AVIATION INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

27 Jul - 02 Aug 2026

SUPPORTING EUROPEAN AVIATION

EUROCONTROL

6 August 2026

Headlines

(Week 31, 27 Jul - 02 Aug 2026)

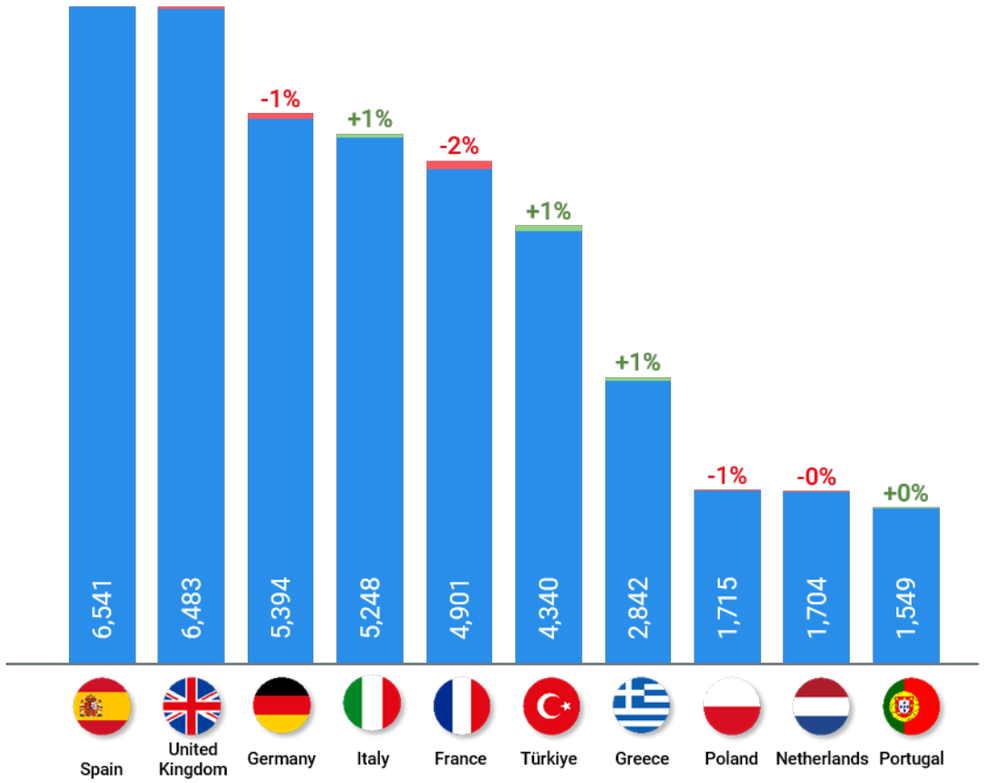
- The network averaged 36,488 daily flights in Week 31, down 0.2% compared to Week 30 and 3% higher than in 2025.
- July 2026 set new records for air traffic. The EUROCONTROL area recorded its highest ever monthly traffic, with over 1.13 million flights and a peak of 37,659 flights on Friday 24 July. Worldwide, commercial aviation also reached an all-time high of 153,359 flights on 23 July*.
- On average, capacity among the busiest 10 carriers remained stable compared to the previous week.
- At State level, the busiest 10 States recorded a decrease of 0.2% in flights compared to the previous week.
- Network arrival and departure punctuality were 72.6% and 65.3%, better than the equivalent week in 2025.
- En-route ATFM delays increased by 11% compared to the previous week, averaging circa 97K delay minutes per day, and were 28% below 2025 levels. Total air traffic flow management (ATFM) delay per flight was 3.31 mins/flight (2.65 for en-route and 0.66 for airport).
- ATC Capacity & Staffing was the top delay cause (64% of all en-route ATFM delays), particularly in France, Spain, and Greece.
- The area control centres contributing the most to en-route ATFM delays (in mins/flight) were Marseille (3.3 mins/flight), Bordeaux (3.0 mins/flight), Barcelona (2.3 mins/flight), Reims (2.0 mins/flight), and Athens (1.9 mins/flight).
- Jet fuel prices in Europe declined through late June and early July, averaging $3.01 per gallon, before rebounding from mid-July to average $3.85 per gallon as tensions in the Middle East re-escalated. On 31 July 2026, jet fuel prices rose to $3.93 per gallon, a 7% increase over the previous two weeks.

* source: flightradar24.com

Top 10 busiest States

On week 27 Jul - 02 Aug 2026

(all flights excl. overflights compared with previous week)



EUROCONTROL

Traffic situation

Average daily flights (including overflights)

Week 27 Jul - 02 Aug 2026

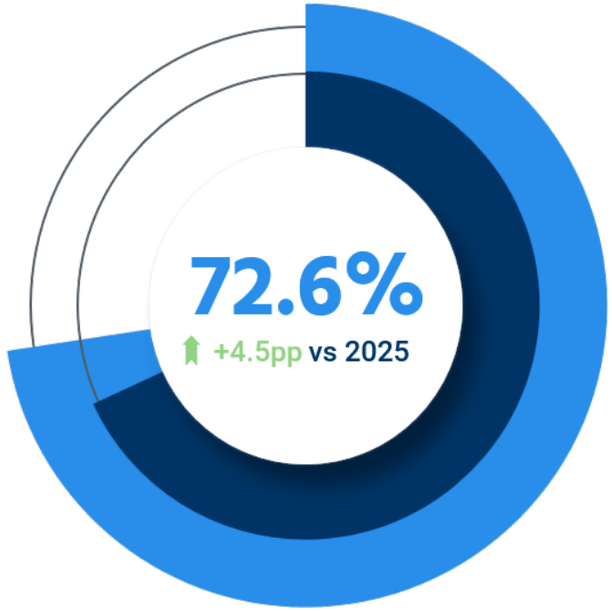
EUROCONTROL

Arrival & departure punctuality

(all network scheduled flights)

