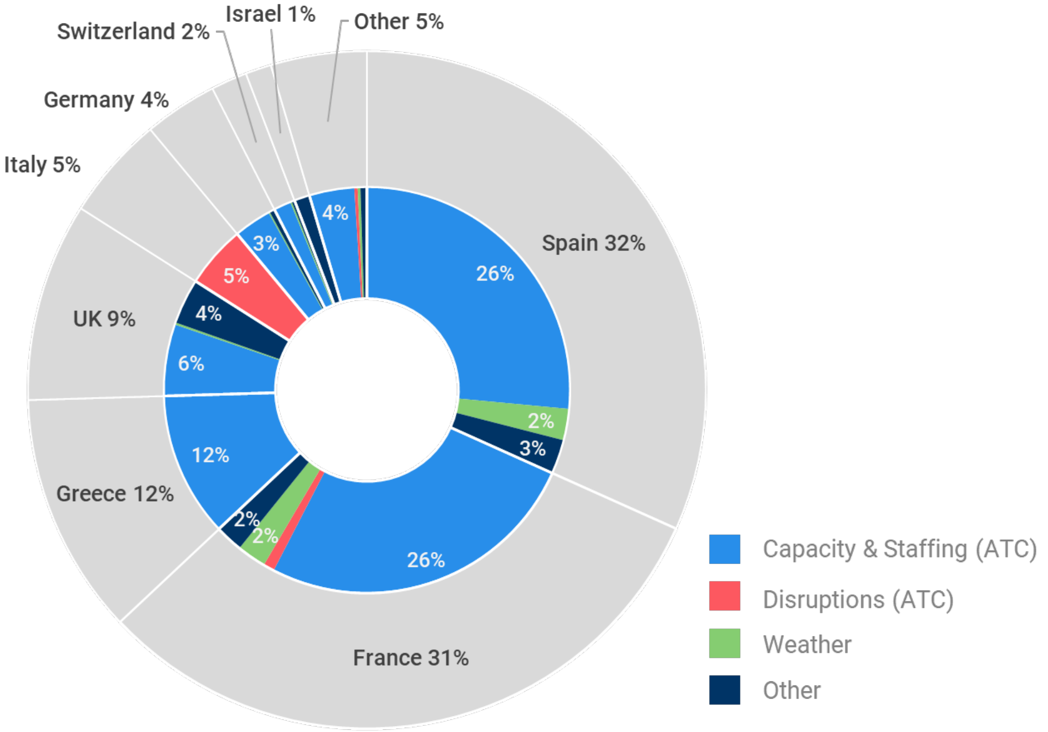
In minutes (total daily and 7-day average) in 2026

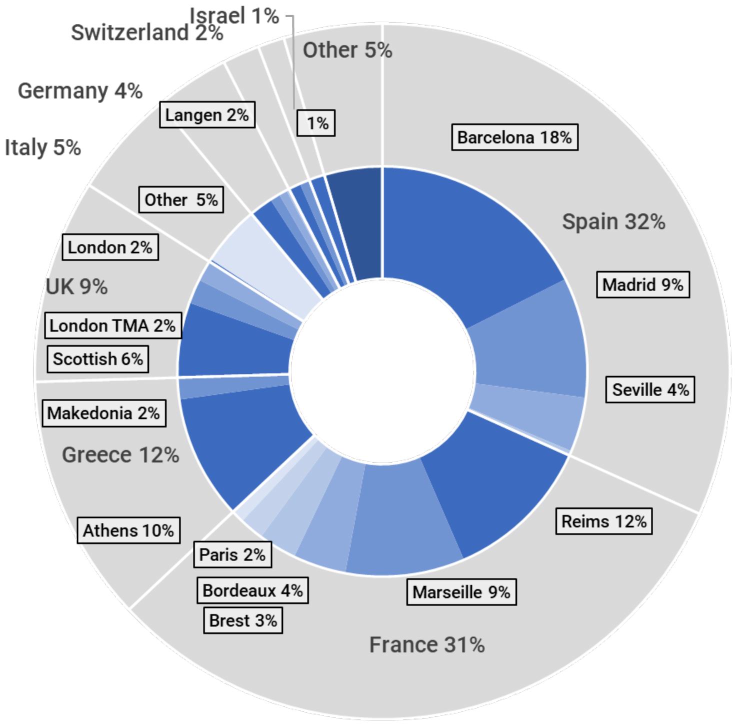


- Week 15 saw a 36% increase in en-route ATFM delays compared to the previous week, with an average of 24,967 minutes per day. Delays were 18% lower than during the same operational week in 2025.
- ATC capacity/staffing was responsible for 78% of all en-route ATFM delays (notably in Spain and France).
- Other factors accounted for 11% of all en-route ATFM delays, affecting the UK, Spain, France and Israel.
- ATC disruptions accounted for 6% of all en-route ATFM delays, mainly impacting Italy due to industrial action on Saturday.
- Weather accounted for 5% of all en-route ATFM delays, most impacting Spain and France.
- There were 1.3 minutes of total ATFM delay per flight in Week 15, made up of 0.83 min/flight en-route delay, and 0.44 min/flight airport delay, an increase of 24% compared to the previous week.

