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EUROCONTROL

EUROPEAN AVIATION OVERVIEW

04-10 May 2026

SUPPORTING
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13 May 2026

Headlines

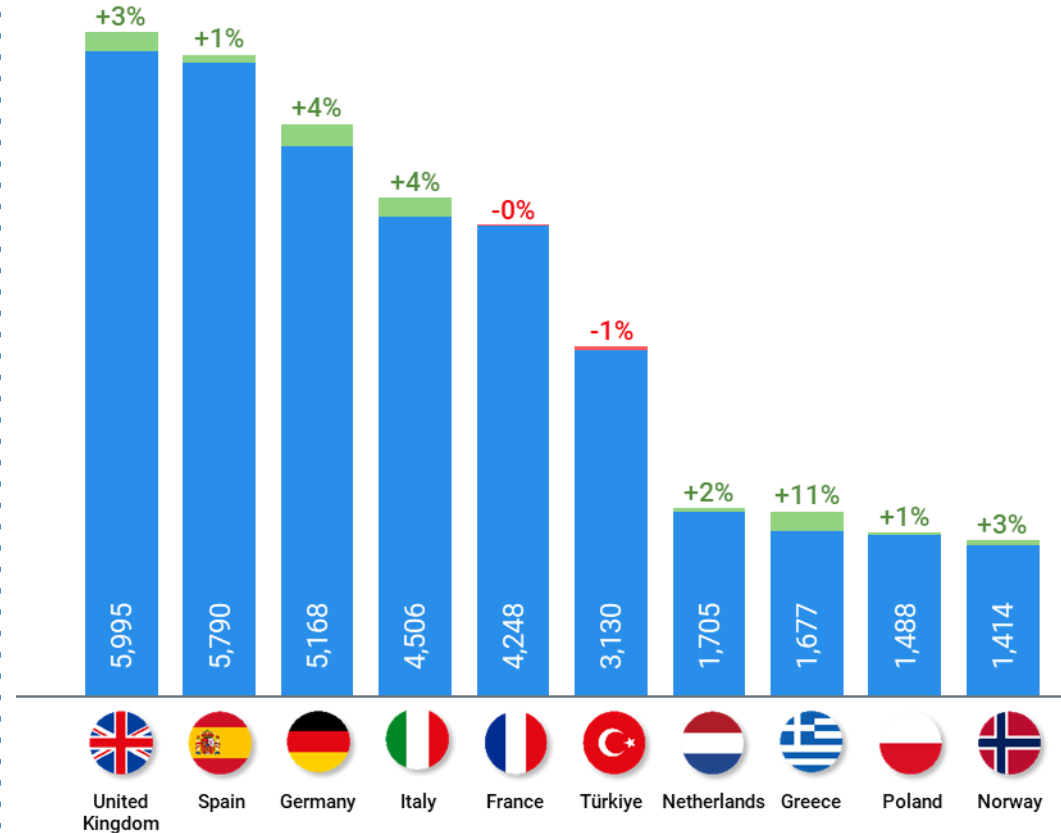
(Week 19, 04-10 May 2026)

- ➔ The network averaged 31,760 daily flights in Week 19, an increase of 2.5% from Week 18, but similar to 2025 levels.
- ➔ While flows to/from virtually all regions are up year-on-year, traffic between Europe and the Middle East remains heavily disrupted by the current crisis, with flights down 38% compared to 2025.
- ➔ On average, the busiest 10 carriers improved their capacity by 0.8% compared to the previous week.
- ➔ At State level, the busiest 10 States recorded a 2.5% increase in flights compared to the previous week.
- ➔ Network arrival and departure punctuality were 80.6% and 77.1%, higher than the equivalent week in 2025.
- ➔ En-route ATFM delays were up 9% compared to the previous week, with a daily average of around 31K delay minutes, but 12% lower than in 2025. Total air traffic flow management (ATFM) delay per flight was 1.6 min/flight (1.0 for en-route, and 0.6 for airports).
- ➔ ATC capacity/staffing was the top delay cause (44% of all en-route ATFM delays), particularly in Spain and in France.
- ➔ The area control centres contributing most to en-route ATFM delays (in mins/flight) were Athens (2.05 min/flight), Barcelona (1.66 min/flight), Makedonia (1.11 min/flight), Reims (0.77 min/flight) and Bordeaux (0.63 min/flight).
- ➔ European airlines' latest schedules show a 2% drop in planned flights for May–June 2026 versus the April 2026 schedules: operators are consolidating to prioritise high-margin routes.
- ➔ As of 08 May 2026, average jet fuel prices fell to \$3.94 per gallon, down 12% from \$4.46 over the previous two weeks. Despite the decrease, jet fuel prices are still 1.75 times higher than pre-crisis levels.

Top 10 busiest States

On week 04-10 May 2026

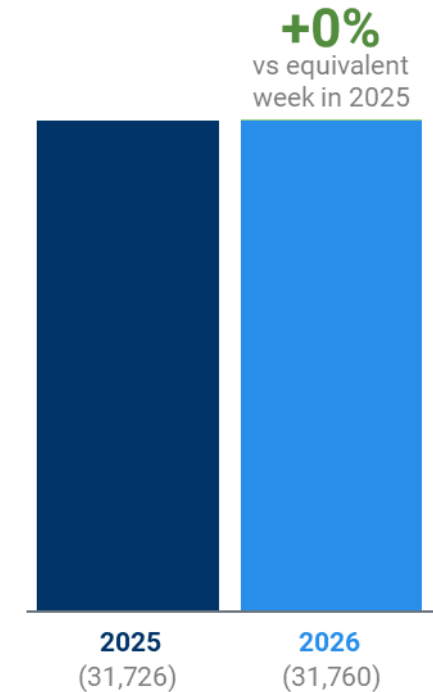
(all flights excl. overflights compared with previous week)



Traffic situation

Average daily flights (including overflights)

Week 04-10 May 2026

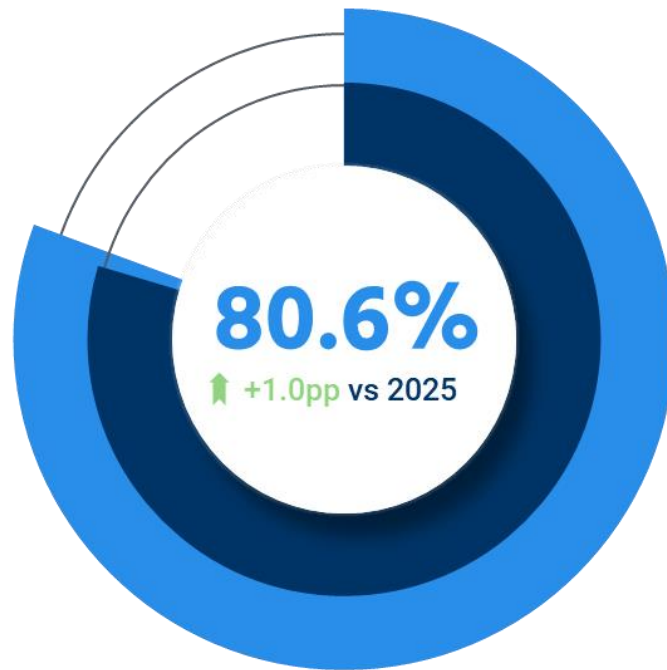


Arrival & departure punctuality

(all network scheduled flights)

