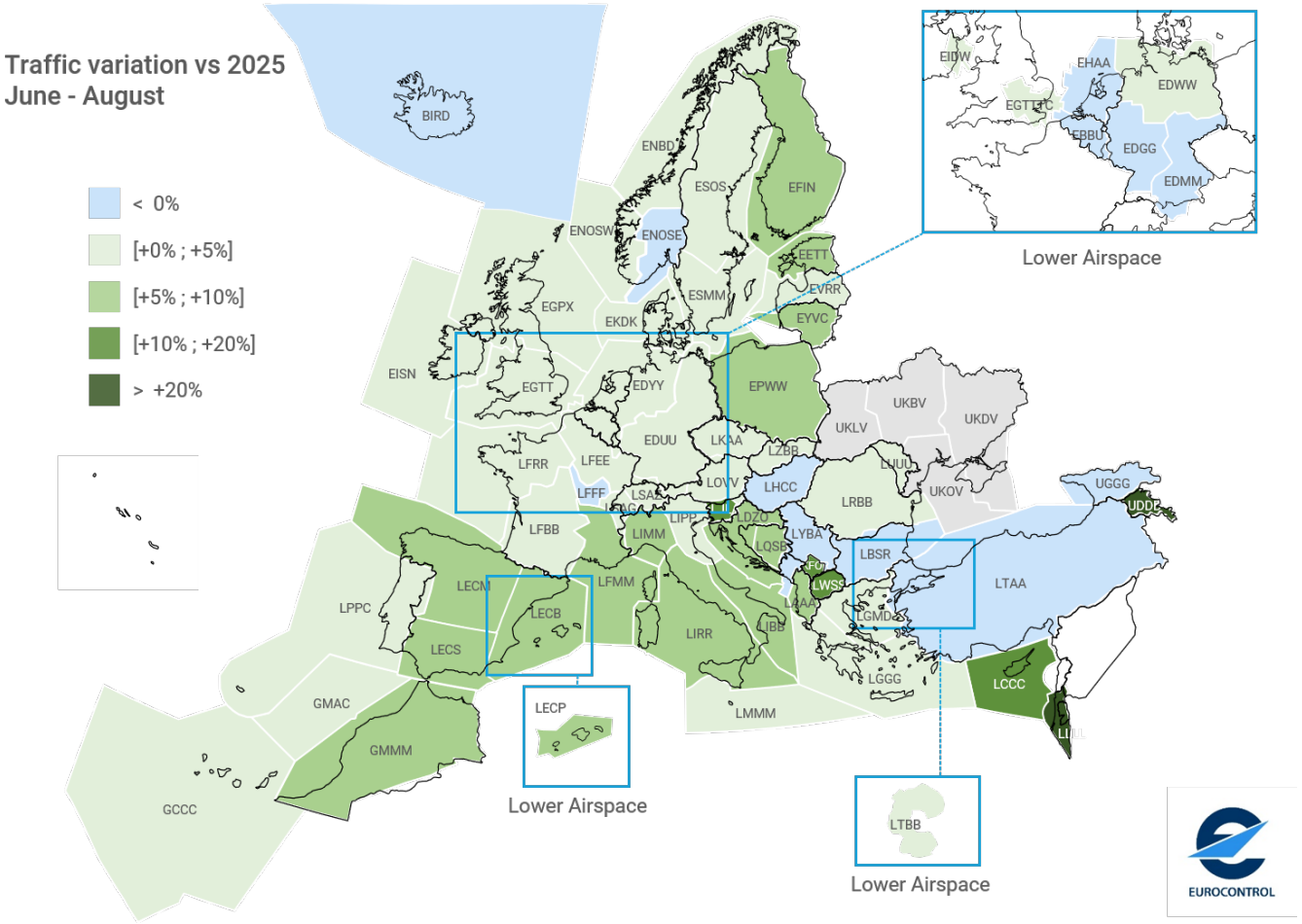
EUROCONTROL Special Flash Briefing

All-Summer (1 June-31 August) Network Performance

11 September 2026

SUMMER 2026 (1 JUNE-31 AUGUST) AT A GLANCE

Traffic	ATFM delays	Arrival punctuality
35,959 daily flights **+2.4%** vs 2025	**3.27** min/flight **-17%** vs 2025 En-route: **2.62**, **-16%** vs 2025 Airport: **0.65**, **-21%** vs 2025	**72.6%** **+1.2p.p.** vs 2025



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SUMMER 2026 NETWORK PERFORMANCE SUMMARY

This EUROCONTROL Special All-Summer #FlashBriefing assesses overall network performance for the busy summer months of June to August 2026.

