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EUROPEAN AVIATION OVERVIEW

24-30 Aug 2026

SUPPORTING EUROPEAN AVIATION

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3 September 2026

Headlines

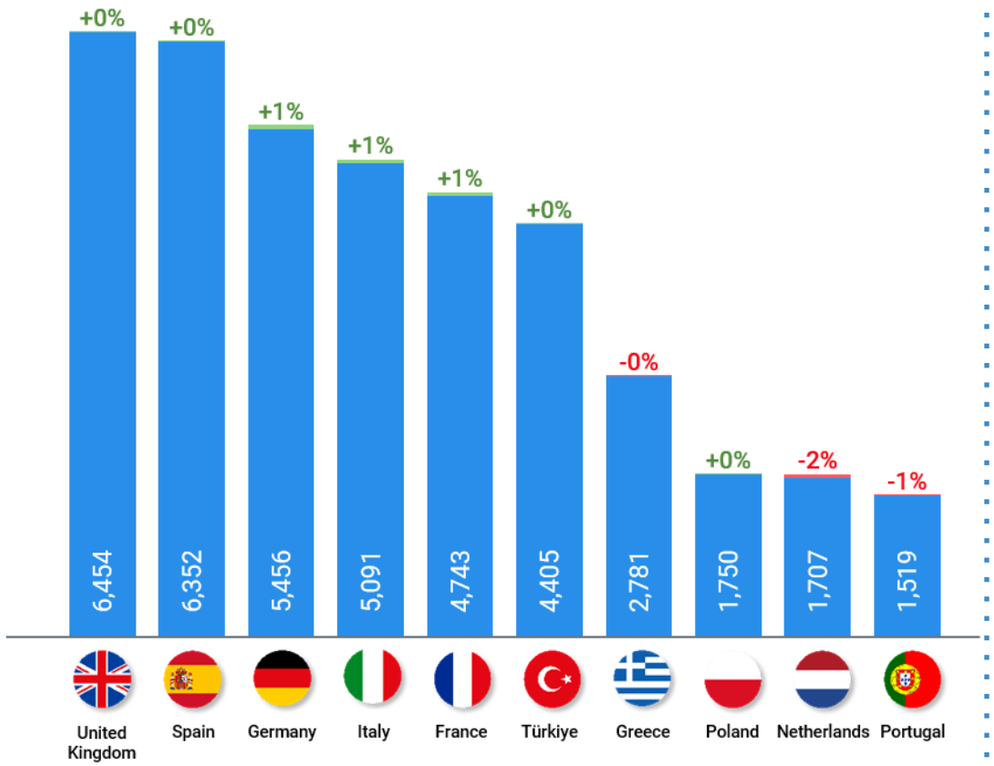
(Week 35, 24-30 Aug 2026)

- The network averaged 36,581 daily flights in Week 35, up 0.6% compared to Week 34 and 2.3% higher than in 2025.
- On average, capacity among the busiest 10 carriers was roughly similar to the previous week. Three airlines recorded their highest-ever flight numbers: Pegasus, Jet2.com and Jet2holidays in Week 35.
- At State level, flight volumes across the busiest 10 States were broadly similar to the previous week. Türkiye recorded its highest-ever traffic in terms of arrivals/departures for the second time in August.
- In Week 35 Europe ↔ Middle East traffic rose 2% week-on-week and returned to 2025 levels (-0%), largely driven by a faster recovery among Gulf carriers – but has since already in Week 36 dropped once more following renewed tensions.
- Network arrival and departure punctuality were 69.0% and 63.6%, worse than in the equivalent week of 2025.
- En-route ATFM delays increased by 28% compared to the previous week, averaging circa 126K delay minutes per day, and were 6% above 2025 levels. Total air traffic flow management (ATFM) delay per flight was 4.2 mins/flight (3.4 for en-route and 0.8 for airport).
- Weather was the top delay cause (56% of all en-route ATFM delays), followed by ATC capacity & staffing (40%).
- The area control centres contributing the most to en-route ATFM delays (in mins/flight) were Marseille (3.9 mins/flight), Brest (3.1 mins/flight), Barcelona (2.7 mins/flight), Reims (2.7 mins/flight), and Karlsruhe (2.2 mins/flight).
- August 2026 marked a reversal of the decline in jet fuel prices seen during the spring, as renewed geopolitical tensions and supply pressures pushed European prices higher. The August average of $3.86 per gallon stood 71% above levels seen before the Middle East crisis. On 28 August 2026, jet fuel prices closed at $3.88 per gallon, a slight decrease of 1% over the previous two weeks.

Top 10 busiest States

On week 24-30 Aug 2026

(all flights excl. overflights compared with previous week)



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Traffic situation

Average daily flights (including overflights)

Week 24-30 Aug 2026

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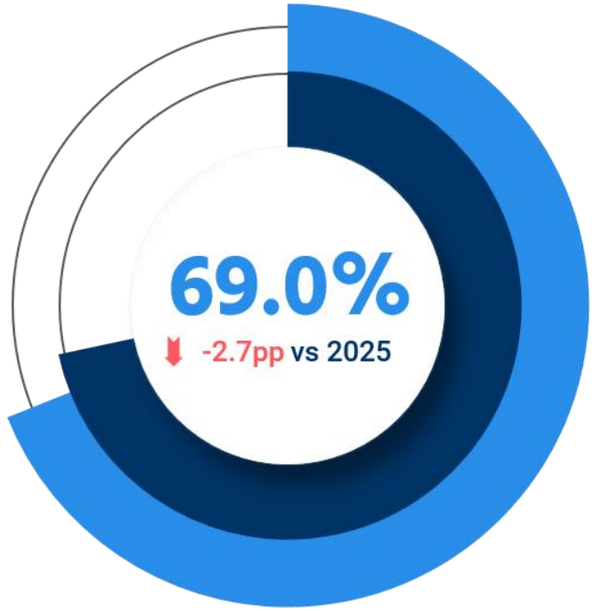
Arrival & departure punctuality

(all network scheduled flights)