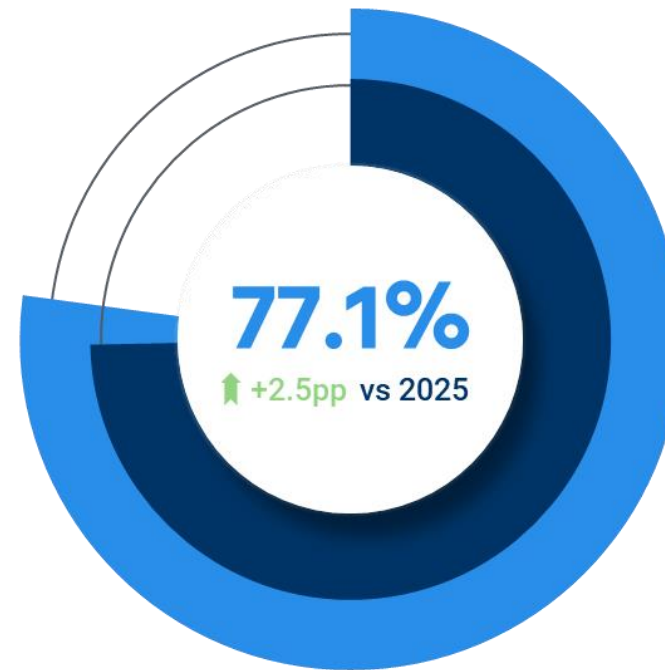
Week 04-10 May 2026

ARRIVAL PUNCTUALITY



79.6% _____ in 2025

DEPARTURE PUNCTUALITY



74.7% _____ in 2025



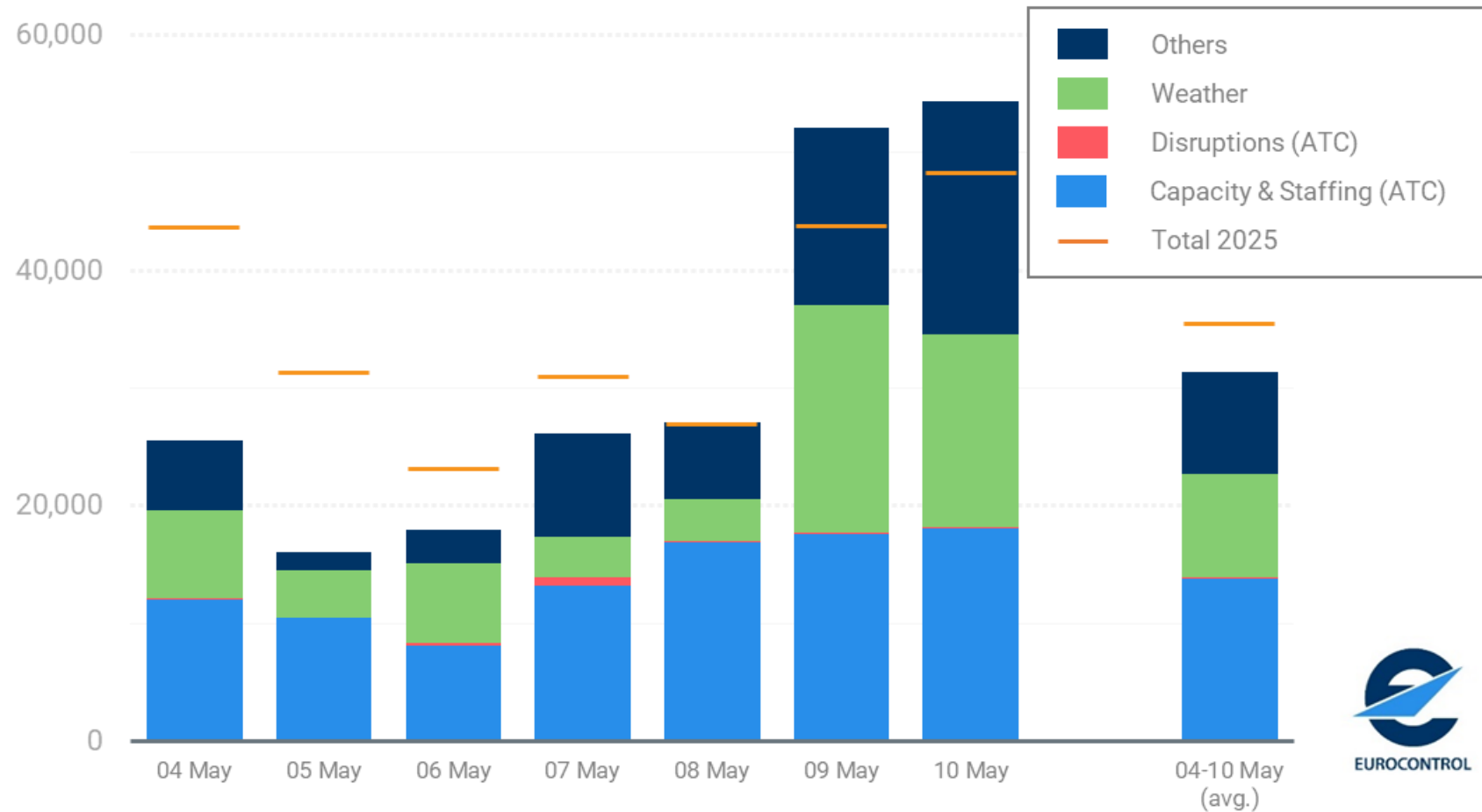
- ➔ Both arrival punctuality (80.6%) and departure punctuality (77.1%) were higher than in the same week of 2025, increasing by 1.0pp and 2.5pp respectively.
- ➔ The airports with the highest air traffic flow management (ATFM) delay per flight were as follows:
 - **Athens** continued to experience daily ATC capacity regulations, as the airport operates with winter arrival capacity of 22/60 and far higher summer demand.
 - **Lisbon** saw regulations due to weather (cumulonimbus and thunderstorms (CB/TS) and high winds) with 09 and 10 May recording the highest delays.
 - **Palma** also experienced delays due to weather (CB/TS) with 06, 07 and 09 May suffering high delays.
 - **Nice** experienced daily ATC capacity regulations.
 - **Barcelona** was impacted by weather (CB/TS) on 04, 05 and 09 May, while work-in-progress also triggered an aerodrome capacity regulation on 08 May.