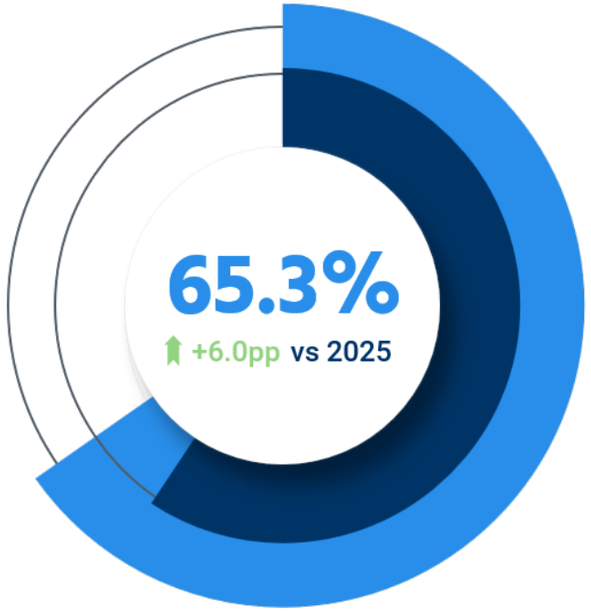
Week 27 Jul - 02 Aug 2026

ARRIVAL PUNCTUALITY



68.1% _____ in 2025

DEPARTURE PUNCTUALITY



59.3% _____ in 2025

EUROCONTROL

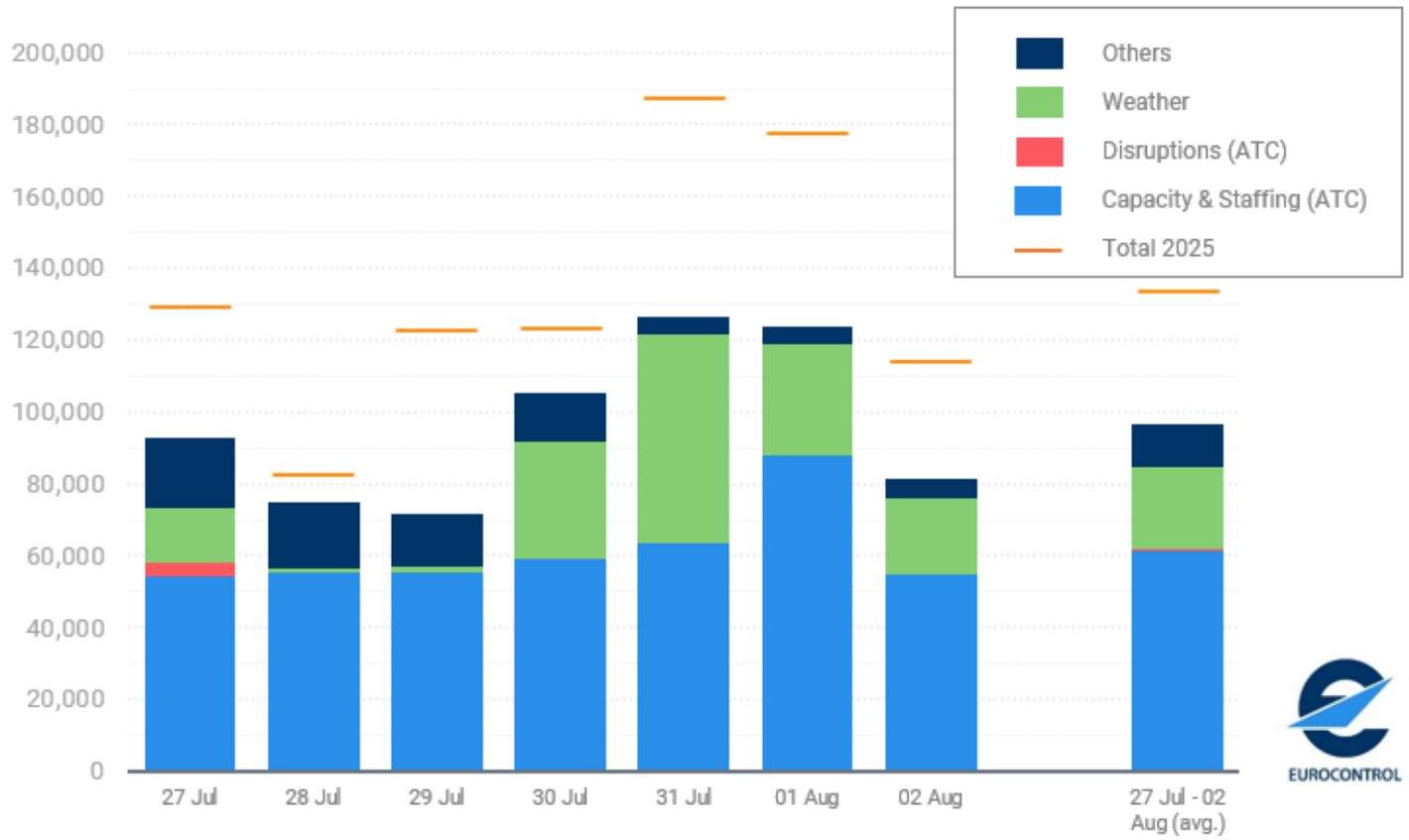
- Both arrival punctuality (72.6%) and departure punctuality (65.3%) were higher than in the same week of 2025, increasing by 4.5pp and 6.0pp respectively.
- **Tel Aviv** continued to experience daily ATC capacity regulations, with the highest delays on Sunday.
- **Athens** suffered from daily ATC capacity regulations, recording highest delays on Sunday.
- **Nice** experienced daily ATC capacity regulations in combination with ATC Staffing regulation on Thursday.
- **Zurich** saw multifactor of aerodrome capacity, ATC staffing and weather regulations due to westerly winds, and convective activity in the vicinity of the airport.
- **Lisbon** was subject to daily aerodrome capacity regulations throughout the week. Following a failure of all tower equipment, an ATC equipment regulation was imposed on Thursday.