The standout stories of Summer 2026 were:

- 35,959 average daily flights, a year-on-year traffic growth over the period June-August of 2.4% coupled with a reduction in ATFM delays of 17% (building on Summer 2025, which recorded traffic growth of 3.1%, and 27% fewer ATFM delays)
- a new highest-ever network traffic peak, set on Friday 10 July 2026 with 37,640 flights – and in total 65 other records being set by 14 States, 24 area control centres (ACCs), 16 airports and 11 airline/airline groups (in many case, multiple times over what was an extremely busy summer for all aviation actors)
- improved arrival punctuality of 72.6%, better than in Summer 2025 by 1.2 percentage points
- overall ATFM delays for the summer stood at 3.27 minutes per flight, 17% lower than 2025, with in total 681K flights delayed by air traffic flow management (ATFM) restrictions, an average of 7.4K flights a day and 21% of all flights.
- en-route ATFM delays made up the bulk of that at 2.62 minutes per flight, 16% lower than 2025:
    - 1% of these delays were due to strikes, making Summer 2026 a virtually industrial action-free period, with just one instance of industrial action (by Norway ATC, generating approximately 14,500 minutes of ATFM delay and cancelling around 150 flights)
    - 49%, the highest amount, were caused by ATC capacity and staffing, making up 1.28 of those 2.62 minutes
    - just below that at 43% of delays were attributed to severe convective weather, making up 1.12 minutes (with the remaining 7% down to miscellaneous causes).
- strong weather phenomena were nevertheless to quite some extent mitigated by the application by the EUROCONTROL Network Manager (NM) and all operational actors of the increasingly effective revised capacity and weather-based operations (CWBO) procedures and related scenarios: these have saved approximately 3.1 million minutes of en-route ATFM delays since 1 May (and 2.9 million in the three peak summer months).

Overall, summer performance proved better than expected from an operational point of view, which demonstrates the clear operational benefits of improved planning, coordination and consistent network procedures being applied across European airspace by NM and operational actors, and further amplified by support from national governments and authorities.

Among the busiest 20 airlines/airline groups, arrival punctuality ranged from 86% (SAS, followed by Turkish Airlines at 85%) down to Aegean at 60% (with ITA Airways just above that at 62%). In terms of being impacted by ATFM delays, Aegean, SWISS and KLM were particularly affected by constraints at their main hubs of Athens, Zurich and Amsterdam, respectively. For most airlines, however, the principal source of delay was regulations within ACCs.

Marseille, Barcelona and Belgrade ACCs were the top penalising location for three airlines each, while the three most penalising locations for the busiest carriers were Marseille ACC (appearing nine times), followed by Reims ACC (eight) and Karlsruhe UAC (seven).

Among the busiest 30 airports, departure punctuality had an even wider spread than arrival punctuality for airlines, ranging from a high of 82% (Stockholm Arlanda, narrowly ahead of Oslo and Istanbul, both at 81%) down to a low of 52% (Lisbon, despite improving by 9 percentage points compared with 2025). Four other

airports recorded punctuality of 55% or below: Zurich and Palma de Mallorca, both at 53%; Athens at 54%; and Manchester at 55%.

Overall, 23 of the 30 busiest airports improved their punctuality year on year. Istanbul's Sabiha Gökçen recorded the largest increase, rising by 12 percentage points despite a 7% increase in traffic. Lisbon and Antalya each improved by 9 percentage points, while Manchester registered the steepest decline, falling by 5 percentage points.