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

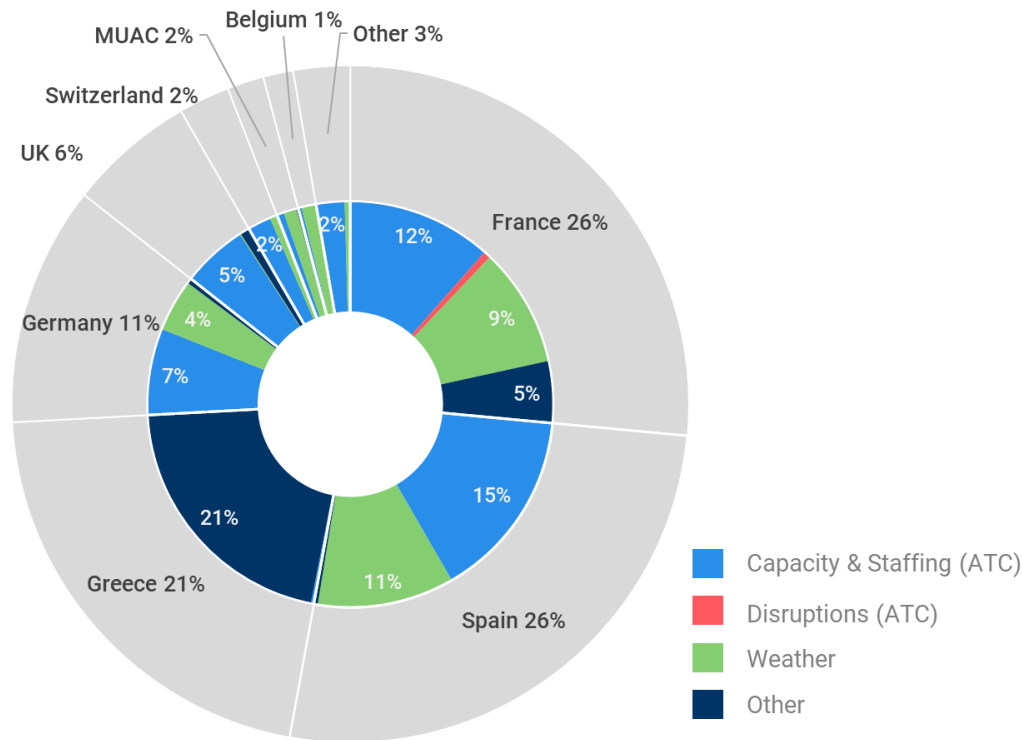


- ✈ Week 19 saw a 9% increase in en-route ATFM delays compared to the previous week, with an average of 31,330 minutes per day. En-route ATFM delays were however 12% lower than during the same operational week in 2025.
- ✈ ATC capacity/staffing were responsible for 44% of all en-route ATFM delays (notably in Spain and France).
- ✈ Other causes accounted for 28% of all en-route ATFM delays, with the greatest impact in Greece (onloading of traffic resulting from the Middle East crisis), as well as in France (4-FLIGHT system upgrade).
- ✈ Weather accounted for 28% of all en-route ATFM delays, affecting Spain mainly, followed by France and Germany.
- ✈ There were 1.6 minutes of total ATFM delay per flight in Week 19, made up of 1.0 min/flight en-route delay, and 0.6 min/flight airport delay, an increase of 14% compared to the previous week.

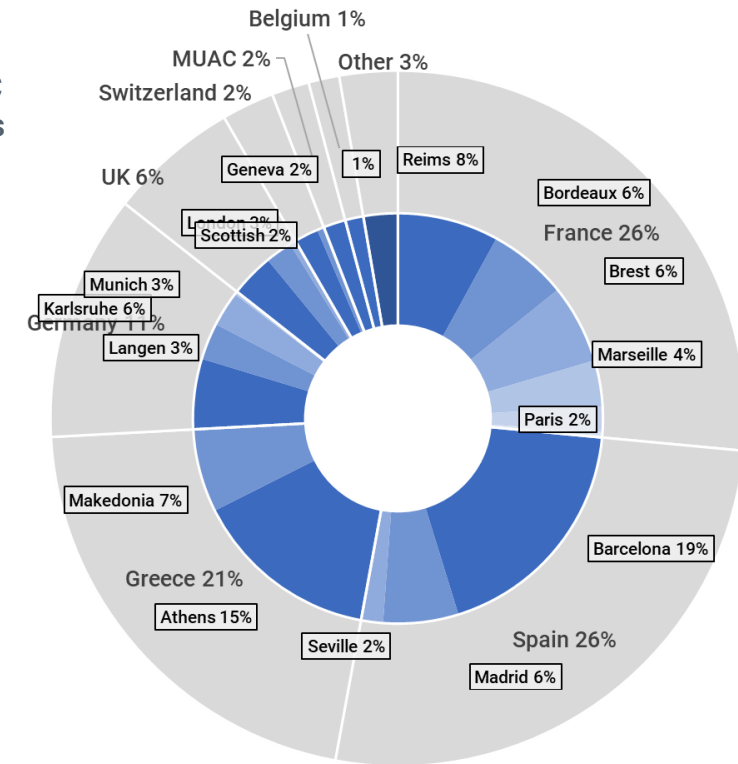
En-route ATFM delays per States per cause & per ACC

Week 04-10 May 2026

En-route ATFM delays per cause for top 8 States



En-route ATFM delays per ACC for top 8 States













- ✈ France represented 26% of en-route ATFM delays, primarily attributed to Reims ACC (8%), Bordeaux (6%) and Brest (6%). The primary cause was ATC capacity & staffing (12%).
- ✈ Spain accounted for 26% of en-route ATFM delays, mainly linked to Barcelona ACC (19%) and Madrid ACC (6%), due to ATC capacity & staffing (15%) and weather (11%).
- ✈ Greece contributed 21% of en-route ATFM delays, attributed to Athens ACC (15%) and Makedonia ACC (7%) and mainly due to 'Other causes' -- in particular the onloading of traffic resulting from the Middle East crisis (21%).
- ✈ Germany generated 11% of en-route ATFM delays, mainly attributed to Karlsruhe UAC (6%), due to ATC capacity & staffing (7%) and weather (4%).