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

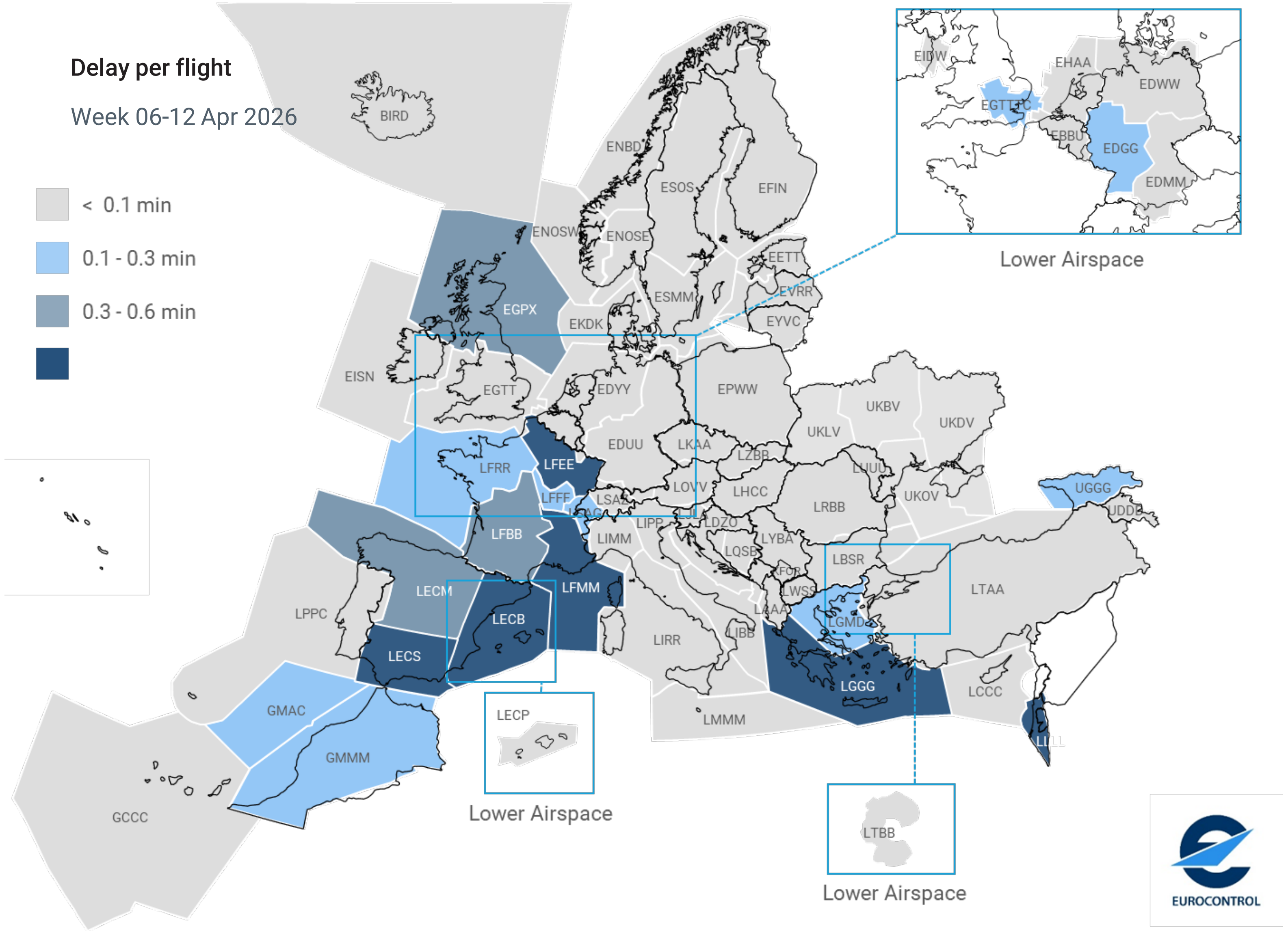
Week 06-12 Apr 2026





- Spain accounted for 32% of en-route ATFM delays, mainly linked to Barcelona ACC (18%), Madrid ACC (9%), and Seville ACC (4%), and primarily due to ATC capacity & staffing (26%).
- France represented 31% of en-route ATFM delays, primarily attributed to Reims ACC (12%), Marseille ACC (9%), and Bordeaux ACC (4%). The primary cause was ATC capacity & staffing (26%).
- Greece generated 12% of en-route ATFM delays, attributed to Athens ACC (10%) and Makedonia ACC (2%), and entirely due to ATC capacity & staffing.
- The UK accounted for 9% of en-route ATFM delays, mainly attributed to Scottish ACC (6%) and London ACC (2%), and due to ATC capacity & staffing (6%) and Other (4%).
- Italy contributed 5% of en-route ATFM delays, entirely due to ATC Disruptions (5%).
- Germany generated 4% of en-route ATFM delays, mainly due to ATC capacity & staffing (3%).

En-route ATFM delayed flights per Area Control Centre



In Week 15, five ACCs recorded en-route ATFM delays between 0.6 and 2.2 min/flight: Tel Aviv (2.22 min/flight), Barcelona (1.32 min/flight), Athens (1.24 min/flight), Reims (0.91 min/flight) and Marseille (0.64 min/flight).

Tel Aviv ACC continues being impacted by the Middle East Crisis with traffic -76% vs 2025.

Barcelona ACC experienced ATC capacity delays throughout the week (traffic +6% versus 2025), while on Sunday high-level turbulence complicated traffic management.

Athens ACC was impacted by staffing issues from Wednesday through to Sunday which limited sector availability.

Reims ACC faced a combination of ATC capacity and staffing delays throughout the week, particularly over the weekend. This was compounded by weather issues, with turbulence on Monday, and cumulonimbus clouds both Thursday and Saturday.

Marseille ACC experienced ATC capacity issues throughout the week and staffing delays notably on Sunday. Late Friday an Eastern sector was regulated because of a buildup of traffic holding on the border with Italy for the end of ATC Industrial Action affecting Italian Airports

Busiest 10 States

Departures and arrivals

Week 06-12 Apr 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	5,709	+1%	▲ +1%
2.	Spain	5,696	+2%	▲ +6%
3.	Germany	4,904	+2%	▼ -6%
4.	France	4,301	+3%	▼ -3%
5.	Italy	4,109	-1%	▼ -0%
6.	Türkiye	3,122	+1%	▲ +2%
7.	Netherlands	1,621	+2%	▼ -2%
8.	Poland	1,383	-0%	▲ +7%
9.	Norway	1,359	+22%	▼ -1%
10.	Portugal	1,357	+0%	▲ +2%

See all States

- The busiest 10 States collectively recorded a 1.9% increase in departure and arrival flights in Week 15 compared to the previous week with seven States recording more flights week-on-week.
- Norway recorded the largest week-on-week increase (+22%) mainly driven by strong domestic flows (+43% vs Week 14).
- France increased by 3% owing to higher flows to/from Spain, Greece, Germany and Switzerland.
- Three states each recorded a 2% increase: Spain driven by domestic flows and flows to/from Germany; Germany due to its domestic flow; and the Netherlands due to its flows to/from Germany, Belgium and Greece.
- Conversely, traffic decreased to/from Italy (-1%) owing to fewer flights to/from Germany and Spain, while traffic in Poland was marginally lower.
- Compared to 2025, five of the busiest 10 States recorded growth in arrival and departure flights. The increases were led by Poland (+7%), Spain (+6%), Portugal (+2%), Türkiye (+2%), and the UK (+1%). The remaining five states saw declines: Germany (-6%), France (-3%), the Netherlands (-2%), Norway (-1%) and Italy (-0%).