Turning to ACCs, delays remained globally above the capacity target levels, but with considerable regional variance, and with again a year-on-year improvement. NM considers that of the network's 68 ACCs, 45 are currently on track to achieve the European capacity target by year-end, with a further 10 on track but continuing to be impacted by adverse weather and/or the ongoing Middle East crisis, leaving 13 that look set to fail to achieve the target.

This once more underlines the ongoing structural lack of capacity (largely driven by a lack of air traffic controllers (ATCOs) in some air navigation service providers (ANSPs), and the need to improve airspace design and accelerate technological modernisation. These delays continue to impact negatively passengers and airlines, and all actors thus still have plenty to do to tackle system congestion for Summer 2027 and future years, in order to meet network capacity needs as traffic continues to grow.

NM, in partnership with all operational stakeholders, has now started analysing the lessons learnt during Summer 2026, and is now moving towards preparing for Summer 2027 traffic with these findings in mind, with particular focus on maintaining strong network planning and commitment, network stability and predictability.

Key areas to focus on will be:

- significant enhancements of strategic network measures and procedures, addressing both weather and capacity management
- early preparation and full commitment to the implementation of the Network Operations Plan
- preparation of optimal sector opening schemes and related staff availability
- improved rostering and continuous ATCO recruitment
- airspace modernisation, including implementation of sectorisation changes to better manage demand
- acceleration of ATM system modernisation and digitalisation, including increased utilisation of datalink and further capacity increases based on this
- tangible sector capacity increases, benefitting from all the above.

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Category	Key figures	Situation Overview
Traffic	35,959 daily flights +2.4% vs 2025	• Traffic distribution was influenced throughout Summer 2026 by the Middle East crisis. This translated into lower traffic in Bulgaria, Hungary, Romania and Türkiye, but a high increase in traffic in Albania, Croatia, Cyprus, Greece, Montenegro, North Macedonia, Serbia and Slovenia – and continuous growth in south-west Europe. • ATFM delay constraints were over the summer most frequently experienced at Marseille, Athens, Barcelona ACCs due to capacity/staffing issues. • The application of capacity and weather-based operations (CWBO) procedures and related scenarios continued in response to strong weather phenomena. Approximately 3.1 million minutes of en-route ATFM delays have now been saved to date through the application of these updated procedures (2.9 million of which 1 June-31 August).
ATFM delays	3.27 minutes per flight: • 17% lower than 2025. A total of 680,987 flights were delayed by ATFM restrictions, an average of 7,402. flights a day and 21% of all flights • en-route ATFM delays were 2.62 minutes per flight • airport ATFM delays were 0.65 minutes per flight.	
Arrival punctuality	72.6%, better than last year by 1.2 percentage points.	
Departure punctuality	66.3%, better than last year by 2.4 percentage points.	

Network hot spots

- France (32% of all en-route delays in the network year to date (YTD), of which 11% attributed to Marseille, 8% to Reims and 6% to Brest area control centres (ACCs)): affected by ongoing capacity, staffing and 4-FLIGHT transition issues. This has been compounded by increasing weather delays; despite this, average en-route delays are 29% lower for 2026 YTD compared to 2025 YTD.
- Spain (17% of all en-route delays in the network YTD, of which 11% attributed to Barcelona ACC): affected mostly by capacity, staffing issues and high traffic growth; average en-route delays are 14% higher for 2026 YTD compared to 2025 YTD.
- Greece (12% of all en-route delays in the network YTD, of which 7% attributed to Athens ACC): affected mostly by capacity and staffing issues, with additional complexity due to traffic demand related to the Middle East crisis; average en-route delays are 57% higher for 2026 YTD compared to 2025 YTD.