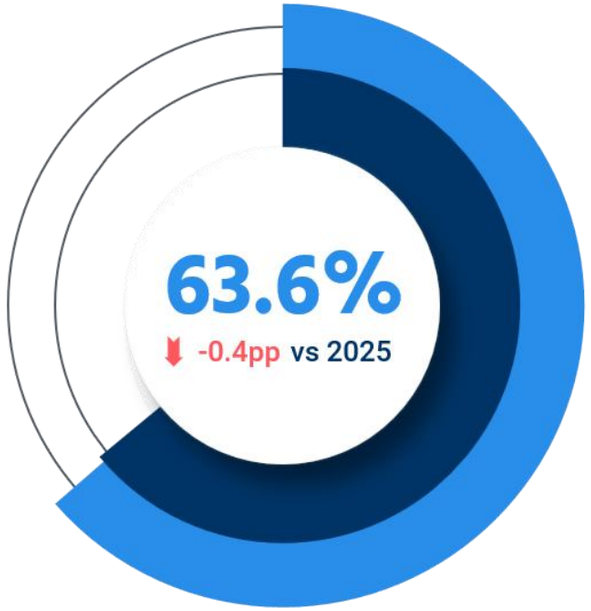
Week 24-30 Aug 2026

ARRIVAL PUNCTUALITY



71.6% _____ in 2025

DEPARTURE PUNCTUALITY



64.0% _____ in 2025

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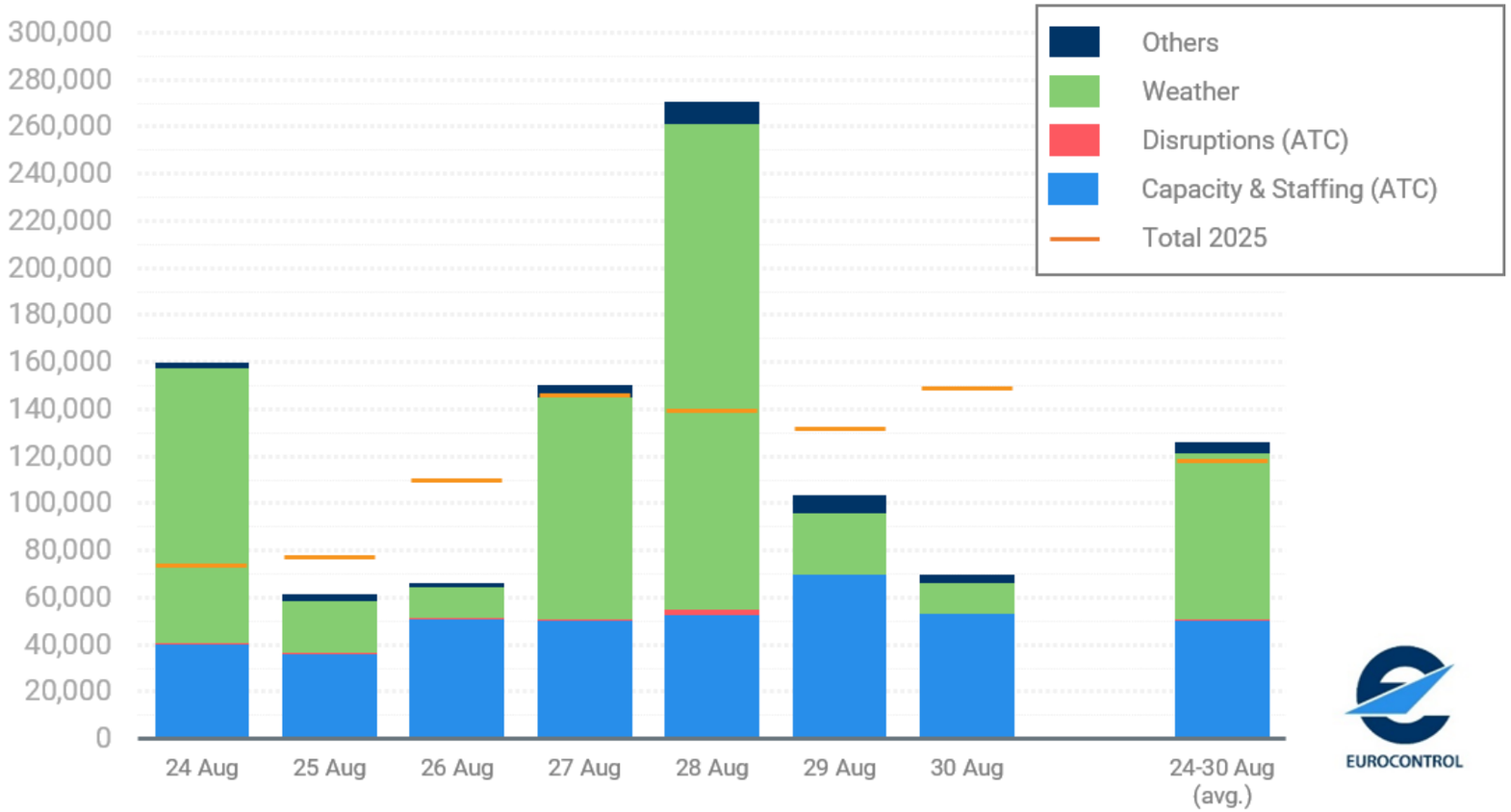
- Both arrival and departure punctuality declined compared to the same week in 2025. Arrival punctuality fell by 2.7pp to 69.0%, while departure punctuality decreased by 0.4pp to 63.6%.
- Tel Aviv continues to experience daily ATC capacity regulations, with the highest delays on Sunday.
- London Gatwick saw a combination of aerodrome capacity, ATC capacity and weather regulations with the highest delays recorded on Thursday due to convective activity (Cumulonimbus) at the airport vicinity.
- Athens was affected by daily ATC capacity regulations with the highest delays recorded on Sunday.
- Palma de Mallorca was affected by a combination of ATC capacity and weather regulations, mainly due to thunderstorms and convective activity (Cumulonimbus) in the vicinity of the airport.
- London Heathrow suffered from daily weather regulations due to convective activity (Cumulonimbus) and thunderstorms.

