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EUROPEAN AVIATION OVERVIEW

20-26 Apr 2026

SUPPORTING EUROPEAN AVIATION

EUROCONTROL

30 April 2026

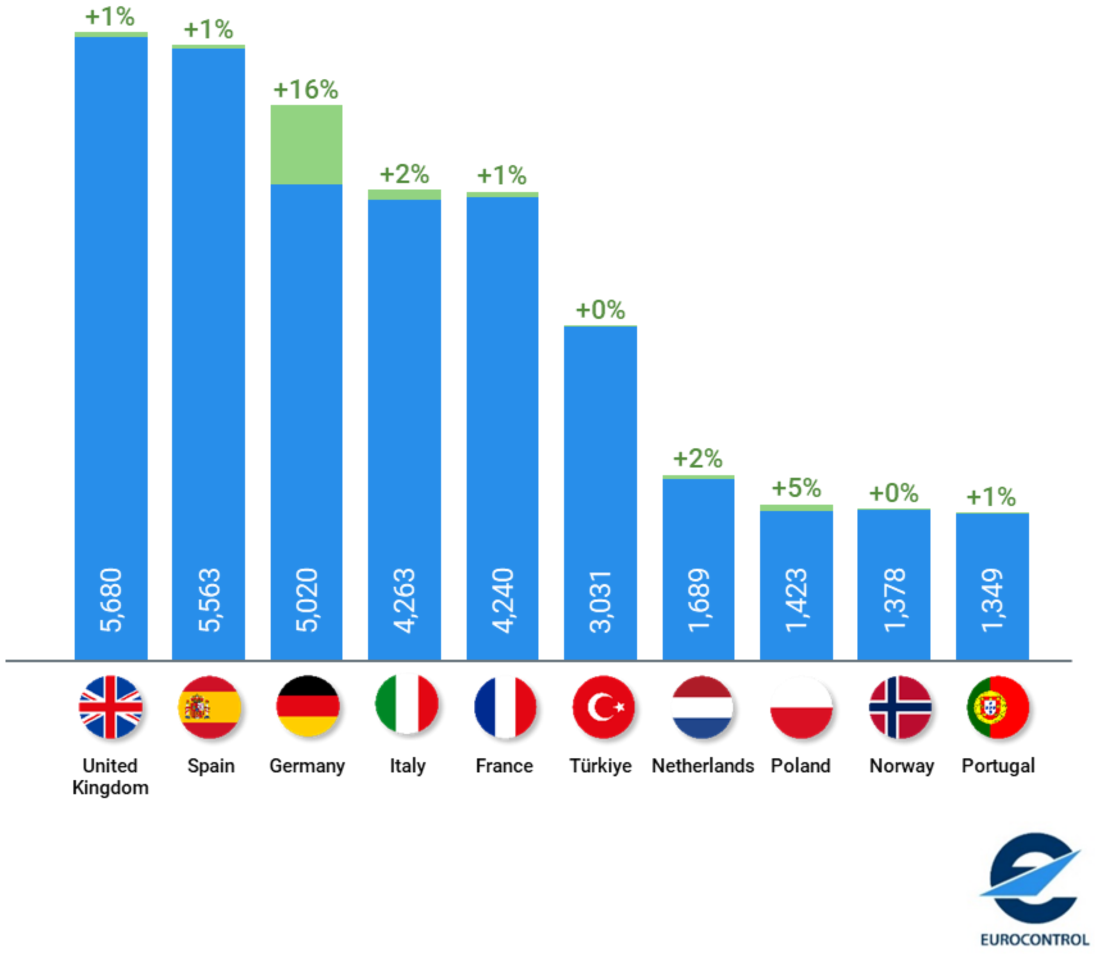
Headlines
(Week 17, 20-26 Apr 2026)

- The network averaged 30,623 daily flights in Week 17, an increase of 2.4% from Week 16, and 1.4% lower than in 2025.
- Year-on-year traffic flows between Europe and the Middle East remain heavily disrupted by the crisis, with flights down 50% compared to 2025.
- On average, the busiest 10 carriers improved their capacity by 4.4% compared to the previous week.
- At State level, the busiest 10 States recorded a 3.2% increase in flights compared to the previous week.
- Network arrival and departure punctuality were 84.6% and 81.5%, higher than the equivalent week in 2025.
- En-route ATFM delays were up 7% compared to the previous week, with a daily average of around 22K delay minutes, 32% lower than in 2025. Total ATFM delay per flight was 1.1 min/flight (0.7 for en-route, and 0.4 for airports).
- ATC capacity/staffing was the top delay cause (59% of all en-route ATFM delays), particularly in Spain, France and Greece.
- The area control centres contributing most to en-route ATFM delays (in mins/flight) were Athens, Barcelona, Makedonia, Seville and Bremen.
- As of 24 April 2026, average jet fuel prices have fallen to $4.46 per gallon, down 8% from $4.85 over the pervious two weeks. Jet fuel prices averaged $4.74 per gallon in April, up 4% from March and more than double pre-crisis levels ($2.26 per gallon in January-February 2026).

10 busiest States

Week 17, 20-26 Apr 2026

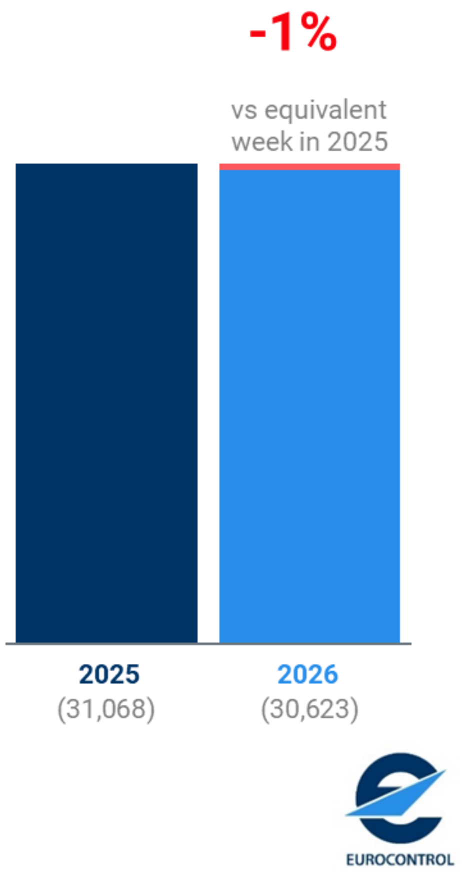
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 20-26 Apr 2026

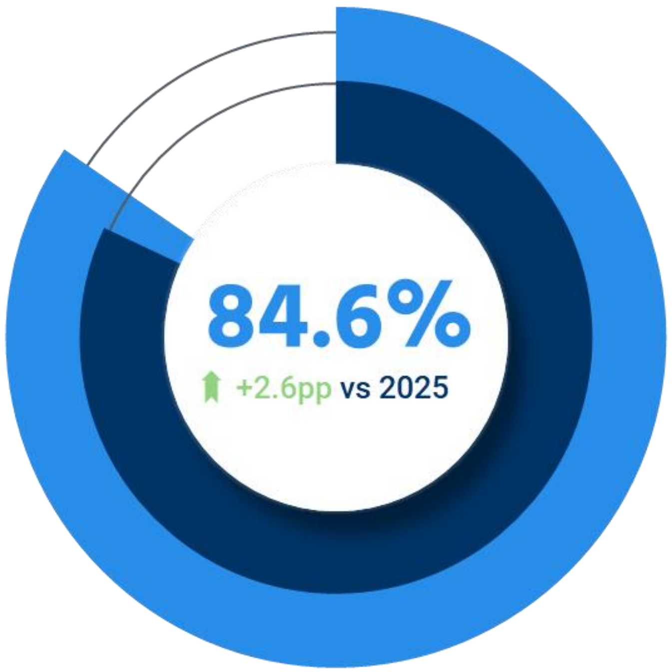


Arrival & departure punctuality

(all network scheduled flights)