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)

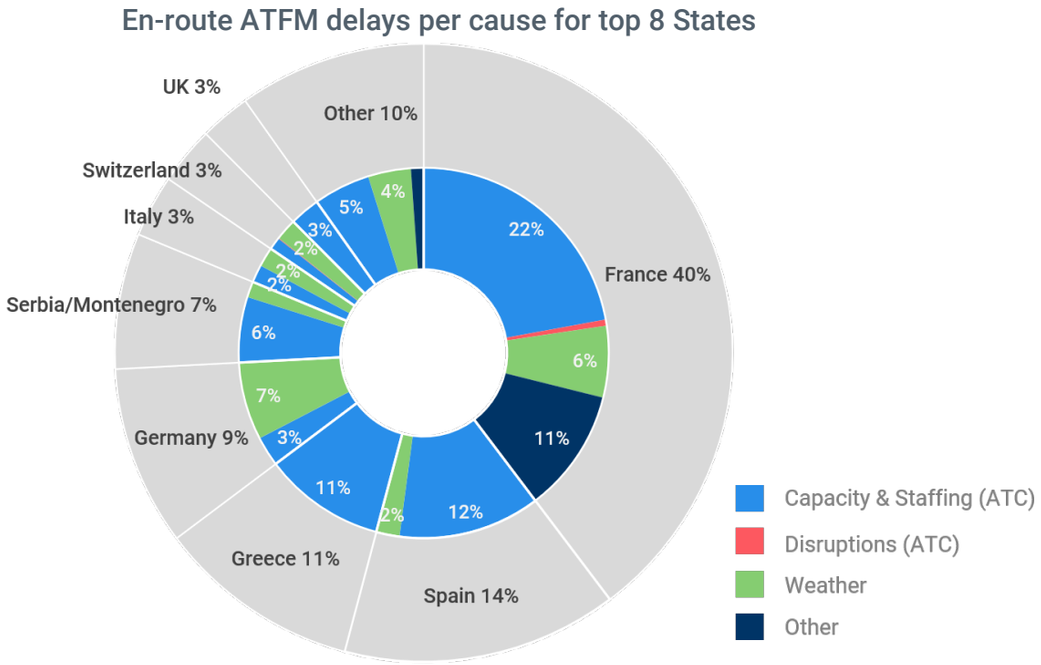
In minutes (total daily and 7-day average) in 2026

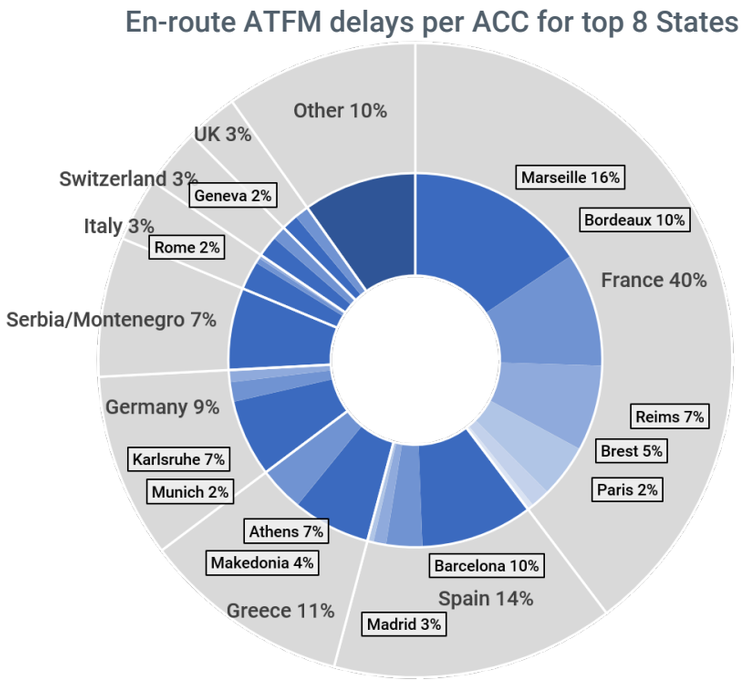


- Week 31 saw an 11% increase in en-route ATFM delays compared to the previous week, averaging 96,546 minutes per day. En-route ATFM delays were 28% lower than during the corresponding operational week in 2025.
- **ATC capacity & staffing** accounted for 64% of all en-route ATFM delays, primarily affecting France, Spain, and Greece.
- **Weather** was responsible for 24% of all en-route ATFM delays, with the greatest impact in Germany and France.
- **Other** causes accounted for 12% of all en-route ATFM delays, mainly due to the 4-FLIGHT system upgrade in France.
- There were 3.31 minutes of total ATFM delay per flight in Week 31 comprising 2.65 mins/flight en-route delay, and 0.66 mins/flight airport delay, an increase of 11% compared to the previous week.

