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EUROPEAN AVIATION OVERVIEW

05-11 Oct 2026

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15 October 2026

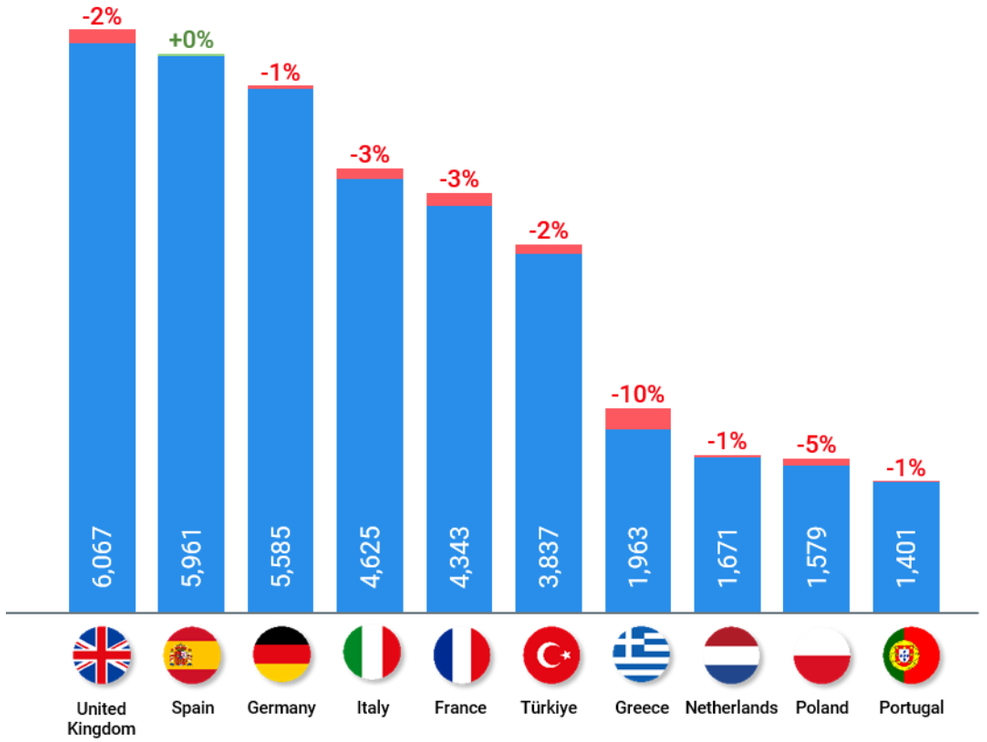
Headlines
(Week 41, 05-11 Oct 2026)

- The network averaged 33,491 daily flights (including overflights) in Week 41, representing a 2.7% decrease compared to Week 40 and remaining unchanged from the same week in 2025.
- Year-to-date traffic (excluding overflights) between Europe and the Middle East remains 14% below 2025 levels, representing a 20% decline from pre-crisis levels (Jan-Feb 2026) when flights were averaging 9% above 2025. The 3 major Gulf hub carriers (Emirates, Etihad and Qatar) are recovering faster than most of the European airline groups, back up to 23% below pre-crisis levels vs circa 82% below for European carriers. Israeli carriers on the other hand are operating 56% above pre-crisis flight levels.
- Among the 10 busiest carriers, capacity fell 1.2% week-on-week on average. Wizz Air Group was the only one to grow (+2%), while SAS Group saw the largest drop (-5%).
- Across the 10 busiest States, flight volumes decreased by 2.3% week-on-week on average, with none recording growth. Greece saw the steepest decline (-10%).
- Network arrival and departure punctuality were 74.1% and 69.8%, worse than in the equivalent week of 2025.
- En-route ATFM delays decreased by 11% compared to the previous week, with a daily average of circa 54K delay minutes, and were 6% above 2025 levels. Total air traffic flow management (ATFM) delay per flight was 2.5 min/flight (1.6 for en-route and 0.9 for airport).
- ATC capacity & staffing was the top delay cause (63% of all en-route ATFM delays), followed by Weather (28%).
- The area control centres contributing the most to en-route ATFM delays (in min/flight) were Barcelona (2.6 min/flight), Marseille (2.5 min/flight), Makedonia (1.2 min/flight), Madrid (1.1 min/flight), and Sarajevo (1.0 min/flight).
- Jet fuel prices remained highly volatile, reaching $4.82 per gallon on 9 October, up 2% over the preceding two weeks. The October average to date stood at $4.74 per gallon, 2.5% higher than the September monthly average of $4.63 per gallon.

Top 10 busiest States

On week 05-11 Oct 2026

(all flights excl. overflights compared with previous week)



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Traffic situation

Average daily flights (including overflights)

Week 05-11 Oct 2026

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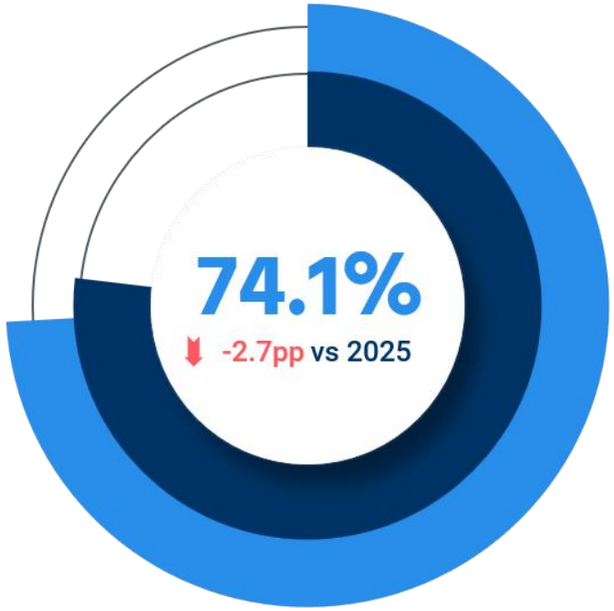
Arrival & departure punctuality

(all network scheduled flights)

