AVIATION INTELLIGENCE+

European Aviation Trends
31 March 2026

EUROCONTROL

Impact of the current Middle East Crisis on European Aviation

The commencement of hostilities in the Middle East and Gulf region started just over a month ago, on Saturday 28 February 2026, with the launch of surprise airstrikes on multiple sites and cities across Iran, following by retaliatory actions targeting a widening number of States in the Gulf and beyond. This escalation has massively impacted aviation in the region, leading to a succession of cascading events including airspace closures owing to missile and drone strikes, closed airports, diverted flights, repatriation flights, significant traffic reductions and routing distortions in this area.

The impact on the European aviation network has also been considerable. Traffic to/from the Middle East[1] has dropped, and now stands at 59% lower than pre-crisis volumes at around 800 daily flights (both ways), a reduction of some 1,200 flights. When including flights from/to the Middle East and overflying Europe (mainly flights from/to North America), the overall decrease is -56%, and represents a reduction of some 1,360 daily flights. A substantial number of reroutings have been put in place to avoid the conflict area and closed airspaces. This has affected a number of European States, airports and aircraft operators.

According to EUROCONTROL estimates, around 1,150 flights would continue to be impacted every day in terms of re-routings assuming airspace remains closed over Iraq, but with traffic to/from the Gulf region returning to more normal levels. This figure includes all rerouted flights including overflights that do not take off or land in Europe. This will continue to have significant environmental impacts: an additional 206,000 km are being flown with an average additional 602 tons of fuel burnt, and around 1,900 excess tons of CO_2 emissions.

The longer hostilities continue, the greater the impact on demand, in terms of increasing fuel prices (currently +134%), potentially growing fuel shortages in many parts of the world, which could also impact volumes of flights as well as flight prices. and growing impacts on the global economy in terms of GDP and energy consumption.

Background

The launch of surprise airstrikes on multiple sites and cities across Iran on Saturday 28 February 2026 in the early morning led to a succession of cascading events in aviation terms: the closure of Israeli and Iranian airspaces at 06:30 UTC, the activation of the European Aviation Crisis Coordination Cell (EACCC) by the EUROCONTROL Network Manager and the European Commission at 07:32, the closure of Iraqi airspace at 07:40, the southern part of Syrian airspace and Bahrain airspaces at 08:30, of Qatar airspace at 08h40, etc.

Since then, the region has experienced airspace closures, multiple missile and drone strikes in many countries, significant traffic reduction and routing distortions in this area, as well as impacts on global flows especially to South East Asia with the closure or reduced traffic at major Middle East hubs.

Right from the start, the EUROCONTROL Network Manager has been in constant liaison with all air navigation service providers (ANSPs) and airspace users impacted by the crisis to facilitate operations, to ensure all stakeholders receive the latest updated information, and to coordinate re-routings with adjacent area control centres (ACCs), and with partner organisations like EASA, the European Union Aviation Safety Agency, and with the European Commission.

Aircraft operators have been requested to consult the relevant published NOTAMs (Notices to Airmen), including those applicable to adjacent Flight Information Regions (FIRs), and have been invited to take into consideration the applicable EASA Conflict Zone Information Bulletin (CZIB).

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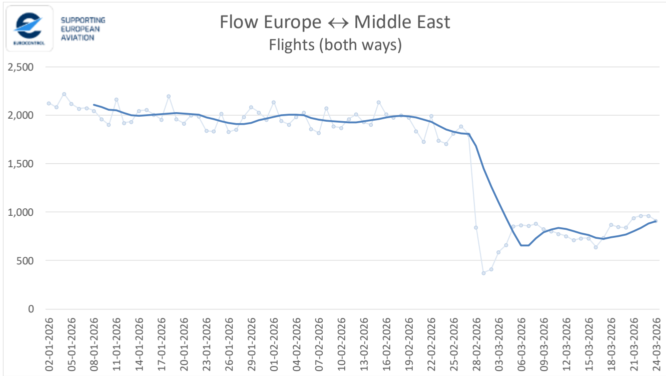
Impact of the main traffic flows

The Europe-Middle East flow has experienced significant traffic reductions since 28 February, with a crisis low point reached on Sunday 1 March when only 373 flights operated, a reduction of 80% compared to the usual daily figure of around 2,000 flights.