Busiest 10 States

Departures and arrivals

Week 04-10 May 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	 United Kingdom	5,995	+3%	↑ +1%
2.	 Spain	5,790	+1%	↑ +4%
3.	 Germany	5,168	+4%	↓ -3%
4.	 Italy	4,506	+4%	↑ +5%
5.	 France	4,248	-0%	↓ -4%
6.	 Türkiye	3,130	-1%	↓ -7%
7.	 Netherlands	1,705	+2%	↓ -0%
8.	 Greece	1,677	+11%	↑ +2%
9.	 Poland	1,488	+1%	↑ +8%
10.	 Norway	1,414	+3%	↑ +1%











[See all States](#)



- ✈ The busiest ten States collectively recorded a 2.5% increase in departure and arrival flights in Week 19 compared to the previous week, with eight recording week-on-week growth and two remaining stable or slightly decreasing.
- ✈ Greece recorded the largest week-on-week increase (+11%) primarily driven by the flows with the UK, Germany and Greece, and primarily by Aegean, Jet2.com and TUI. Germany posted a 4% increase owing to higher internal flows and to/from Greece and Italy. Italy saw a 4% increase too, owing to strong domestic traffic and flows with Germany, while the UK and Norway each rose by 3%. France remained unchanged, while Türkiye slightly decreased by 1%.
- ✈ Compared to 2025, six of the busiest 10 States recorded growth in arrival and departure flights: Poland (+8%), Italy (+5%), Spain (+4%), Greece (+2%), the UK (+1%) and Norway (+1%). Conversely, three States saw declines: Türkiye (-7%), France (-4%), and Germany (-3%). The Netherlands remained stable.

Busiest 10 aircraft operators

Week 04-10 May 2026 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	
1.	 Ryanair Group	3,716	+1%	↑	+6%
2.	 easyJet Group	1,727	+2%	↓	-2%
3.	 Turkish Airlines Group	1,450	-2%	↓	-3%
4.	 Air France Group	1,117	-1%	↑	+0%
5.	 Lufthansa Airlines	1,115	+3%	↓	-10%
6.	 Wizz Air Group	1,058	-3%	↑	+24%
7.	 KLM Group	951	+0%	↑	+3%
8.	 British Airways Group	832	+2%	↓	-4%
9.	 SAS Group	812	+5%	↑	+7%
10.	 Vueling	638	+1%	↓	-2%

[See top 40 airlines](#)



- ✈ The busiest 10 aircraft operators collectively recorded a 0.8% increase in flights in Week 19 compared to the previous week.
- ✈ SAS recorded the highest increase with +5% over the previous week, owing to domestic flows in Sweden and Norway. Lufthansa recorded an increase of 3% primarily due to domestic flows in Germany.
- ✈ easyJet increased by 2% owing to flows between the UK and the south (Greece, Spain, Croatia, France, Türkiye and Portugal). Similarly, British Airways increased by 2%, mainly due to flows between the UK and Spain, Italy, the US, Greece and Canada.
- ✈ Three airline groups saw fewer flights compared to the previous week: Wizz Air Group (-3%) owing to the flows Romania ↔ Germany and Romania ↔ UK., the Turkish Airlines Group (-2%) owing to fewer flights on domestic flows. The Air France Group was narrowly down week-on-week (-1%).
- ✈ Compared to 2025, four of the 10 busiest aircraft operators recorded higher flight volumes. Growth was led by the Wizz Air Group (+24%) followed by the SAS Group (+7%), the Ryanair Group (+6%) and KLM Group (+3%). The Air France Group remained stable. In contrast, Lufthansa Airlines (-10%), the British Airways Group (-4%), the Turkish Airlines Group (-3%), the easyJet Group (-2%) and Vueling (-2%) all flew less than this time last year.

Europe's 6 largest airline groups

Week 04-10 May 2026 (average daily flights)

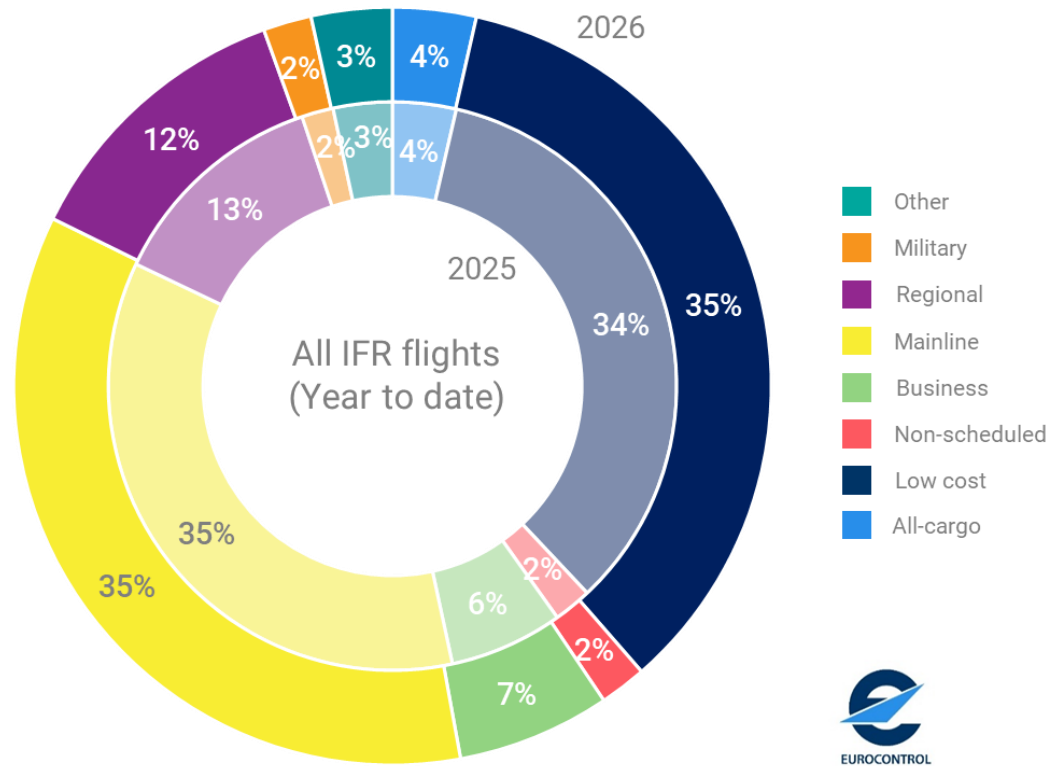
No.	Aircraft operator	Average daily flights	% prev week	% prev year	
1.	Ryanair Group	3,716	+1%	↑	+6%
2.	Lufthansa Group	2,889	+4%	↓	-7%
3.	IAG Group	2,332	+2%	↓	-1%
4.	Air France-KLM Group	2,068	-0%	↑	+1%
5.	easyJet Group	1,727	+2%	↓	-2%
6.	Turkish Airlines Group	1,450	-2%	↓	-3%