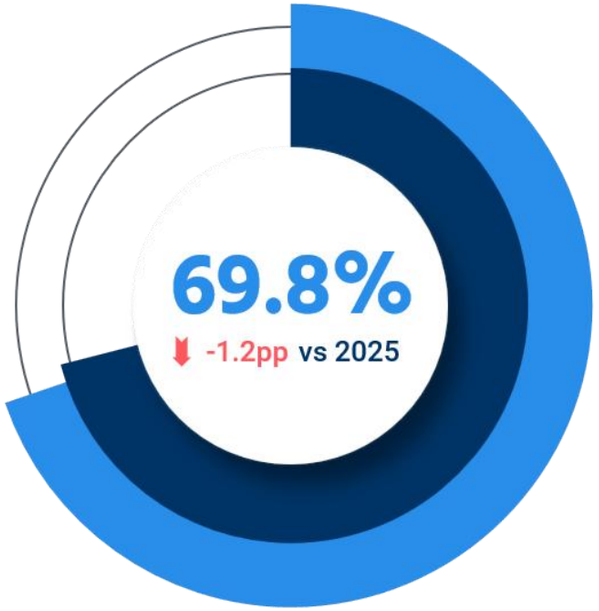
Week 05-11 Oct 2026

ARRIVAL PUNCTUALITY



76.9% _____ in 2025

DEPARTURE PUNCTUALITY



71.0% _____ in 2025

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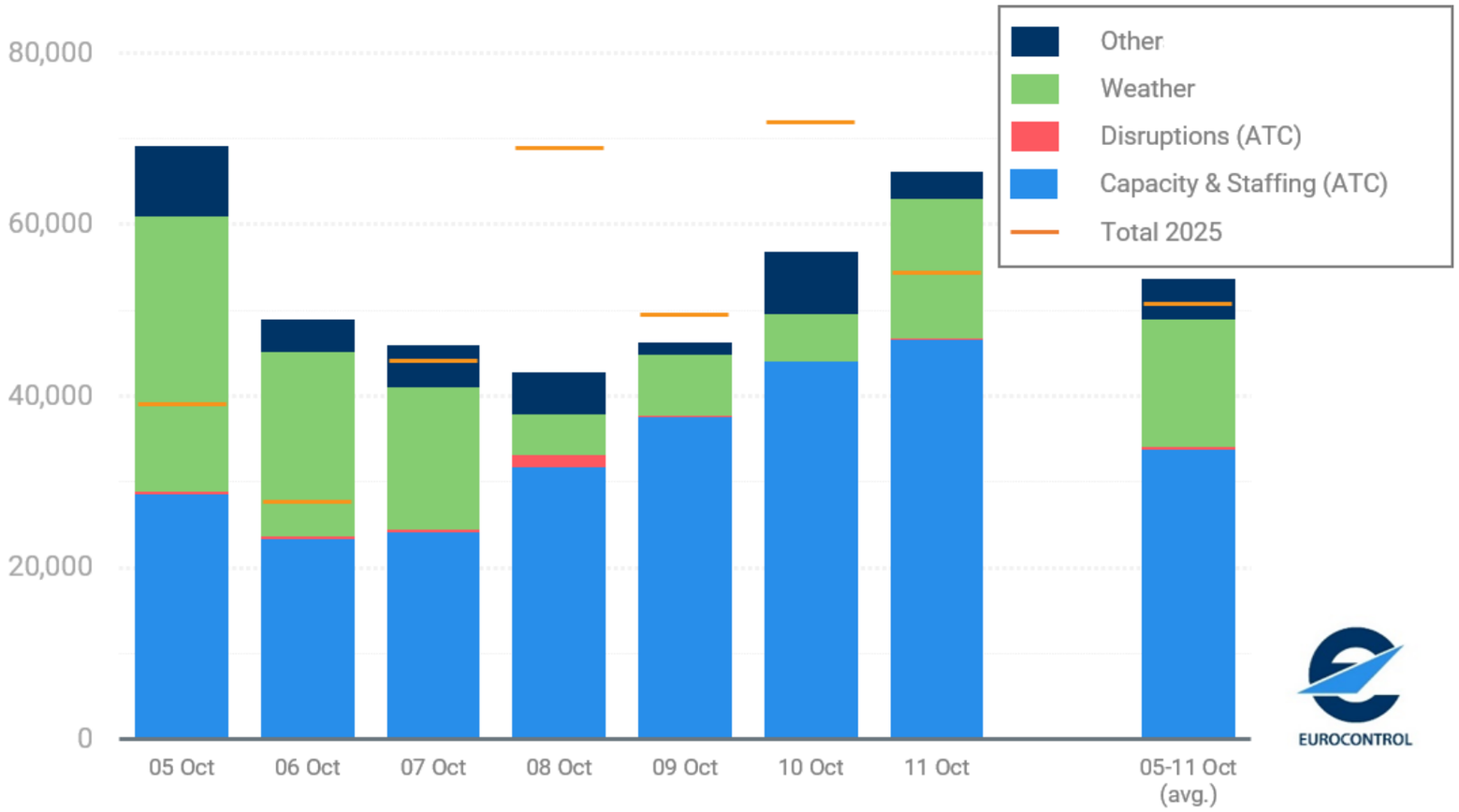
- Both arrival and departure punctuality deteriorated compared to the same week in 2025. Arrival punctuality declined by 2.7pp to 74.1%, while departure punctuality fell by 1.2pp to 69.8%.
- **Barcelona** was affected by a combination of aerodrome capacity and convective weather activity (cumulonimbus) throughout the week, resulting in weather-related regulations and significant delays on Monday.
- **Tel Aviv** continued to experience a daily combination of aerodrome and ATC capacity regulations, with the highest delays on Monday.
- **Athens** was affected by daily aerodrome capacity regulations due to work in progress (WIP) at the airport.
- **London Gatwick** saw multifactor delays caused by aerodrome capacity and weather regulations with significant delays on Monday.
- **London Heathrow** suffered from a combination of aerodrome capacity and weather regulations due to low visibility procedures (LVP) and convective activity in the vicinity of the airport.