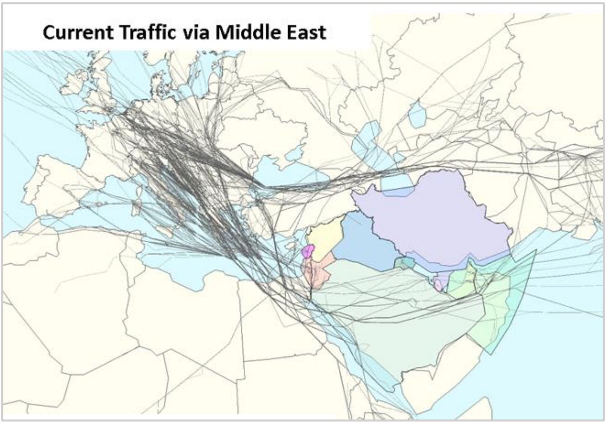
Since Thursday 5 March, traffic with the Middle East region has been stable at around 800 daily flights (in both directions), which represents a reduction of some 1,200 flights, or 59% lower.



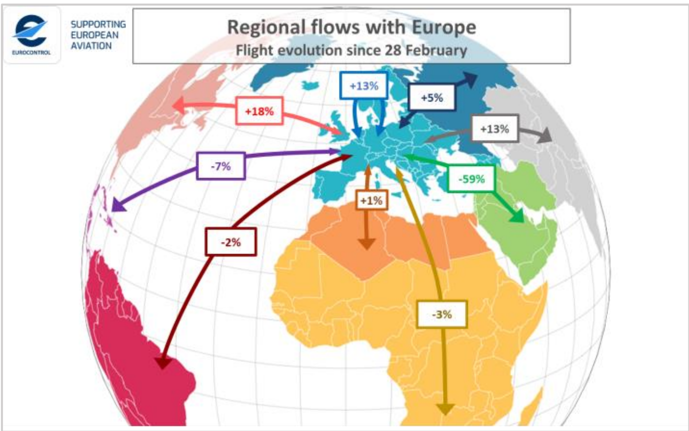
While this flow usually represents 5% of all flows from/to Europe, it has now been halved to just 2.5%.

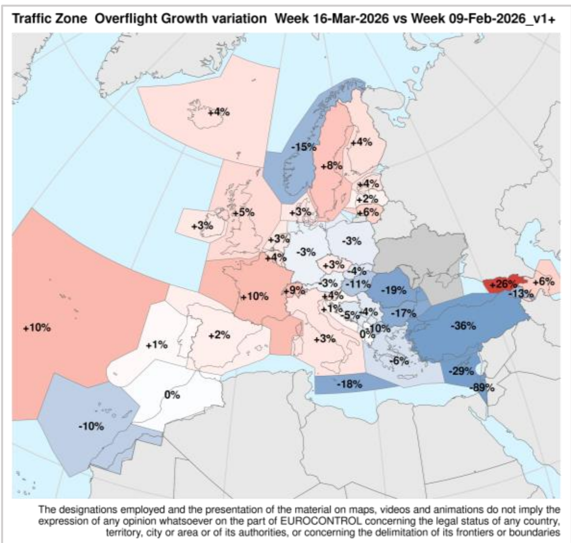
When including flights to/from the Middle East and overflying Europe (mainly flights to/from North America), the overall decrease is -56%, and represents a reduction of some 1,360 daily flights.

The closure of several airspaces as well as the evolution of the crisis have led to massive re-routings around the conflict area, as shown on the map to the right, which shows how two main corridors have emerged to fly to the east: a narrow northern corridor through Türkiye, Georgia and Azerbaijan avoiding Ukraine and Iran and largely Russia, and a wider southern corridor through Saudi Arabia and Oman.