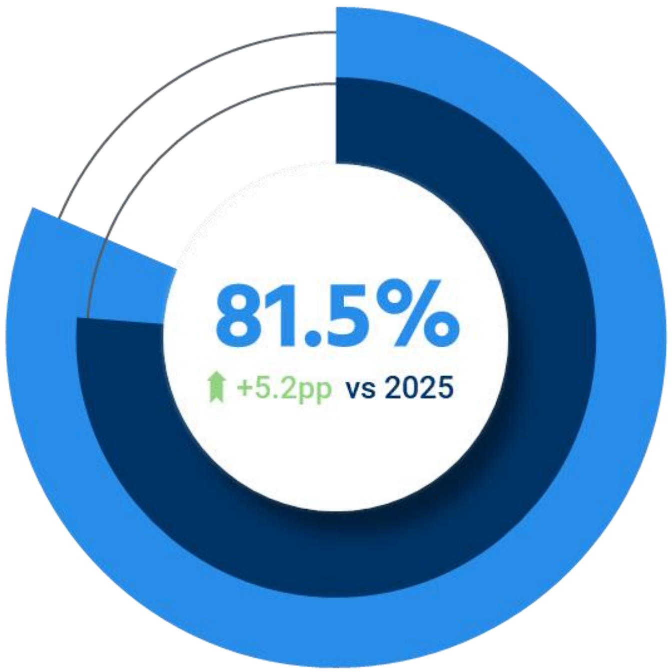
Week 17, 20-26 Apr 2026

ARRIVAL PUNCTUALITY



82.0% ________ in 2025

DEPARTURE PUNCTUALITY



76.2% ________ in 2025

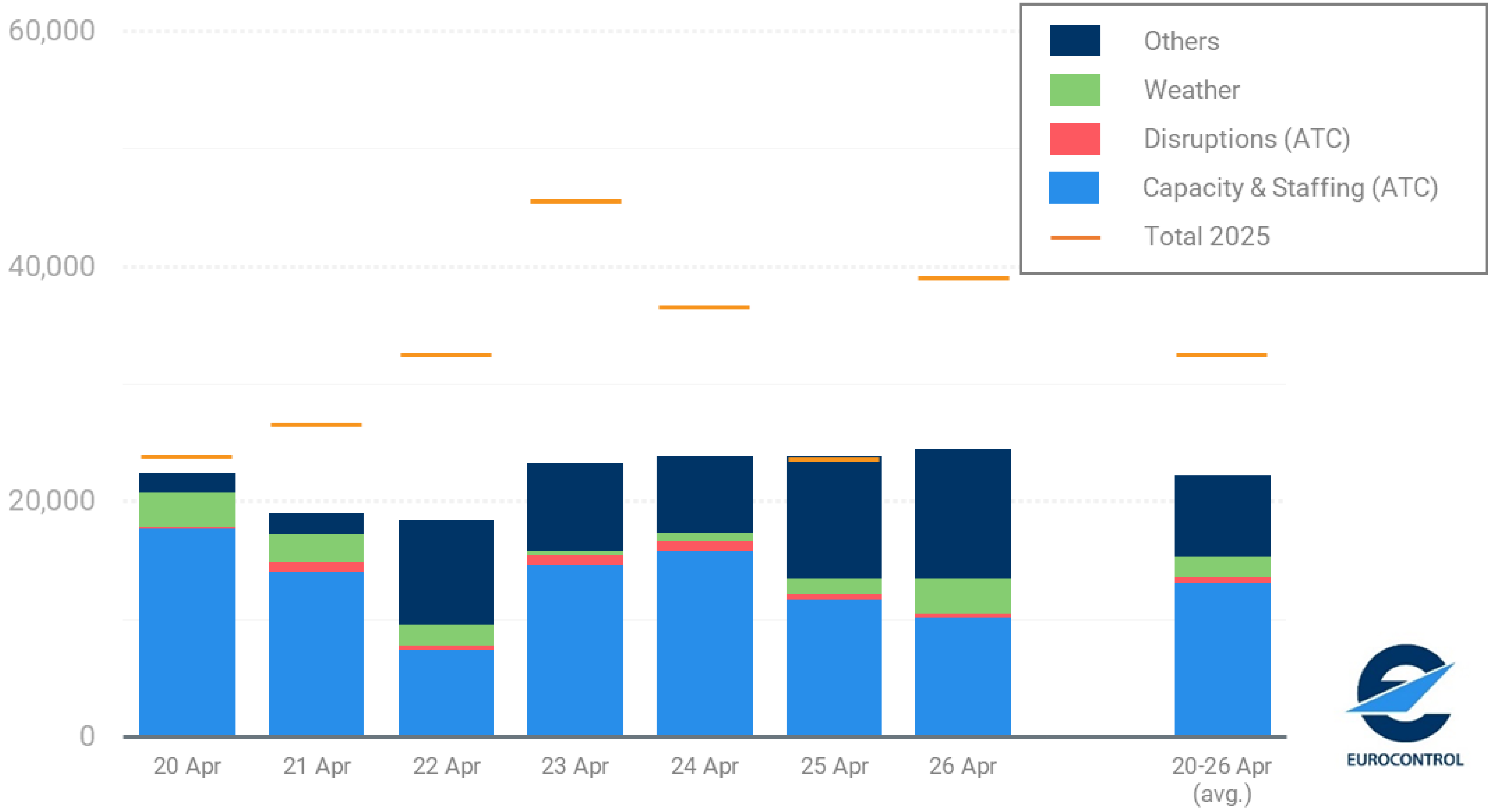
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

- Both arrival punctuality (84.6%) and departure punctuality (81.5%) were higher than in the same week of 2025, increasing by 2.6pp and 5.2pp respectively.
- The airports with the highest air traffic flow management (ATFM) delay per flight were as follows:
- Zurich saw regulations due to an on-going Target Time Management System (TTMS) trial, combined with significant weather delays on Tuesday and Wednesday.
- Athens suffered from daily ATC regulations, as the airport continues to operate with winter arrival capacity of 22 arrivals/hour despite much higher summer demand.
- Nice also suffered from near daily ATC capacity regulations, with the highest delays recorded on Thursday and Friday.
- Tel Aviv is operating with low-capacity arrival rates due to the Middle East crisis.
- Brussels saw multifactor delays owing to weather (Low Visibility Procedures) and work in progress on the Runway 25R ILS, resulting in weather, aerodrome capacity and ATC equipment-related delays.