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

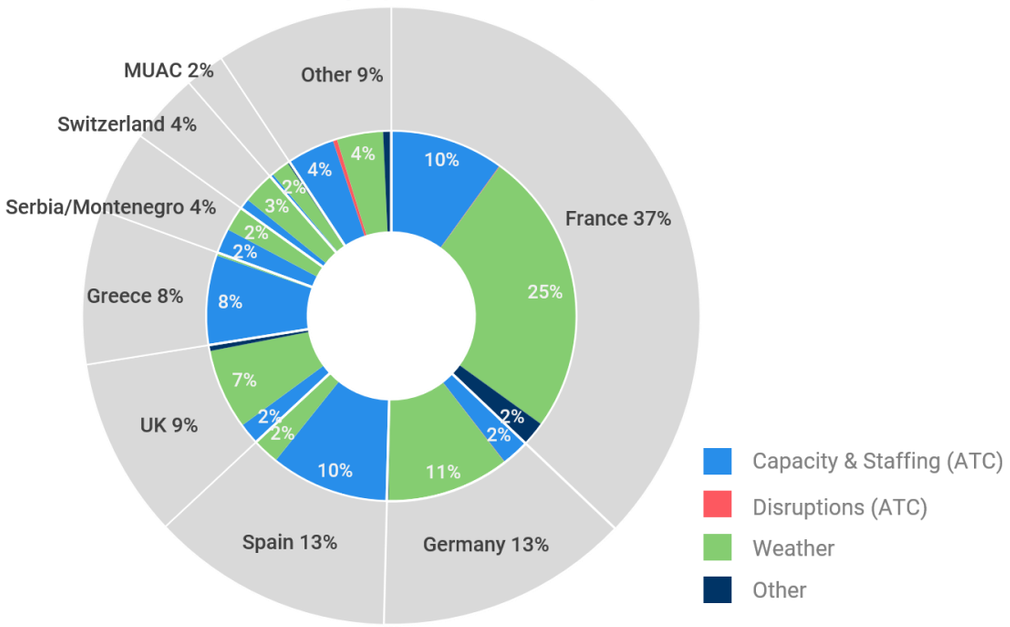


- Week 35 saw a 28% increase in en-route ATFM delays compared to the previous week, averaging 125,958 minutes per day. En-route ATFM delays were 6% higher than during the corresponding operational week in 2025.
- **Weather** accounted for 56% of all en-route ATFM delays, primarily affecting France, Germany and the UK.
- **ATC Capacity & Staffing** accounted for 40% of all en-route ATFM delays, impacting mostly France, Spain and Greece.
- **Other** causes accounted for 4% of all en-route ATFM delays.
- There were 4.2 minutes of total ATFM delay per flight in Week 35, comprising 3.4 mins/flight en-route delay and 0.8 mins/flight airport delay.

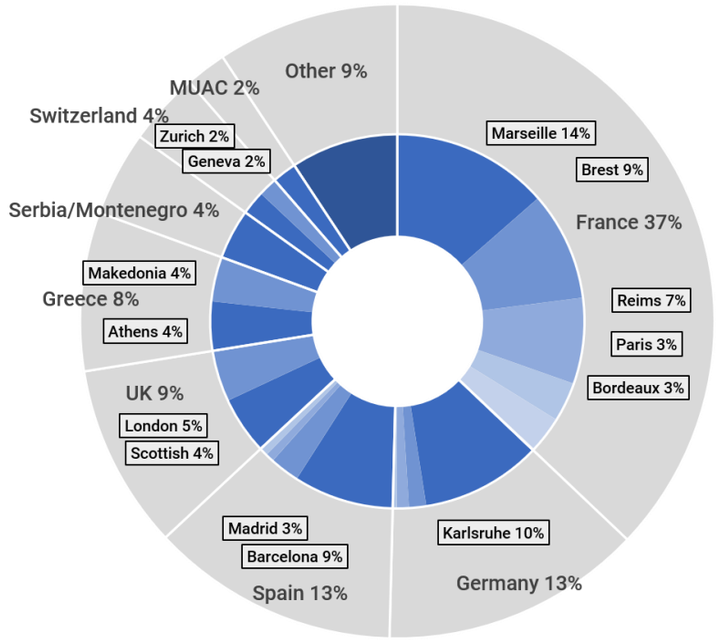
En-route ATFM delays per States per cause & per ACC

