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EUROPEAN AVIATION OVERVIEW

21-27 Sep 2026

SUPPORTING EUROPEAN AVIATION

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1 October 2026

Headlines

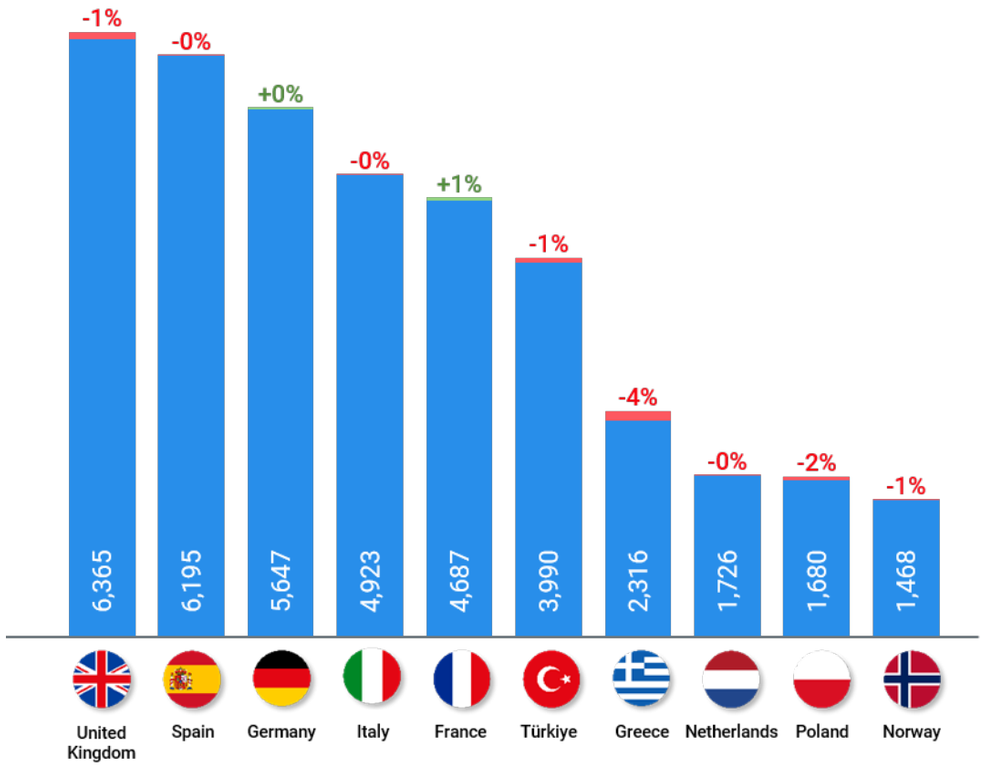
(Week 39, 21-27 Sep 2026)

- The network averaged 35,279 daily flights in Week 39, down 1.1% compared to Week 38 and 2.9% higher than in 2025.
- On average, capacity among the 10 busiest carriers decreased by 0.6% compared to the previous week.
- At State level, flight volumes across the busiest 10 States decreased by 0.6% compared to the previous week.
- Network arrival and departure punctuality were 77.0% and 71.7%, better than in the equivalent week of 2025.
- En-route ATFM delays decreased by 12% compared to the previous week, averaging circa 49K delay minutes per day, and were 39% below 2025 levels. Total air traffic flow management (ATFM) delay per flight was 2.1 min/flight (1.4 for en-route and 0.7 for airport).
- ATC capacity & staffing was the top delay cause (78% of all en-route ATFM delays), followed by ATC disruption (9%) following the ATC system failure in the UK on 21 September.
- The area control centres contributing the most to en-route ATFM delays (in min/flight) were Makedonia (1.7 min/flight), Prestwick (1.5 min/flight), Barcelona (1.4 min/flight), Marseille (1.2 min/flight), and Reims (1.1 min/flight).
- Jet fuel prices rose significantly in September 2026, reaching a peak of $4.92 per gallon on 18 September. The monthly average stood at $4.63 per gallon, the highest since April 2026 and more than double the pre-crisis level of $2.26 per gallon in January-February 2026. On 25 September 2026, jet fuel prices averaged $4.71 per gallon, up 3% from the previous two weeks.

Top 10 busiest States

On week 21-27 Sep 2026

(all flights excl. overflights compared with previous week)



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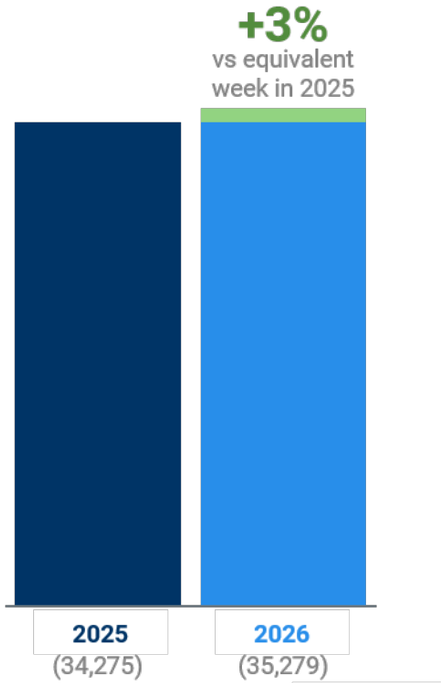
Traffic situation

Average daily flights (including overflights)

Week 21-27 Sep 2026



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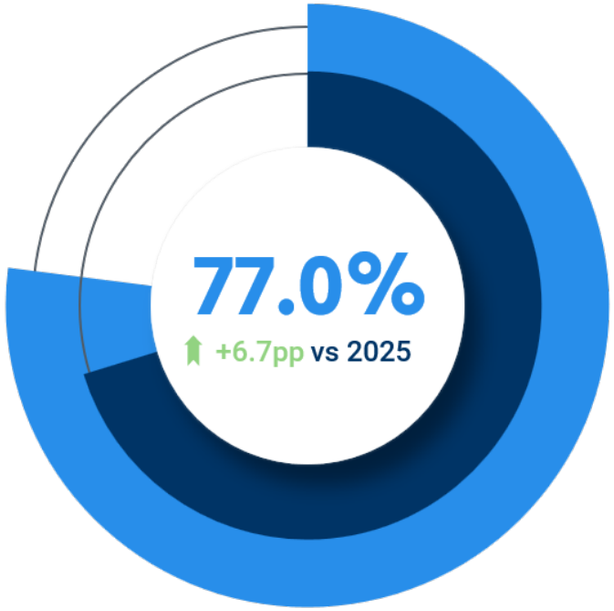
Arrival & departure punctuality