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)

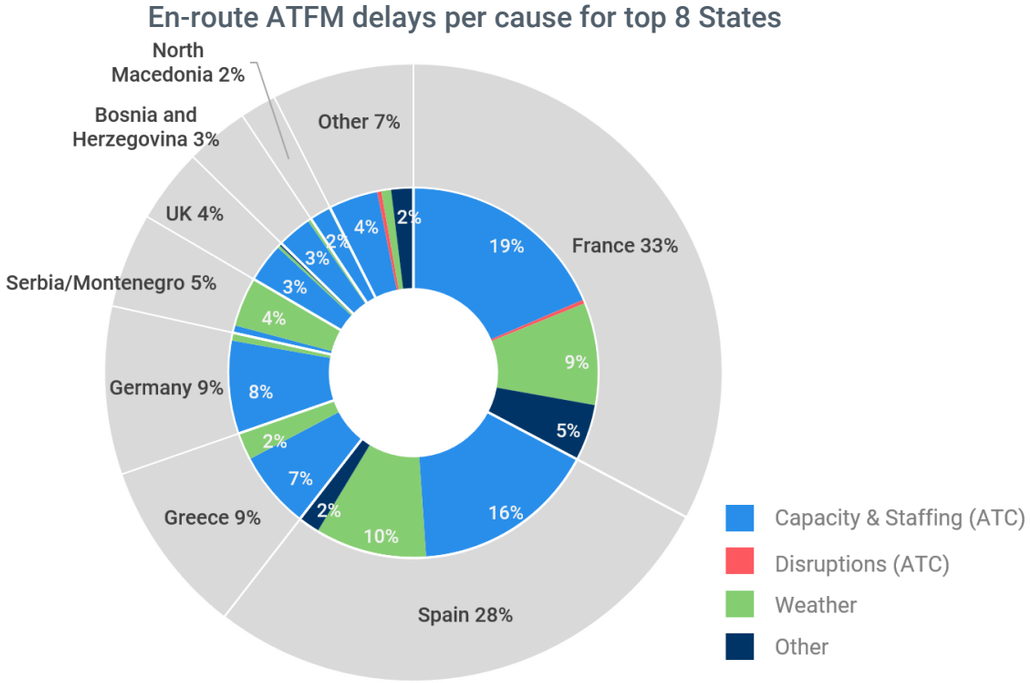
In minutes (total daily and 7-day average) in 2026

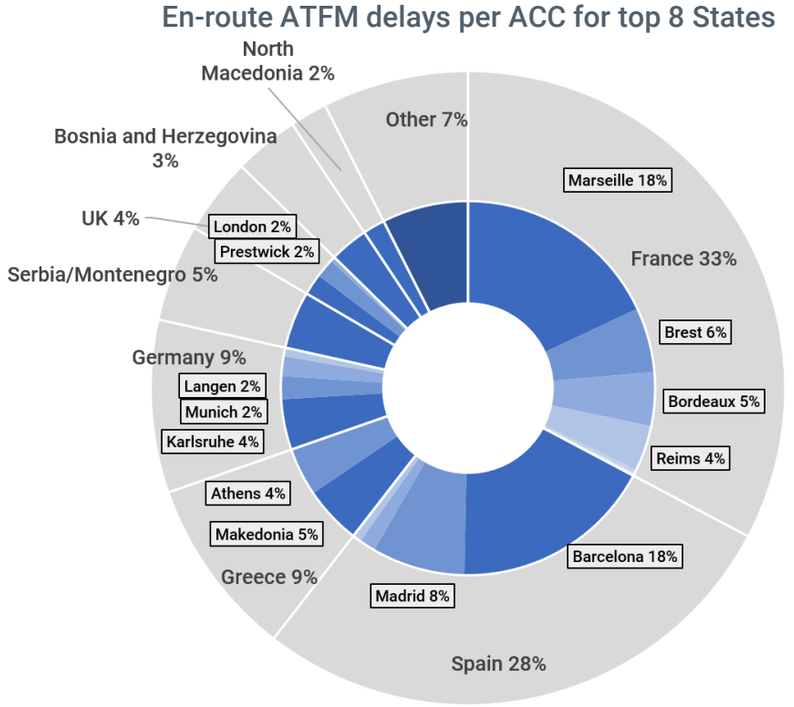


- In Week 41, en-route ATFM delays averaged 53,712 minutes per day, down 11% from the previous week, but 6% higher than in the corresponding operational week of 2025.
- **ATC capacity & staffing** accounted for 63% of all en-route ATFM delays, primarily affecting France, Spain, Germany, and Greece.
- **Weather** accounted for 28% of all en-route ATFM delays, impacting Spain, France, and Serbia/Montenegro.
- **Other** accounted for 9% of all en-route ATFM delays, owing partly to the implementation of the new ATFM system (4-FLIGHT) in France.
- There were 2.5 minutes of total ATFM delay per flight in Week 41, comprising 1.6 min/flight en-route delay and 0.9 min/flight airport delay. This represented a 9% decrease compared to Week 40.