Week 24-30 Aug 2026

En-route ATFM delays per cause for top 8 States

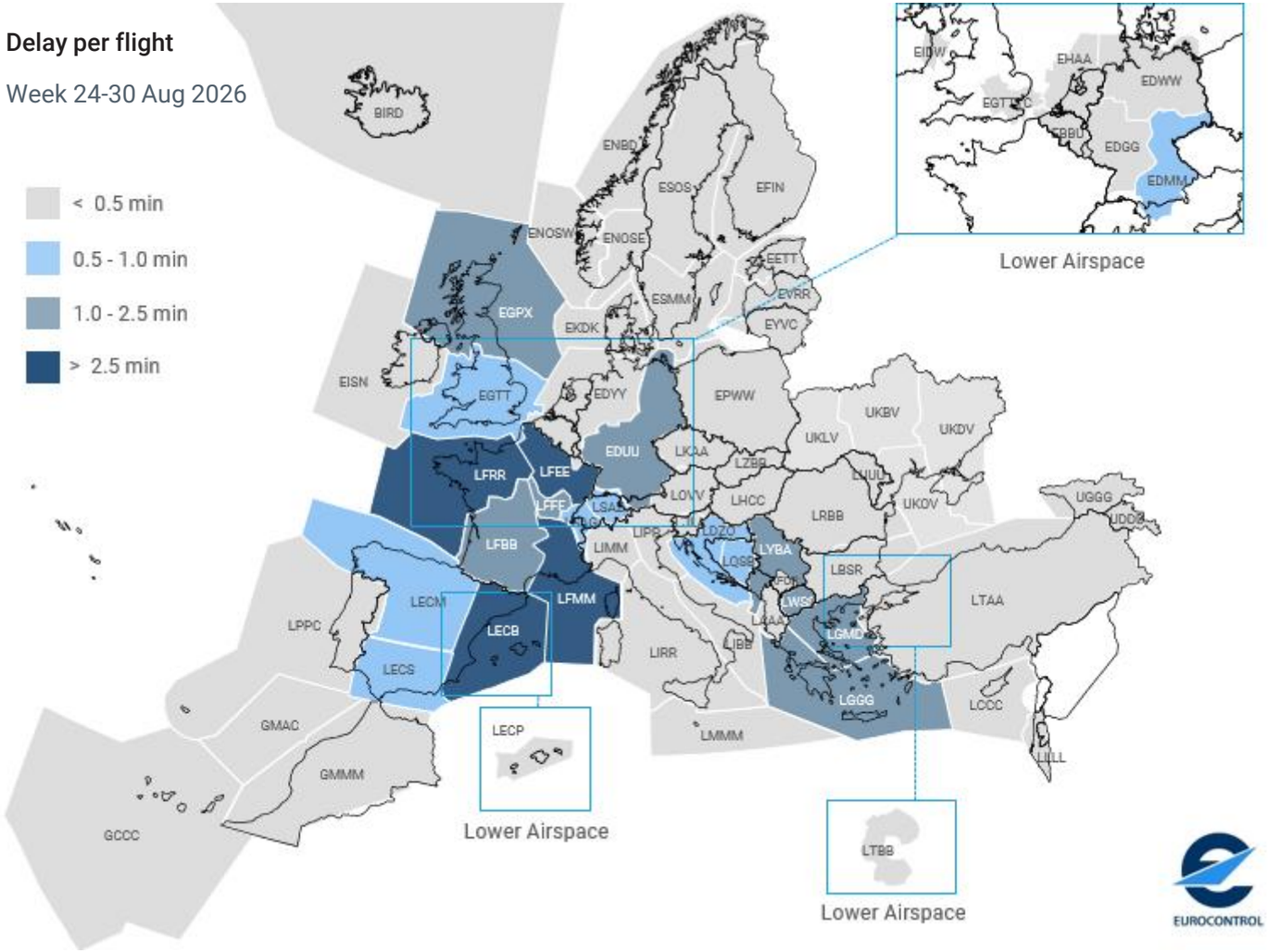


En-route ATFM delays per ACC for top 8 States



- **France** accounted for 37% of all en-route ATFM delays, primarily attributed to Marseille ACC (14%), Brest ACC (9%), and Reims ACC (7%). The primary causes were weather (25%), ATC capacity & staffing (10%) and other causes (2%).
- **Germany** accounted for 13% of all en-route ATFM delays, mainly attributed to Karlsruhe UAC (10%), due to weather (11%) and ATC capacity & staffing (2%).
- **Spain** also accounted for 13% of all en-route ATFM delays, attributed to Barcelona ACC (9%) and Madrid ACC (3%), primarily due to ATC capacity & staffing (10%) and weather (2%).
- **UK** accounted for 9% of all en-route ATFM delays, mainly attributed to weather (7%) and ATC capacity & staffing (2%).
- **Greece** accounted for 8% of all en-route ATFM delays, evenly attributed to Athens ACC (4%) and Makedonia ACC (4%), due to ATC capacity & staffing (8%).

En-route ATFM delayed flights per Area Control Centre



- In Week 35, five ACCs recorded en-route ATFM delays above 2 mins/flight: Marseille (3.9 mins/flight), Brest (3.1 mins/flight), Barcelona (2.7 mins/flight), Reims (2.7 mins/flight) and Karlsruhe UAC (2.2 mins/flight).
- Marseille ACC faced weather delays throughout the week except Saturday, with some staffing and capacity delays every day.
- Brest ACC experienced weather-related delays from Monday to Friday and staffing delays on most days, except Wednesday and Thursday. Additional capacity delays were recorded during the week, while 4-FLIGHT (4F) pre-transition activities resulted in further delays on Friday.
- Barcelona ACC was impacted by ATC capacity delays throughout the week with some weather delays on several days.
- Reims ACC was impacted by weather delays on multiple days during the week with capacity and staffing delays every day.
- Karlsruhe UAC recorded capacity delays every day except Friday with weather delays on multiple days during the week, and some staffing issues on Monday and Sunday.

Busiest 10 States

Departures and arrivals

Week 24-30 Aug 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	6,454	+0%	▲ +1%
2.	Spain	6,352	+0%	▲ +5%
3.	Germany	5,456	+1%	▼ -2%
4.	Italy	5,091	+1%	▲ +6%
5.	France	4,743	+1%	▼ -2%
6.	Türkiye	4,405	+0%	▲ +3%
7.	Greece	2,781	-0%	▲ +5%
8.	Poland	1,750	+0%	▲ +7%
9.	Netherlands	1,707	-2%	▼ -4%
10.	Portugal	1,519	-1%	▲ +1%

See all States

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- The busiest ten States collectively recorded a 0.2% week-on-week increase in departure and arrival flights in Week 35, although only three posted higher traffic than in the previous week.
- **Germany**, **Italy** and **France** each saw traffic increase by 1% week-on-week, with the growth in all three States driven by higher domestic traffic.
- Departure and arrival traffic remained stable in the **UK**, **Spain**, **Türkiye** and **Poland** (+0%), as well as in **Greece** (-0%).
- Two States recorded declines: the **Netherlands** (-2%) driven primarily by fewer flights to/from the UK and Greece; **Portugal** (-1%) owing to reduced flows to/from the UK and Ireland, and weaker domestic traffic.
- Compared to the equivalent week of 2025, seven of the busiest 10 States recorded growth in arrival and departure flights: Poland and Italy posted the strongest increases (+7% and +6% respectively), followed by Spain and Greece (each +5%), Türkiye (+3%), and the UK and Portugal (each +1%). By contrast, traffic declined in the Netherlands (-4%), France and Germany (each -2%).