En-route ATFM delays

Delays per cause (EUROCONTROL area)

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

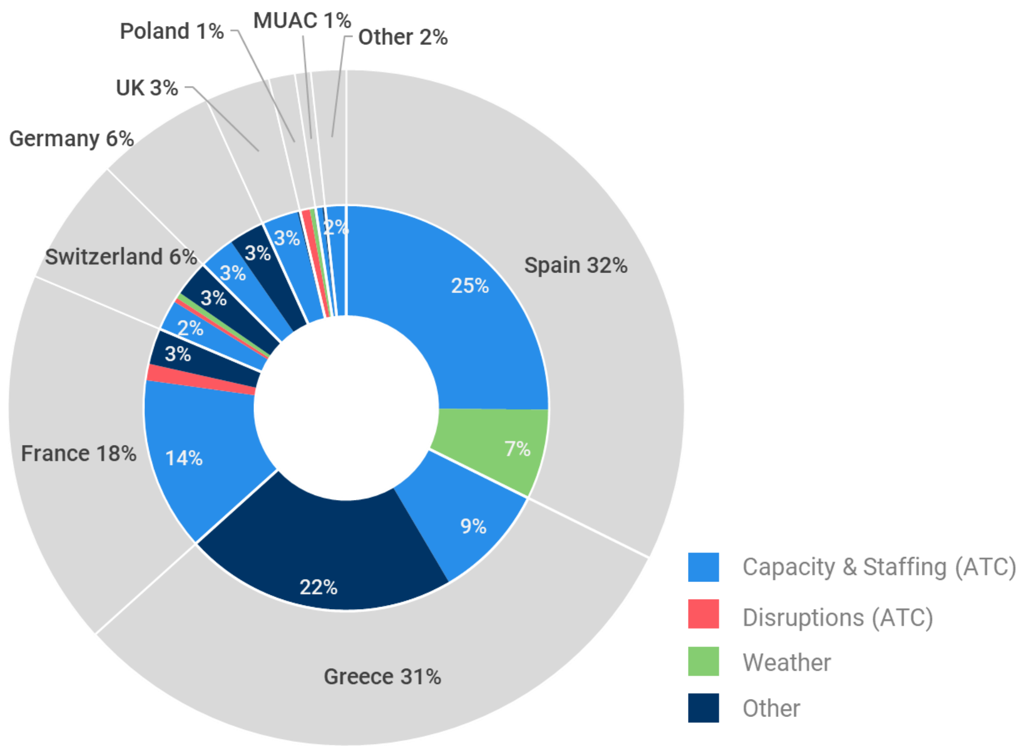


- Week 17 saw a 7% increase in en-route ATFM delays compared to the previous week, with an average of 22,253 minutes per day. Delays were 32% lower than during the same operational week in 2025.
- ATC capacity/staffing were responsible for 59% of all en-route ATFM delays (notably in Spain, France and Greece).
- Other causes accounted for 31% of all en-route ATFM delays, with the greatest impact in Greece (onloading of traffic resulting from the Middle East crisis), as well as in France (4-FLIGHT system upgrade), Switzerland and Germany (the 'Hammer Down military exercise).
- Weather accounted for 8% of all en-route ATFM delays, mostly affecting Spain.
- ATC disruptions made up 2% of all en-route ATFM delays primarily in France, Poland and Switzerland.
- There were 1.1 minutes of total ATFM delay per flight in Week 17, made up of 0.7 min/flight en-route delay, and 0.4 min/flight airport delay, an increase of 14% compared to the previous week.

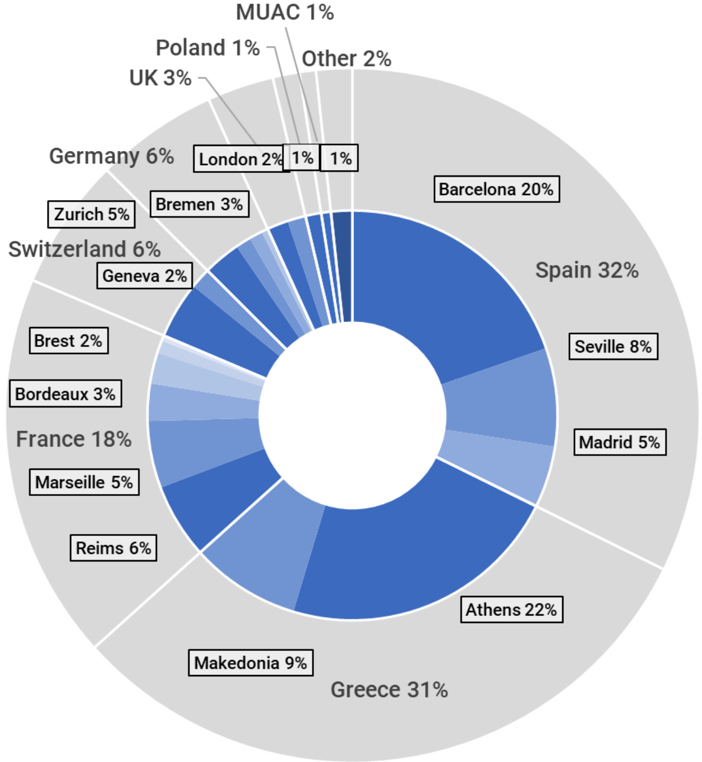
En-route ATFM delays per State, per cause & per ACC