- ➔ The six largest European airline groups – i.e. aggregating the constituent members of the Lufthansa, IAG and AFR-KLM groups to join the Ryanair, easyJet and Turkish Airlines Groups from the previous slide – in aggregate recorded a combined week-on-week increase in flights of 1.4%.
- ➔ Four airline groups recorded week-on-week increases: **Lufthansa** (+4%), **IAG** (+2%), **easyJet** (+2%) and **Ryanair** (+1%)
- ➔ **Air France-KLM** (-0%) remained stable while **Turkish Airlines** recorded a decrease (-2%).
- ➔ Compared to 2025, two of the largest European airline groups recorded growth -- Ryanair (+6%) and Air France-KLM (+1%) – but all other have posted declines, from Lufthansa (-7%) to Turkish Airlines (-3%), easyJet (-2%) and IAG (-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	11,861	+2%	↑ +2%
2.	Mainline	10,788	+2%	↓ -0%
3.	Regional	3,623	+3%	↓ -5%
4.	Business	2,151	+5%	↑ +3%
5.	Other	1,085	-1%	↑ +10%
6.	All-cargo	963	+2%	↓ -2%
7.	Non-Scheduled	688	+9%	↓ -17%
8.	Military	612	+4%	↑ +13%

➔ In the year to date, the two largest market segments (Low-cost and Mainline) each hold a 35% share. Low-cost has increased by 1 percentage point (pp) compared to 2025 while Mainline has remained stable. The Regional segment's market share has declined by 1pp to 12%, whereas Business aviation has grown by 1 pp to 7%. The All-cargo and Non-scheduled remain unchanged at 4% and 2% respectively.

➔ Week-on-week, Low-cost and Mainline increased by 2%. The non-scheduled segment increased by 9% and Regional increase by 3%. Business aviation recorded +5% growth, while All-cargo was up by 2%.

➔ Compared to 2025, the Non-scheduled segment declined by 17%, due in part to reduced traffic on flows Russia ↔ Türkiye, Germany ↔ Türkiye and Germany ↔ Greece. Regional fell by 5% and All-cargo by 2%. Mainline remained stable while Low Cost increased by 2% and Business aviation by 3%.

Busiest 10 airports

Week 04-10 May 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	
1.	Amsterdam	1,404	+1%	↑	+0%
2.	Istanbul	1,381	-1%	↓	-6%
3.	Paris Charles de Gaulle	1,350	+1%	↓	-0%
4.	Frankfurt	1,319	+3%	↓	-3%
5.	London Heathrow	1,313	+1%	↓	-2%
6.	Madrid Barajas	1,259	-1%	↑	+7%
7.	Barcelona	1,117	+3%	↑	+4%
8.	Rome Fiumicino	961	+3%	↑	+2%
9.	Munich	879	+6%	↓	-13%
10.	Palma de Mallorca	856	+5%	↑	+1%

- ✈ The busiest 10 airports together saw a 1.7% increase in Week 19 compared to the previous week.
- ✈ Only Istanbul and Madrid Barajas were down (both -1%). Istanbul saw fewer internal flights and between Türkiye and Russia, Egypt and Germany, while the main drivers for Madrid were fewer flights between Spain and Morocco plus the UK.
- ✈ The largest week-on-week increases were recorded at Munich (+6%), with higher intra-German as well as flights between Germany and Italy plus Greece; and Palma (+5%) owing to flows between Spain and UK and Germany. Frankfurt, Barcelona and Rome Fiumicino increased by 3% driven respectively by Condor and Lufthansa, Vueling and Condor, and ITA Airways, Aeritalia and Condor.
- ✈ Compared to 2025, four of the busiest ten airports are handling more flights, led by Madrid Barajas (+7%), Barcelona (+4%), Rome Fiumicino (+2%) and Palma (+1%). Traffic has declined at Munich (-13%), Istanbul (-6%), Frankfurt (-3%) and Heathrow (-2%). It remained stable at Amsterdam and Paris.

[See top 40 airports](#)

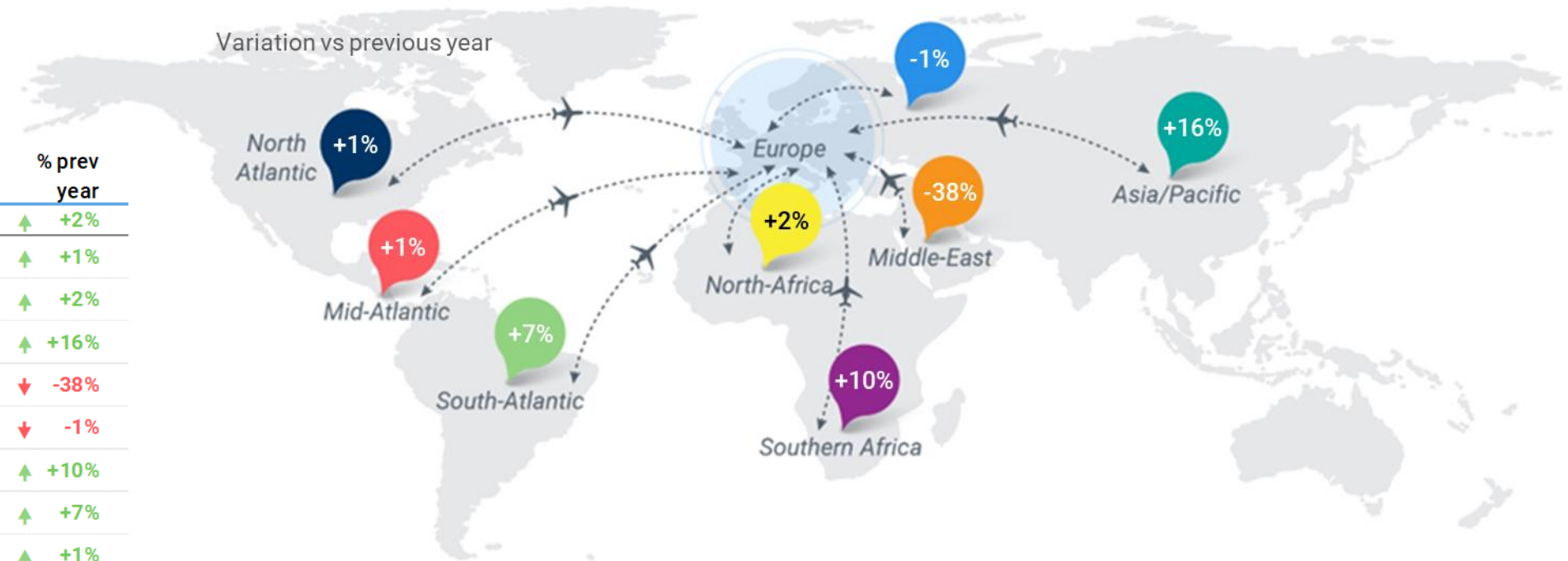


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Traffic flows

(average daily departure/arrival flights for week 04-10 May 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	25,061	↑ +3%	↑ +2%
Europe ↔ North Atlantic	1,525	↑ +5%	↑ +1%
Europe ↔ North-Africa	1,372	↓ -4%	↑ +2%
Europe ↔ Asia/Pacific	1,075	↓ -2%	↑ +16%
Europe ↔ Middle-East	858	↑ +6%	↓ -38%
Europe ↔ Other Europe	393	↓ -3%	↓ -1%
Europe ↔ Southern Africa	312	↑ +0%	↑ +10%
Europe ↔ South-Atlantic	210	↓ -0%	↑ +7%
Europe ↔ Mid-Atlantic	159	↓ -5%	↑ +1%
Non Intra-Europe	5,903	↑ +0%	↓ -4%