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Network Operations Plan (NOP) delivery

- With 1.5% YTD traffic growth, average en-route ATFM delay for 2026 YTD is 17% better than 2025 YTD, with good delivery by the vast majority of ANSPs, and with the perspective of being 20% better by the end of the year compared to all of 2025 (and for Summer 2026 only, stood at 16% lower).
- The main issues related to delivery against the NOP over Summer 2026 concerned just two ACCs, Prestwick and Athens.
- Despite some persistent hotspots, overall improvements have been seen to delays compared to 2025 in Austria, Croatia, France, Germany and Hungary when compared to the NOP.
- Overall, out of the 68 ACCs included in the NOP, over Summer 2026:
  - 59 delivered in full accordance with the NOP in virtually all weeks
  - 7 delivered in accordance with the NOP, but were frequently impacted by adverse convective weather and/or the Middle East crisis
  - 2 frequently fell short of delivering in accordance with the NOP.
- Concerning the achievement of the European-wide capacity target, as of Summer 2026, out of the 68 ACCs included in the network:
  - 45 are currently on track to achieve the European-wide capacity target
  - 10 are on track, but are being impacted by bad weather and/or the Middle East crisis
  - 13 look set to fail to achieve the target.
- Summer 2026 saw a large number of new traffic records set (and in many cases, set repeatedly):
  - a new all-time traffic record for the NM area on Friday 10 July 2026 of 37,640 flights (and with 128,603 mins of delay)
  - 14 States recorded their highest-ever daily traffic in terms of arrivals/departures (Albania, Armenia, Georgia, Greece, Ireland, Italy, Moldova, North Macedonia, Montenegro, Portugal, Serbia, Slovakia, Spain and Türkiye)
  - 24 ACCs managed record daily traffic levels (Athens, Barcelona, Belgrade, Bordeaux, Brest, Dublin, Geneva, Istanbul, Ljubljana, London, Madrid, Marseille, Nicosia, Padova, Palma, Prague, Bosnia-Herzegovina, Roma, Skopje, Tirana, Vienna, Yerevan, Zagreb and Zurich ACCs)
  - 16 airports: Alicante, Athens, Barcelona, Belgrade, Bucharest-Henri Coanda, Casablanca, Chisinau, Dublin, Istanbul Airport, Istanbul-Sabiha Gökçen, Malaga, Nice, Podgorica, Tbilisi, Tirana and Yerevan
  - 11 airline/airline groups: Aegean, Air Serbia, easyJet, Jet2.com, Pegasus, Royal Air Maroc, Ryanair, Sky Express, SunExpress, Turkish Airlines and Wizzair.
- **Weather**
  - CWBO procedures and related scenarios have been applied since the beginning of May 2026 to manage strong weather phenomena across the network. Approximately 3.1 million minutes of en-route ATFM delays have now been saved as of 31 August, with the updated procedures applied now in total to approximately 10,100 flights – with 2.9 million to 9,000 flights in the period 1 June-31 August.
- **Industrial action/Other**
  - No major issues were recorded during Summer 2026, except industrial action by Norway ATC (which generated approximately 14,500 minutes of ATFM delay and saw approximately 150 flights cancelled).

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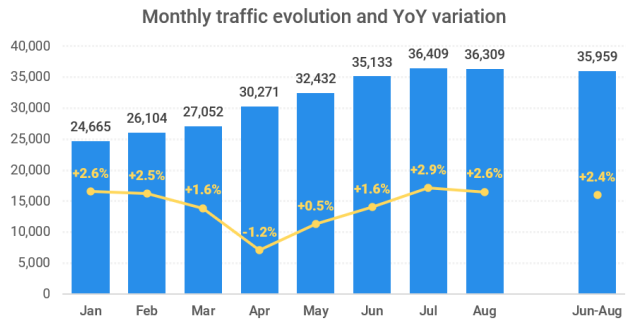
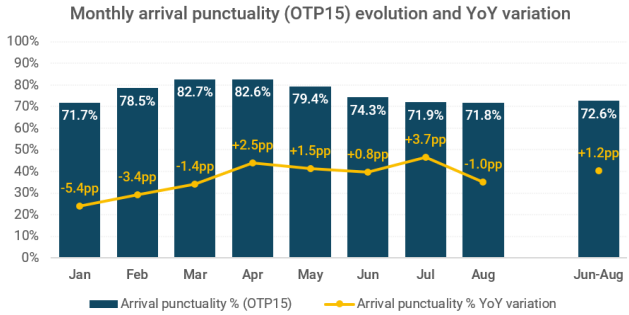
ROLLING OVERVIEW