The second map below presents the variation of overflights before and after 28 February. The traffic increase for Georgia and Azerbaijan is clearly visible with +26% and +6% respectively. On the other side, the number of overflights has considerably reduced for Türkiye (-36%), Cyprus (-29%), Romania (-19%) and Bulgaria (-17%).





Since the start of the crisis, while traffic has reduced by 59% for flows to the Middle East, traffic has increased within Europe (+13%) and indeed to/from all other regions, most notably to the Asia/Pacific region, up 13%, mainly driven by an increased number of cargo flights, and to the North Atlantic region (the US and Canada), which is up by 18%.

Overall, the network is currently up, looking at the seven-day flight average (24-30 March 2026), on all flows compared to the same period in 2025 except the Middle East (-51%), ranging from +4% within Europe to +18% to North Africa, +21% to the North Atlantic, and +23% to Asia/Pacific, with the total number of network flights currently 2% higher than 2025.

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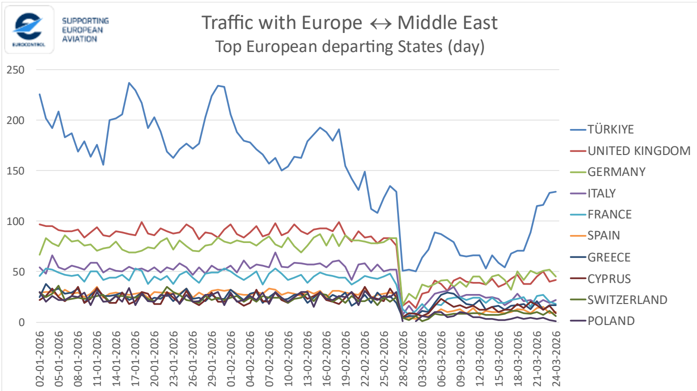
According to the latest information received by the EUROCONTROL Network Manager, EUROCONTROL expects, until end-April, the number of flights operated to/from Middle East airports to remain more or less similar. The airlines based in the Gulf region expect to operate a similar number of flights in April as during the last week of March, but this will depend on the evolution of the crisis. So far, European-based carriers have cancelled their flights for almost the entire IATA summer season, but would be expected to restore them if conditions permit.

Impact on States

The European State with the highest traffic flows to/from the Middle East region is by a long way Türkiye, followed by the UK, Germany, Italy and France. For these States, the reduction of arrival/departure flights to the region ranges from -42% to -59%.

No.	Country	Avg. daily dep flights (1 Jan - 27 Feb)	Avg. daily dep flights (11 - 24 March)	% vs prior Crisis
1.	TÜRKIYE	179	82	↓ -54%
2.	UNITED KINGDOM	89	41	↓ -54%
3.	GERMANY	78	45	↓ -42%
4.	ITALY	54	23	↓ -59%
5.	FRANCE	46	22	↓ -52%
6.	SPAIN	29	11	↓ -62%
7.	GREECE	26	16	↓ -38%
8.	CYPRUS	24	14	↓ -43%
9.	SWITZERLAND	24	9	↓ -64%
10.	POLAND	25	3	↓ -87%

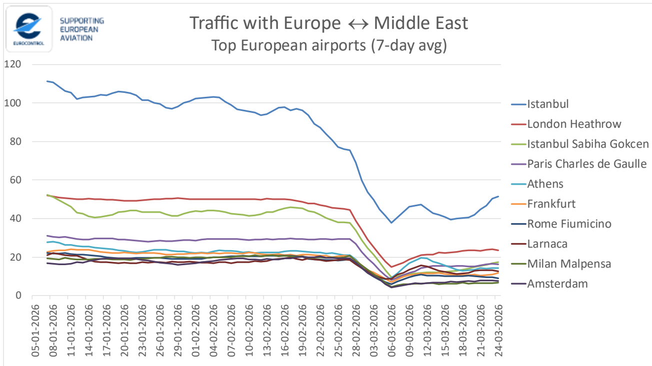


Impact on airports

Istanbul Airport, Europe's busiest, is also by far the most connected to the Middle East with usually almost 100 daily flights, followed by London Heathrow (50 daily flights) and Istanbul Sabiha Gökçen (43 daily flights).