Busiest 10 aircraft operators

Week 24-30 Aug 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,921	-0%	+6%
2.	Turkish Airlines Group	1,872	-0%	+6%
3.	easyJet Group	1,864	-2%	-0%
4.	Wizz Air Group	1,277	-0%	+24%
5.	Air France Group	1,170	-0%	+0%
6.	Lufthansa Airlines	1,141	+0%	-7%
7.	KLM Group	946	-1%	-1%
8.	British Airways Group	861	-1%	-2%
9.	SAS Group	816	+5%	+3%
10.	Vueling	731	-1%	+2%

See top 40 airlines

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- The busiest 10 aircraft operators collectively recorded a 0.2% decrease in flight numbers in Week 35 compared to the previous week.
- SAS Group was the only airline/airline group to record a week-on-week increase (+5%), mainly driven by higher domestic traffic in Norway and Sweden. Lufthansa Airlines remained stable (+0%), as well as Ryanair, Turkish Airlines, Wizz Air, and Air France (-0%).
- Four airlines/airline groups recorded a week-on-week decrease. easyJet decreased by 2% mainly due to fewer flights on the UK ↔ France, UK ↔ Spain, UK ↔ Netherlands, UK ↔ Portugal flows, and domestic flights within the UK. KLM, British Airways, and Vueling each recorded a 1% decrease. KLM's decline was due to fewer flights on the Netherlands ↔ Greece, Netherlands ↔ UK, and Netherlands ↔ Portugal flows; British Airways was affected by lower domestic traffic within the UK, and fewer flights between UK ↔ France and UK ↔ Spain; and Vueling recorded fewer domestic flights within Spain, together with reductions on France ↔ Spain and Italy ↔ Spain flows.
- Five airlines/airline groups recorded higher flight volumes than in the equivalent week of 2025. Wizz Air led the growth (+24%), continuing to significantly outpace every other carrier. Ryanair and Turkish Airlines followed, both up 6%, while SAS increased by 3%, and Vueling by 2%. Air France remained stable (+0%). Conversely, Lufthansa decreased by 7% (impacted by the closure of Lufthansa's subsidiary CityLine on 18 April 2026). British Airways was down by 2% and KLM by 1%, while easyJet remained stable (-0%).

Europe’s 6 largest airline groups

Week 24-30 Aug 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,921	-0%	+6%
2.	Lufthansa Group	3,008	-0%	-6%
3.	IAG Group	2,490	-1%	+0%
4.	Air France-KLM Group	2,116	-0%	-0%
5.	Turkish Airlines Group	1,872	-0%	+6%
6.	easyJet Group	1,864	-2%	-0%

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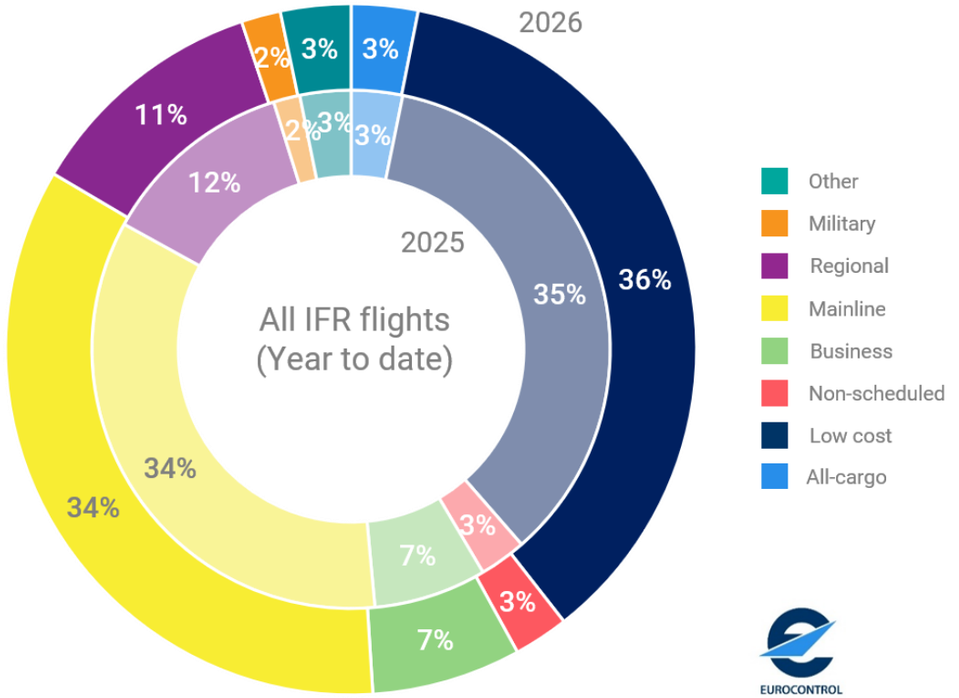
- The six largest European airline groups, aggregating the constituent members of Lufthansa, IAG and AFR-KLM Groups to join Ryanair, easyJet and Turkish Airlines Groups from the previous slide, collectively recorded a slight week-on-week decrease in flights (-0.5%).
- None of the six largest airline groups recorded week-on-week growth in Week 35. **easyJet** posted the largest decrease (-2%), followed by **IAG** (-1%). **Ryanair, Lufthansa**, **Air France-KLM**, and **Turkish Airlines** remained broadly stable (-0%).
- Compared to the same week in 2025, two airline groups recorded higher flight volumes: Ryanair and Turkish Airlines, each up by 6%. IAG remained stable (+0%). Lufthansa saw a 6% decrease, partly reflecting the closure of its regional subsidiary, CityLine. Air France-KLM and easyJet 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	13,789	-0%	▲ +6%
2.	Mainline	12,610	-0%	▲ +3%
3.	Regional	3,871	+2%	▼ -6%
4.	Business	2,529	+4%	▼ -2%
5.	Non-Scheduled	1,225	+2%	▼ -11%
6.	Other	1,070	+3%	▲ +7%
7.	All-cargo	957	+2%	▼ -1%
8.	Military	540	-1%	▲ +6%

- Year-to-date, Low-cost remained the largest market segment and the only segment to gain market share, rising by 1 percentage point (pp) from 35% to 36%. Mainline maintained its 34% share, while Regional declined by 1%, from 12% to 11%. Business aviation (7%), Non-scheduled (3%) and All-cargo (3%), all remained unchanged.
- Over the past week, among the passenger airline segments, Low-cost and Mainline remained unchanged (-0%). The Regional segment increased by 2%, driven mainly by the SAS Group. Non-scheduled traffic also rose by 2%, supported by increased charter flights between Croatia ↔ Spain, UK ↔ Spain, as well as higher domestic traffic within Spain. Business aviation and All-cargo were up 4% and 2% respectively.
- Compared to 2025, growth was concentrated in the Low-cost (+6%) and Mainline (+3%) segments, while Non-scheduled recorded the sharpest decline (-11%), partly driven by a significant reduction in charter traffic in Germany ↔ Greece, Türkiye ↔ Türkiye, France ↔ Algeria, and Moldova ↔ Türkiye. Regional was down by 6%, mostly due to lower domestic traffic in Germany, Germany ↔ Poland, and Germany ↔ France. Business aviation and All-cargo were down by 2% and 1% respectively.