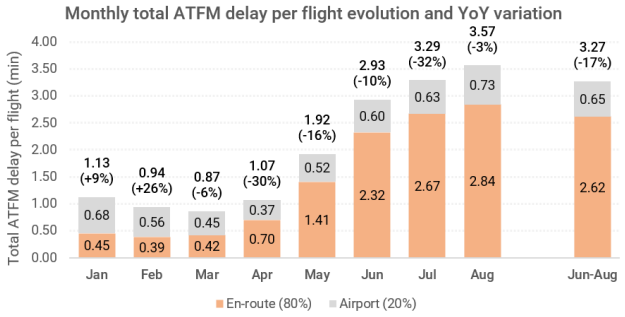
Traffic



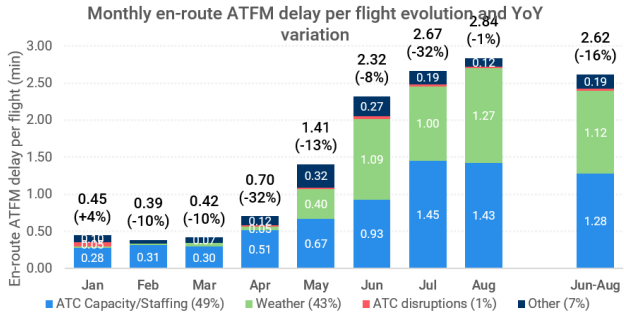
Punctuality (On Time Performance 15')



Total ATFM delay



En-route ATFM delay



AIRCRAFT OPERATORS: **Arrival punctuality** and the three most penalising ATFM locations for the 20 busiest aircraft operators*.

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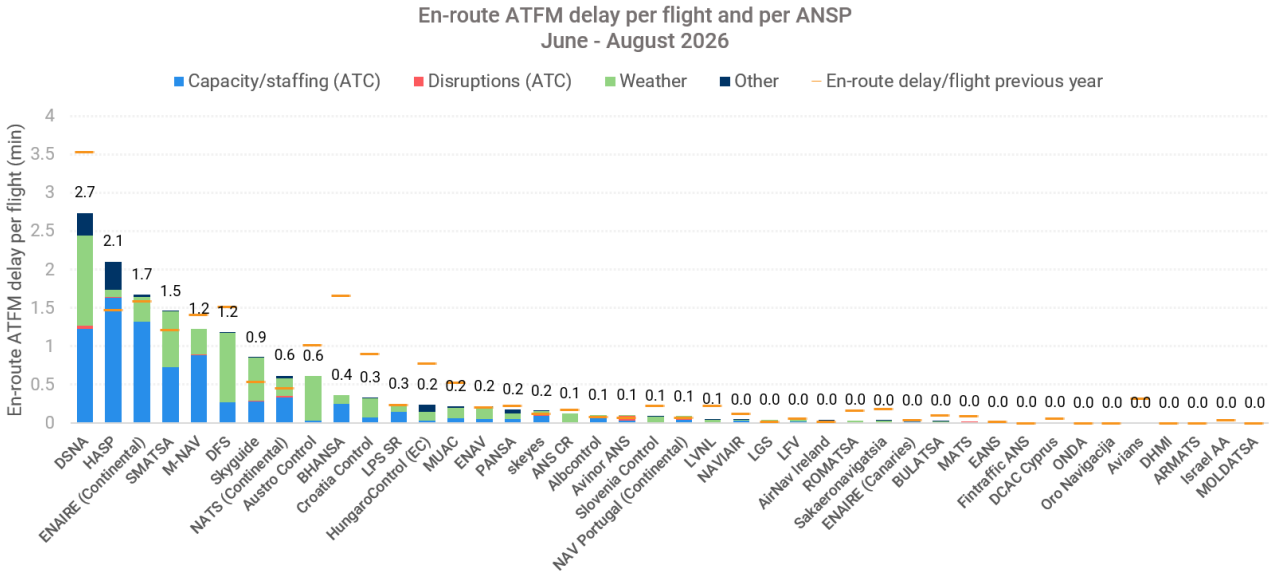
Rotation: All **Period: June - August 2026**