Busiest 10 aircraft operators

Week 06-12 Apr 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,637	-1%	+5%
2.	easyJet Group	1,726	+0%	+1%
3.	Turkish Airlines Group	1,521	-2%	+2%
4.	Wizz Air Group	1,093	-1%	+24%
5.	Lufthansa Airlines	1,079	-9%	-11%
6.	Air France Group	1,070	+2%	-1%
7.	KLM Group	918	+1%	+3%
8.	British Airways Group	830	-0%	-3%
9.	SAS Group	761	+11%	-0%
10.	Vueling	649	+0%	+3%

See top 40 airlines

- The busiest 10 aircraft operators collectively recorded a 0.5% decrease in flights in Week 15 compared to the previous week.
- In contrast, SAS group grew by 11%, driven by strong domestic flows within Norway, while Lufthansa Airlines declined by 9% due to fewer domestic flights within Germany as a result of the cabin crew strike.
- More moderate increases compared to the previous week were recorded by Air France Group (+2%) owing to increases in flows France ↔ Greece, France ↔ Tunisia. KLM Group saw a 1% increase owing to flows Netherlands ↔ Spain and Netherlands ↔ Greece. In contrast, Turkish Airlines Group recorded a 2% decrease owing to weak domestic flows within Türkiye. Ryanair declined by 1% owing to fewer domestic flows within Italy along with decreases in flows Italy ↔ Spain, Italy ↔ Austria, Italy ↔ Poland.
- Compared to 2025, six of the 10 busiest aircraft operators recorded higher flight volumes. Growth was led by the Wizz Air Group (+24%) followed by the Ryanair Group (+5%), KLM Group (+3%), Vueling (+3%), Turkish Airlines Group (+2%) and easyJet Group (+1%). Conversely, Lufthansa Airlines (-11%), British Airways Group (-3%) and Air France Group (-1%) reported lower flight volumes.

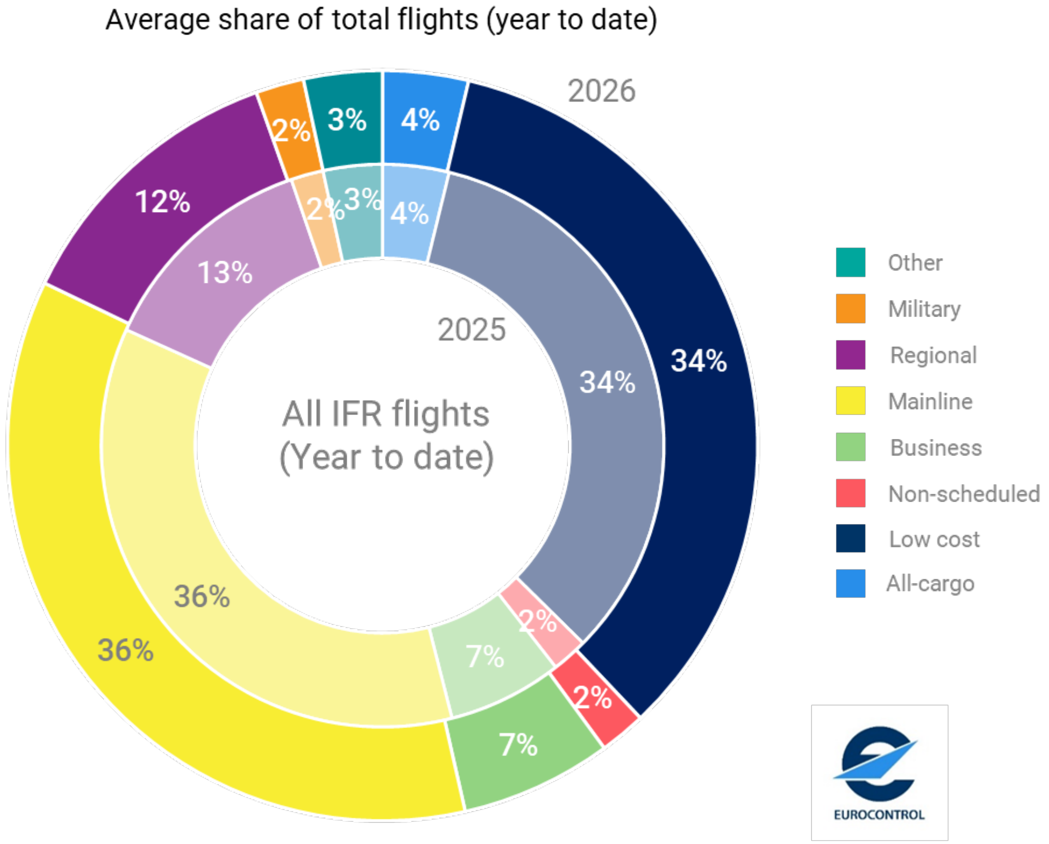
Europe's 6 largest airline groups

Week 06-12 Apr 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,637	-1%	+5%
2.	Lufthansa Group	2,713	-4%	-8%
3.	IAG Group	2,309	+0%	+0%
4.	Air France-KLM Group	1,988	+2%	+1%
5.	easyJet Group	1,726	+0%	+1%
6.	Turkish Airlines Group	1,521	-2%	+2%

- 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 decrease in flights of -0.9%.
- Only one airline group recorded week-on-week increases: Air France-KLM (+2%) while IAG and easyJet remained stable.
- The main decreases compared to the previous week were recorded by Lufthansa (-4%) as a result of the cabin crew strike which affected domestic flows within Germany (-10%). Turkish Airlines (-2%) and Ryanair (-1%) also operated fewer flights.
- Compared to 2025, only Lufthansa (-8%) operated fewer flights. All other groups recorded increases, led by Ryanair (+5%), Turkish Airlines (+2%), and both Air France-KLM and easyJet (each +1%). IAG remained stable (+0%).

Market segments in the EUROCONTROL Network



No.	Market segment	Avg. flights	% prev week	% prev year
1.	Low Cost	11,394	+1%	+3%
2.	Mainline	10,228	-0%	-3%
3.	Regional	3,557	+4%	-6%
4.	Business	1,891	+16%	-6%
5.	Other	1,105	+18%	-4%
6.	All-cargo	932	-1%	-9%
7.	Non-Scheduled	571	+4%	-11%
8.	Military	569	-7%	-0%

- 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 Regional on 12%, down by 1 percentage point. The remaining segments are unchanged: Business aviation on 7%, All-cargo on 4% and Non-scheduled on 2%.
- Week-on-week, however, the Regional segment (+4%) recorded stronger growth than Low-cost (+1%) and Mainline (-0%), matching the performance of Non-scheduled (+4%). The Business aviation segment surged by 16% while All-cargo declined by 1%.
- Compared to 2025, Low-cost (+3%) is the only segment showing growth. The Non-scheduled segment has dropped by 11%, and All-cargo by 9%. Regional and Business aviation have both declined by 6%, while Mainline is down 3%.