(all network scheduled flights)

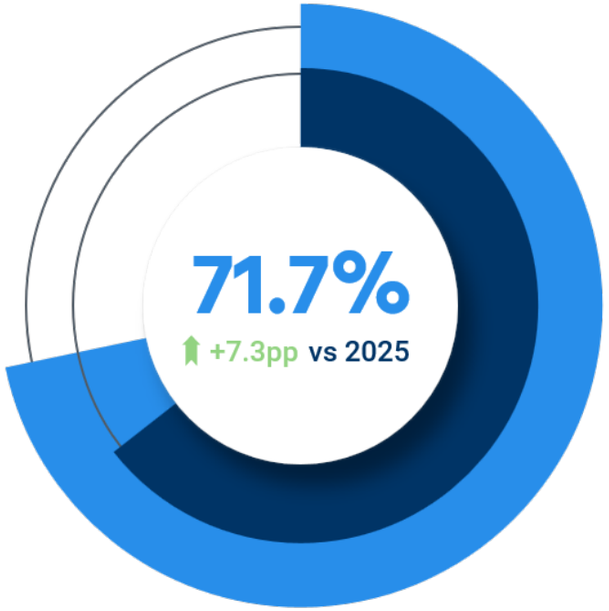
Week 21-27 Sep 2026

ARRIVAL PUNCTUALITY



70.3% _____ in 2025

DEPARTURE PUNCTUALITY



64.4% _____ in 2025

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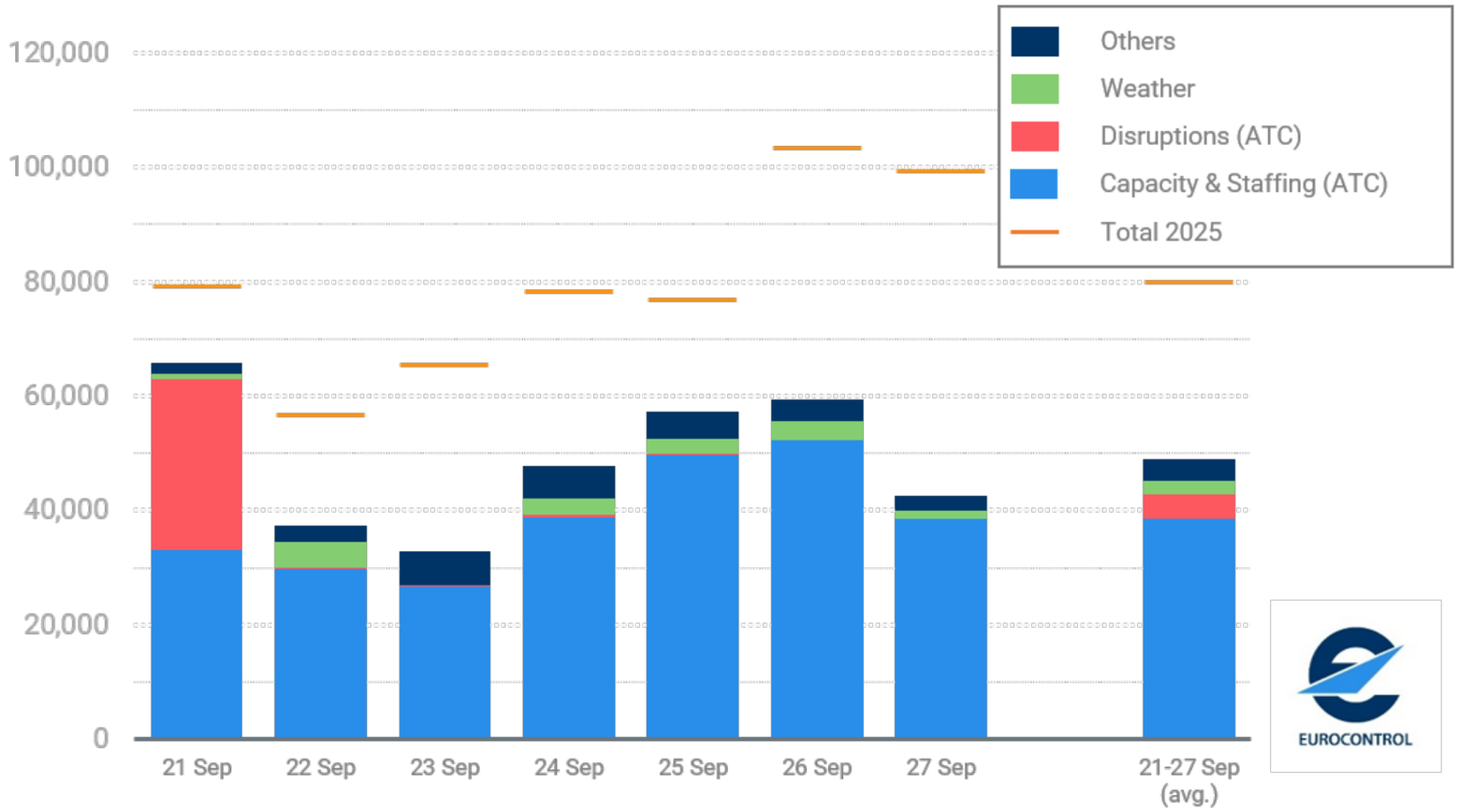
- Both arrival and departure punctuality improved compared to the same week in 2025. Arrival punctuality increased by 6.7pp to 77.0%, while departure punctuality rose by 7.3pp to 71.7%.
- **Tel Aviv** continued to experience daily ATC capacity regulations, with the highest delays on Thursday.
- **Athens** suffered from daily ATC capacity regulations with high delays on Saturday and Sunday.
- **Nice** experienced daily ATC capacity regulations, along with ATC staffing and aerodrome capacity regulations.
- **Paris Orly** was impacted by a combination of ATC capacity, aerodrome capacity and weather regulations, due to Low Visibility Procedures (LVP). The highest delays were recorded on Monday as a result of ATC system failure in the UK.
- **Zurich** experienced a combination of aerodrome capacity and weather regulations, driven by runway changes due to westerly winds.