Aircraft operator	Arrival punct (OTP15)	ATFM delay / flight (min)	Most penalising location (ATFM)	2nd most penalising location (ATFM)	3rd most penalising location (ATFM)
SAS Group	86%	1.76	Copenhagen Airport - 11%	Karlsruhe UAC - 10%	Athens ACC - 9%
Turkish Airlines Group	85%	1.02	Belgrade ACC - 19%	Karlsruhe UAC - 12%	Makedonia ACC - 11%
Vueling	81%	3.54	Barcelona ACC - 27%	Barcelona Airport - 14%	Marseille ACC - 14%
Iberia Group	81%	3.17	Barcelona ACC - 22%	Madrid ACC - 18%	Marseille ACC - 14%
Austrian Airlines	80%	3.23	Vienna Airport - 14%	Vienna ACC - 12%	Belgrade ACC - 10%
Norwegian Group	80%	2.39	Karlsruhe UAC - 12%	Reims ACC - 9%	Brest ACC - 8%
Pegasus	78%	1.27	Belgrade ACC - 19%	Karlsruhe UAC - 14%	Makedonia ACC - 7%
Lufthansa Airlines	78%	2.75	Munich ACC - 14%	Karlsruhe UAC - 12%	Langen ACC - 7%
KLM Group	76%	3.26	Amsterdam Airport - 25%	Reims ACC - 12%	Karlsruhe UAC - 10%
British Airways Group	75%	4.17	Reims ACC - 15%	Heathrow Airport - 11%	Brest ACC - 10%
Air France Group	74%	3.64	Marseille ACC - 14%	Paris ACC - 14%	Bordeaux ACC - 10%
Wizz Air Group	72%	3.55	Belgrade ACC - 17%	Marseille ACC - 13%	Barcelona ACC - 9%
Ryanair Group	71%	4.07	Barcelona ACC - 14%	Marseille ACC - 13%	Brest ACC - 8%
TAP Group	68%	4.70	Brest ACC - 15%	Madrid ACC - 14%	Lisbon Airport - 14%
TUI Group	68%	5.90	Reims ACC - 11%	Athens ACC - 10%	Brest ACC - 9%
Eurowings Group	67%	5.23	Karlsruhe UAC - 15%	Marseille ACC - 13%	Reims ACC - 9%
SWISS Group	67%	4.82	Zurich Airport - 37%	Reims ACC - 9%	Marseille ACC - 8%
easyJet Group	65%	5.92	Marseille ACC - 16%	Reims ACC - 11%	Brest ACC - 8%
ITA Airways	62%	1.86	Marseille ACC - 16%	Barcelona ACC - 8%	Reims ACC - 7%
AEGEAN Group	60%	4.06	Athens Airport - 33%	Athens ACC - 16%	Makedonia ACC - 14%

** Aircraft operator groups in the table above are defined @ https://www.eurocontrol.int/directory/airline-groups-lookup*

AIR NAVIGATION SERVICE PROVIDERS (ANSPs):