- ✈ Intra-European traffic saw 25,061 daily flights on average during Week 19, a 3% increase vs the previous week. Intercontinental flows amounted to 5,903 daily flights on average, stable vs the previous week. The top intercontinental flows were between Europe and the North Atlantic, North Africa, and Asia/Pacific.
- ✈ Week-on-week, the Middle East flow rose by 6%, driven by more flights to/from Israel. Flows between Europe and North Atlantic rose by 5% driven by stronger UK ↔ US, France ↔ US and Italy ↔ US flows. Small increases were recorded between Europe and Southern Africa (+0%) and the South Atlantic (-0%). In contrast, flows between Europe and the Mid-Atlantic fell by 5% followed by North Africa (-4%), Other Europe (-3%) and Asia/Pacific (-2%).
- ✈ Compared to 2025, all intercontinental flows recorded increases in flight volumes except those to the Middle East (-38%) and Other Europe (-1%). The strongest growth was observed between Europe and Asia/Pacific (+16%).

Top 10 long-haul country pairs

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

Week 04-10 May 2026

No.	Country pair	Average daily flights	% prev week	% prev year	
1.	UK ↔ US	321	+3%	↑	+1%
2.	Germany ↔ US	172	-0%	↓	-3%
3.	France ↔ US	136	+8%	↓	-1%
4.	Italy ↔ US	109	+9%	↑	+14%
5.	Spain ↔ US	92	+7%	↑	+14%
6.	Ireland ↔ US	87	+4%	↑	+7%
7.	Netherlands ↔ US	81	+1%	↓	-0%
8.	Egypt ↔ Russia	63	+1%	↑	+20%
9.	India ↔ UK	52	+0%	↑	+18%
10.	UAE ↔ UK	48	+10%	↓	-21%

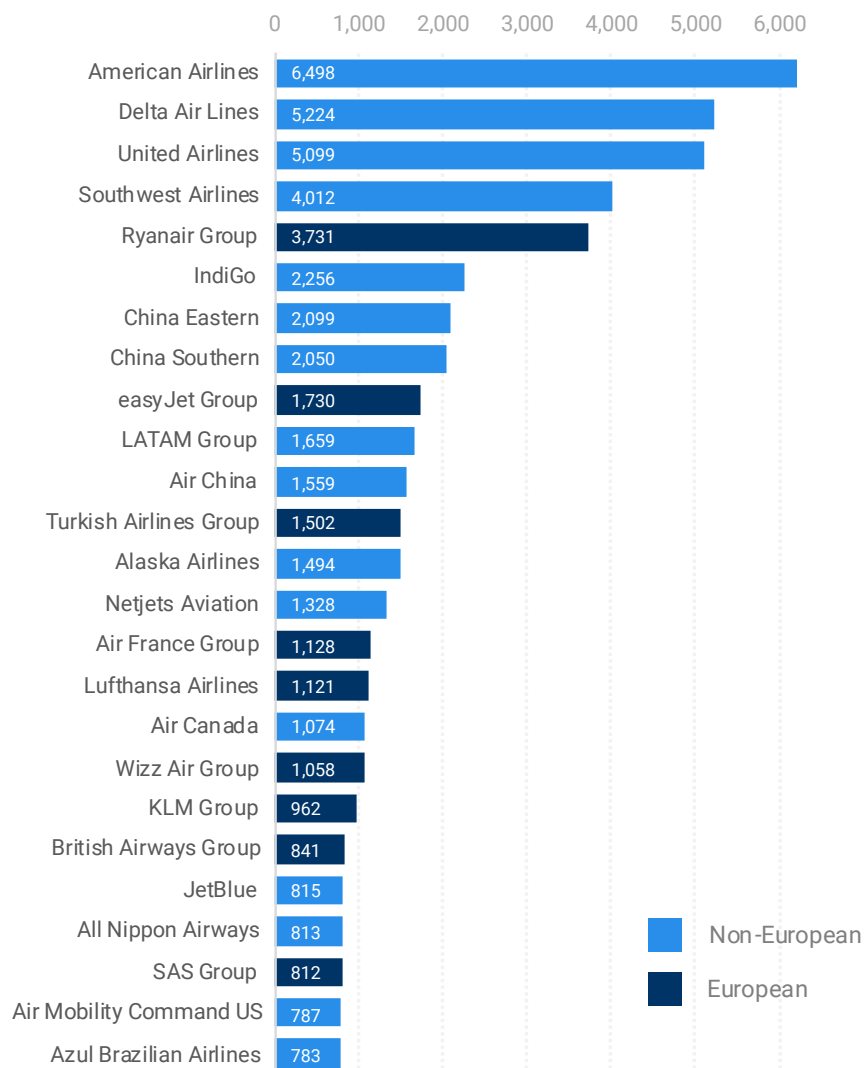
- ➔ Seven of the top ten long-haul country pairs included the US, with the largest three being the US ↔ UK, US ↔ Germany and US ↔ France.
- ➔ The remaining three non-US long-haul flows were between Egypt ↔ Russia (i.e. overflying the network), India ↔ UK, and UAE ↔ UK.
- ➔ Compared to the previous week, all but one long-haul flow recorded an increase, led by UAE ↔ UK (+10%), Italy ↔ US (+9%), France ↔ US (+8%), Spain ↔ US (+7%), Ireland ↔ US (+4%), UK ↔ US (+3%). Two flows remained relatively stable: Germany ↔ US and India ↔ UK.
- ➔ Compared to the same week in 2025, six of the top ten long-haul flows recorded growth, led by Egypt ↔ Russia (+20%), India ↔ UK (+18%), Italy ↔ US (+14%), Spain ↔ US (+14%), Ireland ↔ US (+7%) and UK ↔ US (+1%). The Netherlands ↔ US remained stable while UAE ↔ US decreased by 21%, Germany ↔ US by 3% and France ↔ US by 1%.