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)

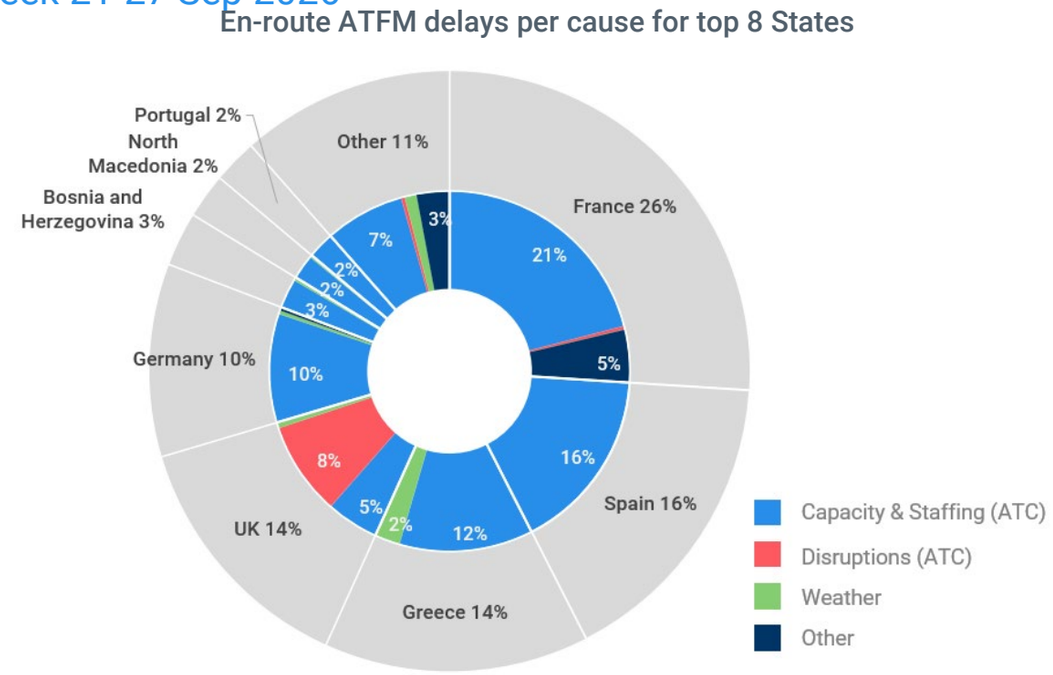
In minutes (total daily and 7-day average) in 2026

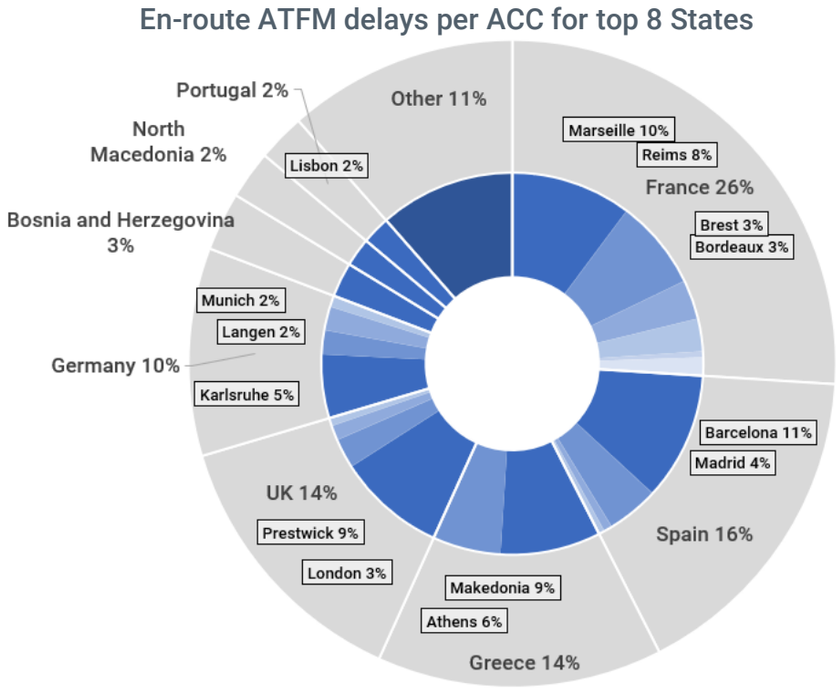


- Week 39 saw a 12% decrease in en-route ATFM delays compared to the previous week, averaging 49,021 minutes per day. En-route ATFM delays were 39% lower than during the corresponding operational week in 2025.
- **ATC capacity & staffing** accounted for 78% of all en-route ATFM delays, primarily affecting France, Spain, Greece, and Germany.
- **ATC disruption** accounted for 9% of all en-route ATFM delays, almost entirely attributable to the ATC system failure in the UK on 21 September.
- **Others** accounted for 8% of all en-route ATFM delays, mainly affecting France due to the implementation of the new ATFM system (4-FLIGHT).
- **Weather** accounted for 5% of all en-route ATFM delays, mainly impacting Greece.
- There were 2.1 minutes of total ATFM delay per flight in Week 39, comprising 1.4 min/flight en-route delay and 0.7 min/flight airport delay. This represented an 8% decrease compared to Week 38.