En-route ATFM delay per flight and per ANSP



ANSPs: En-route ATFM delay per flight and per ACC

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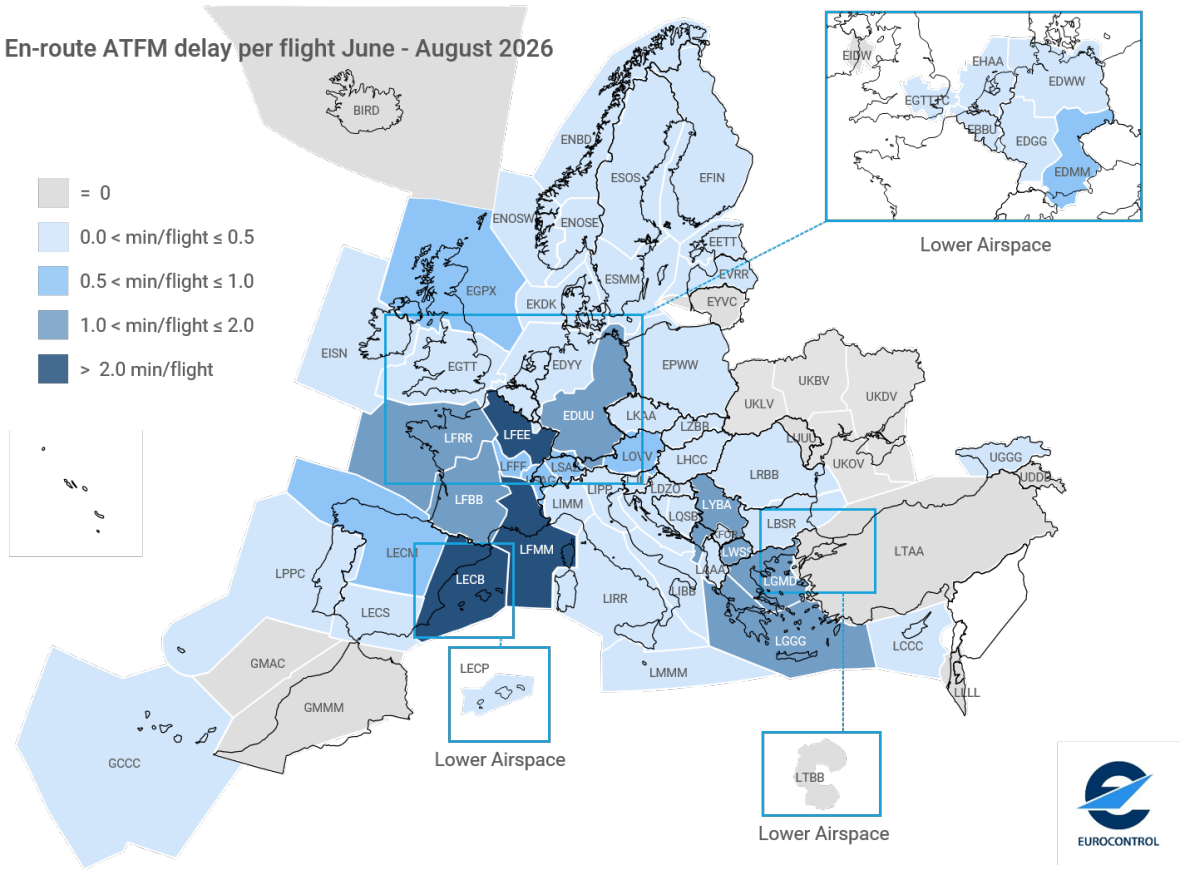
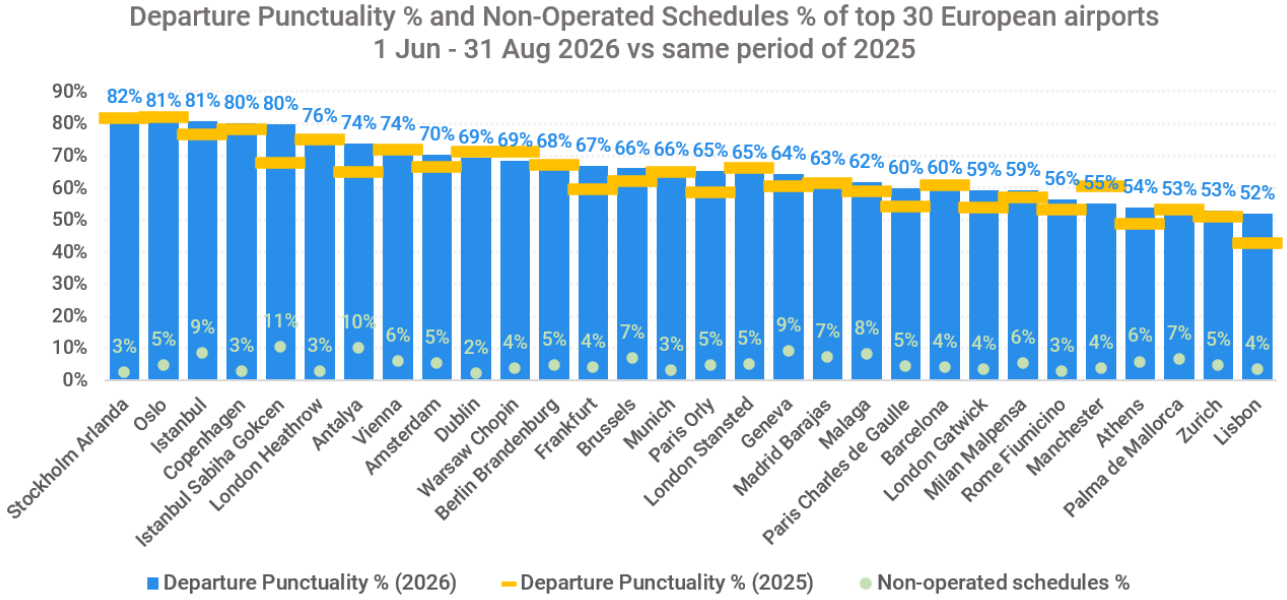