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

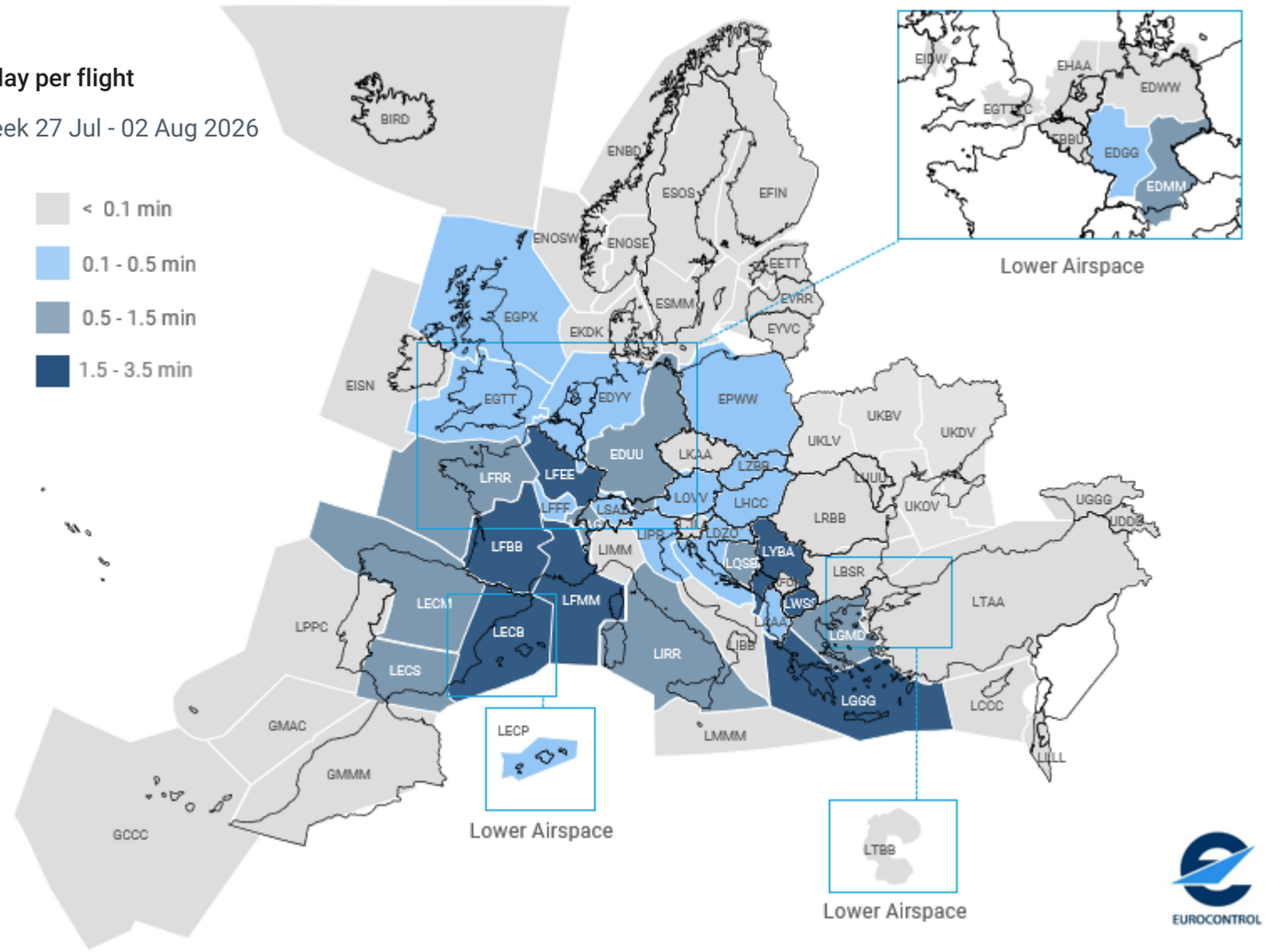
Week 27 Jul - 02 Aug 2026





- **France** accounted for 40% of all en-route ATFM delays, primarily attributed to Marseille ACC (16%), Bordeaux ACC (10%), Reims ACC (7%), Brest ACC (5%), and Paris ACC (2%). The primary causes were ATC capacity & staffing (22%), other (11%) due to the 4-FLIGHT system upgrade at Brest ACC, and weather (6%).
- **Spain** accounted for 14% of all en-route ATFM delays, attributed to Barcelona ACC (10%) and Madrid ACC (3%), primarily due to ATC capacity & staffing (12%).
- **Greece** accounted for 11% of all en-route ATFM delays, mainly attributed to Athens ACC (7%) and Makedonia ACC (4%), due to ATC capacity & staffing (11%).
- **Germany** accounted for 9% of all en-route ATFM delays, attributed to Karlsruhe UAC (7%) and Munich ACC (2%), due to weather (7%) and ATC capacity & staffing (3%).
- **Serbia/Montenegro** accounted for 7% of all en-route ATFM delays, mainly owing to ATC capacity & staffing (6%).

En-route ATFM delayed flights per Area Control Centre



- In Week 31, five ACCs recorded en-route ATFM delays between 1.9 and 3.3 mins/flight: Marseille (3.3 mins/flight), Bordeaux (3.0 mins/flight), Barcelona (2.3 mins/flight), Reims (2.0 mins/flight), and Athens (1.9 mins/flight).
- **Marseille ACC** sector availability in both the Western and Eastern sector groups was compromised on a daily basis due ATC Staffing issues but most notably in the East. Complex convective weather complicated traffic management and limited sector capacities from Thursday onwards.
- **Bordeaux ACC** capacity was affected by the wildfires in the Gironde department of France. Sector availability was limited due to the displacement of staff from their family homes, and traffic management was further challenged by the need to facilitate fire-fighting aircraft. On Friday convective weather resulted in aircraft following non-standard routings for avoidance action which further complicated traffic management.
- **Barcelona ACC** West sector availability was limited due to an ongoing shortfall in controllers in the Western Sector Group, and with traffic via the ACC 5% above the 2025 levels. ATFM Capacity delays were recorded through the week. Convective weather caused some disruption Friday and Saturday.
- **Reims ACC** sector availability was limited throughout the week with delays attributed daily to ATC Staffing and demand exceeding the available capacity (traffic +7% versus 2025). Airspace reservations for military training complicated traffic management Monday, Tuesday and Thursday. Convective weather added complexity and limited sector capacities Thursday and Friday.
- **Athens ACC** recorded delays caused by ATC Staffing issues on a daily basis although the number of available sectors matched the planned sector availability, with some moderate Capacity delays Thursday and Friday.
- .

Busiest 10 States

Departures and arrivals

Week 27 Jul - 02 Aug 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	Spain	6,541	+0%	+6%
2.	United Kingdom	6,483	-1%	+2%
3.	Germany	5,394	-1%	-1%
4.	Italy	5,248	+1%	+7%
5.	France	4,901	-2%	+0%
6.	Türkiye	4,340	+1%	+1%
7.	Greece	2,842	+1%	+5%
8.	Poland	1,715	-1%	+7%
9.	Netherlands	1,704	-0%	-1%
10.	Portugal	1,549	+0%	+2%

See all States

EUROCONTROL

- The busiest ten States collectively recorded a 0.2% week-on-week decrease in departure and arrival flights in Week 31, with four of the ten States reporting lower traffic compared to the previous week.
- **France** recorded the largest week-on-week decline (-2%), driven primarily by significantly weaker domestic traffic, and reduced flows to/from Algeria and Switzerland. The **UK**, **Germany** and **Poland** each recorded a 1% decline, mainly due to weaker domestic flight volumes. Traffic in the Netherlands remained stable (-0%).
- Three States, **Italy**, **Türkiye**, and **Greece** recorded a 1% increase compared to the previous week. **Spain** and **Portugal** remained stable (+0%).
- Compared to 2025, eight of the busiest 10 States recorded growth in arrival and departure flights: Italy and Poland posted the strongest increase (each +7%) followed by Spain (+6%), Greece (+5%), the UK and Portugal (both +2%), and Türkiye (+1%). France remained unchanged (+0%). In contrast, traffic declined in Germany and the Netherlands (both -1%).