Busiest 10 airports

Week 06-12 Apr 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,472	-1%	+1%
2.	Amsterdam	1,346	+1%	-1%
3.	Paris Charles de Gaulle	1,335	+0%	-0%
4.	London Heathrow	1,290	-0%	-4%
5.	Madrid Barajas	1,246	+1%	+6%
6.	Frankfurt	1,214	-4%	-7%
7.	Barcelona	1,083	+1%	+5%
8.	Rome Fiumicino	907	-1%	-3%
9.	Munich	856	-4%	-12%
10.	Palma de Mallorca	781	+4%	+7%

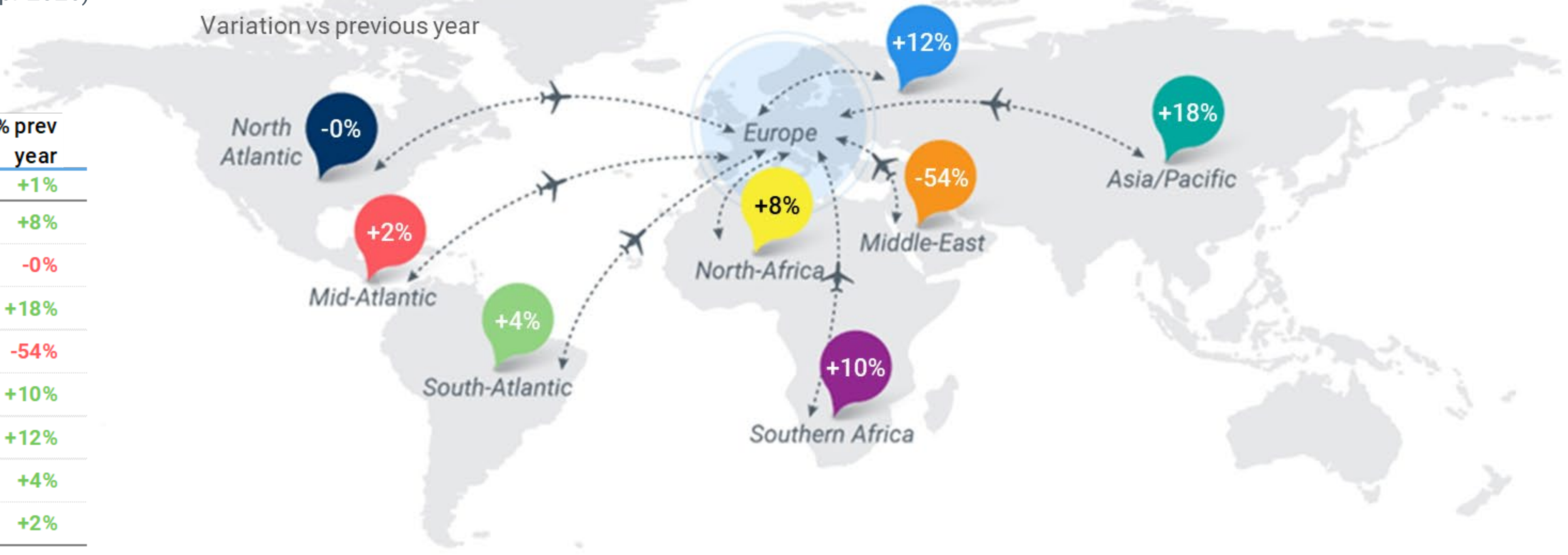
See top 40 airports

- The busiest 10 airports together saw a decrease of 0.3% in Week 15 compared to the previous week.
- Five airports reported growth, with the largest increase at Palma de Mallorca (+4%) mainly driven by its flows with Germany, UK and France for Iberia Regional and Volotea. Three airports each posted a 1% rise: Amsterdam (supported by increases with Belgium, Greece and the Scandinavian countries) for KLM and SAS; Madrid Barajas (driven by domestic flows within Spain, and flows with Germany and Qatar); Barcelona (led by domestic flows within Spain and flows with France and Portugal). Paris CDG remained stable.
- Five airports recorded declines with the largest drops at Munich and Frankfurt (both -4%) primarily due to the Lufthansa cabin crew strike, which disrupted domestic traffic within Germany along with Italy, France, UK, US and China flows . Two airports posted a 1% decrease: Istanbul (affected by a weaker domestic demand) and Rome Fiumicino (due to fewer flights to/from France, Spain and within Italy). London Heathrow remained stable.
- Compared to 2025, four of the busiest 10 airports are handling more flights, led by strong growth at Palma de Mallorca (+7%), followed by Madrid Barajas (+6%), Barcelona (+5%), and Istanbul (+1%). Traffic has declined at Munich (-12%), Frankfurt (-7%), London Heathrow (-4%), Rome Fiumicino (-3%), and Amsterdam (-1%), while Paris CDG remained stable.

Traffic flows

(average daily departure/arrival flights for week 06-12 Apr 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	23,846	+3%	+1%
Europe ↔ North-Africa	1,506	+0%	+8%
Europe ↔ North Atlantic	1,339	+0%	-0%
Europe ↔ Asia/Pacific	1,113	-0%	+18%
Europe ↔ Middle-East	714	+5%	-54%
Europe ↔ Southern Africa	330	+0%	+10%
Europe ↔ Other Europe	296	+2%	+12%
Europe ↔ South-Atlantic	204	+1%	+4%
Europe ↔ Mid-Atlantic	186	-0%	+2%
Non Intra-Europe	5,688	+1%	-8%



- Intra-European traffic saw 23,846 daily flights on average during Week 15, a 3% increase vs the previous week. Intercontinental flows amounted to 5,688 daily flights on average, +1% vs the previous week.
- The leading intercontinental flows were between Europe and North Africa, followed by flights to/from North America and Asia/Pacific, with flight levels remaining stable compared to Week 14.
- Week on week, the Middle East (+5%) recorded the strongest growth although flight revels remained significantly below normal.Notably, flows between Türkiye ↔ Saudi Arabia rose significantly compared to the previous week. Flows with Other Europe (Russia/Belarus) increased by 2% mainly owing to higher Russia ↔ Türkiye flows. Flows between Europe and South-Atlantic grew by 1% supported by higher volumes on Spain ↔ Argentina and Spain ↔ Venezuela flows. The Asia/Pacific flow remained stable overall despite a decline in flights on the Germany ↔ China and France ↔ China flows.
- Compared to 2025, with the exception of the flow to the Middle East (-54%), all other intercontinental flows recorded more flights than in 2025, as indeed has intra-Europe (+1%). The strongest growth was observed between Europe and Asia/Pacific (+18%) followed by Other Europe (+12%) Southern Africa (+10%), and North-Africa (+8%).