Week 17, 20-26 Apr 2026

En-route ATFM delays per cause for top 8 States

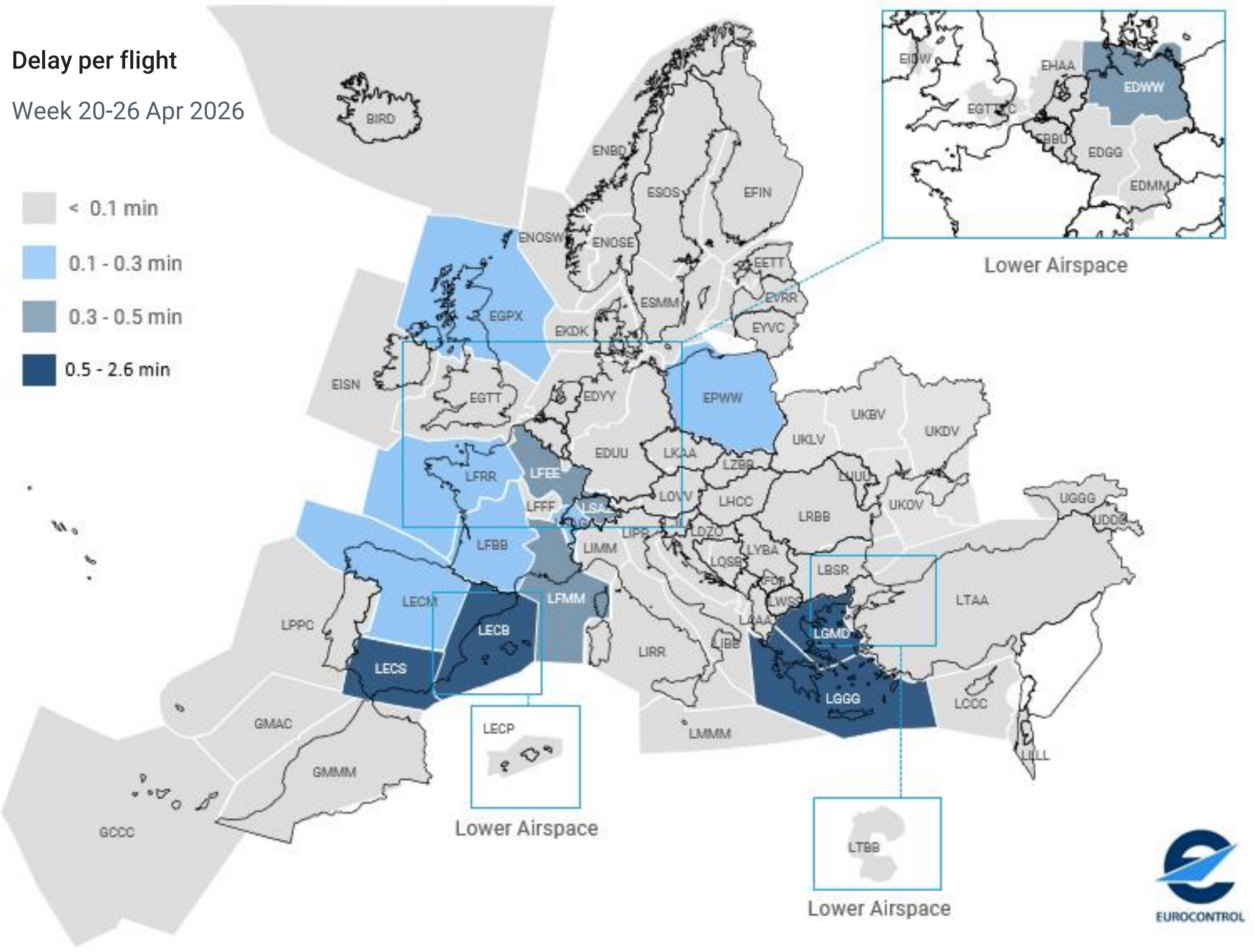


En-route ATFM delays per ACC for top 8 States



- Spain accounted for 32% of en-route ATFM delays, mainly linked to Barcelona ACC (20%), Seville ACC (8%), and Madrid ACC (5%), and primarily due to ATC capacity & staffing (25%).
- Greece contributed 31% of en-route ATFM delays, attributed to Athens ACC (22%) and Makedonia ACC (9%) and mainly due to other causes -- onloading of traffic resulting from the Middle East crisis (22%).
- France represented 18% of en-route ATFM delays, primarily attributed to Reims ACC (6%) and Marseille ACC (5%). The primary cause was ATC capacity & staffing (14%).
- Switzerland generated 6% of en-route ATFM delays, mainly attributed to Zurich ACC (5%), and owing to a mix of other causes (3%) and ATC capacity and staffing (2%).
- Germany generated 6% of en-route ATFM delays, mainly attributed to Bremen ACC (3%), and split between other causes (Hammer Down – 3%) and ATC capacity & staffing (3%).

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



In Week 17, five ACCs recorded en-route ATFM delays between 0.5 and 2.6 min/flight: Athens (2.53 min/flight), Barcelona (1.31 min/flight), Makedonia (1.16 min/flight), Seville (1.03 min/flight) and Bremen (0.45 min/flight).

Athens ACC attributed ATFM delays to staffing (daily with the exception of Wednesday and Friday), as negotiations continued around the issue of compensation for additional working hours by air traffic personnel during Summer 2026. From Wednesday on, several sectors were regulated with ATFM delays attributed to the onloading of traffic resulting from the Middle East crisis.

Barcelona ACC (traffic +1%) attributed ATFM delays to capacity daily throughout the week, with convective weather complicating traffic management on Monday, Tuesday, Friday and Sunday. Sector availability was additionally limited in Valencia TMA on Thursday.

Makedonia ACC attributed ATFM delays to staffing on Monday and Tuesday as negotiations continued around the issue of compensation for additional working hours by air traffic personnel during Summer 2026. From Wednesday on, ATFM delays were attributed to the onloading of traffic resulting from the Middle East crisis.

Seville ACC attributed ATFM delays to ATC capacity daily (traffic +6% vs 2025) with staffing issues limiting sector availability on Tuesday.

Bremen ACC experienced delays from Monday to Friday due to Hammer Down.

Busiest 10 States

Departures and arrivals

Week 17, 20-26 Apr 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	5,680	+1%	+0%
2.	Spain	5,563	+1%	+0%
3.	Germany	5,020	+16%	-2%
4.	Italy	4,263	+2%	+3%
5.	France	4,240	+1%	-4%
6.	Türkiye	3,031	+0%	-7%
7.	Netherlands	1,689	+2%	-1%
8.	Poland	1,423	+5%	+4%
9.	Norway	1,378	+0%	-0%
10.	Portugal	1,349	+1%	-1%

See all States

- The busiest 10 States collectively recorded a 3.2% increase in departure and arrival flights in Week 17 compared to the previous week, with eight recording week-on-week growth, two remaining stable, and none with declining traffic.

- Germany recorded the largest week-on-week increase (+16%), but this rise mostly reflects a rebound following pilot and cabin crew strikes at Lufthansa in Week 16, with the rebound primarily driven by strong domestic traffic. Poland posted a 5% increase owing to higher flows to/from Germany, Türkiye and Greece. The Netherlands and Italy each saw a 2% increase, while the UK, Spain, France and Portugal each rose by 1%. Türkiye and Norway remained unchanged.

- Compared to 2025, only two of the busiest 10 States recorded growth in arrival and departure flights: Poland (+4%) and Italy (+3%). The UK, Spain and Norway remained stable. Conversely, five States saw declines: Türkiye (-7%), France (-4%), Germany (-2%), the Netherlands and Portugal (each -1%).

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Busiest 10 aircraft operators

Week 17, 20-26 Apr 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,641	-1%	+4%
2.	easyJet Group	1,669	-1%	-4%
3.	Turkish Airlines Group	1,464	-2%	-2%
4.	Air France Group	1,130	+2%	+0%
5.	Wizz Air Group	1,084	+1%	+22%
6.	Lufthansa Airlines	1,079	+127%	-10%
7.	KLM Group	942	+1%	-1%
8.	British Airways Group	808	-1%	-5%
9.	SAS Group	789	-0%	+6%
10.	Vueling	613	+1%	-6%

See top 40 airlines

- The busiest 10 aircraft operators collectively recorded a 4.4% increase in flights in Week 17 compared to the previous week.
- The 127% week-on-week increase for **Lufthansa Airlines** is overstated as the airline's schedule was disrupted by pilot and cabin crew strikes in Week 16. There was in this regard a strong recovery at Frankfurt and Munich airports.
- There were small increases at the **Air France Group** (+2%) owing to flows France ↔ Greece, France ↔ Morocco, France ↔ Spain and France ↔ Italy. **Wizz Air Group**, **KLM Group** and **Vueling** each recorded a 1% increase.
- Four airline groups saw fewer flights compared to the previous week: **Turkish Airlines Group** (-2%) owing to fewer flights on flows Türkiye ↔ Saudi Arabia, Türkiye ↔ Germany and Türkiye ↔ UK; **Ryanair Group** (-1%), **easyJet Group** (-1%) and **British Airways Group** (-1%).
- Compared to 2025, only three of the 10 busiest aircraft operators recorded higher flight volumes. Growth was led by the **Wizz Air Group** (+22%) followed by the **SAS Group** (+6%), and the **Ryanair Group** (+4%). In contrast, **Lufthansa Airlines** (-10%), **Vueling** (-6%), **British Airways Group** (-5%), **easyJet Group** (-4%), **Turkish Airlines Group** (-2%) and **KLM Group** (-1%) all reported lower flights.