Busiest 10 aircraft operators

Week 27 Jul - 02 Aug 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,929	+0%	+6%
2.	easyJet Group	1,903	+1%	+2%
3.	Turkish Airlines Group	1,842	+1%	+5%
4.	Wizz Air Group	1,265	+0%	+25%
5.	Air France Group	1,184	+1%	+1%
6.	Lufthansa Airlines	1,161	-1%	-5%
7.	KLM Group	952	-1%	+0%
8.	British Airways Group	866	-1%	-2%
9.	Vueling	737	+0%	+1%
10.	SAS Group	688	-2%	+0%

See top 40 airlines

EUROCONTROL

- The busiest 10 aircraft operators collectively maintained their flight numbers in Week 31 compared to the previous week.
- Three airlines/airline groups recorded a modest week-on-week increase of 1% in flight numbers: **easyJet**, supported by higher domestic traffic within Italy and increased flows between Spain ↔ the UK; **Turkish Airlines**, driven by more flights between Germany ↔ Türkiye and Saudi Arabia ↔ Türkiye; and **Air France**, owing to a slight increase in domestic traffic. **Ryanair**, **Wizz Air** and **Vueling** remained unchanged (+0%).
- Four airlines/airline groups recorded week-on-week declines. **SAS** fell by 2%, mainly owing to fewer domestic flights within Sweden and Norway. Three other airlines/airline groups each recorded a 1% decline: **Lufthansa** driven by reduced domestic traffic within Germany; **KLM**, owing to weaker domestic traffic within the Netherlands; and **British Airways**, reflecting lower domestic traffic within the UK.
- Eight airlines/airline groups recorded higher flight volumes than the equivalent week of 2025. Wizz Air led the growth (+25%), continuing to significantly outpace every other carrier. Ryanair followed with 6% growth, Turkish Airlines rose 5%, easyJet gained 2%, and both Vueling and Air France added 1%. SAS remained flat (+0%). Lufthansa recorded a decline of 5%, impacted by the closure of Lufthansa's subsidiary CityLine on 18 April 2026, while British Airways slipped 2%.

Europe’s 6 largest airline groups

Week 27 Jul - 02 Aug 2026 (average daily flights)

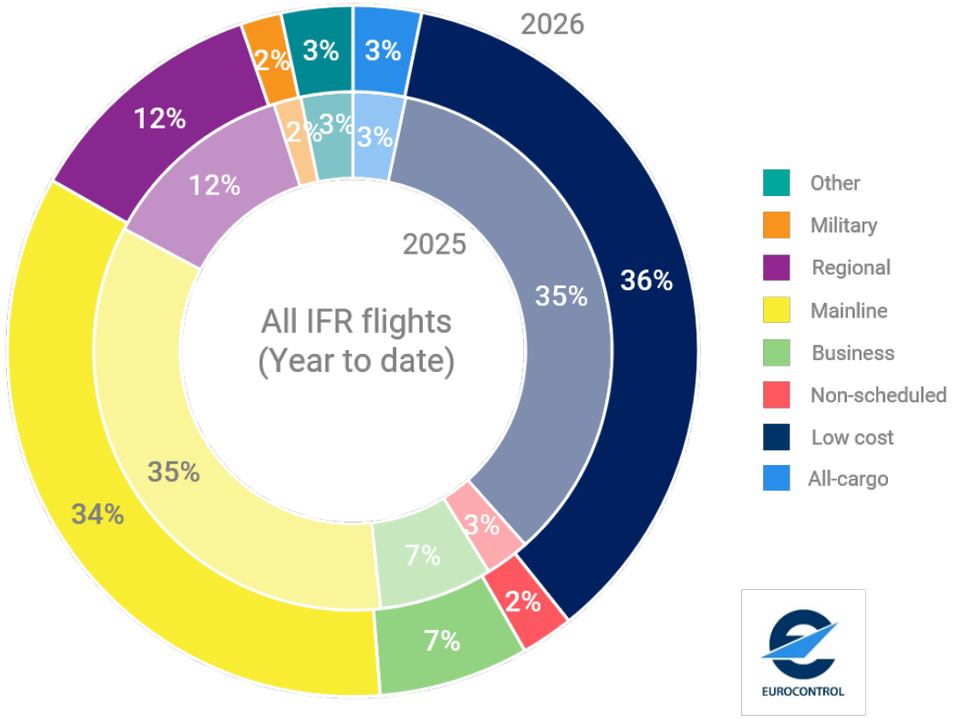
No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,929	+0%	+6%
2.	Lufthansa Group	3,072	+0%	-4%
3.	IAG Group	2,504	-0%	-0%
4.	Air France-KLM Group	2,135	-0%	+1%
5.	easyJet Group	1,903	+1%	+2%
6.	Turkish Airlines Group	1,842	+1%	+5%

EUROCONTROL

- The six largest European airline groups – i.e. aggregating the constituent members of Lufthansa, IAG and AFR-KLM Groups to join Ryanair, easyJet and Turkish Airlines Groups from the previous slide – in aggregate recorded only a marginal week-on-week increase in flights (+0.2%).
- Turkish Airlines and easyJet were the only airline groups to post week-on-week growth, each up 1%, while four airline groups remained broadly unchanged: Ryanair (+0%), Lufthansa (+0%), IAG (-0%), and Air France-KLM (-0%).
- Compared to 2025, four airline groups operated more flights: Ryanair recorded the strongest growth (+6%), followed by Turkish Airlines (+5%), easyJet (+2%), and Air France-KLM (+1%). Lufthansa saw a 4% decrease, partly reflecting the closure of its regional subsidiary, CityLine. IAG remained unchanged (-0%).

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	13,761	+0%	+6%
2.	Mainline	12,459	+0%	+4%
3.	Regional	3,777	-1%	-6%
4.	Business	2,719	-2%	+4%
5.	Non-Scheduled	1,197	-0%	-13%
6.	Other	1,092	+1%	+12%
7.	All-cargo	939	-2%	-2%
8.	Military	554	-10%	+14%

- Year-to-date, Low-cost remained the largest market segment and the only one to grow its market share (+1 pp) to 36% up from 35% in 2025. Mainline slipped 1pp to 34% from 35% share, still ahead of Regional (12%), Business aviation (7%), and All-cargo (3%), all three unchanged. The Non-scheduled segment saw its share fall from 3% in 2025 to 2% year-to-date.
- Over the past week, among the passenger airline segments, only Regional declined, down 1%. Low-cost (+0%), Mainline (+0%), and Non-scheduled (-0%) remained unchanged. In contrast, Business aviation and All-cargo saw a 2% drop.
- Compared to 2025, growth was concentrated in the Low-cost (+6%) and Mainline (+4%), with Business aviation also up 4%. Non-scheduled traffic experienced the sharpest decline (-13%), partly driven by a significant reduction in charter traffic between Germany ↔ Greece, Germany ↔ Türkiye, Türkiye ↔ Moldova, Türkiye ↔ Russia and Greece ↔ Israel. Regional (-6%) and All-cargo (-2%) also declined.