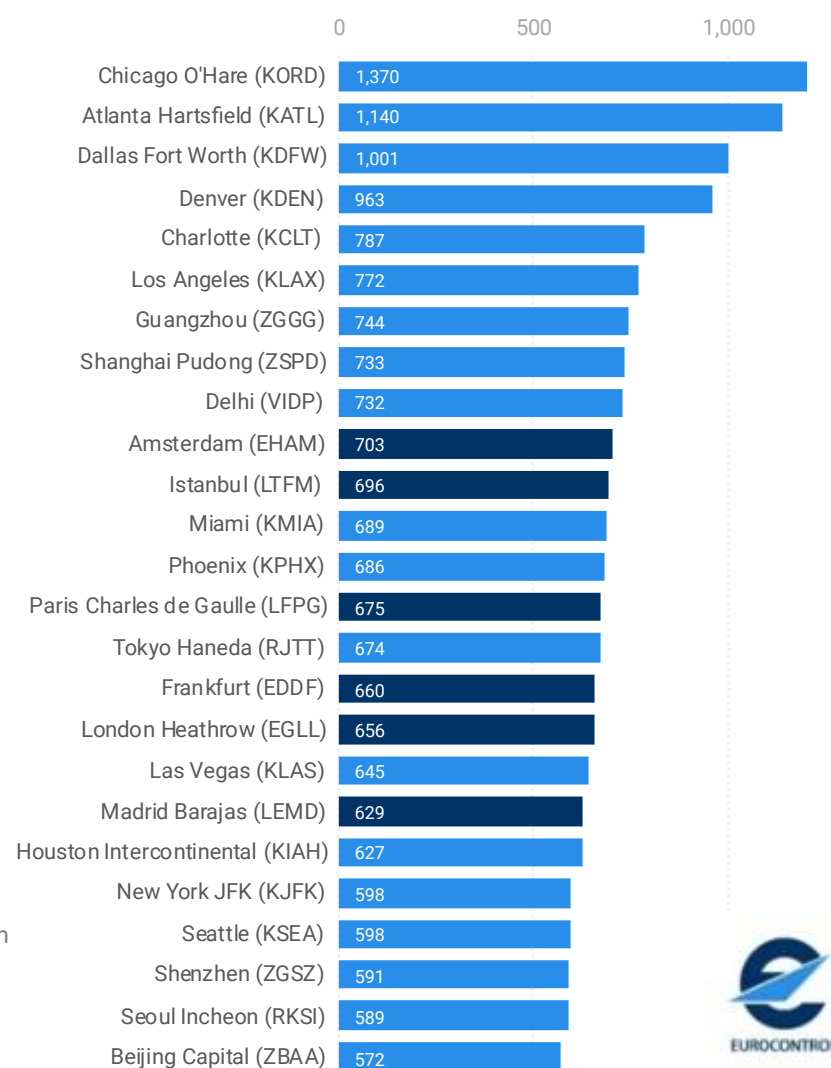
Top 25 global aircraft operators and airport departures

(average daily departure flights) (Week 04-10 May 2026)

Top 25 global aircraft operators



Top 25 global airports

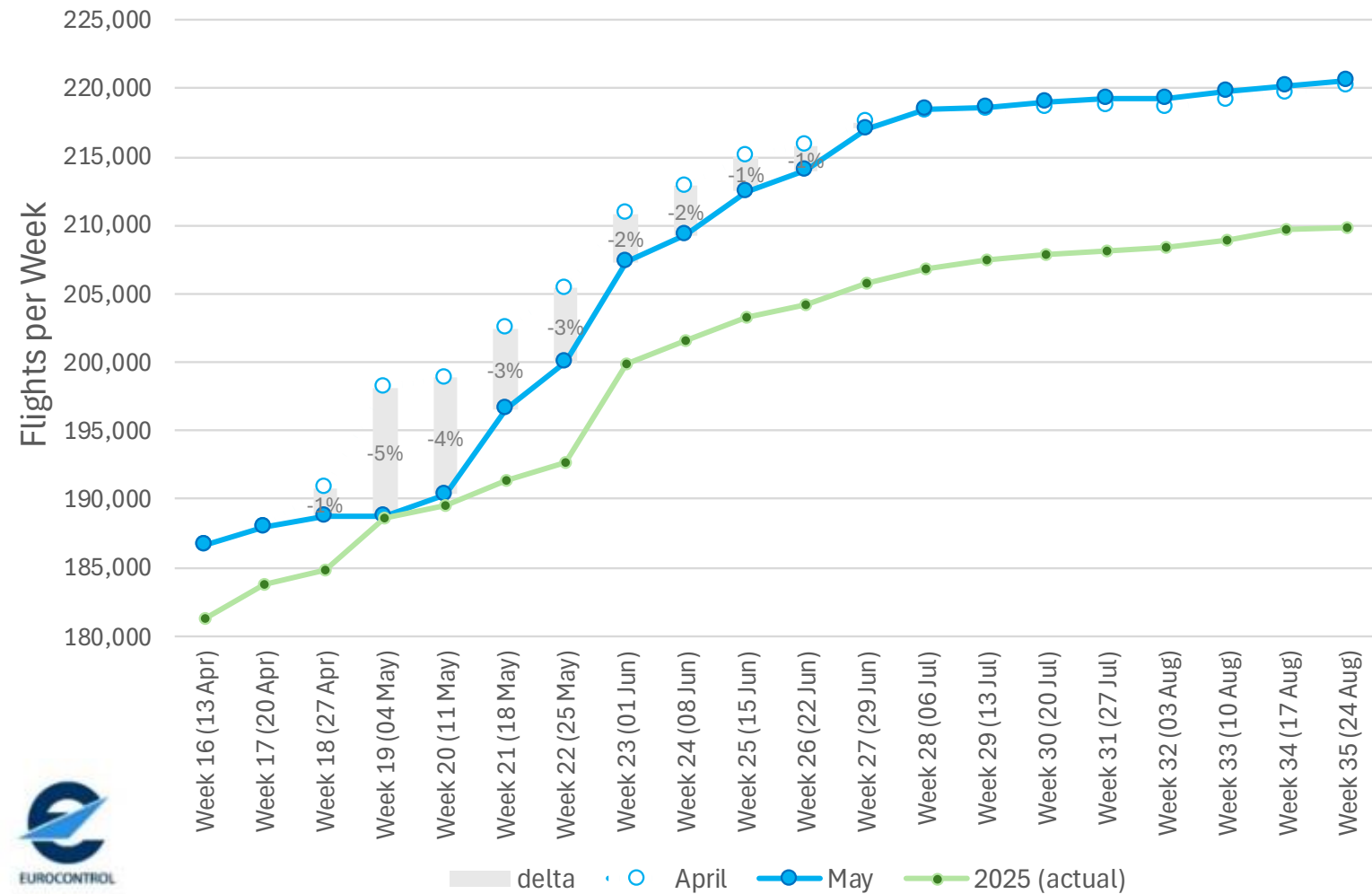


Source: Flightradar24 Historical Global Utilisation data

- ✈️ **Aircraft operators:** In Week 19, nine European aircraft operators ranked among the top 25 global aircraft operators, unchanged compared to Week 18.
- ✈️ Two European carriers made the top 10, with Ryanair in 5th place and easyJet in 9th place, unchanged from Week 19.
- ✈️ Seven more European carriers made the top 25, starting with Turkish Airlines Group (12th), Air France Group (15th), Lufthansa Airlines (16th), Wizz Air Group (18th), KLM Group (19th), British Airways (20th) and SAS Group (23rd).
- ✈️ **Airports:** six European airports ranked among the Global top 25 for departures in Week 19, unchanged compared to two weeks earlier.
- ✈️ Amsterdam was the only one European airport ranked in the global top 10 in Week 19. Istanbul was narrowly below in 11th place, followed by Paris CDG (14th), Frankfurt (16th), London Heathrow (17th) and Madrid Barajas (19th).
- ✈️ Of the other ten busiest airports six were American, two were Chinese (Shanghai-Pudong and Guangzhou), and one was Indian (Delhi).