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

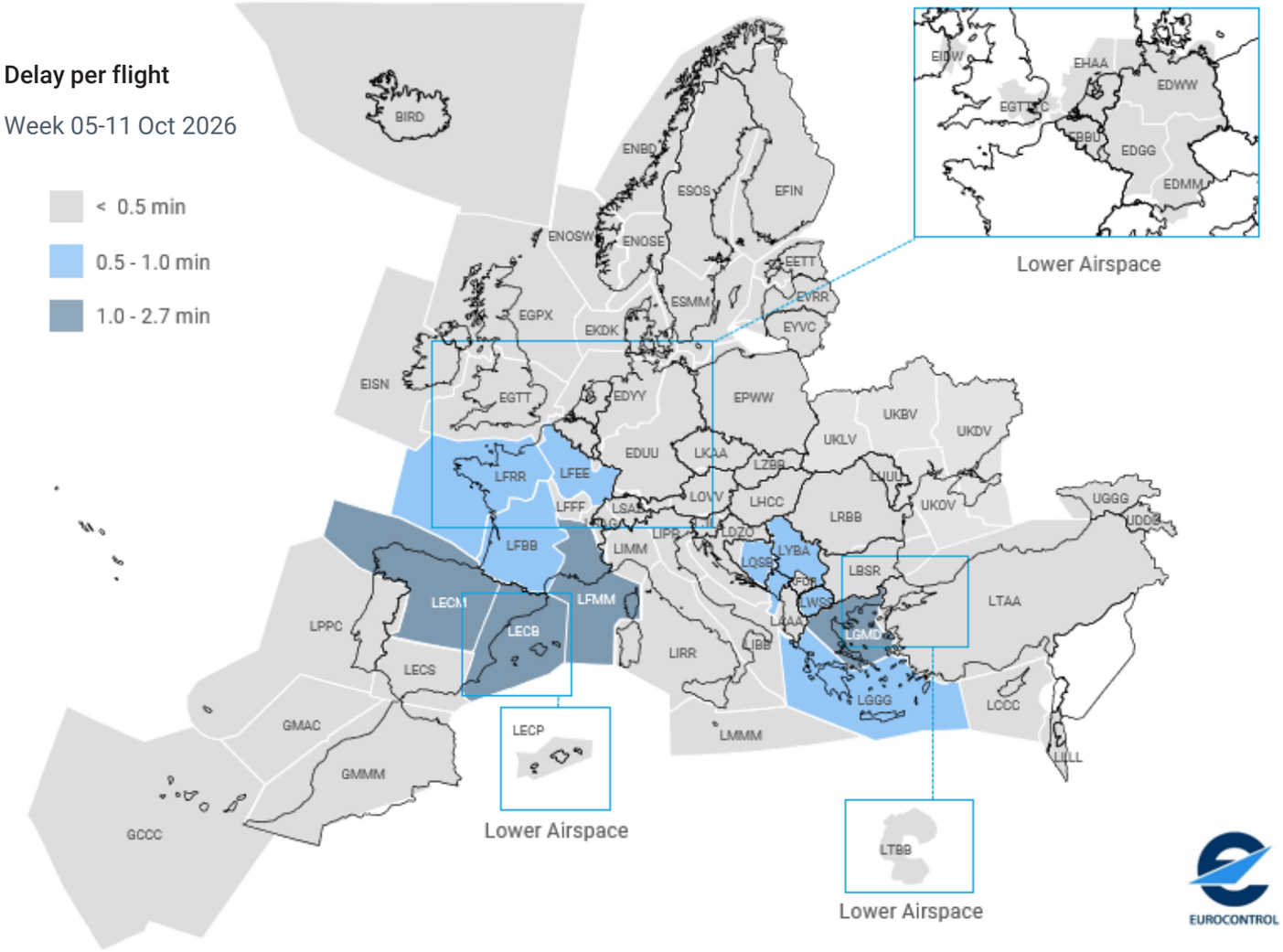
Week 05-11 Oct 2026





- **France** accounted for 33% of all en-route ATFM delays, primarily attributed to Marseille ACC (18%), Brest ACC (6%), Bordeaux ACC (5%), and Reims ACC (4%). The primary causes were ATC capacity & staffing (19%), weather (9%), and other causes (5%).
- **Spain** accounted for 28% of all en-route ATFM delays, mainly attributed to Barcelona ACC (18%) and Madrid ACC (8%), due to ATC capacity & staffing (16%) and weather (10%).
- **Greece** accounted for 9% of all en-route ATFM delays, mainly attributed to Makedonia ACC (5%) and Athens ACC (4%), due to ATC capacity & staffing (7%) and weather (2%).
- **Germany** also accounted for 9% of all en-route ATFM delays, mainly attributed to Karlsruhe UAC (4%), Munich ACC and Langen ACC (each 2%), driven mainly by ATC capacity & staffing (8%).
- **Serbia/Montenegro** accounted for 5% of all en-route ATFM delays, mainly due to weather (4%).
- **UK** accounted for 4% of all en-route ATFM delays, mostly due to ATC capacity & staffing (3%).

En-route ATFM delayed flights per Area Control Centre



- In Week 41, five ACCs recorded en-route ATFM delays between 1.0 and 2.6 min/flight: Barcelona (2.6 min/flight), Marseille (2.5 min/flight), Makedonia (1.2 min/flight), Madrid (1.1 min/flight), and Sarajevo (1.0 min/flight).
- **Barcelona ACC** recorded ATC capacity delays throughout the week, with additional weather delays from Monday to Wednesday.
- **Marseille ACC** faced staffing delays throughout the week, with additional weather delays from Monday to Wednesday. ATC capacity delays were also recorded on most days.
- **Makedonia ACC** experienced staffing delays every day except Sunday, while significant weather delays were recorded on Sunday.
- **Madrid ACC** was impacted by ATC capacity delays throughout the week (traffic +5% vs 2025), with other delay causes creating more delays on Monday to Thursday.
- **Sarajevo ACC** was impacted by ATC capacity delays throughout the week. Staffing delays were recorded on Friday, along with weather-related delays from Thursday to Saturday.

Busiest 10 States

Departures and arrivals

Week 05-11 Oct 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	6,067	-2%	+0%
2.	Spain	5,961	+0%	+3%
3.	Germany	5,585	-1%	-2%
4.	Italy	4,625	-3%	+4%
5.	France	4,343	-3%	-4%
6.	Türkiye	3,837	-2%	-1%
7.	Greece	1,963	-10%	+3%
8.	Netherlands	1,671	-1%	-3%
9.	Poland	1,579	-5%	+6%
10.	Portugal	1,401	-1%	+0%

See all States

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In Week 41, departure and arrival flights across the ten busiest States fell 2.3% week-on-week. Spain was the only State to hold steady, while the other nine all declined compared to Week 40.

Greece recorded the largest week-on-week decline (-10%), mainly driven by a sharp drop in traffic between Greece and Israel, alongside fewer domestic flights, and fewer flights to/from the UK and Italy, reducing capacity mainly for Ryanair Group and Aegean Group. **Poland** followed with a 5% decrease, reflecting weaker domestic traffic, and fewer flights between Poland and Greece, Türkiye, and Spain from Ryanair Group, Enter Air, and LOT.

The following States saw declines ranging from 1% to 3%, primarily driven by weaker domestic traffic, in addition to fewer international flights:

- **Italy** (-3%): fewer flights to/from France, Greece, and UK, mainly operated by Volotea, Ryanair Group, and Aeroitalia.
- **France** (-3%): fewer flights to/from Italy, UK, and Switzerland from Volotea, Air Corsica, and Netjets Europe.
- **UK** (-2%): fewer flights to/from and Greece, Spain, Germany, France, and Italy, particularly from TUI Group, British Airways Group, Ryanair Group, and Netjets Europe.
- **Türkiye** (-2%): fewer flights to/from Türkiye and Russia, Saudi Arabia, Czechia, and Poland from Turkish Airlines Group, Pegasus, and Smartwings Group.
- **Germany**, the **Netherlands**, and **Portugal** (each -1%) recorded a modest decline, also affected by weaker domestic traffic.

Compared to the equivalent week of 2025, four of the busiest ten States recorded growth in departure and arrival flights. Poland and Italy recorded the strongest increases (+6%) and (+4%) respectively, followed by Spain and Greece (each +3%), while the UK and Portugal remained stable. Conversely, France (-4%), the Netherlands (-3%), Germany (-2%), and Türkiye (-1%) declined.