Top 10 long-haul country pairs

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

Week 06-12 Apr 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	289	+0%	-4%
2.	Germany ↔ US	161	-4%	-3%
3.	France ↔ US	121	+4%	-1%
4.	Italy ↔ US	91	+5%	+7%
5.	Netherlands ↔ US	81	+2%	-1%
6.	Spain ↔ US	78	+1%	+11%
7.	Ireland ↔ US	74	+2%	+4%
8.	Egypt ↔ Russia	63	+2%	+24%
9.	India ↔ UK	52	+4%	+11%
10.	China ↔ Germany	45	-6%	+7%

- 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 Italy ↔ US (+5%), France ↔ US and UK ↔ India (both +4%). The Netherlands ↔ US, Ireland ↔ US and Egypt ↔ Russia flows, each rose by 2%, while Spain ↔ US recorded an increase of 1%. Conversely the Germany ↔ China flow saw a decrease of 6% and the Germany ↔ US flow was down -4%.
- Compared to the same week in 2025, six of the top 10 long-haul flows recorded growth, led by Egypt ↔ Russia (+24%), Spain ↔ US (+11%), UK ↔ India (+11%), Italy ↔ US (+7%), Germany ↔ China (+7%), and Ireland ↔ US (+4%). Declines were recorded between UK ↔ US (-4%), Germany ↔ US (-3%), France ↔ US and Netherlands ↔ US (both -1%).

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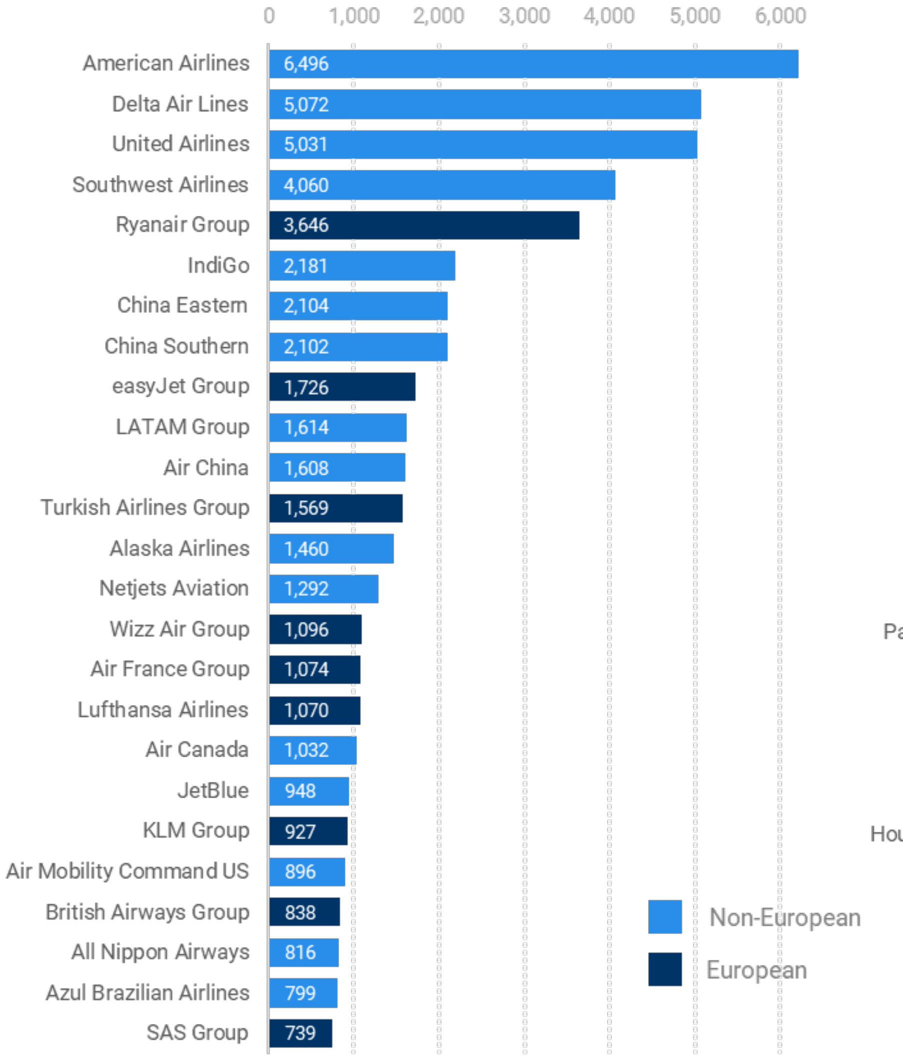
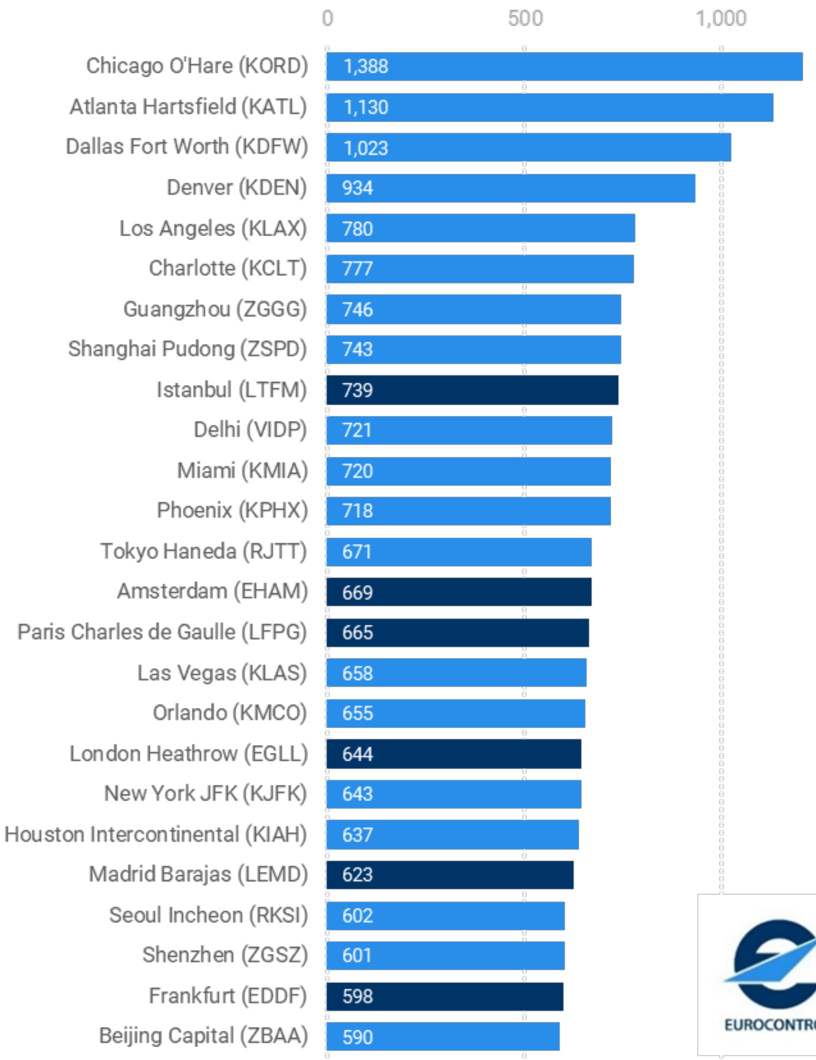
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 06-12 Apr 2026)**