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Europe's 6 largest airline groups

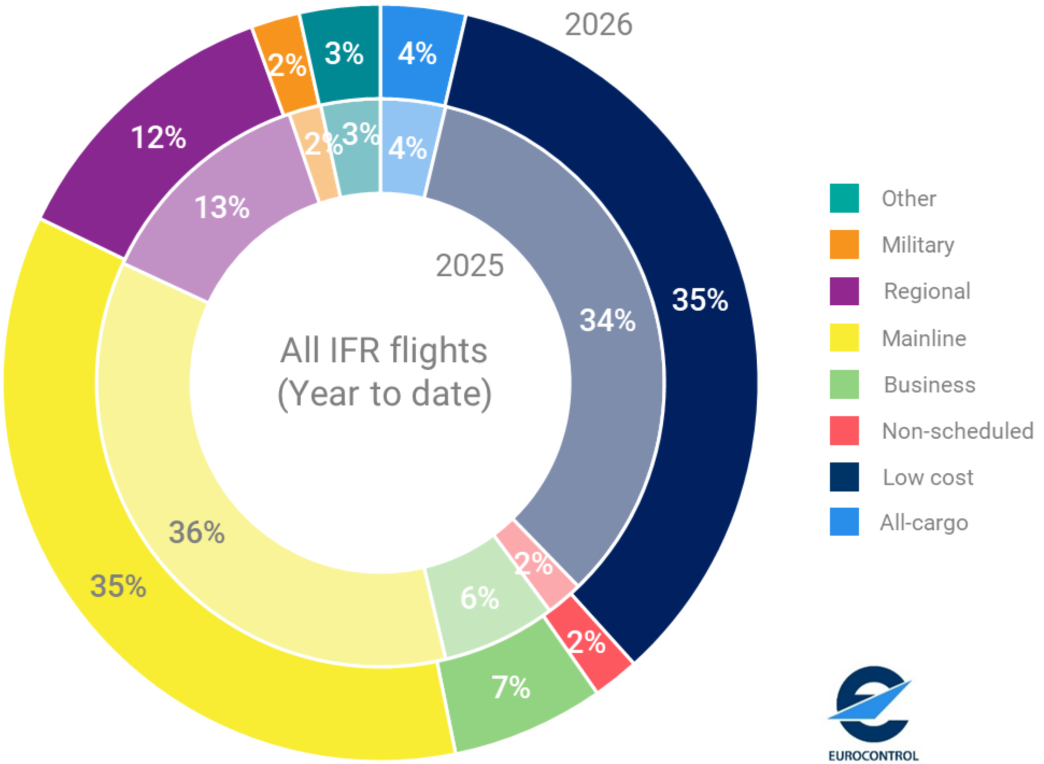
Week 17, 20-26 Apr 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,641	-1%	+4%
2.	Lufthansa Group	2,738	+32%	-8%
3.	IAG Group	2,251	-1%	-4%
4.	Air France-KLM Group	2,072	+1%	-0%
5.	easyJet Group	1,669	-1%	-4%
6.	Turkish Airlines Group	1,464	-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 increase in flights of 4.5%.
- Only two airline groups recorded week-on-week increases: Lufthansa (+32%) driven by a rebound after pilot and cabin crew strikes in Week 16, and Air France-KLM (+1%).
- The main decreases compared to the previous week were recorded by Turkish Airlines (-2%), Ryanair, IAG, and easyJet (each down by 1%).
- Compared to 2025, only Ryanair recorded growth (+4%). All other groups posted declines, led by Lufthansa (-8%), followed by IAG and easyJet (each ,-4%), and Turkish Airlines (-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	11,327	+0%	+0%
2.	Mainline	10,330	+6%	-4%
3.	Regional	3,539	-1%	-8%
4.	Business	2,034	+7%	+7%
5.	Other	1,179	+3%	+13%
6.	All-cargo	1,010	+1%	+10%
7.	Military	632	-4%	+26%
8.	Non-Scheduled	579	+3%	-26%

- In the year to date, the two largest market segments (Mainline and Low-cost) each hold a 35% share. Low-cost has increased by 1 percentage point (pp) compared to 2025 while Mainline has declined by 1 pp. The Regional segment has seen its market share decline by 1pp to 12%; Business aviation has conversely grown by 1 pp to 7%. The All-cargo and Non-scheduled segments remain unchanged at 4% and 2% respectively.
- Week-on-week, Mainline grew by 6%, while Low-cost remained unchanged. The non-scheduled segment increased by 3% whereas Regional declined by 1%. Business aviation recorded the strongest growth (+7%) and All-cargo increased by 1%.
- Compared to 2025, the Non-scheduled segment has declined by 26%, due in part to reduced traffic on flows Türkiye ↔ Middle East, Türkiye ↔ Poland, Türkiye ↔ Germany. Regional has fallen by 8% and Mainline by 4%, while low-cost has remained stable. All-cargo has increased by 10% and Business aviation by 7%.

Busiest 10 airports

Week 17, 20-26 Apr 2026 (average daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,395	-2%	-6%
2.	Amsterdam	1,390	+2%	-2%
3.	Paris Charles de Gaulle	1,340	+0%	-0%
4.	London Heathrow	1,296	+2%	-5%
5.	Madrid Barajas	1,264	+1%	+7%
6.	Frankfurt	1,249	+47%	-5%
7.	Barcelona	1,074	+3%	+3%
8.	Rome Fiumicino	928	+1%	-3%
9.	Munich	808	+33%	-16%
10.	Zurich	788	+1%	+6%

See top 40 airports

- The busiest 10 airports together saw an 8.9% increase in Week 17 compared to the previous week.
- Only **Paris CDG** saw no change, remaining stable vs Week 16, while **Istanbul** posted a 2% decrease due to fewer flights between Türkiye and Saudi Arabia.
- The largest week-on-week increases were recorded at **Frankfurt** (+47%) and **Munich** (+33%), increases that reflected a rebound after industrial action at Lufthansa in Week 16. **Barcelona** increased by 3% driven by a recovery in flights between Spain and Germany. **Amsterdam** and **London Heathrow** each increased by 2% while **Madrid Barajas**, **Rome Fiumicino** and **Zurich** all rose by 1%.
- Compared to 2025, three of the busiest 10 airports are handling more flights, led by **Madrid Barajas** (+7%), **Zurich** (+6%) and **Barcelona** (+3%). Traffic has declined at **Munich** (-16%), **Istanbul** (-6%), **London Heathrow** and **Frankfurt** (each, -5%), **Rome Fiumicino** (-3%) and **Amsterdam** (-2%).