Busiest 10 aircraft operators

Week 05-11 Oct 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,600	-2%	+0%
2.	easyJet Group	1,820	-0%	+0%
3.	Turkish Airlines Group	1,677	-2%	-1%
4.	Wizz Air Group	1,230	+2%	+24%
5.	Lufthansa Airlines	1,170	+0%	-6%
6.	Air France Group	1,099	-0%	-1%
7.	KLM Group	922	-1%	-1%
8.	British Airways Group	835	-2%	-4%
9.	SAS Group	764	-5%	-2%
10.	Pegasus	666	-3%	+3%

See top 40 airlines

In Week 41, flight numbers for the ten busiest aircraft operators decreased by 1.2% week-on-week. **Wizz Air Group** was the only operator to register growth (+2%), mainly driven by increased domestic flights in Italy, alongside higher traffic between Italy ↔ Spain, Italy ↔ Albania, Spain ↔ UK, and Poland ↔ UK. **Lufthansa Airlines** remained stable.

SAS Group saw the largest decline (-5%), owing mainly to weaker domestic flights within Norway and Sweden, as well as fewer flights between Sweden ↔ Greece, and Norway ↔ Greece. **Pegasus** followed with a 3% decrease, primarily due to reduced domestic flights in Türkiye and fewer flights between Türkiye ↔ Germany and Türkiye ↔ Saudi Arabia. **Air France Group** and **easyJet Group** remained broadly unchanged.

The following airlines/airline groups recorded declines ranging from -1% to -2%:

- **Ryanair** (-2%): fewer flights between Italy ↔ Greece, Greece ↔ Poland, France ↔ UK, and Spain ↔ UK.
- **Turkish Airlines** (-2%): weaker domestic traffic, fewer flights between Türkiye ↔ Saudi Arabia, Türkiye ↔ Russia, and Türkiye ↔ UK.
- **British Airways** (-2%): fewer flights between UK ↔ France, UK ↔ Italy, and UK ↔ UK.
- **KLM** (-1%): fewer flights between Netherlands ↔ UK, Netherlands ↔ France, and Netherlands ↔ Norway.

Two airline groups posted higher flight volumes than in the same week of 2025. Wizz Air led by a wide margin (+24%), continuing to outperform all other operators, while Pegasus posted a more modest increase (+3%). Ryanair and easyJet remained broadly stable (+0%). On the downside, Lufthansa Airlines (-6%) recorded the largest decline, partly reflecting the closure of its subsidiary Lufthansa CityLine last April, followed by British Airways (-4%), SAS (-2%), Air France and KLM (each group -1%).

Europe’s 6 largest airline groups

Week 05-11 Oct 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	3,600	-2%	+0%
2.	Lufthansa Group	3,018	-1%	-6%
3.	IAG Group	2,276	-0%	-4%
4.	Air France-KLM Group	2,021	-1%	-1%
5.	easyJet Group	1,820	-0%	+0%
6.	Turkish Airlines Group	1,677	-2%	-1%

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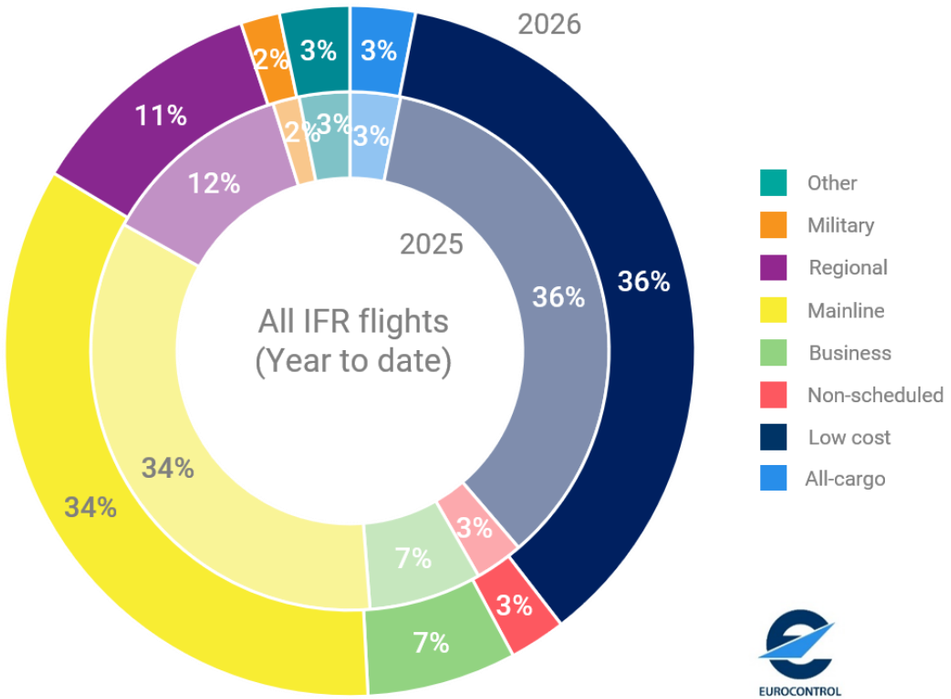
- The six largest European airline groups, aggregating the constituent members of Lufthansa, IAG and AFR-KLM Groups to join Ryanair, easyJet and Turkish Airlines Groups from the previous slide, collectively recorded a 1.1% week-on-week decline in flight volumes.
- None of the six largest airline groups recorded week-on-week growth in Week 41. **Ryanair and Turkish Airlines** posted the largest decrease (each -2%), followed by **Lufthansa** and **Air France-KLM** (each -1%). IAG and easyJet remained stable.
- In Week 41, Ryanair and easyJet were the only airline groups to maintain flight volumes broadly in line with the same week in 2025. Lufthansa saw a 6% decrease, followed by IAG (-4%), and Air France-KLM and Turkish Airlines (each -1%).

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	12,536	-2%	+2%
2.	Mainline	11,592	-2%	+3%
3.	Regional	3,641	-2%	-7%
4.	Business	2,243	-6%	+1%
5.	Other	1,035	-10%	-3%
6.	All-cargo	944	-3%	-6%
7.	Non-Scheduled	877	-10%	-14%
8.	Military	632	+1%	+8%

- Year-to-date, Low-cost (36%) and Mainline (34%) remained the largest market segments and maintained their market share compared to 2025. Regional declined by 1pp, from 12% to 11%. Business aviation (7%), Non-scheduled (3%) and All-cargo (3%), all remained unchanged.
- In Week 41 vs the previous week, all passenger airline segments declined with the largest drop for Non-Scheduled (-10%), while Low-cost, Mainline and Regional, each declined by 2%. Business aviation and All-cargo decreased by 6% and 3% respectively.
- Compared to 2025, the strongest growth was recorded in the Mainline segment (+3%), followed by Low-cost (+2%). All other passenger segments declined, with Non-scheduled posting the largest decrease (-14%), followed by Regional (-7%). All-cargo traffic fell by 6%, while Business aviation was up 1%.