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Source: Flightradar24 Historical Global Utilisation data

- Aircraft operators: In Week 15, nine European aircraft operators ranked among the top 25 global aircraft , one more than in Week 13 with SAS entering at 25th place.
- easyJet moved into the global top 10, securing 9th place from 12th in Week 13, while Ryanair remained unchanged in 5th compared to two weeks earlier.
- Seven more European carriers made the top 25, starting with Turkish Airlines Group (12th), Wizz Air (15th), Air France Group (16th), Lufthansa Airlines (17th), KLM Group (20th), British Airways Group (22nd), and SAS (25th).
- Airports: Six European airports ranked among the top 25 in terms of global airport departures in Week 15, one more than in Week 13 with Frankfurt entering at 24th place.
- Istanbul entered the top 10 in Week 15 at 9th place from 12th in Week 13.
- Five more airports made the top 25 with Amsterdam (14th), Paris CDG (15th), London Heathrow (18th), Madrid Barajas (21st) and Frankfurt (24th).
- 6/10 of the busiest airports were American; the remaining 4 were Chinese (Guangzhou and Shanghai-Pudong), European (Istanbul) and Indian (Delhi).

Jet fuel price (Europe)

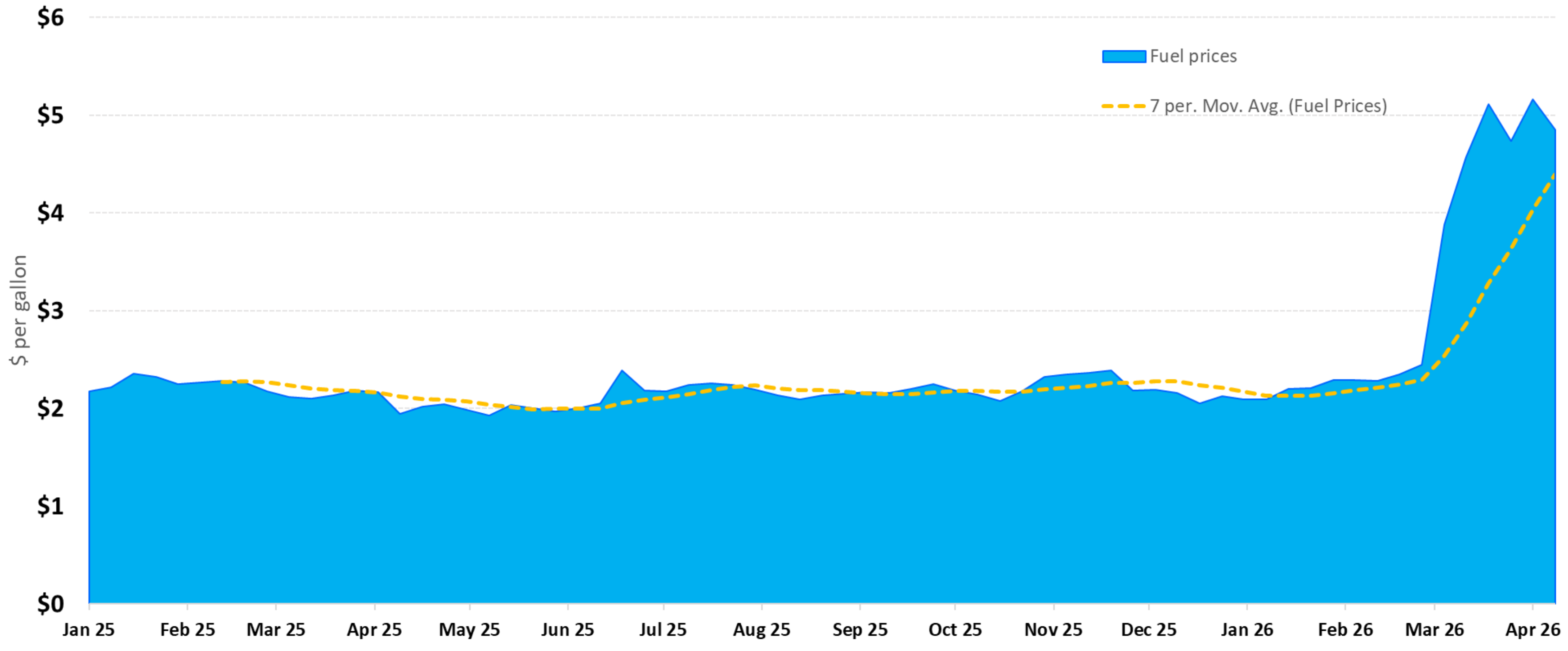
Week 06-12 Apr 2026

10 Apr 2026
avg fuel price:

$4.85 /gallon

+2%
vs. $4.73 /gallon
on 27 Mar 2026

Source: IATA/Platts

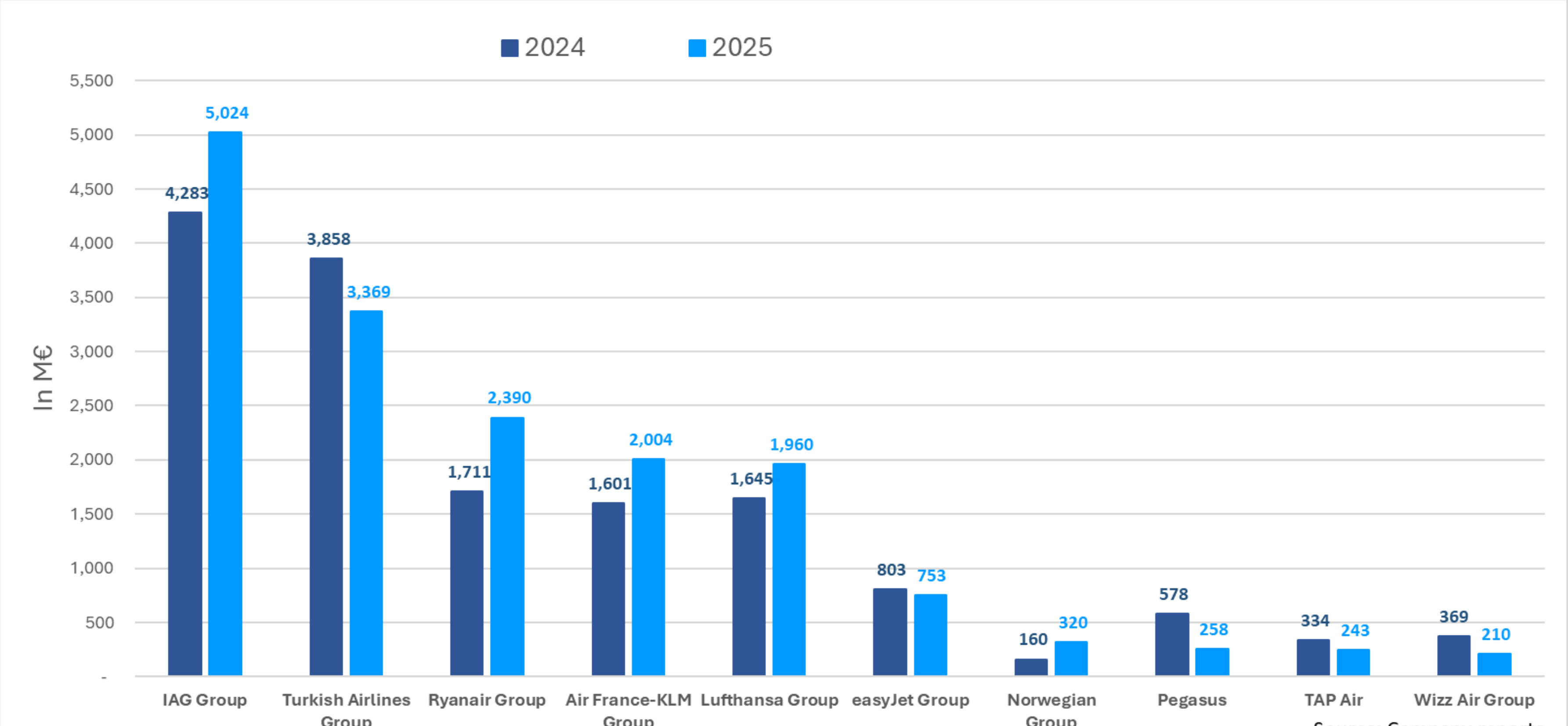


Source: IATA/Platts

- Jet fuel prices continue to fluctuate as the ongoing Middle East conflict disrupts global oil supplies. On 10 April, the average price rose to $4.85/gallon, marking a 2.4% increase compared to two weeks earlier.
- 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 5 April meeting, the eight OPEC+ countries agreed to implement a production adjustment of 206,000 barrels/day from the 1.65 million barrels per day in additional voluntary cuts announced in April 2023. This adjustment will take effect in May 2026.