The traffic decrease from these top 10 airports to the Middle East ranges from 35% for Larnaca to 67% for Milan Malpensa.

No.	Airport	Avg. daily dep flights (1 Jan - 27 Feb)	Avg. daily dep flights (11 - 24 March)	% vs prior Crisis
1.	Istanbul	98	46	↓ -53%
2.	London Heathrow	49	23	↓ -53%
3.	Istanbul Sabiha Gokcen	43	15	↓ -65%
4.	Paris Charles de Gaulle	29	16	↓ -46%
5.	Athens	23	14	↓ -41%
6.	Frankfurt	22	11	↓ -49%
7.	Rome Fiumicino	20	10	↓ -53%
8.	Milan Malpensa	20	7	↓ -67%
9.	Amsterdam	18	7	↓ -60%
10.	Larnaca	18	12	↓ -35%



At the time of publication, all airports in Iraq, Iran and Kuwait are closed for all types of traffic. Airports in Qatar, Bahrain, Syria and Israel are opened with restrictions. The other airports are open, but with strict monitoring of the situation.

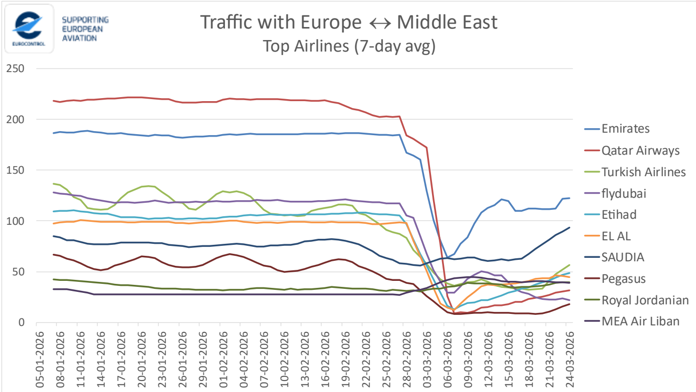
Impact on all aircraft operators

The impact on aircraft operators normally flying between Europe and the Middle East is very varied. The first aircraft operator in this segment is usually Qatar Airways; Qatar has however been forced to reduce operations massively by 88% since 28 February and now sits in 8th place.

Flydubai and Pegasus have also reduced significantly their traffic between Europe and the Middle East (-79% and -76% respectively) moving them into 9th and 10th. Emirates, on the other hand, has reduced its traffic only by 37%, and is currently the carrier operating most flights to/from Europe from the Middle East; fellow carriers Turkish Airlines, Etihad and El Al, on the other hand, are down by around 60%.

Conversely, Saudia, Royal Jordanian and MEA Air Liban have actually increased flights to Europe (+3%, +8% and +39% respectively), moving into 3rd and 7th at the moment.

No.	Aircraft operator	Avg. daily flights (1 jan - 27 Feb)	Avg. daily flights (11 - 24 March)	% vs prior Crisis
1.	Qatar Airways	216	26	-88%
2.	Emirates	185	116	-37%
3.	flydubai	120	26	-79%
4.	Turkish Airlines	116	45	-61%
5.	Etihad	106	41	-61%
6.	EL AL	98	42	-57%
7.	SAUDIA	76	78	+3%
8.	Pegasus	57	13	-76%
9.	Royal Jordanian	35	37	+8%
10.	MEA Air Liban	28	39	+39%