Busiest 10 airports

Week 05-11 Oct 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,530	-3%	-2%
2.	Amsterdam	1,386	-1%	-4%
3.	Paris Charles de Gaulle	1,361	+0%	+2%
4.	Frankfurt	1,358	+0%	-3%
5.	Madrid Barajas	1,305	+0%	+6%
6.	London Heathrow	1,289	-1%	-5%
7.	Barcelona	1,066	+4%	-1%
8.	Rome Fiumicino	993	-0%	+5%
9.	Munich	991	-3%	-5%
10.	Antalya	909	-1%	-6%

See top 40 airports

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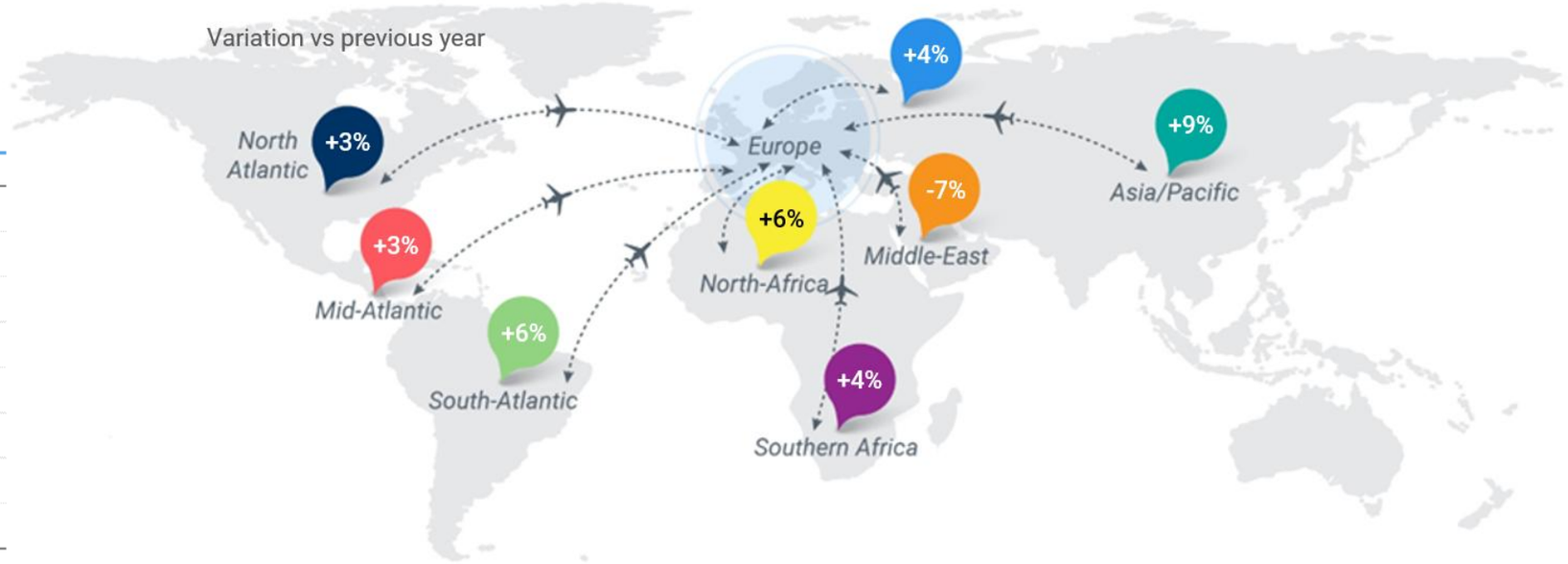
- In Week 41, the busiest 10 airports collectively recorded a slight week-on-week decrease of 0.4%.
- Only one airport stood out, with **Barcelona** recording a 4% increase partly due to stronger domestic traffic within Spain, and higher flight volumes on the Spain ↔ UK, and Spain ↔ Italy flows from Vueling, Ryanair, easyJet and Wizz Air Groups. **Paris CDG**, **Frankfurt**, and **Madrid Barajas** remained unchanged.
- Five airports recorded week-on-week declines ranging from -1% to -3%:
  - **Istanbul** (-3%): weaker domestic traffic, fewer flights on the Türkiye ↔ Saudi Arabia, Türkiye ↔ Iran, and Türkiye ↔ Germany flows.
  - **Munich** (-3%): Lower domestic traffic and fewer flights on the Germany ↔ UK, Germany ↔ Italy, and Germany ↔ US flows from easyJet Group, Lufthansa Airlines, and Netjets Europe.
  - **Amsterdam** (-1%): fewer flights on the Netherlands ↔ Greece, Netherlands ↔ Italy, Netherlands ↔ Norway, and Netherlands ↔ Germany flows from KLM Group mainly.
  - **London Heathrow** (-1%): fewer flights within the UK, along with fewer flights between UK ↔ Germany, UK ↔ France, UK ↔ Switzerland, UK ↔ Türkiye, and UK ↔ Saudi Arabia.
  - **Antalya** (-1%): fewer flights between Türkiye ↔ Russia, Türkiye ↔ Czechia, Türkiye ↔ Romania and weaker domestic traffic within Türkiye.
- Compared to the same week in 2025, three airports posted increases, starting with Madrid Barajas (+6%), followed by Rome Fiumicino (+5%) and Paris CDG (+2%). Conversely, seven airports recorded decreases: Antalya (-6%), Munich and London Heathrow (each -5%), Amsterdam (-4%), Frankfurt (-3%), and Istanbul (-2%).

Traffic flows

(average daily departure/arrival flights for week 05-11 Oct 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	25,695	-3%	-0%
Europe ↔ North Atlantic	1,585	-2%	+3%
Europe ↔ North-Africa	1,534	+1%	+6%
Europe ↔ Middle-East	1,452	-6%	-7%
Europe ↔ Asia/Pacific	1,094	-1%	+9%
Europe ↔ Other Europe	498	-6%	+4%
Europe ↔ Southern Africa	328	+1%	+4%
Europe ↔ South-Atlantic	226	-1%	+6%
Europe ↔ Mid-Atlantic	149	-0%	+3%
Non Intra-Europe	6,866	-2%	+3%