Airline Schedules

Comparison between airline schedules (Europe)



Source: INNOVATA, STATFOR analysis

- ✈ Comparison of the schedules for Europe between the May 2026 edition (solid line in blue) and the April 2026 edition (dotted line in blue) show that aircraft operators filed service changes equivalent to 2% fewer flights over the period May-June 2026.
- ✈ While there is *currently* no concrete evidence of fuel shortages in Europe, some airlines are taking measures to anticipate the future rising costs with adapting their plans: consolidating flights on most profitable (long-haul) routes while removing the (short-haul) less profitable ones, grounding less fuel-efficient aircraft, cancelling routes near the conflict zone.
- ✈ Most significant revisions were observed for Week 19 (-5%) and Week 20 (-4%).
- ✈ Over the May-June period, largest revisions (in absolute terms) between the two schedules editions were recorded mainly for: Germany (-4%, owing notably to the closure of Lufthansa CityLine--originally planned for 2027), Türkiye (-2% owing mostly to changes in plans for Turkish Airlines and AJet), UK (-1%, reduction from British Airways on flights between Heathrow and the Middle East), France (-1%, owing to Transavia France on flights from/to Middle East) or Poland (-3% from LOT).
- ✈ The latest schedules (solid line in blue) show a 3% increase in flights for May-June 2026 compared to the same period in 2025 (solid line in green).



Jet fuel price (Europe)

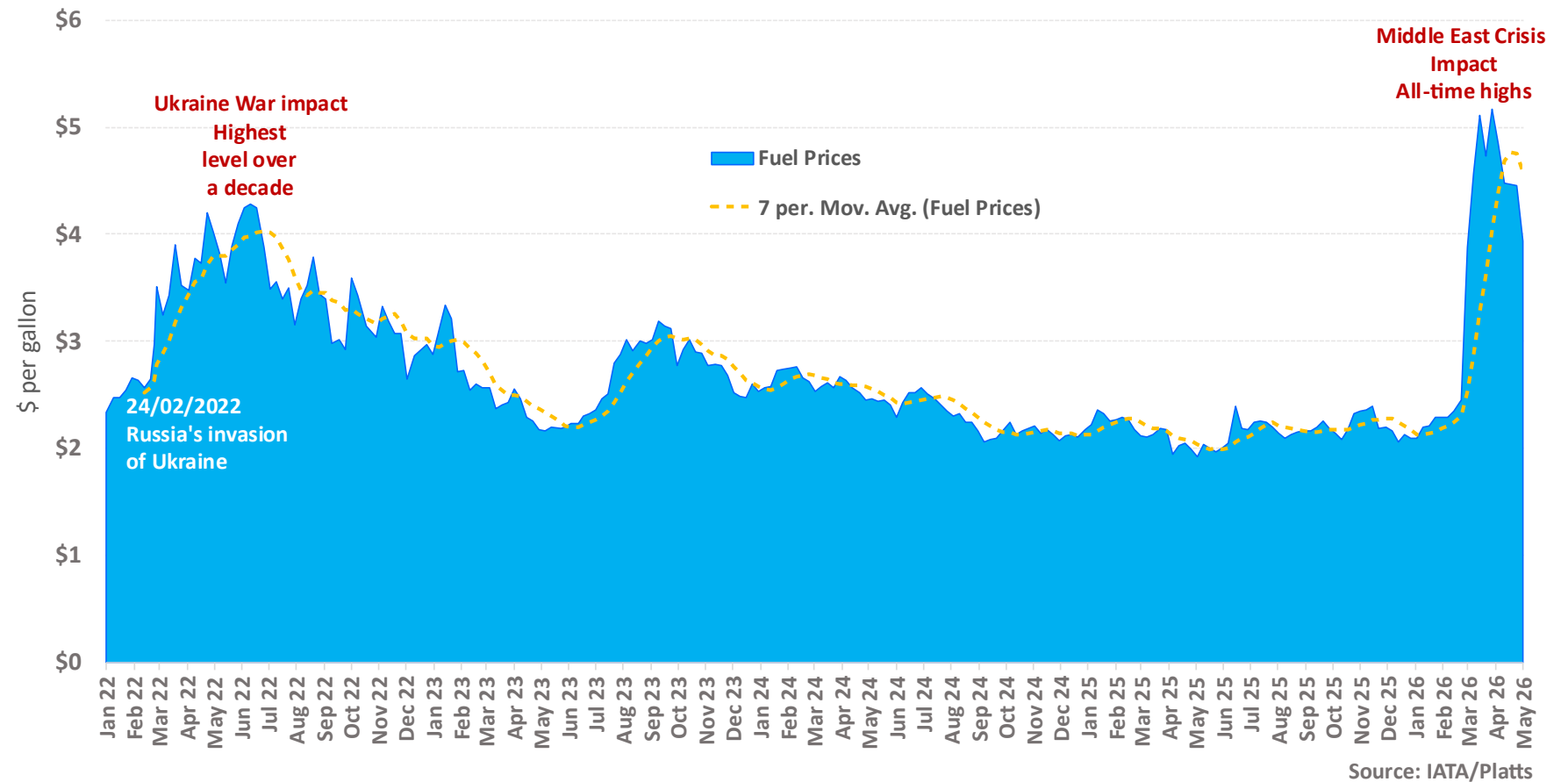
Week 04-10 May 2026

08 May 2026
avg fuel price:

\$3.94 /gallon

-12%
vs. \$4.46 /gallon
on 24 Apr 2026

Source: IATA/Platts



- ➔ As of 08 May 2026, average jet fuel prices fell to \$3.94 per gallon, down 12% from \$4.46 over the previous two weeks. Jet fuel prices averaged \$4.74 per gallon in April, up 4% from March and more than double pre-crisis levels (\$2.26 per gallon in January-February 2026). European jet fuel prices reached a record high in mid-March 2026, surpassing the 2022 Ukraine war peak following supply disruptions caused by the closure of the Strait of Hormuz.
- ➔ The International Energy Agency forecasts global crude oil supply will decline by approximately 1 million barrels per day in 2026. Global jet fuel supply is expected to suffer a net 200,000 barrels per day reduction versus pre-conflict levels, with the impact forecast to be concentrated in 2Q2026 with a drop in global jet fuel output losses of as much as 500,000 barrels per day.
- ➔ United Arab Emirates (UAE) announced its exit from OPEC and OPEC+ effective May 1, 2026.

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.
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.



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