Busiest 10 airports

Week 24-30 Aug 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,689	+1%	+3%
2.	Paris Charles de Gaulle	1,437	+0%	-1%
3.	Amsterdam	1,419	-2%	-3%
4.	London Heathrow	1,329	-1%	-2%
5.	Frankfurt	1,320	+0%	-5%
6.	Madrid Barajas	1,288	+1%	+6%
7.	Barcelona	1,106	-1%	+3%
8.	Rome Fiumicino	1,033	-1%	+4%
9.	Antalya	1,032	-0%	-3%
10.	Palma de Mallorca	1,018	-1%	+2%

See top 40 airports

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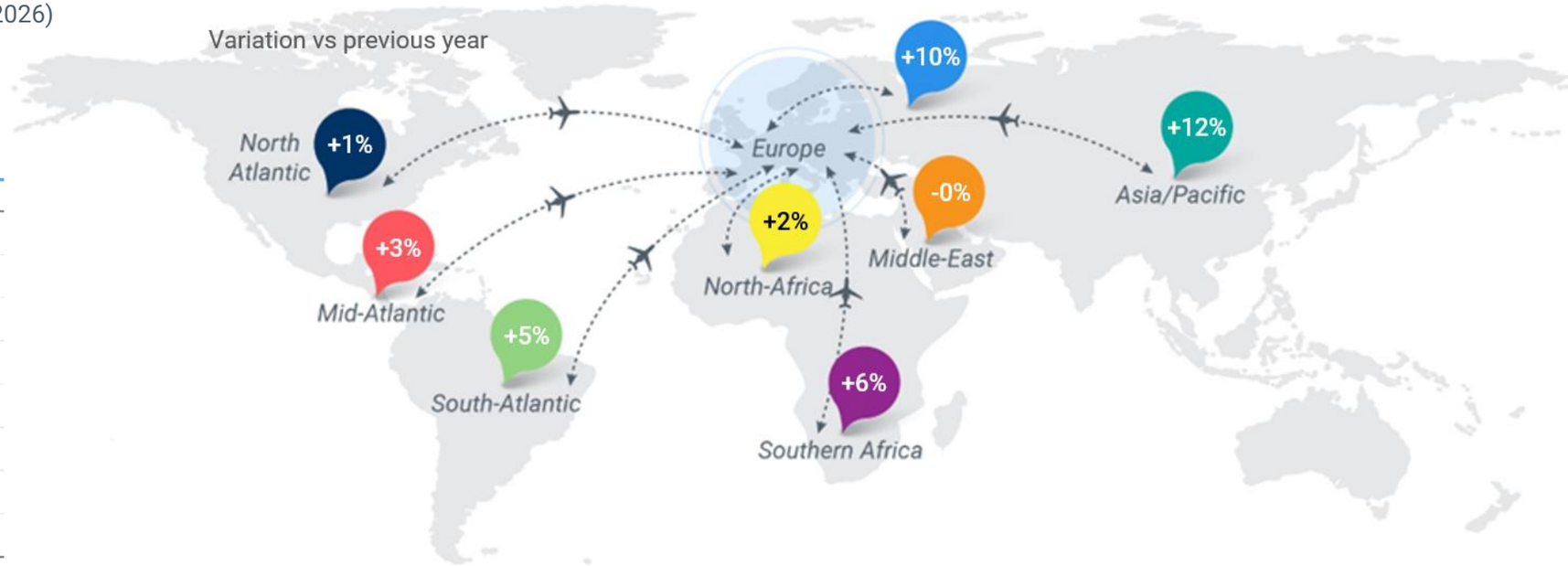
- The busiest 10 airports together recorded stable flight volumes in Week 35, down by just 0.1% compared to Week 34.
- Only two airports posted week-on-week growth in flight volumes, both up 1%. **Istanbul**'s increase was supported by higher domestic traffic within Türkiye, as well as increased flows between Türkiye ↔ Iran and, to a lesser extent Türkiye ↔ Russia. **Madrid Barajas**' growth was driven by increased traffic between Spain ↔ UK, notably from business aviation operators such as Netjets Europe and Gestair Executive Jets, and between Spain ↔ Switzerland, mainly from the Swiss Group. **Paris CDG** and **Frankfurt** remained unchanged (+0%).
- Five airports saw week-on-week declines in flight volumes. **Amsterdam** posted the largest decrease (-2%), driven by fewer flights on the Netherlands ↔ UK, Netherlands ↔ Spain, and Netherlands ↔ Greece flows from KLM Group and easyJet Group. Four airports recorded decreases of 1%: **London Heathrow** owing to lower domestic traffic within the UK from British Airways Group; **Barcelona** due to fewer flights within Spain and reduced traffic on Spain ↔ Italy flow; **Rome Fiumicino**, due to fewer flights on the Italy ↔ France flow; and **Palma de Mallorca** due to reduced traffic on Spain ↔ Italy flow. **Antalya** remained stable (-0%).
- Compared to the equivalent week of 2025, five of the 10 busiest airports handled more flights. Madrid Barajas recorded the strongest growth (+6%), followed by Rome Fiumicino (+4%), Barcelona and Istanbul (each +3%), and Palma de Mallorca (+2%). On the downside, Frankfurt recorded the largest decline (-5%), partly reflecting the closure of Lufthansa's subsidiary CityLine. Amsterdam and Antalya (each -3%), London Heathrow (-2%), and Paris CDG (-1%) also handled fewer flights.