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

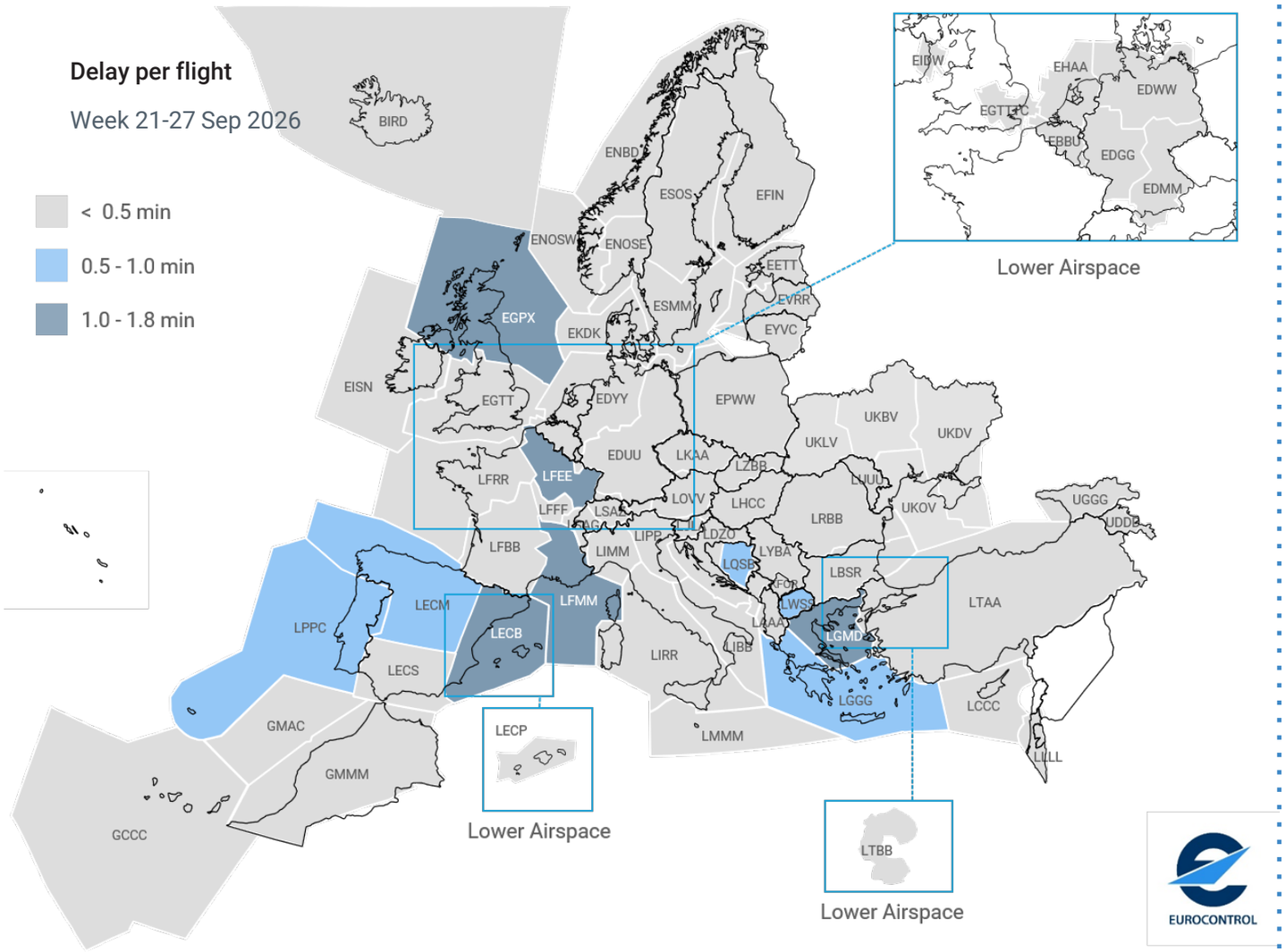
Week 21-27 Sep 2026





- France accounted for 26% of all en-route ATFM delays, primarily attributed to Marseille ACC (10%), Reims ACC (8%), Brest ACC (3%), and Bordeaux ACC (3%). The primary causes were ATC capacity & staffing (21%), and other causes (5%).
- Spain accounted for 16% of all en-route ATFM delays, mainly attributed to Barcelona ACC (11%) and Madrid ACC (4%), entirely due to ATC capacity & staffing (16%).
- Greece accounted for 14% of all en-route ATFM delays, mainly attributed to Makedonia ACC (9%) and Athens ACC (6%), due to ATC capacity & staffing (12%) and weather (2%).
- UK also accounted for 14% of all en-route ATFM delays, mainly attributed to Prestwick ACC (9%) and London ACC (3%), driven by ATC disruption (8%) following the UK ATC system failure, and ATC capacity & staffing (5%).
- Germany accounted for 10% of all en-route ATFM delays, mainly attributed to Karlsruhe UAC (5%), Langen ACC and Munich ACC (each 2%), due to ATC capacity & staffing (10%).
- Bosnia and Herzegovina accounted for 3% of all en-route ATFM delays, entirely due to ATC capacity & staffing (3%).
- North Macedonia accounted for 2% of all en-route ATFM delays, entirely due to ATC capacity & staffing.
- Portugal also accounted for 2% of all en-route ATFM delays, entirely due to ATC capacity & staffing.

En-route ATFM delayed flights per Area Control Centre



- In Week 39, five ACCs recorded en-route ATFM delays between 1.1 and 1.7 min/flight): Makedonia (1.7 min/flight), Prestwick (1.5 min/flight), Barcelona (1.4 min/flight), Marseille (1.2 min/flight), and Reims (1.1 min/flight).
- **Makedonia ACC** recorded delays as ATC staffing on a daily basis although the number of available sectors matched the planned sector availability. Convective weather complicated traffic management on Tuesday and Saturday.
- **Prestwick ACC** had a technical issue with their Flight-Data-Processing-System data connection early on Monday morning. As capacity was significantly reduced, protective measures were put in place to reroute traffic away from the ACC. As a result, traffic demand in adjacent ACCs increased, complicating traffic management. This was particularly the case on routes not designed to accommodate higher flows of traffic. Recovery began mid-morning and the last measures were lifted late Monday afternoon. In addition, the ACC experienced capacity delays on Friday and Saturday. On Sunday, convective activity affected operations during the morning, while mountain waves generated turbulence in the afternoon.
- **Barcelona ACC** recorded ATC capacity delays daily, most notably in the Western Sector Group where the number of available sectors remains limited.
- **Marseille ACC** sector availability in both the Western and Eastern sector groups was compromised on a daily basis due to ATC staffing issues, but to a far greater extent in the Eastern group. Activation of Area 54 to the South of the Toulon Naval Base complicated traffic management in the Western sectors on Thursday and Friday.
- **Reims ACC** recorded delays daily as ATC capacity with demand exceeding the available capacity. Sector availability was limited intermittently throughout the week by ATC staffing issues.

Busiest 10 States

Departures and arrivals

Week 21-27 Sep 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	6,365	-1%	+2%
2.	Spain	6,195	-0%	+5%
3.	Germany	5,647	+0%	+0%
4.	Italy	4,923	-0%	+8%
5.	France	4,687	+1%	+1%
6.	Türkiye	3,990	-1%	+0%
7.	Greece	2,316	-4%	+2%
8.	Netherlands	1,726	-0%	+0%
9.	Poland	1,680	-2%	+7%
10.	Norway	1,468	-1%	+1%

See all States

- In Week 39, departure and arrival flights across the ten busiest States fell by 0.6% week-on-week. **France** was the only one to record some growth (+1%), driven mainly by small increases on flows to and from Spain, Switzerland and the UK. **Germany** (+0%) remained broadly stable.
- Five States recorded week-on-week decreases with **Greece** having the largest drop (-4%). This was driven by weaker domestic traffic as the summer season ended, together with fewer flights between Greece and Romania, Italy, the UK, and France. **Poland** declined by 2%, reflecting weaker domestic traffic along with fewer flights between Poland and Bulgaria, Greece, and Israel. **Norway**, **Türkiye**, and the **UK** each recorded a 1% decrease, all due to fewer domestic flights. **Spain**, **Italy**, and the **Netherlands** remained stable (each -0%).
- Compared to the equivalent week of 2025, arrival and departure flights were higher or unchanged in all ten of the busiest States. Italy recorded the strongest growth (+8%), followed by Poland (+7%), and Spain (+5%), the UK and Greece were each up 2%, and France and Norway up 1%, while Germany, Türkiye, and the Netherlands were stable (+0%).