AIRPORTS:

Departure punctuality for the top 30 busiest airports in the network.



** Non-operated schedules defined @ https://ansperformance.eu/definition/opschedules/*

CONSORTIUM COORDINATOR sesar DEPLOYMENT MANAGER
FOUNDING MEMBER sesar JOINT UNDERTAKING
NETWORK MANAGER

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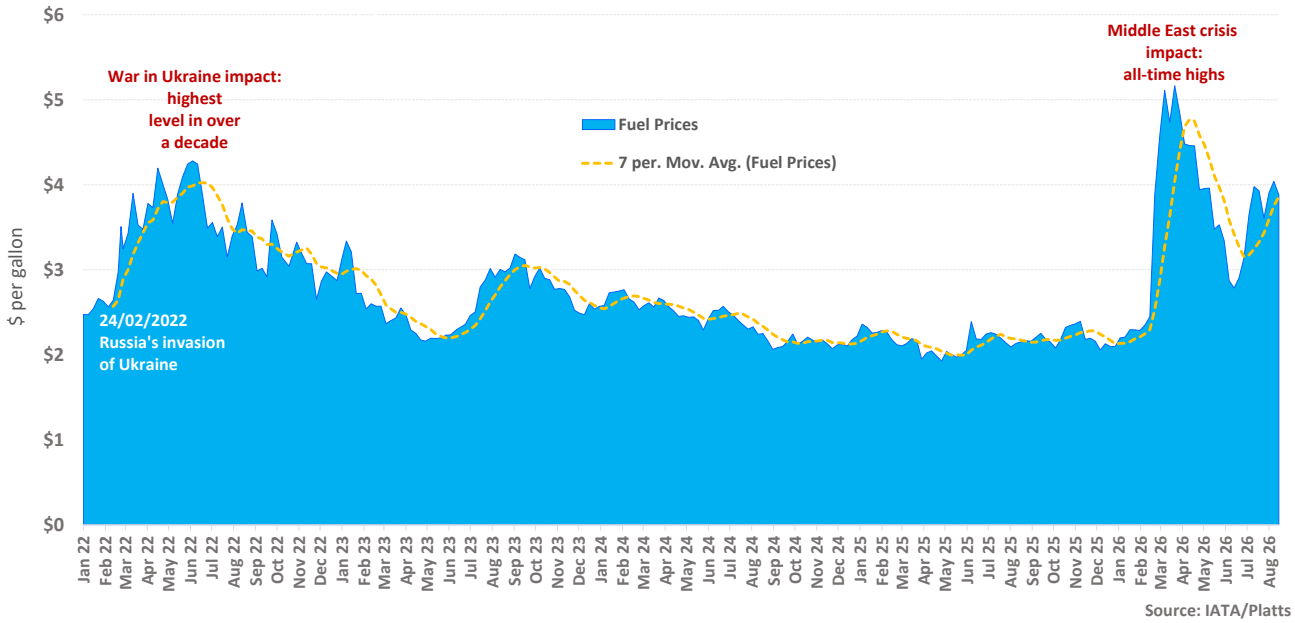
IMPACT OF THE MIDDLE EAST CRISIS



Source: IATA/Platts

Fuel price	**June - August 2026 (average)**	**$3.51 /gallon +61% vs June - August 2025**