Traffic flows

(average daily departure/arrival flights for week 24-30 Aug 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	**27,968**	↑ +1%	↑ +2%
Europe ↔ Middle-East	1,758	↑ +2%	↓ -0%
Europe ↔ North Atlantic	1,724	↓ -0%	↑ +1%
Europe ↔ North-Africa	1,667	↑ +0%	↑ +2%
Europe ↔ Asia/Pacific	1,148	↑ +0%	↑ +12%
Europe ↔ Other Europe	595	↑ +1%	↑ +10%
Europe ↔ Southern Africa	349	↑ +1%	↑ +6%
Europe ↔ South-Atlantic	225	↓ -1%	↑ +5%
Europe ↔ Mid-Atlantic	177	↑ +1%	↑ +3%
Non Intra-Europe	**7,642**	↑ +0%	↑ +3%



- Intra-European traffic saw 27,968 daily flights on average during Week 35, slightly higher (+1%) compared to the previous week. Intercontinental flows amounted to 7,642 daily flights on average, remaining stable (+0%) vs the previous week. The largest intercontinental flow was between Europe and the Middle East.
- Week-on-week, the Europe ↔ Middle East flow recorded the strongest growth (+2%), driven mainly by increased traffic between Türkiye ↔ Iran, Türkiye ↔ United Arab Emirates, and Greece ↔ Israel flows. As a result, it surpassed the Europe ↔ North Atlantic for the first time since the onset of the Middle East crisis in early March 2026. Europe ↔ Other Europe, Europe ↔ Southern Africa, and Europe ↔ Mid-Atlantic each increased by 1%, while Europe ↔ North Africa and Europe ↔ Asia/Pacific flows remained unchanged (+0%).
- Compared to the same week in 2025, all intercontinental flows recorded higher or broadly stable flight volumes. The strongest year-on-year growth was observed on the Europe ↔ Asia/Pacific flow (+12%), followed by Europe ↔ Other Europe (+10%), Europe ↔ Southern Africa (+6%), Europe ↔ South-Atlantic (+5%), Europe ↔ Mid-Atlantic (+3%), Europe ↔ North Africa (+2%) and Europe ↔ North Atlantic (+1%). Europe ↔ Middle East traffic returned to 2025 levels (-0%), led by a faster recovery among Gulf carriers, while most European flag carriers continued to suspend services to the region.

Top 10 long-haul country pairs

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

Week 24-30 Aug 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	318	+0%	-4%
2.	Germany ↔ US	177	+0%	+3%
3.	France ↔ US	146	-0%	-4%
4.	Italy ↔ US	133	-0%	+7%
5.	Spain ↔ US	95	-1%	+5%
6.	Ireland ↔ US	94	+2%	+7%
7.	Netherlands ↔ US	83	-2%	-1%
8.	UAE ↔ UK	64	+4%	+1%
9.	Egypt ↔ Russia	61	+2%	+29%
10.	Canada ↔ UK	55	-2%	-3%

- Seven of the top ten long-haul country pairs in Week 35 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, three of the top 10 long-haul country pairs recorded higher flight volumes: UAE ↔ UK (+4%), Ireland ↔ US, and Egypt ↔ Russia (each +2%). Conversely, Netherlands ↔ US and Canada ↔ UK saw the largest decreases (both -2%), followed by Spain ↔ US (-1%).
- Compared to the same week in 2025, six of the top ten long-haul flows recorded year-on-year growth. The strongest increase was by far between Egypt ↔ Russia (+29%), followed by Italy ↔ US and Ireland ↔ US (both +7%), Spain ↔ US (+5%), Germany ↔ US (+3%), and UAE ↔ UK (+1%).

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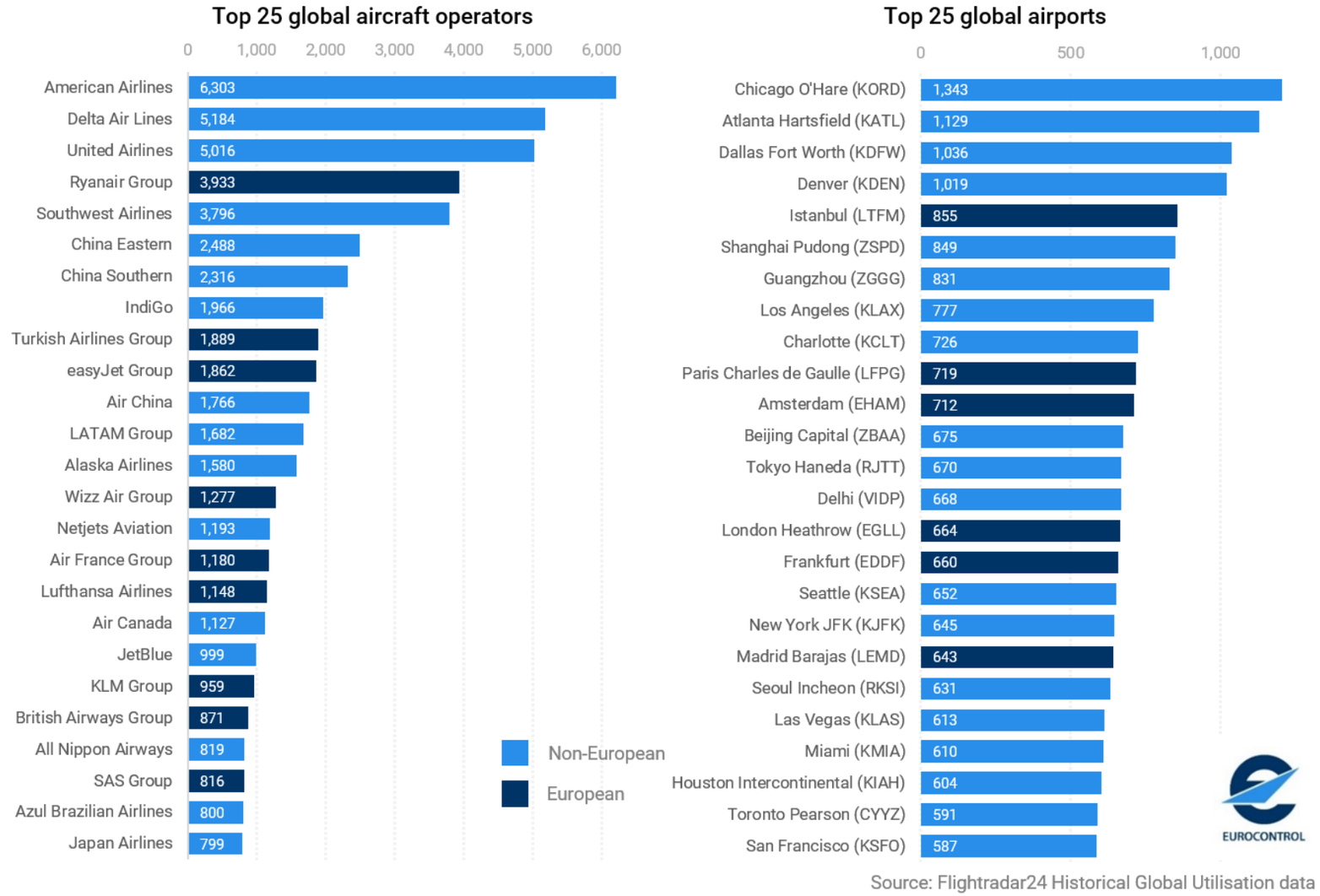
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 24-30 Aug 2026)**