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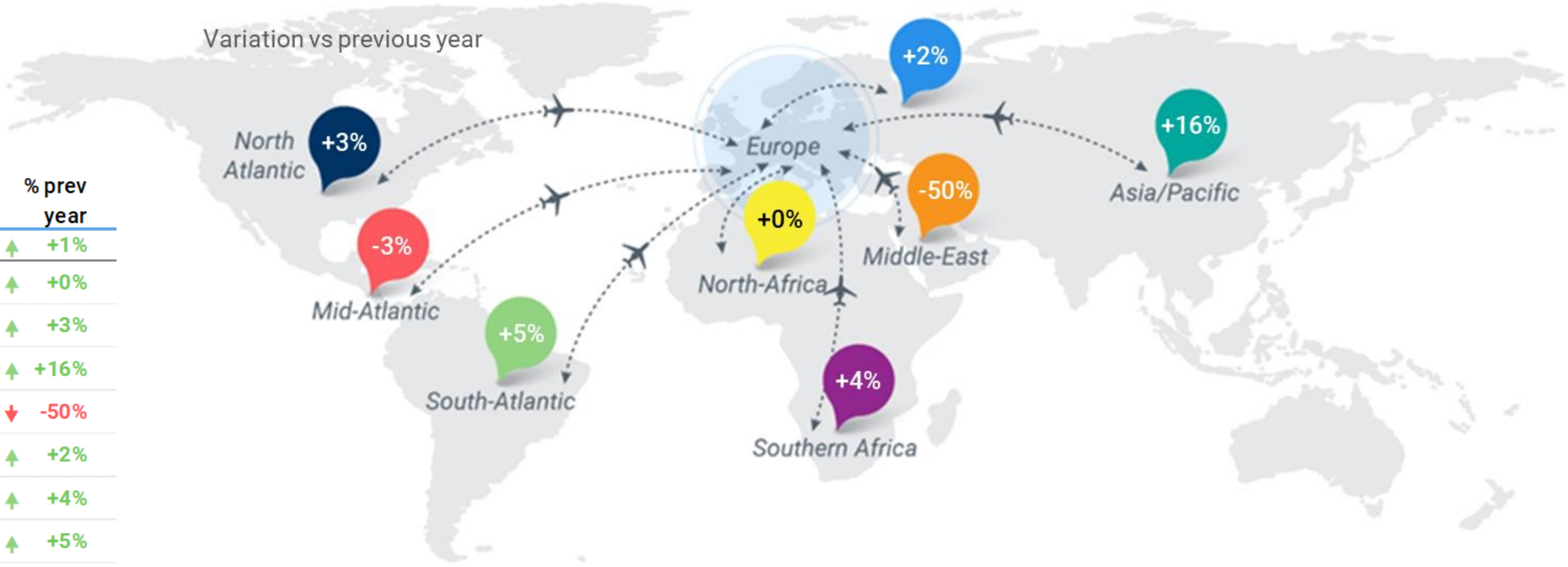
Traffic flows

(average daily departure/arrival flights for Week 17, 20-26 Apr 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	**24,200**	▲ **+3%**	▲ **+1%**
Europe ↔ North-Africa	1,427	▼ -2%	▲ +0%
Europe ↔ North Atlantic	1,413	▲ +4%	▲ +3%
Europe ↔ Asia/Pacific	1,108	▲ +2%	▲ +16%
Europe ↔ Middle-East	757	▼ -2%	▼ -50%
Europe ↔ Other Europe	327	▲ +9%	▲ +2%
Europe ↔ Southern Africa	317	▼ -3%	▲ +4%
Europe ↔ South-Atlantic	207	▲ +2%	▲ +5%
Europe ↔ Mid-Atlantic	173	▼ -4%	▼ -3%
Non Intra-Europe	**5,729**	▲ **+1%**	▼ **-9%**



- Intra-European traffic saw 24,200 daily flights on average during Week 17, a 3% increase vs the previous week. Intercontinental flows amounted to 5,729 daily flights on average, +1% vs the previous week. The top intercontinental flows were between Europe and North Africa , Europe and North Atlantic, and Europe and Asia/Pacific.

- Week-on-week, the Other Europe flow rose by 9%, driven by an increase in flights between Türkiye ↔ Russia. Flows between Europe and North Atlantic rose by 4% driven by stronger Germany ↔ US flows. Small increases were recorded between Europe and Asia/Pacific (+2%) and South Atlantic (+2%). In contrast, flows between Europe and Mid Atlantic fell by 4% followed by Southern Africa (-3%), Middle East (-2%), and North Africa (-2%).

- Compared to 2025, all intercontinental flows recorded increases in flight volumes except those to the Middle East (-50%) and Mid Atlantic (-3%). The strongest growth was observed between Europe and Asia/Pacific (+16%).

Top 10 long-haul country pairs

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

Week 20-26 Apr 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	311	+4%	-0%
2.	Germany ↔ US	172	+26%	+6%
3.	France ↔ US	125	+1%	+2%
4.	Italy ↔ US	97	+5%	+19%
5.	Spain ↔ US	82	+2%	+13%
6.	Netherlands ↔ US	81	-3%	-2%
7.	Ireland ↔ US	80	-0%	+2%
8.	Egypt ↔ Russia	62	-4%	+23%
9.	India ↔ UK	52	+1%	+18%
10.	China ↔ Germany	47	+15%	+8%

- Seven of the top 10 long-haul country pairs included 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, seven long-haul flows saw increases, led by Germany ↔ US (+26%), Germany ↔ China (+15%), Italy ↔ US (+5%), UK ↔ US (+4%), Spain ↔ US (+2%), and France ↔ US and UK ↔ India (each, +1%).
- Compared to the same week in 2025, eight of the top 10 long-haul flows recorded growth, led by Egypt ↔ Russia (+23%), Italy ↔ US (+19%), India ↔ UK (+18%), Spain ↔ US (+13%), China ↔ Germany (+8%), Germany ↔ US (+6%), France ↔ US and Ireland ↔ US (each, +2%). UK ↔ US remained stable. Only the Netherlands ↔ US (-2%) has declined.