- Intra-European traffic saw 25,695 daily flights on average during Week 41, significantly lower (-3%) compared to the previous week. Intercontinental flows amounted to 6,866 daily flights on average; a 2% decrease compared to Week 40.
- Only two international flows recorded a modest increase of 1% each. The Europe ↔ North Africa flow rose, mainly driven by additional flights between Germany ↔ Egypt, Moldova ↔ Egypt, and UK ↔ Morocco. The Europe ↔ Southern Africa was supported in part by more flights between Türkiye ↔ Sudan and France ↔ Réunion.
- The Europe ↔ Other Europe flow declined by 6%, mainly due to fewer flights between Russian and Türkiye, Georgia, and Armenia. Europe ↔ Middle East also recorded 6% decrease, driven primarily by reduced traffic between Greece ↔ Israel, Cyprus ↔ Israel, and Türkiye ↔ Saudi Arabia. Europe ↔ North Atlantic fell by 2%, reflecting fewer flights between Iceland ↔ US, France ↔ US, UK ↔ US, and Spain ↔ US. Both Europe ↔ South Atlantic and Europe ↔ Asia/Pacific declined b y 1%, while Europe ↔ Mid-Atlantic remained stable.
- Compared to the same week in 2025, Europe ↔ Asia/Pacific posted the strongest growth (+9%), followed by North Africa and South Atlantic (both +6%). Europe ↔ Other Europe and Europe ↔ Southern Africa each increased by 4%, while Europe ↔ North Atlantic and Europe ↔ Mid-Atlantic rose each by 3%.
- Compared to the same week in 2025, Europe ↔ Middle East was the only flow to record a decline (-7%). Despite traffic growth with Israel (+6%), the largest market in this flow, and Jordan (+9%), the overall decline was driven by fewer flights to/from Saudi Arabia (-19%), Qatar (-16%) and the UAE (-10%).
- Year-to-date traffic (excluding overflights) between Europe and the Middle East remains 14% below 2025 levels, representing a 20% decline from pre-crisis levels (Jan-Feb 2026) when flights were averaging 9% above 2025. The major Gulf hub carriers (Emirates, Etihad and Qatar) are recovering faster than most of the European airline groups, operating 23% below pre-crisis levels vs circa 82% below for European carriers. Israeli carriers are operating 56% above pre-crisis flight levels.

Top 10 long-haul country pairs

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

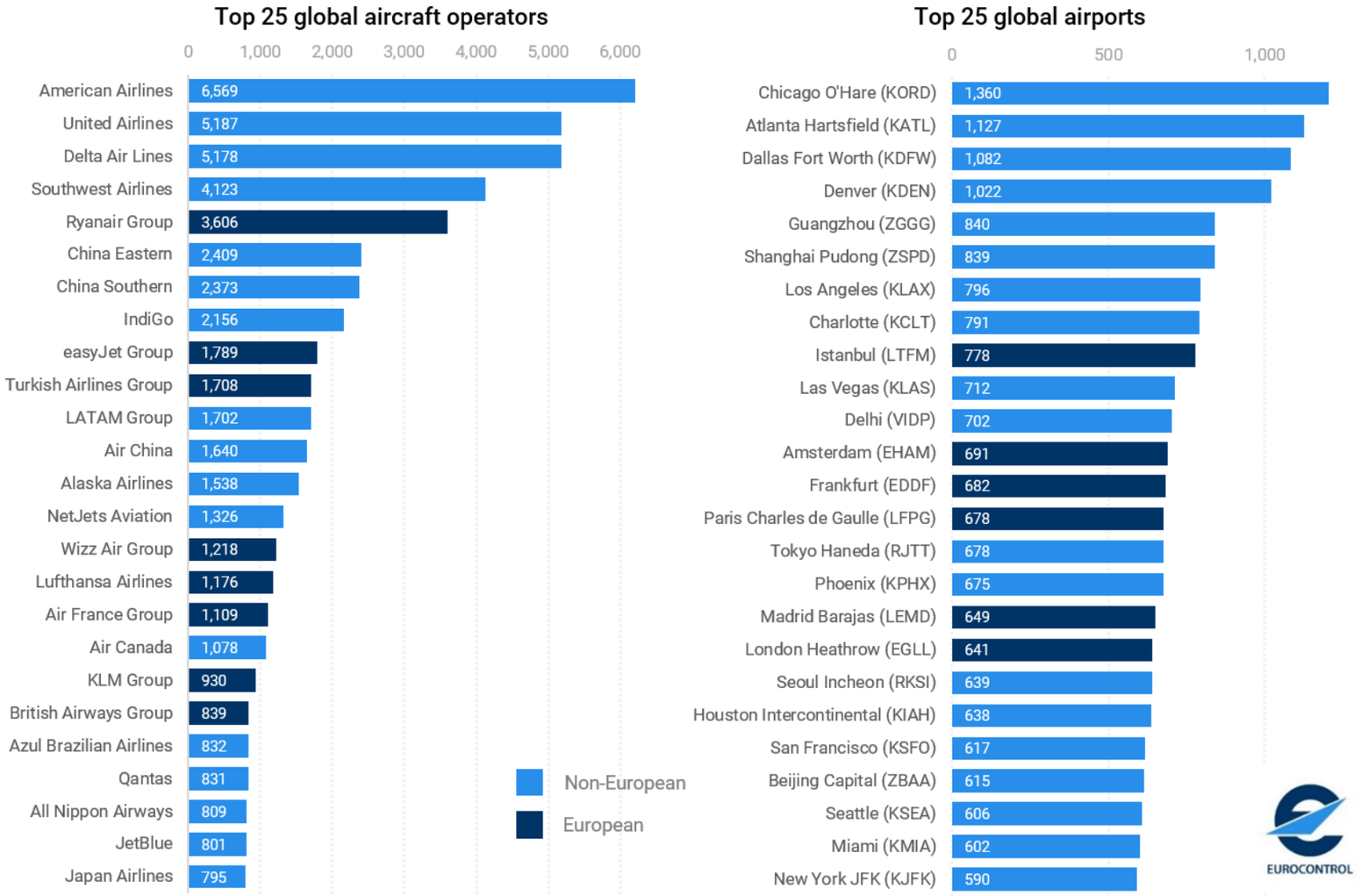
Week 05-11 Oct 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	321	-1%	-2%
2.	Germany ↔ US	178	-1%	+6%
3.	France ↔ US	145	-3%	+8%
4.	Italy ↔ US	125	+1%	+9%
5.	Spain ↔ US	88	-5%	+5%
6.	Ireland ↔ US	85	-2%	+0%
7.	Netherlands ↔ US	77	+1%	-3%
8.	Egypt ↔ Russia	61	-3%	+14%
9.	UAE ↔ UK	59	+1%	-8%
10.	India ↔ UK	52	-2%	+21%

- Seven of the top ten long-haul country pairs in Week 41 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 three of the top 10 long-haul country pairs recorded growth, each increasing by 1%: Italy ↔ US, Netherlands ↔ US, and UAE ↔ UK. The remaining seven recorded declines, led by Spain ↔ US (-5%), followed by France ↔ US and Egypt ↔ Russia (both -3%), Ireland ↔ US and India ↔ UK (both -2%), and UK ↔ US, and Germany ↔ US (both -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 between India ↔ UK (+21%), followed by Egypt ↔ Russia (+14%), Italy ↔ US (+9%), France ↔ US (+8%), Germany ↔ US (+6%), and Spain ↔ US (+5%). Ireland ↔ US remained stable. By contrast, three country pairs recorded declines, with the largest drop on UAE ↔ UK (-8%), Netherlands ↔ US (-3%), and UK ↔ US (-2%).

Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 05-11 Oct 2026)**



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Source: Flightradar24 Historical Global Utilisation data

- **Aircraft operators:** in Week 41, eight European aircraft operators ranked among the top 25 global aircraft operators, SAS Group dropped out of the ranking compared to the previous two weeks.
- Three European carriers ranked among the global top 10 in Week 41; Ryanair Group (5th), followed by easyJet Group (9th), and Turkish Airlines Group (10th). They all retained their position from Week 39.
- A further five European carriers made the top 25: Wizz Air Group (15th), Lufthansa Airlines (16th), Air France Group (17th), KLM Group (19th), British Airways Group (20th).
- **Airports:** six European airports ranked among the global top 25 for departures in Week 41, unchanged from two weeks earlier. Istanbul was the only European airport in the global top 10, slipping from 7th to 9th place. The other five airports also slipped in the rankings: Amsterdam (from 10th to 12th), Frankfurt (12th to 13th), Paris CDG (11th to 14th), Madrid Barajas (15th to 17th), and London Heathrow (14th to 18th).
- Among the ten busiest airports, six were American, and two were Chinese (Shanghai and Guangzhou).

Jet fuel price (Europe)

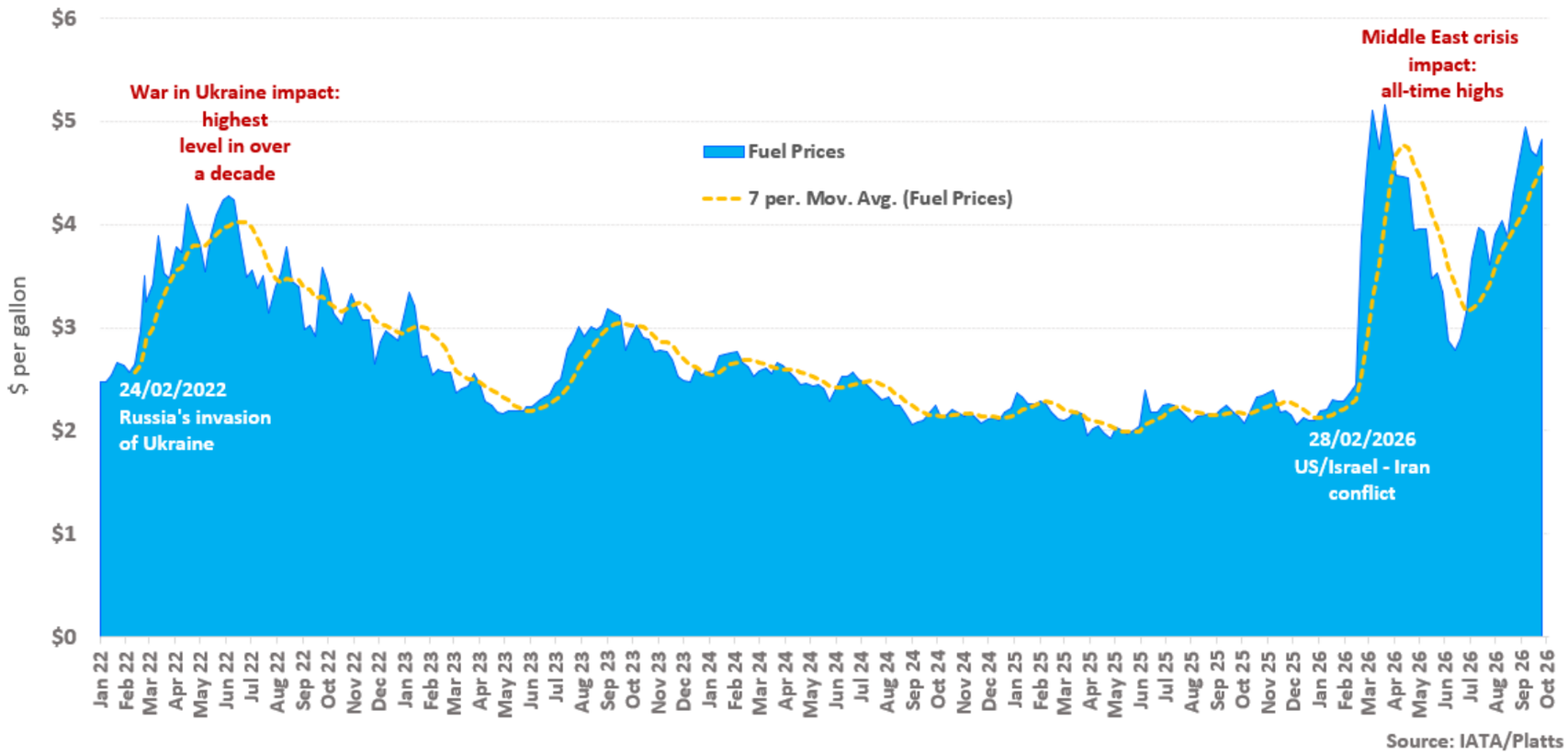
Week 05-11 Oct 2026

09 Oct 2026
avg fuel price:

$4.82 /gallon

+2%
vs. $4.71 /gallon
on 25 Sep 2026

Source: IATA/Platts



Source: IATA/Platts

- Jet fuel prices remained highly volatile, reaching $4.82 per gallon on 9 October, up 2% over the preceding two weeks. The October average to date stood at $4.74 per gallon, 2.5% higher than the September monthly average of $4.63 per gallon.
- At its 4 October meeting, OPEC+ decided to maintain the production targets of its participating countries at circa 31 million barrels per day for November, unchanged from October levels.
- Reuters reported that Gulf producers continued operating below their targets as disruptions linked to the Middle East conflict continued to constrain Gulf exports to circa 60-80% of normal levels.

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

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