Busiest 10 aircraft operators

Week 21-27 Sep 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,749	+0%	+4%
2.	easyJet Group	1,868	-1%	+3%
3.	Turkish Airlines Group	1,716	-2%	+0%
4.	Wizz Air Group	1,205	-1%	+22%
5.	Lufthansa Airlines	1,187	+1%	-5%
6.	Air France Group	1,126	-1%	-0%
7.	KLM Group	949	-0%	+3%
8.	British Airways Group	871	-1%	-1%
9.	SAS Group	821	-1%	+3%
10.	Pegasus	690	-1%	+6%

See top 40 airlines

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In Week 39, flight numbers for the ten busiest aircraft operators fell by 0.6% week-on-week. **Lufthansa Airlines** was the only one to record growth (+1%), driven mainly by strong domestic traffic. Ryanair Group (+0%) and **KLM Group** (-0%) remained stable.

Seven airlines/airline groups recorded week-on-week decreases. **Turkish Airlines** had the largest drop (-2%), mainly because of weaker domestic traffic. The other six each declined by 1%:

- **easyJet**: fewer flights on domestic routes, as well as between the UK and Spain and between France and Spain.
- **Wizz Air**: fewer flights between Greece and Romania, Croatia and Poland, Bulgaria and Poland, and Greece and Hungary.
- **Air France**: fewer flights between France and Algeria, Greece, Tunisia, Portugal and Sweden.
- **British Airways**: fewer domestic flights and fewer flights between the UK and Greece.
- **SAS Group**: fewer flights within Norway, between Norway and Denmark, and between Norway and the US.
- **Pegasus**: fewer flights, mainly within Türkiye.

Six airlines/airline groups posted higher flight volumes than in the same week of 2025. Wizz Air led the growth (+22%), once again outpacing every other carrier. Pegasus (+6%), Ryanair (+4%) followed, while easyJet, KLM and SAS each up 3%, On the downside, Lufthansa Airlines (-5%) and British Airways (-1%) declined. Turkish Airlines (+0%) and Air France (-0%) remained stable.

Europe’s 6 largest airline groups

Week 21-27 Sep 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,749	+0%	+4%
2.	Lufthansa Group	3,097	+0%	-3%
3.	IAG Group	2,413	-0%	-0%
4.	Air France-KLM Group	2,075	-1%	+1%
5.	easyJet Group	1,868	-1%	+3%
6.	Turkish Airlines Group	1,716	-2%	+0%

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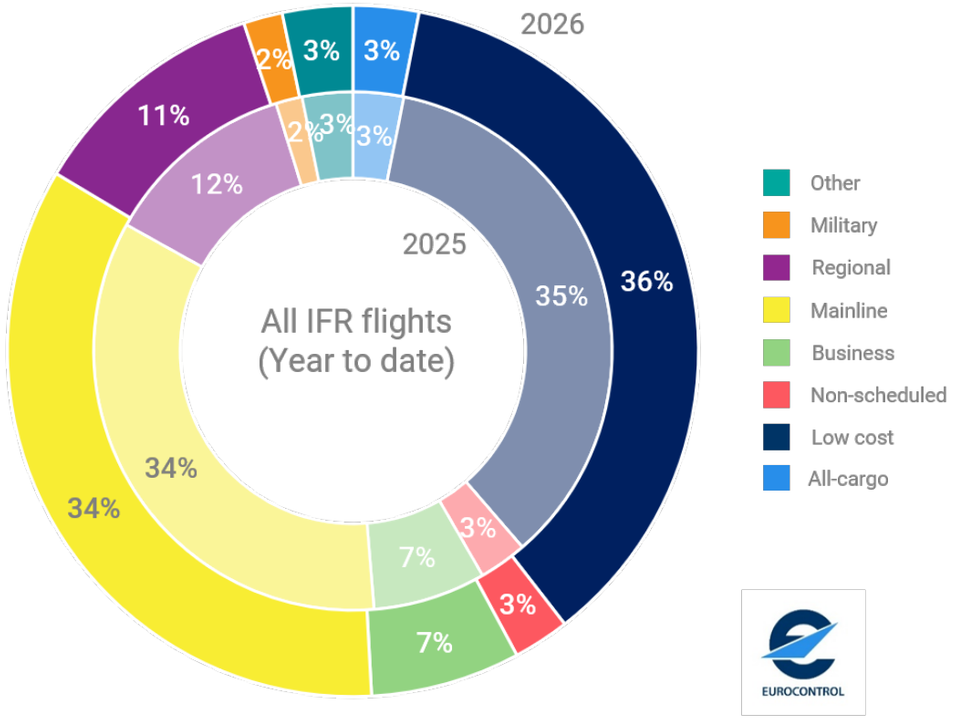
- The six largest European airline groups, aggregating the constituent members of Lufthansa, IAG and AFR-KLM Groups to join Ryanair, easyJet and Turkish Airlines Groups from the previous slide, together posted a week-on-week decline of 0.3%.
- None of the European airline groups recorded growth in Week 39 compared to the previous week. **Turkish Airlines** decreased by 2%, while both **Air France-KLM** and **easyJet** were each down 1%. **Ryanair** and **Lufthansa** (each +0%), and **IAG** (-0%) remained stable.
- Compared to the same week in 2025, three airline groups recorded higher flight volumes: Ryanair (+4%), easyJet (+3%), and Air France-KLM (+1%). By contrast Lufthansa was down 3%. Turkish Airlines (+0%) and IAG (-0%) remained stable.