Busiest 10 airports

Week 27 Jul - 02 Aug 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,633	+1%	-0%
2.	Paris Charles de Gaulle	1,410	+0%	-1%
3.	Amsterdam	1,407	-1%	-2%
4.	Frankfurt	1,336	-0%	-3%
5.	London Heathrow	1,330	-0%	-1%
6.	Madrid Barajas	1,304	-0%	+8%
7.	Barcelona	1,149	-1%	+5%
8.	Palma de Mallorca	1,056	+2%	+3%
9.	Antalya	1,033	+1%	-2%
10.	Rome Fiumicino	1,027	+0%	+2%

See top 40 airports

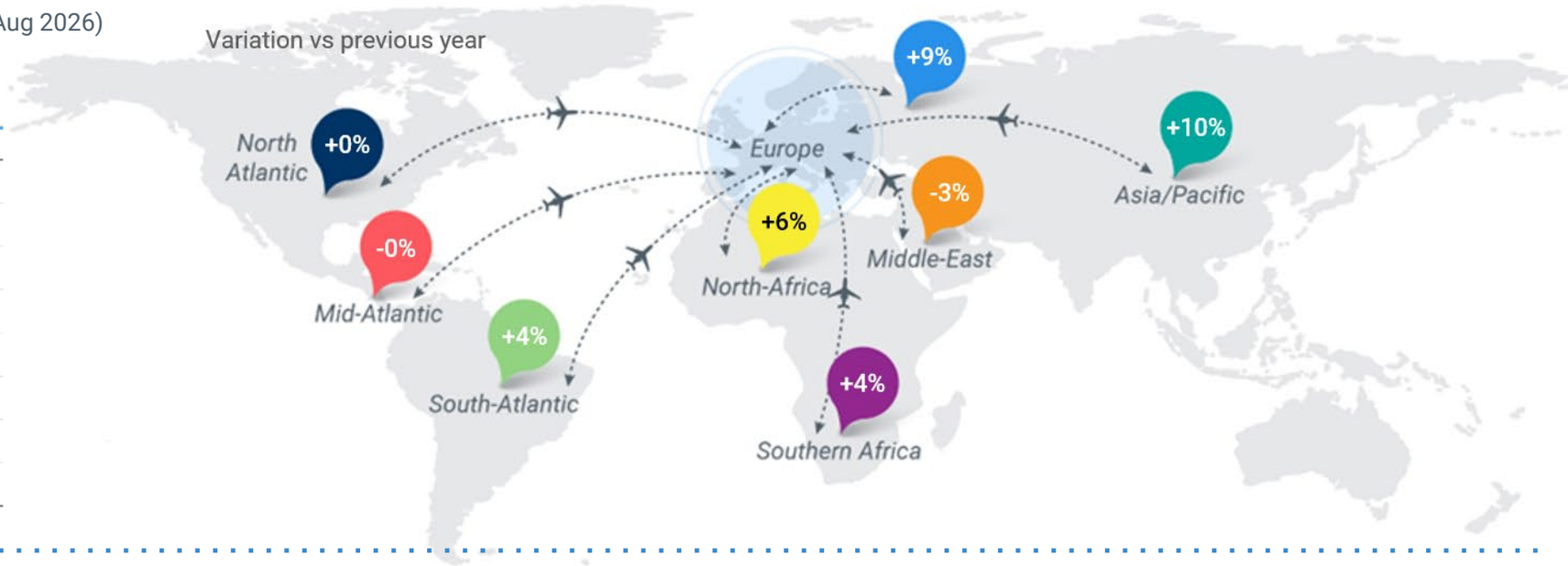
EUROCONTROL

- The busiest 10 airports together recorded a marginal increase of 0.1% in Week 31 compared to Week 30.
- Only three airports posted week-on-week growth in flight volumes. **Palma de Mallorca** led the way, supported by strong domestic traffic within Spain and higher flows between France ↔ Spain. **Istanbul** rose 1%, driven by increased flows between Germany ↔ Türkiye, while **Antalya** also gained 1% due to higher traffic between Russia ↔ Türkiye and Germany ↔ Türkiye.
- Two airports saw week-on-week declines of 1% in flight volumes: **Amsterdam** due to fewer flights between the Netherlands ↔ France, and **Barcelona**, due to reduced domestic traffic within Spain, and fewer flights between Germany ↔ Spain. **Frankfurt**, **London Heathrow**, and **Madrid Barajas** remained stable (all -0%). **Paris CDG** and **Rome Fiumicino** remained flat (+0%).
- Compared to 2025, four of the 10 busiest airports handled more flights. Madrid Barajas recorded the largest increase (+8%), followed by Barcelona (+5%), Palma de Mallorca (+3%), and Rome Fiumicino (+2%). On the downside, Frankfurt fell 3%, partly reflecting the closure of Lufthansa's subsidiary CityLine, while Amsterdam and Antalya both declined 2%, and Paris CDG and London Heathrow both slipped 1%. Istanbul remained stable (-0%).

Traffic flows

(average daily departure/arrival flights for week 27 Jul - 02 Aug 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	28,074	-0%	+3%
Europe ↔ North Atlantic	1,734	-3%	+0%
Europe ↔ North-Africa	1,644	+1%	+6%
Europe ↔ Middle-East	1,636	+2%	-3%
Europe ↔ Asia/Pacific	1,129	-0%	+10%
Europe ↔ Other Europe	578	+1%	+9%
Europe ↔ Southern Africa	343	-2%	+4%
Europe ↔ South-Atlantic	226	+1%	+4%
Europe ↔ Mid-Atlantic	174	-0%	-0%
Non Intra-Europe	7,464	+0%	+3%



- Intra-European traffic saw 28,074 daily flights on average during Week 31, broadly unchanged (-0%) compared to the previous week. Intercontinental flows amounted to 7,464 daily flights on average, also unchanged (+0%) vs the previous week. The largest intercontinental flows were between Europe and North Atlantic, North-Africa, Middle-East, and Asia/Pacific.