Source: Flightradar24 Historical Global Utilisation data

- **Aircraft operators**: in Week 35, nine European aircraft operators ranked among the top 25 global aircraft operators.
- Three European carriers ranked among the global top 10 in Week 35, all maintaining their position compared to Week 33. Ryanair Group (4th), Turkish Airlines Group (9th), and easyJet Group (10th).
- A further six European carriers made the top 25, starting with Wizz Air Group (14th); Air France Group (16th), Lufthansa Airlines (17th), KLM Group (20th), British Airways Group (21st), and SAS Group, which entered the top 25 in 23rd place.
- **Airports**: six European airports ranked among the global top 25 for departures in Week 35, unchanged from two weeks earlier. Two of these were in the global top 10: Istanbul moved up one position to 5th place from 6th in Week 33, while Paris CDG remained 10th.
- Among the ten busiest airports, six were American, and two were Chinese (Shanghai and Guangzhou).

Jet fuel price (Europe)

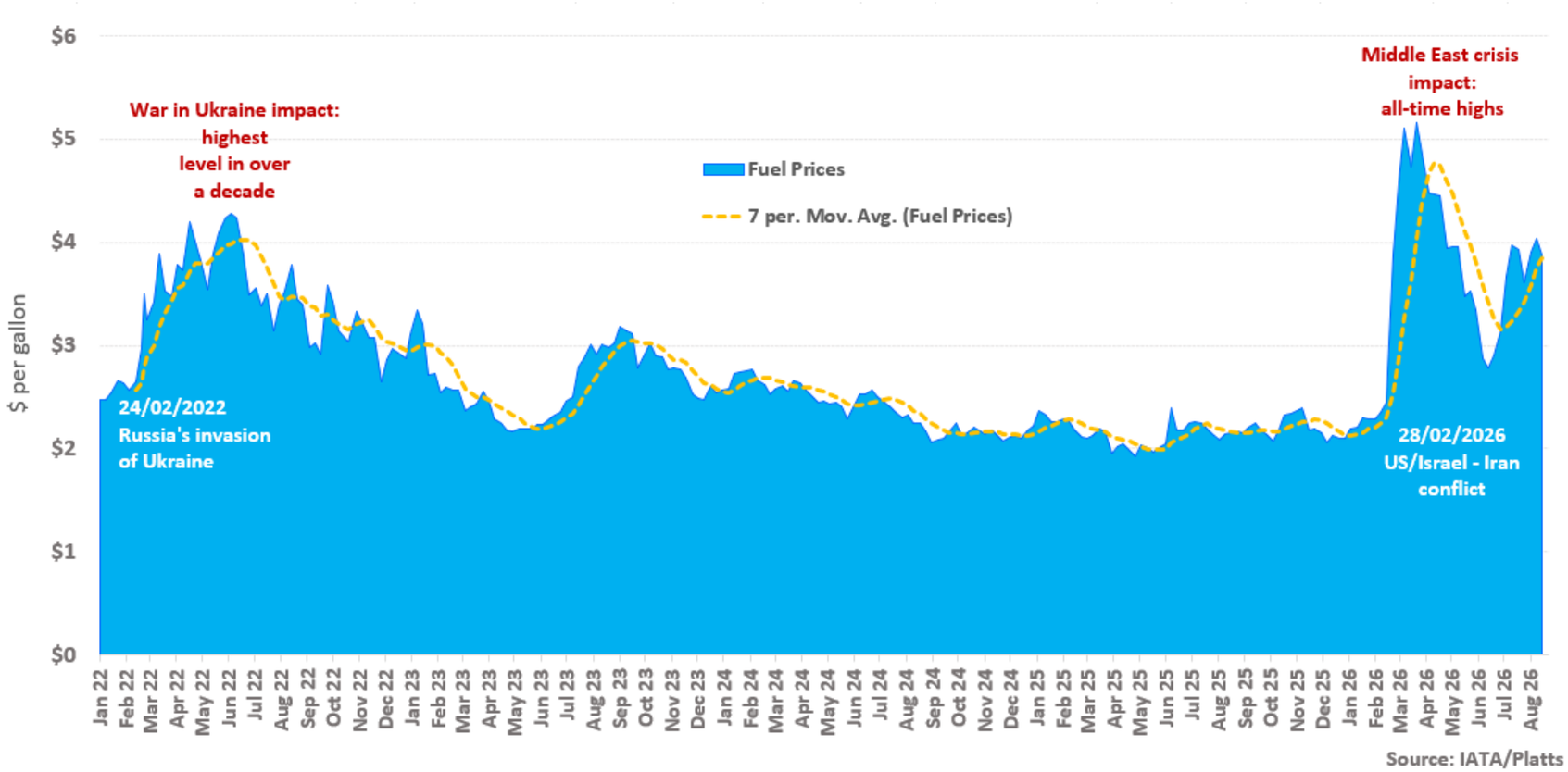
Week 24-30 Aug 2026

28 Aug 2026
avg fuel price:

$3.88 /gallon

-1%
vs. $3.90 /gallon
on 14 Aug 2026

Source: IATA/Platts



Source: IATA/Platts

- August 2026 marked a reversal of the decline in jet fuel prices seen during the spring, as renewed geopolitical tensions and supply pressures pushed European prices higher. The August average of $3.86 per gallon stood 71% above levels seen before the Middle East crisis. On 28 August 2026, jet fuel prices closed at $3.88 per gallon, a slight decrease of 1% 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 during 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 eight-week period. It plays a major role in helping European aviation by providing key actors with the global view they need to plan effectively.

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