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	13,144	-1%	+5%
2.	Mainline	12,020	-1%	+5%
3.	Regional	3,801	-1%	-6%
4.	Business	2,528	+0%	+3%
5.	Other	1,207	+2%	+16%
6.	Non-Scheduled	1,033	-8%	-13%
7.	All-cargo	992	+0%	-0%
8.	Military	565	-11%	+3%

- Year-to-date, Low-cost remained the largest market segment and saw its market share, rising by 1 percentage point (pp) from 35% to 36%. Mainline maintained its 34% share, while Regional declined by 1pp, from 12% to 11%. Business aviation (7%), Non-scheduled (3%) and All-cargo (3%), all remained unchanged.
- In Week 39, all passenger airline segments declined with the largest drop for Non-Scheduled (-8%), while Low-cost, Mainline and Regional each declined by 1%. Business aviation and All-cargo remained flat (+0%).
- Compared to 2025, the strongest growth was recorded in the Low-cost and Mainline segments, both up 5%, followed by Business aviation with a 3%increase. Conversely, Non-scheduled traffic fell sharply by 13%. Regional traffic decreased by 6%. All-cargo remained stable (-0%).

Busiest 10 airports

Week 21-27 Sep 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,587	-1%	+0%
2.	Amsterdam	1,423	-0%	+0%
3.	Paris Charles de Gaulle	1,384	-0%	+2%
4.	Frankfurt	1,359	+1%	-2%
5.	London Heathrow	1,324	-0%	-1%
6.	Madrid Barajas	1,320	-1%	+9%
7.	Barcelona	1,119	+1%	+3%
8.	Munich	1,032	+1%	-4%
9.	Rome Fiumicino	1,026	+3%	+6%
10.	Palma de Mallorca	936	-2%	+1%

See top 40 airports

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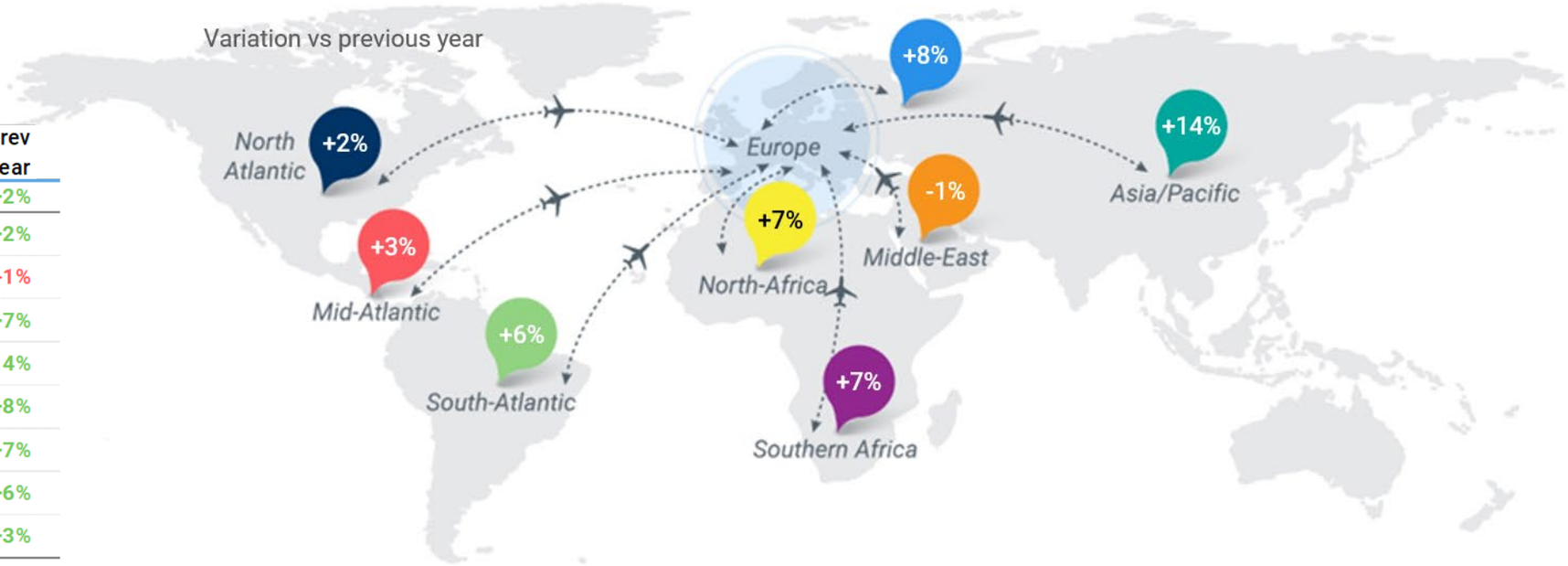
- The busiest 10 airports collectively recorded unchanged traffic in Week 39 compared to Week 38.
- Four airports recorded week-on-week growth in flight volumes. **Rome Fiumicino** increased by 3%, supported by stronger domestic traffic and increased flights on the Italy ↔ Spain, and Italy ↔ Israel flows from ITA Airways, Ryanair, Wizz Air and easyJet groups. **Frankfurt**, **Barcelona**, and **Munich** recorded each a 1% increase:
  - Frankfurt: higher traffic within Germany and more flights on the Germany ↔ Italy flow, notably from Lufthansa Airlines.
  - Barcelona: higher traffic on the Spain ↔ Italy flow, mainly from Vueling.
  - Munich: higher traffic within Germany and more flights on the Germany ↔ Spain flow, mainly from Lufthansa Airlines.
- Three airports recorded week-on-week declines in flight volumes. **Palma de Mallorca** decreased by 2% owing to fewer flights on the Spain ↔ UK, Spain ↔ France, and Spain ↔ Switzerland flows, mainly from easyJet group. **Istanbul** fell by 1%, due to weaker domestic traffic, while **Madrid Barajas** was also down 1% driven by fewer flights on the Spain ↔ UK flow. **Amsterdam**, **Paris CDG**, and **London Heathrow** remained stable (-0%).
- Compared to the equivalent week of 2025, five of the busiest 10 airports handled more flights. Madrid Barajas recorded the strongest growth (+9%), followed by Rome Fiumicino (+6%), Barcelona (+3%), Paris CDG (+2%), and Palma de Mallorca (+1%). Istanbul and Amsterdam remained unchanged (+0%). By contrast, Munich (-4%), Frankfurt (-2%), and London Heathrow (-1%) saw declines.