Operating profits of airlines

In M€ in 2025 and 2024

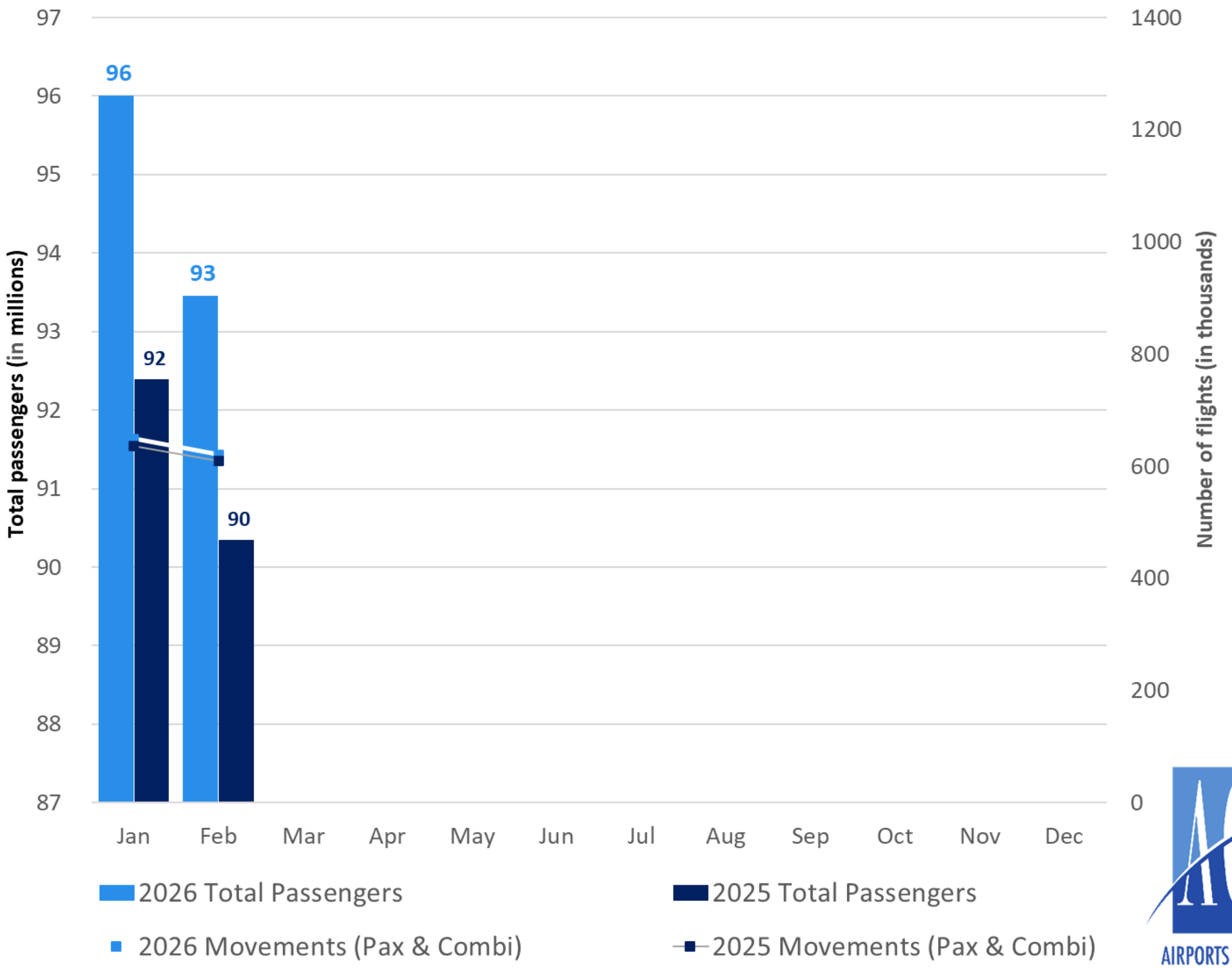


Source: Company reports

- In this top 10, all airlines/airline groups managed to record profit for 2025.
- Five airlines/airline groups managed to improve their operating profit compared to 2024.
- IAG group was the most profitable European airline group (5,024 M€) driven by strong performances from British Airways and Iberia in their core markets, alongside the advantages of lower fuel prices and favorable foreign exchange rates.
- Ryanair group reported 2,390 M€ profit, marking a 40% increase compared to its 2024 results.
- Air France-KLM group posted a record operating profit of 2,000 M€ driven by continued recovery in premium travel across North Atlantic, South American and Asian routes.
- Lufthansa Group (1,960 M€) reported stronger demand in premium segments, ongoing growth in its cargo operations, lower fuel costs and fewer disruptions (2024 was heavily impacted by strikes).
- Norwegian group posted a record operating profit of 320 M€, doubling its 2024 performance, partly due to strong passenger growth supported by the integration of Widerøe.
- Airlines considered in this sample recorded 17 Bn€ in operating profits for 2025, marking an 8% increase compared to 2024.

Top 40 European airports: passengers

Passengers and flights at ECAC top 40 Airports