Impact on European aircraft operators

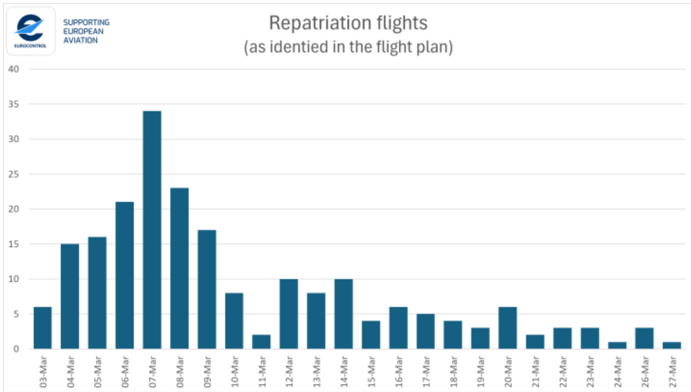
Focussing on just the European aircraft operators, usually the busiest by far is Turkish Airlines with 116 daily flights, followed by Pegasus and Wizz Air. These three have reduced their traffic between Europe and the Middle East between -76% and 100%.

While both Wizz Air and Wizz Air Malta have stopped all flights to the Middle East, other European carriers have reduced operations to a handful of daily flights.

No.	European Aircraft operator	Avg. daily flights (1 Jan - 27 Feb)	Avg. daily flights (11 - 24 March)	% vs prior crisis
1.	Turkish Airlines	116	45	-61%
2.	Pegasus	57	13	-76%
3.	Wizz Air	24	0	-100%
4.	Wizz Air Malta	24	0	-100%
5.	British Airways	22	3	-88%
6.	Eurowings	17	1	-93%
7.	Lufthansa	16	1	-94%
8.	Aegean Airlines	13	2	-85%
9.	Ryanair	12	0	-100%
10.	Transavia France	11	2	-85%

Repatriation flights

The commencement of hostilities on 28 February caught airlines and passengers by surprise, stranding a large number of passengers in the region. A system of repatriation flights was over the next weeks put in place to rescue these passengers. The following chart presents an estimation of the number of specific repatriation flights based on flights stating "Repat" in field 18 of their Flight Plan- not all flights were marked this way, but many were, providing an indication if not a true proxy of the number of flights organised with repatriation in mind.



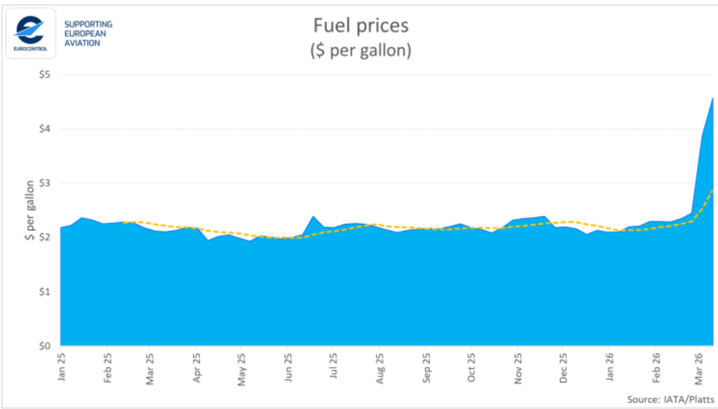
The first flights specifically indicating they were organised for repatriation purposes started 5 days after the start of the crisis on Tuesday 3 March and peaked on Saturday 7 March.

Economic impact

The average jet fuel price had been relatively stable since the beginning of 2025 until the eve of the crisis.

Unsurprisingly, prices started to rise rapidly as of 28 February, to reach $5.1/gallon on 20 March, a 134% increase vs the average price from January 2025 to 27 February 2026.

Depending on the duration of the crisis and on the hedging of aircraft operators, an impact on ticket prices



can be expected which could have a significant effect on demand, as well as making certain routes impossible or increasingly pricey to operate/buy tickets on.