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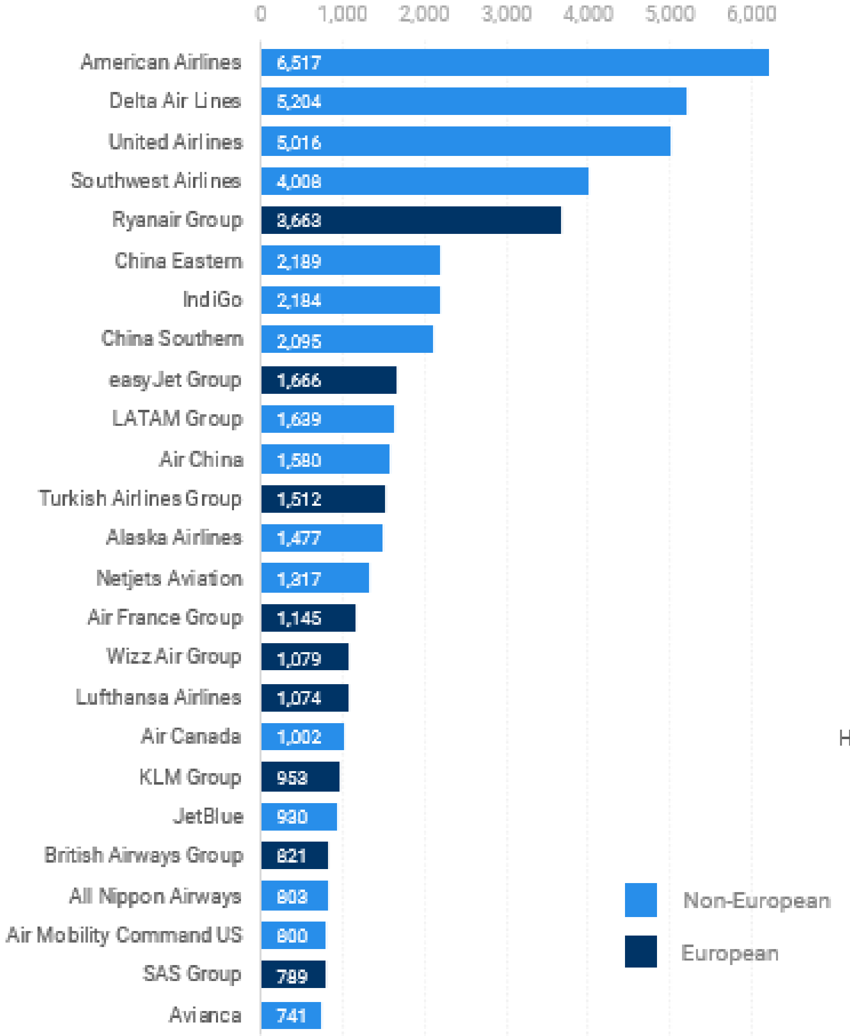
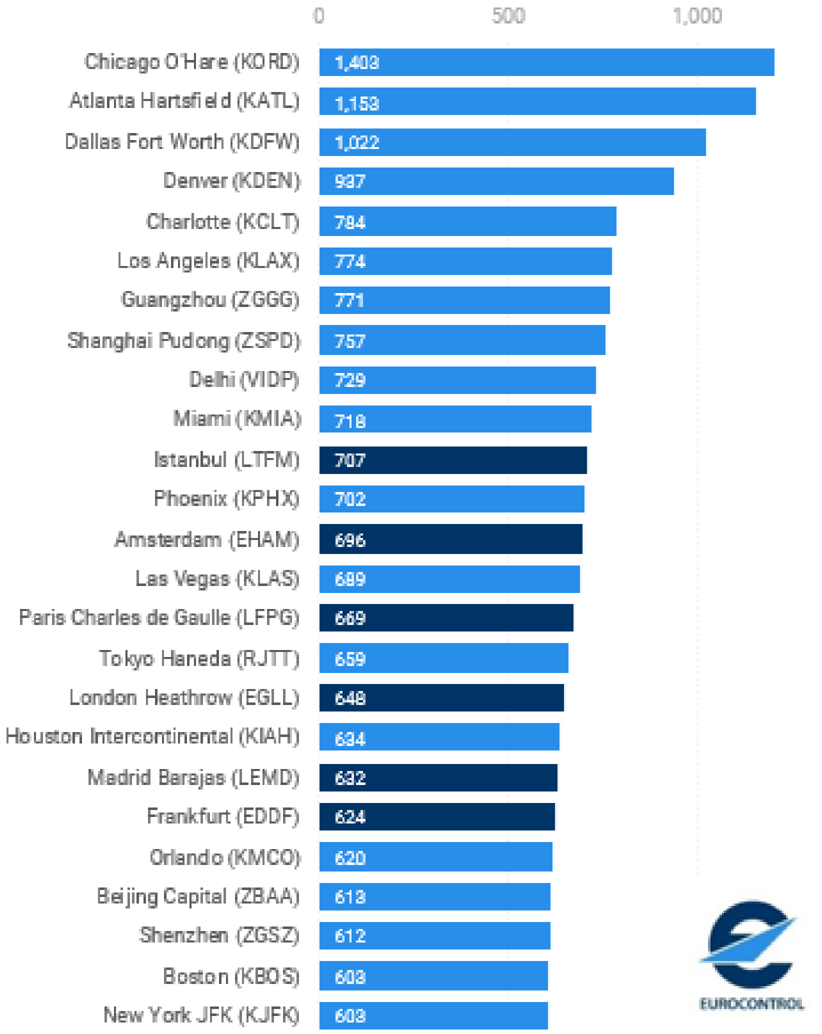
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 17, 20-26 Apr 2026)**