The graph on the left is based on ACI Europe* data and refers to a stable sample of the **top 40 European airports:**

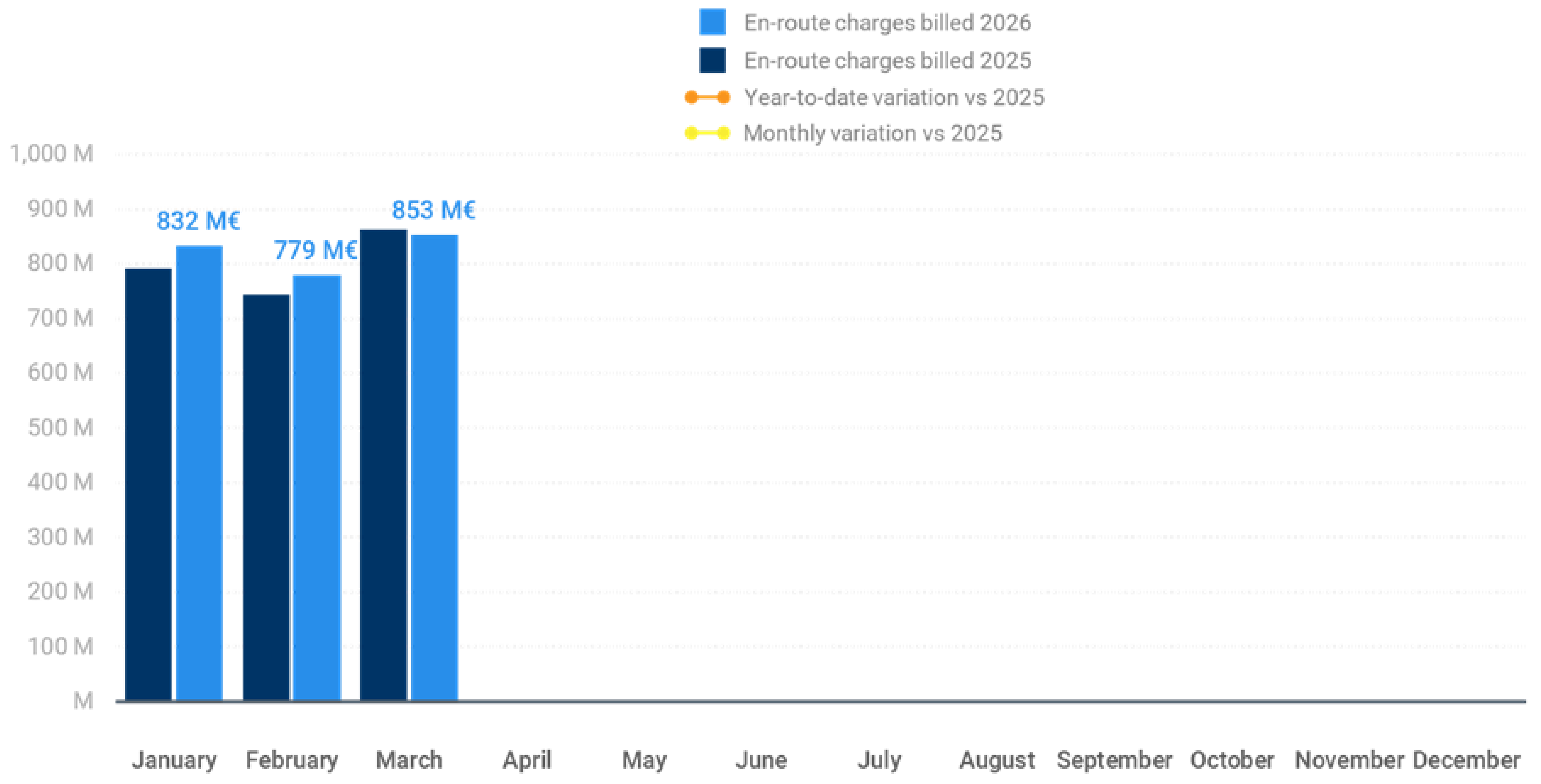
The **number of passengers**** was **189 million** in **January-February 2026, +3.7%** more than in January-February 2025, while the number of corresponding flights amounted to 1,270, a +1.9% increase on the same period in 2025.

*: Europe for ACI covers 55 States, ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

**: Passengers comprise International enplaned + deplaned, Domestic enplaned +deplaned, as well as Transit passengers (counted once).

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

Year-to-date amount billed: 2,465 M€ (+3% vs 2025)



- At the network level, 853 M€ were billed for March 2026, which represents a 1% decrease vs March 2025, partly reflecting the impact of the Middle East crisis.
- These changes were driven by the evolution of unit rates and of traffic characterized by the volumes of traffic (+2% in March 2026 vs March 2025), the average distance flown (-2%) and the average weight of each aircraft (-2%).
- In the first quarter of 2026, 2,465 M€ were billed, representing a 3% increase compared to the same period 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

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