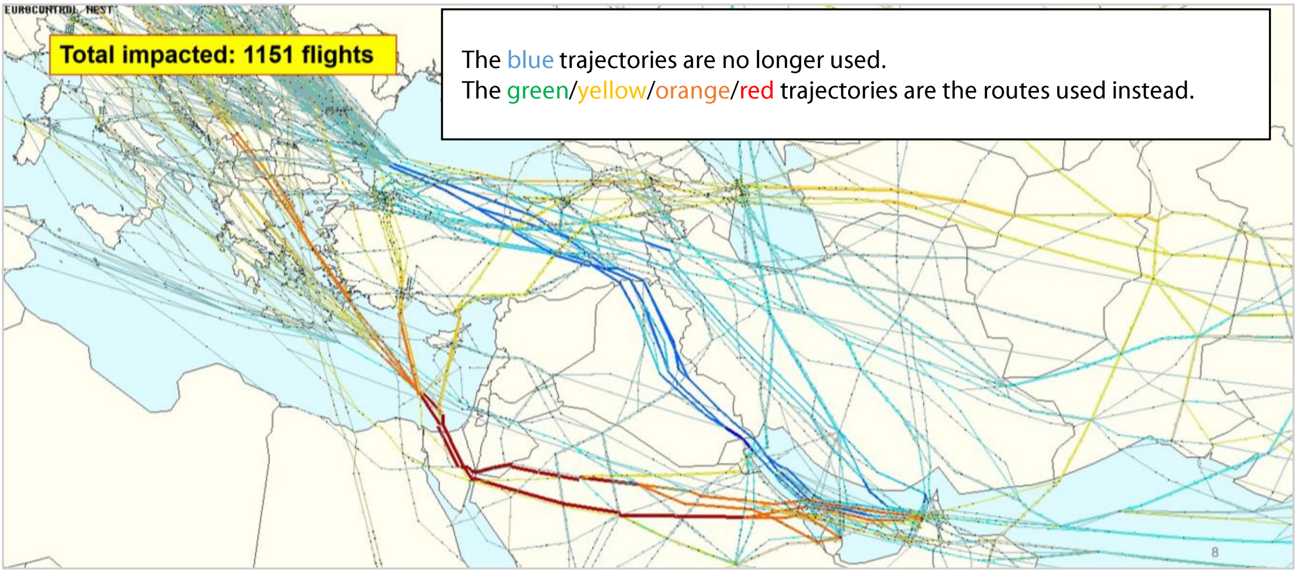
A slowdown of the European/global economy can also be anticipated, which will impact GDP growth and therefore demand. So far, there has only been a limited downward revision to GDP growth, but the longer the crisis lasts, and the more it escalates, the more inevitable further downward revisions undoubtedly become.

Environmental impact

In addition to the impact on citizens in many states and on passengers, this crisis has also had a large environmental footprint. EUROCONTROL estimates that **1,150 flights** are likely to continue to be impacted by reroutings every day during the summer as long as the conflict lasts in its current form, with an additional **206 thousand km** flown every day by those flights, resulting in an average **additional 602 tons of fuel burnt** and more than **1,900 excess tons of CO_2 emissions**.

The following map shows the trajectories (in blue) which are no longer used, and which have been replaced by the green/yellow/orange/red trajectories (the darker red, the higher the traffic on these trajectories).

Estimated impact per day
1,150 impacted flights
206,000 additional km flown
28,000 additional minutes flown
602 tons of additional fuel burnt
1,900 additional tons of CO_2 emissions
3.3 additional tons of NOx



Conclusions

The crisis in the Middle East and Gulf region has, since hostilities started on Saturday 28 February, had a considerable impact already to flows from this region to/from Europe, with traffic down by 59%. A succession of cascading events has materialised since then triggering multiple airspace closures, significant traffic reductions, routing distortions in the area, and emergency repatriation flights.

Moreover, the impact on fuel prices (+134% already) and more generally on the global economy (GDP) is likely to have a strong effect on demand for and pricing of flights, the longer the crisis persists.

In all of this. EUROCONTROL is committed to assisting operational stakeholders – ANSPs, airports and aircraft operators – in these difficult times, ensuring strong coordination between all affected operational stakeholders, partner organisations, and delivering transparent and objective reporting on network impacts.

[1] The Middle East Region referred to in this document comprises the following list of States: Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria and the United Arab Emirates. It does not contain Egypt which for aviation region purposes is considered part of Northern Africa.