Top 25 global aircraft operators



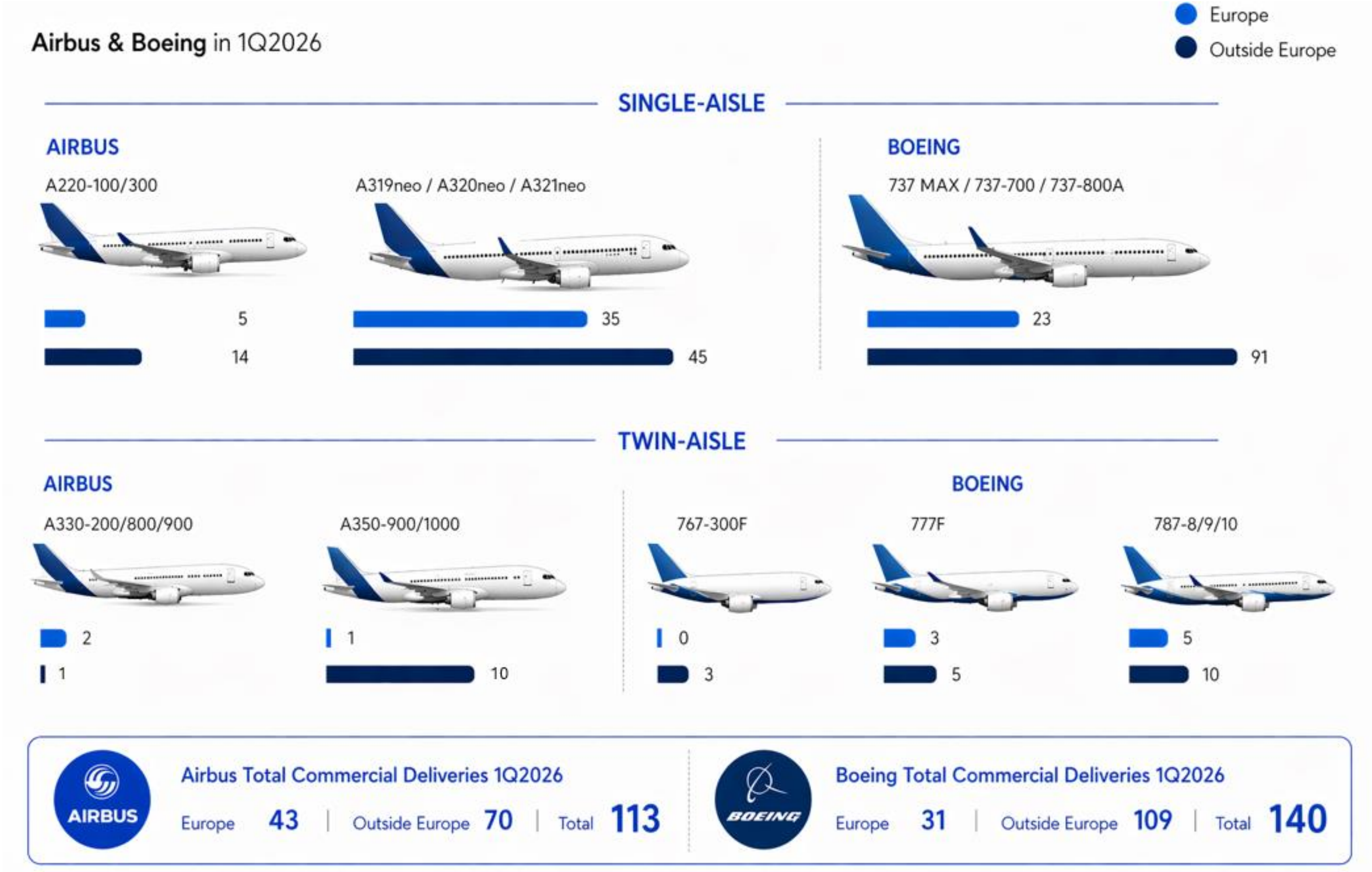
Top 25 global airports



Source: Flightradar24 Historical Global Utilisation data

- Aircraft operators: In Week 17, nine European aircraft operators ranked among the top 25 global aircraft operators, unchanged compared to Week 15.
- Two European carriers made the top 10, with Ryanair in 5th place and easyJet in 9th place, unchanged from Week 15.
- Seven more European carriers made the top 25, starting with Turkish Airlines Group (12th), Air France Group (15th), Wizz Air Group (16th), Lufthansa Airlines (17th), KLM Group (19th), British Airways (21st) and SAS Group (24th).
- Airports: six European airports ranked among the Global top 25 for departures in Week 17, unchanged compared to two weeks earlier.
- No European airport ranked in the global top 10 in Week 17. Istanbul was the highest in 11th place (down from 10th in Week 15), followed by Amsterdam (13th), Paris CDG (15th), London Heathrow (17th), Madrid Barajas (19th) and Frankfurt (20th up from 25th in Week 15) .
- Seven of the ten busiest airports were American, while the remaining 3 were Chinese (Guangzhou and Shanghai-Pudong) and Indian (Delhi).

Aircraft Deliveries



Note: the aircraft illustrations are indicative only and do not represent actual aircraft accurately.

- In 1Q2026, Boeing surpassed Airbus in commercial aircraft deliveries for the first time since the 737 MAX grounding in early 2019. Boeing delivered 140 commercial aircraft, a 10% increase compared to 1Q2025, while Airbus deliveries fell 16% to 114 units*. This decline for Airbus was largely attributed to Pratt & Whitney engine shortages and supply chain bottlenecks affecting the A320neo family.
- In the European market, Airbus recorded 43 deliveries, representing 38% of its total volume, while Boeing delivered 31 aircraft, accounting for 22% of its total. Narrow-body jets continued to lead the market; Airbus delivered 19 A220s and 80 A320neo family aircraft, together making up 88% of its total deliveries. Boeing delivered 114 737 MAX aircraft, which accounted for 81% of its total quarterly deliveries.
- Overall, Boeing delivered 15% more narrow-body aircraft than Airbus during this period.
- Conversely, Airbus dominated 1Q2026 net orders, securing 398 aircraft, nearly triple Boeing's 140 net orders.

* including 1 A320neo to a private customer.

Jet fuel price (Europe)

Week 17, 20-26 Apr 2026

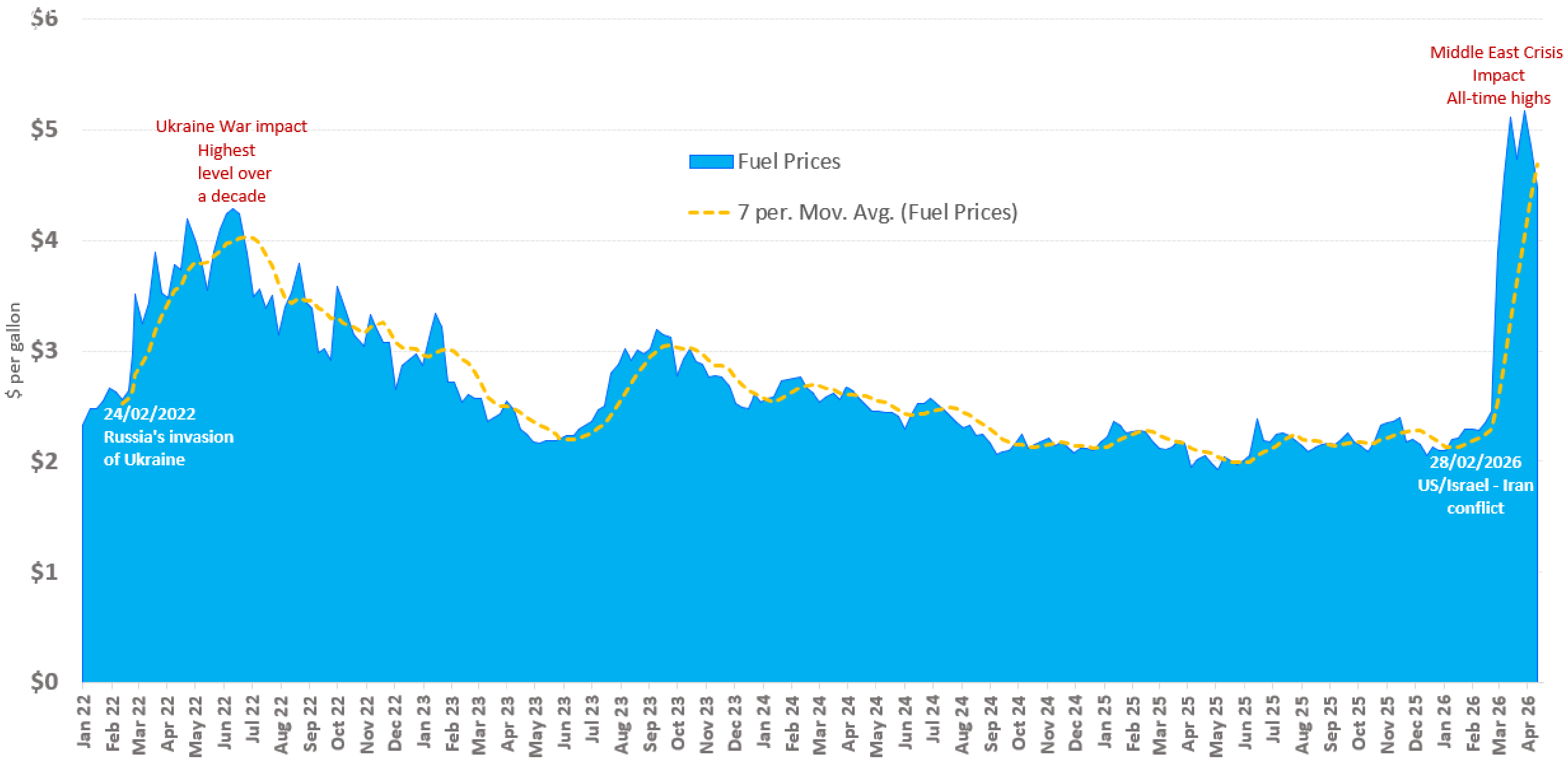
24 Apr 2026
avg fuel price:

$4.46 /gallon

-8%

vs. $4.85 /gallon
on 10 Apr 2026

Source: IATA/Platts



Source: IATA/Platts

- As of 24 April 2026, average jet fuel prices fell to $4.46 per gallon, down 8% from $4.85 over the previous two weeks. Jet fuel prices averaged $4.74 per gallon in April, up 4% from March and more than double pre-crisis levels ($2.26 per gallon in January-February 2026). European jet fuel prices reached a record high in mid-March 2026, surpassing the 2022 Ukraine war peak following supply disruptions caused by the closure of the Strait of Hormuz.
- The International Energy Agency forecasts global crude oil supply will decline by approximately 1 million barrels per day in 2026. Global jet fuel supply is expected to suffer a net 200,000 barrels per day reduction versus pre-conflict levels, with the impact forecast to be concentrated in 2Q2026 with a drop in global jet fuel output losses of as much as 500,000 barrels per day.

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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

www.eurocontrol.int