- Week-on-week, the Europe ↔ Middle-East flow recorded the strongest growth (+2%), driven primarily by increased traffic on Türkiye ↔ Saudi Arabia, Italy ↔ United Arab Emirates, and UK ↔ United Arab Emirates flows. Europe ↔ North-Africa, Europe ↔ Other Europe, and Europe ↔ South-Atlantic each rose 1%. On the downside, Europe ↔ North Atlantic posted the strongest decline (-3%), primarily driven by weaker traffic between UK ↔ US, Germany ↔ US, France ↔ US, and Spain ↔ US. The Europe ↔ Southern Africa flow declined by 2%, while Europe ↔ Asia/Pacific and Europe ↔ Mid-Atlantic remained stable (-0%).

- Compared to the same week in 2025, five intercontinental flows recorded higher flight volumes. The strongest year-on-year growth was observed on the Europe ↔ Asia/Pacific flow (+10%), partly owing to increased flights on Türkiye ↔ China, UK ↔ India, and Spain ↔ China flows. This was followed by Europe ↔ Other Europe (+9%), Europe ↔ North-Africa (+6%), and Europe ↔ Southern Africa and Europe ↔ South-Atlantic, both up 4%. The Europe ↔ North Atlantic flow was unchanged (+0%). By contrast, the Europe ↔ Middle-East flow declined by 3%, while Europe ↔ Mid-Atlantic remained unchanged (-0%).

Top 10 long-haul country pairs

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

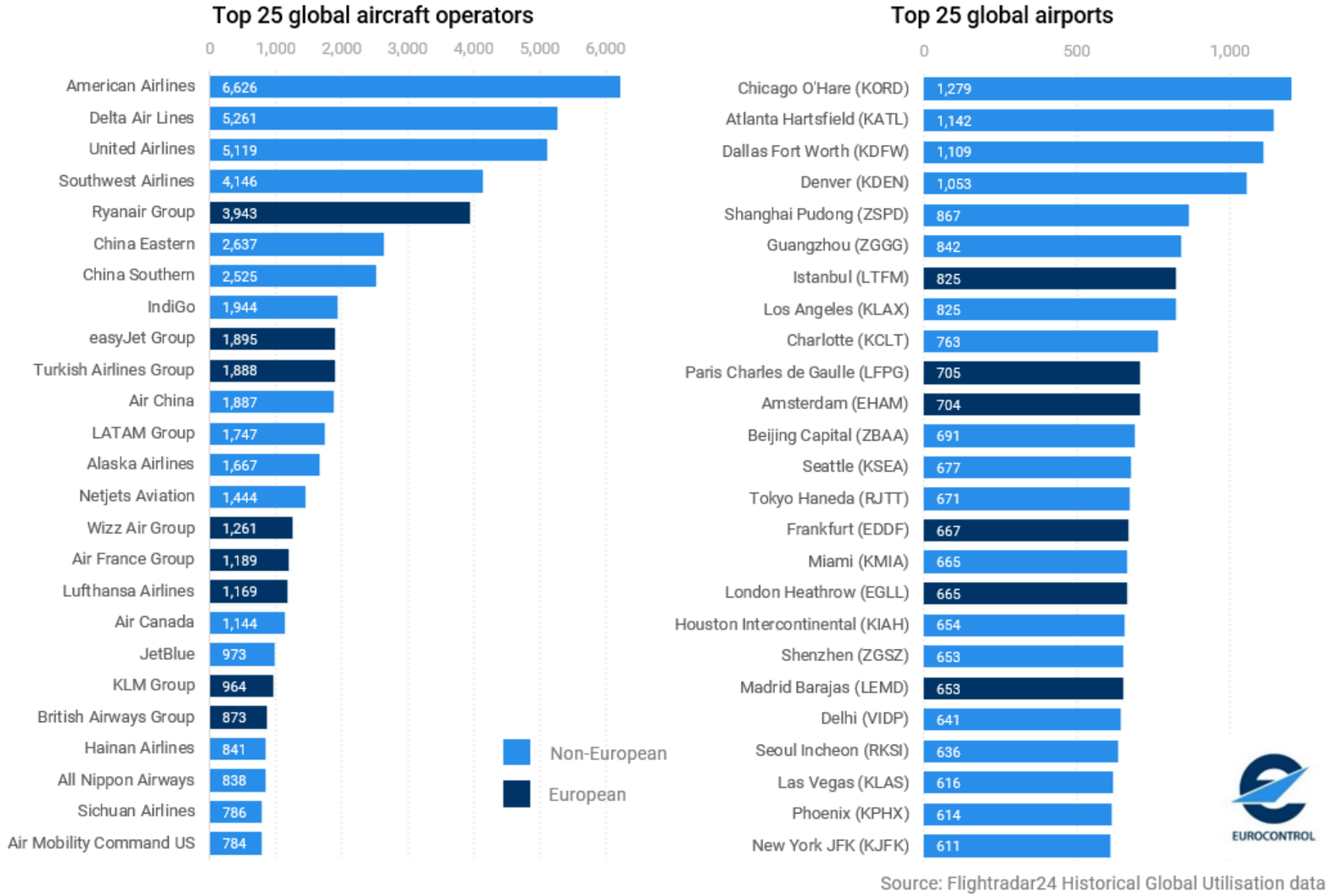
Week 27 Jul - 02 Aug 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	318	-3%	-6%
2.	Germany ↔ US	176	-4%	+2%
3.	France ↔ US	156	-4%	-2%
4.	Italy ↔ US	135	+1%	+5%
5.	Spain ↔ US	96	-4%	+9%
6.	Ireland ↔ US	95	+0%	+8%
7.	Netherlands ↔ US	81	-2%	-2%
8.	UAE ↔ UK	61	+4%	-3%
9.	Egypt ↔ Russia	59	-3%	+31%
10.	Canada ↔ UK	54	-4%	-2%

- Seven of the top ten long-haul country pairs in Week 31 involved the US, with the four largest flows being the UK ↔ US, Germany ↔ US, France ↔ US, and Italy ↔ US.
- The remaining three non-US long-haul flows were UAE ↔ UK, Egypt ↔ Russia (i.e. overflying the network), and Canada ↔ UK.
- Compared to the previous week, only two long-haul country pairs recorded higher flight volumes: UAE ↔ UK (+4%) and Italy ↔ US (+1%), while Ireland ↔ US was unchanged (+0%). Seven country-pairs saw week-on-week declines, led by Germany ↔ US, France ↔ US, Spain ↔ US and Canada ↔ UK, all down 4%. UK ↔ US and Egypt ↔ Russia were both down 3%, and Netherlands ↔ US was down 2%.
- Compared to the same week in 2025, half of the top ten long-haul flows recorded year-on-year growth. The strongest increase was between Egypt ↔ Russia (+31%), followed by Spain ↔ US (+9%), Ireland ↔ US (+8%), Italy ↔ US (+5%), and Germany ↔ US (+2%). Declines were seen on UK ↔ US (-6%), UAE ↔ UK (-3%), France ↔ US, Netherlands ↔ US, and Canada ↔ UK, all three down 2%.

Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 27 Jul - 02 Aug 2026)**



Source: Flightradar24 Historical Global Utilisation data

- **Aircraft operators:** in Week 31, eight European aircraft operators ranked among the top 25 global aircraft operators.
- Three European carriers ranked among the global top 10. Ryanair and Turkish Airlines Groups retained their 5th and 10th positions from Week 29, while easyJet rose to 9th place from 11th place two weeks earlier.
- Five additional European carriers made the top 25, starting with Wizz Air Group (15th), Air France Group (16th), Lufthansa Airlines (17th), KLM Group (20th), and British Airways Group (21st).
- **Airports:** six European airports ranked among the global top 25 for departures in Week 31, unchanged from two weeks earlier.
- Two European airports ranked among the global top 10. Istanbul climbed to 7th place from 8th in Week 29, while Paris CDG rose to 10th from 11th, pushing Amsterdam down to 11th place.
- Among the remaining ten busiest airports, six were American, and two were Chinese (Shanghai and Guangzhou).

Jet fuel price (Europe)

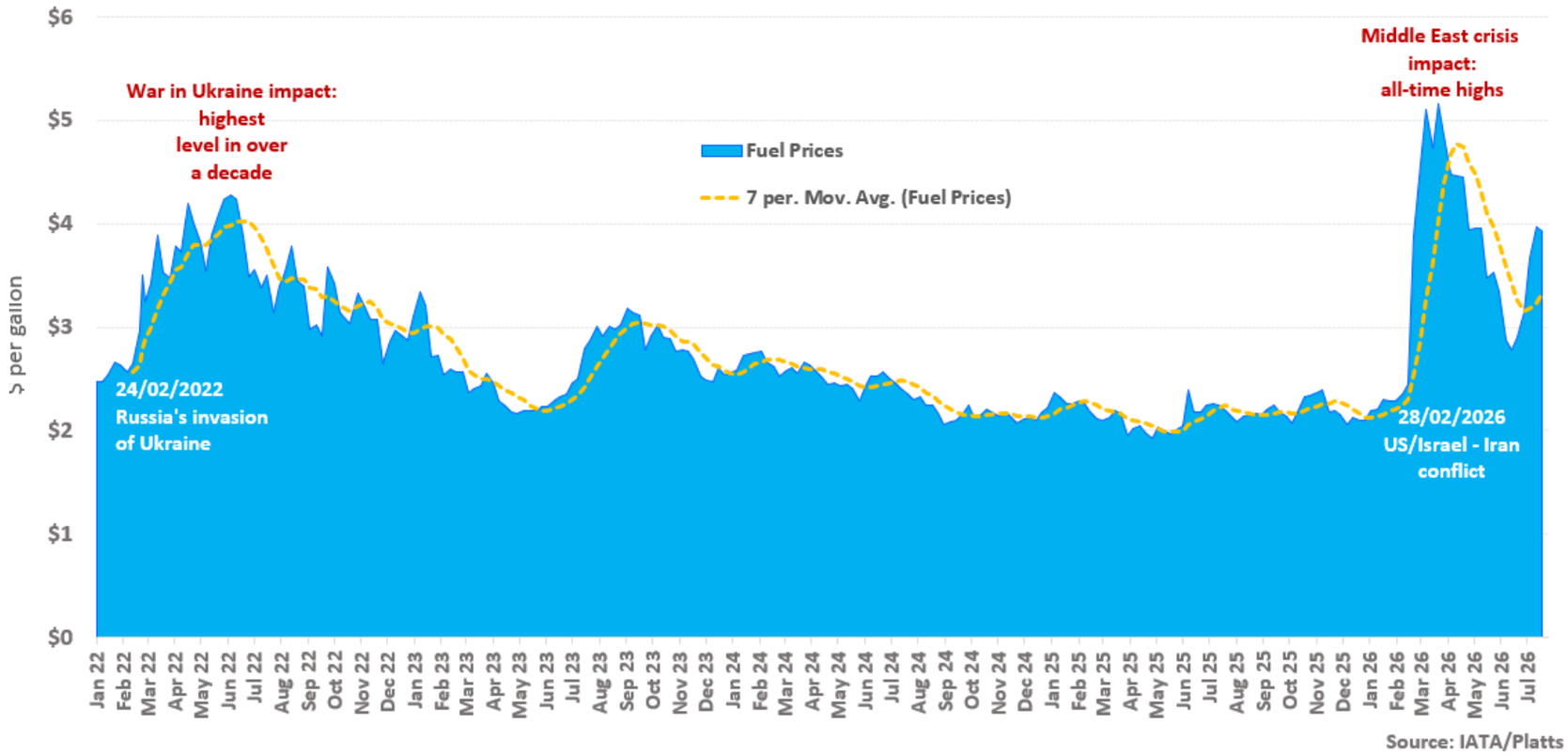
Week 27 Jul - 02 Aug 2026

31 Jul 2026
avg fuel price:

$3.93 /gallon

+7%
vs. $3.66 /gallon
on 17 Jul 2026

Source: IATA/Platts



Source: IATA/Platts

- Jet fuel prices in Europe declined through late June and early July, averaging $3.01 per gallon, before rebounding from mid-July to average $3.85 per gallon as tensions in the Middle East re-escalated. On 31 July 2026, jet fuel prices climbed to $3.93 per gallon, a 7% increase over the previous two weeks.
- OPEC+ countries continued the gradual unwinding of their 2023 voluntary production cuts, confirming a production target increase of 188K barrels per day for August, the third consecutive monthly increase of that size. This brings the cumulative increase since April 2026 to 800K barrels per day. The group also agreed to a further increase of 188K barrels per day for September, as announced at its 2 August meeting.

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.

You can also follow us on social media: **LinkedIn** **Instagram**

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

SUPPORTING EUROPEAN AVIATION

EUROCONTROL

© EUROCONTROL - 2026

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

www.eurocontrol.int