Traffic flows

(average daily departure/arrival flights for week 21-27 Sep 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	27,271	-1%	+2%
Europe ↔ North Atlantic	1,663	-2%	+2%
Europe ↔ Middle-East	1,534	-3%	-1%
Europe ↔ North-Africa	1,504	-2%	+7%
Europe ↔ Asia/Pacific	1,132	+1%	+14%
Europe ↔ Other Europe	547	-0%	+8%
Europe ↔ Southern Africa	323	-3%	+7%
Europe ↔ South-Atlantic	225	-0%	+6%
Europe ↔ Mid-Atlantic	150	-1%	+3%
Non Intra-Europe	7,078	-1%	+5%



- Intra-European traffic saw 27,271 daily flights on average during Week 39, slightly lower (-1%) compared to the previous week. Intercontinental flows amounted to 7,078 daily flights on average; a 1% decrease compared to Week 38.
- Europe ↔ Asia/Pacific was the only flow to record an increase (+1%), owing partly to increased flights between China ↔ the Netherlands and China ↔ Germany.
- The remaining flows recorded week-on-week decreases. The largest declines were on Europe ↔ Middle East (-3%) owing to fewer flights between Greece ↔ Israel, and between Türkiye ↔ Saudi Arabia, and on Europe ↔ Southern Africa (-3%). Europe ↔ North Atlantic fell by 2%, due to fewer flights between the UK ↔ US, France ↔ Canada, UK ↔ Canada and Portugal ↔ Canada. Europe ↔ North Africa also declined by 2%, mainly because of fewer flights between France ↔ Algeria, France ↔ Morocco, and France ↔ Tunisia flows. Europe ↔ Mid-Atlantic was down 1%.
- Compared to the same week in 2025, Europe ↔ Middle East was the only flow to record fewer flights (-1%). The strongest year-on year growth was on the Europe ↔ Asia/Pacific flow (+14%), followed by Europe ↔ Other Europe (+8%), Europe ↔ North Africa and Europe ↔ Southern Africa (each +7%), Europe ↔ South Atlantic (+6%), Europe ↔ Mid-Atlantic (+3%), and Europe ↔ North Atlantic (+2%).

Top 10 long-haul country pairs

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

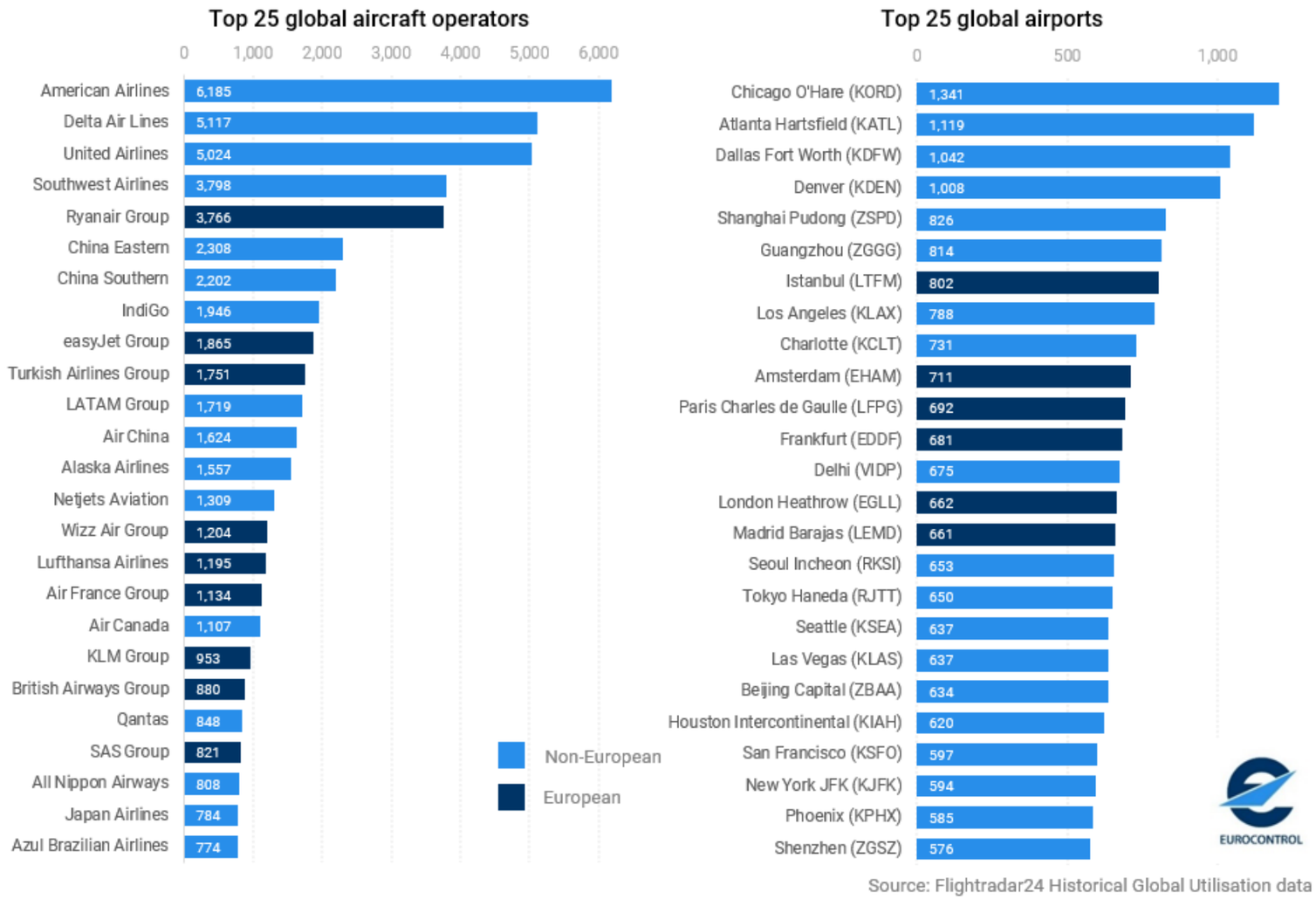
Week 21-27 Sep 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	325	+0%	-3%
2.	Germany ↔ US	178	-0%	+3%
3.	France ↔ US	149	+0%	+6%
4.	Italy ↔ US	128	-3%	+6%
5.	Spain ↔ US	92	-4%	+0%
6.	Ireland ↔ US	90	-5%	-2%
7.	Netherlands ↔ US	80	+0%	+0%
8.	Egypt ↔ Russia	62	+3%	+36%
9.	UAE ↔ UK	62	-2%	-2%
10.	India ↔ UK	54	+6%	+27%

- Seven of the top ten long-haul country pairs in Week 39 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 Egypt ↔ Russia (i.e. overflying the network), UAE ↔ UK, and India ↔ UK.
- Compared to the previous week, only two of the top 10 long-haul country pairs recorded higher flight volumes with India ↔ UK (+6%) posting the largest increase, followed by Egypt ↔ Russia (+3%). Conversely, Ireland ↔ US recorded the largest decline in flight volumes (-5%), followed by Spain ↔ US (-4%), Italy ↔ US (-3%), and UAE ↔ UK (-2%).
- Compared to the same week in 2025, five of the top ten long-haul flows recorded year-on-year growth. The strongest increase was between Egypt ↔ Russia (+36%), followed by India ↔ UK (+27%), France ↔ US and Italy ↔ US (each +6%), and Germany ↔ US (+3%). By contrast, UK ↔ US (-3%), Ireland ↔ US (-2%), and UAE ↔ UK (-2%) recorded declines.

Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 21-27 Sep 2026)**



Source: Flightradar24 Historical Global Utilisation data

- **Aircraft operators:** in Week 39, nine European aircraft operators ranked among the top 25 global aircraft operators.
- Three European carriers ranked among the global top 10 in Week 39. Ryanair Group held its 5th position, while Turkish Airlines Group and easyJet Group exchanged 9th and 10th places compared to two weeks earlier.
- A further six European carriers made the top 25: Wizz Air Group (15th), Lufthansa Airlines (16th), Air France Group (17th), KLM Group (19th), British Airways Group (20th from 24th in Week 37), and SAS Group (22nd from 20th).
- **Airports:** six European airports ranked among the global top 25 for departures in Week 39, unchanged from two weeks earlier. Two of these were in the global top 10: Istanbul (7th from 5th in Week 37) and Amsterdam (10th). The remaining four were Paris CDG ranked (11th), Frankfurt (12th), London Heathrow (14th up from 20th in Week 37), and Madrid Barajas (15th).
- Among the ten busiest airports, six were American, and two were Chinese (Shanghai and Guangzhou).

Jet fuel price (Europe)

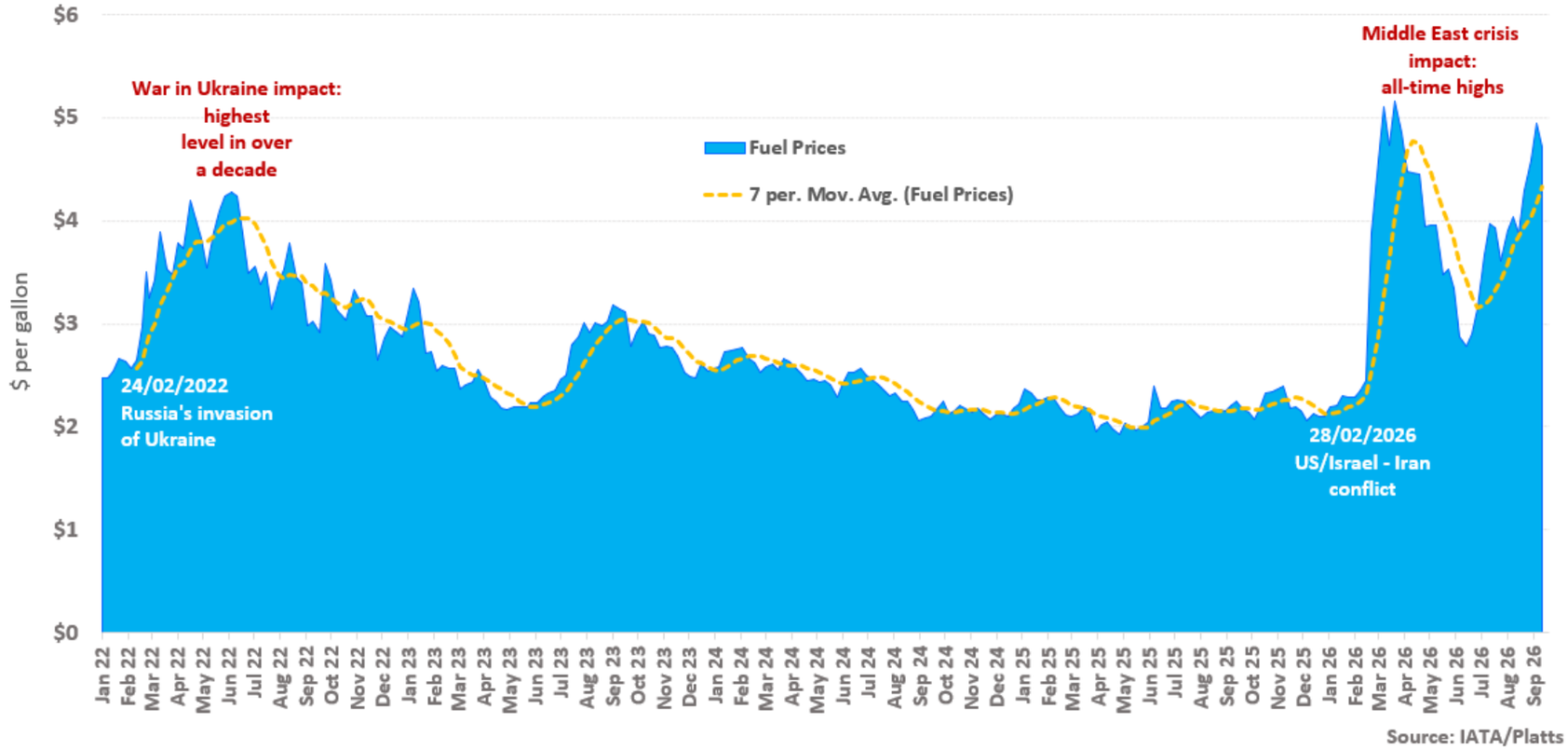
Week 21-27 Sep 2026

25 Sep 2026
avg fuel price:

$4.71 /gallon

+3%
vs. $4.58 /gallon
on 11 Sep 2026

Source: IATA/Platts



Source: IATA/Platts

- Jet fuel prices rose significantly in September 2026, reaching a peak of $4.92 per gallon on 18 September. The monthly average stood at $4.63 per gallon, the highest since April 2026 and more than double the pre-crisis level of $2.26 per gallon in January-February 2026. On 25 September 2026, jet fuel prices averaged $4.71 per gallon, up 3% from the previous two weeks.
- Reuters reported that Europe is expected to face a jet fuel supply shortage of circa 510K barrels per day in the fourth quarter of 2026. To offset disruptions to Middle Eastern supply, Europe has increasingly relied on jet fuel imports from Asia and Africa.
- At its 6 September meeting, OPEC+ kept October production targets unchanged from September, pausing further output increases after completing the planned unwinding of its 1.65 million barrels/day voluntary cut. The decision offered no additional supply relief to a market that remained affected by ongoing disruptions in the Middle East.

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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