AVIATION INTELLIGENCE+

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EUROPEAN AVIATION OVERVIEW

09-15 Feb 2026

SUPPORTING EUROPEAN AVIATION

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19 February 2026

Headlines

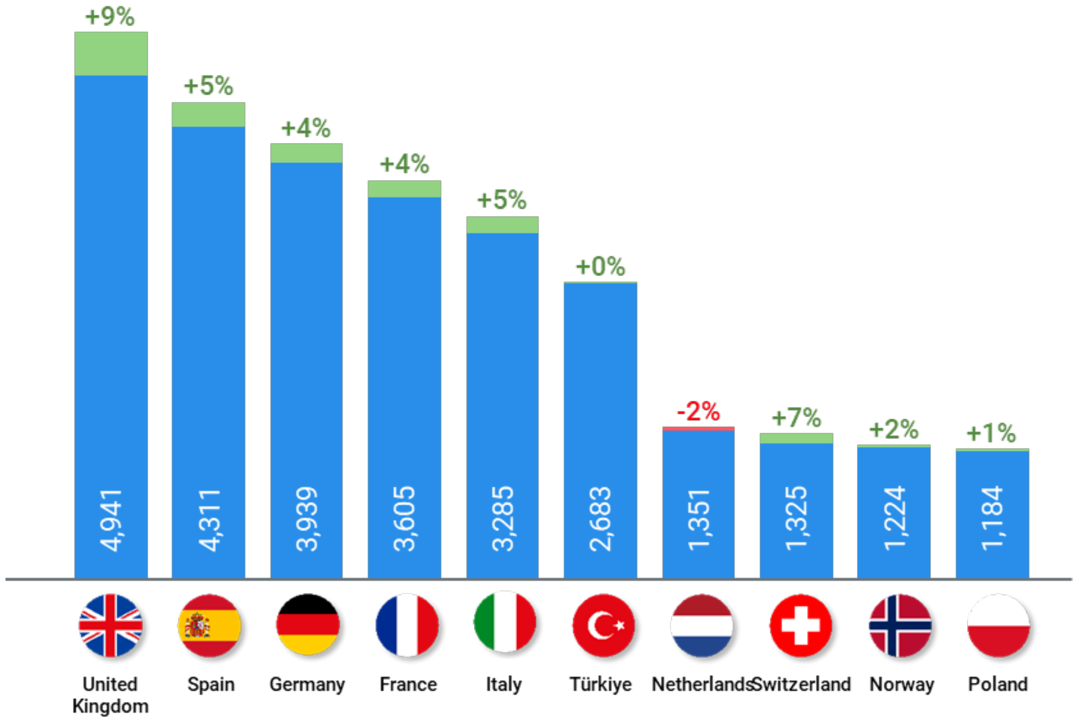
(Week 7, 09-15 Feb 2026)

- The network averaged 26,168 daily flights in Week 7, up 3.3% compared to Week 6 and 2.7% higher than in 2025.
- On average the busiest 10 carriers increased their capacity by 2.9% compared to the previous week.
- At State level, the busiest 10 States saw their flights increase by 4.5% compared to the previous week.
- Arrival and departure punctuality were 75.7% and 71.8%, worse than the equivalent week in 2025 owing partly to adverse weather conditions.
- En-route ATFM delays were +83% compared to the previous week, with a daily average of around 13K delay minutes, -18% lower than 2025. Total ATFM delay per flight was 1.1 min/flight (0.5 for en-route, and 0.6 for airports).
- ATC capacity/staffing was the top delay cause (82% of all en-route ATFM delays), notably in France and Spain. This was followed by weather-related delays (9%), mainly in Spain, with Other factors making up 8%, primarily in France and Portugal.
- The Area Control Centres that contributed the most to en-route ATFM delays (in mins per flight) were Reims, Seville, Barcelona and Brest.
- The average jet fuel price stood at \$2.29/gallon on 13 February, unchanged from two weeks earlier, but up 4.9.% vs the beginning of the year.

10 busiest States

Week 09-15 Feb 2026

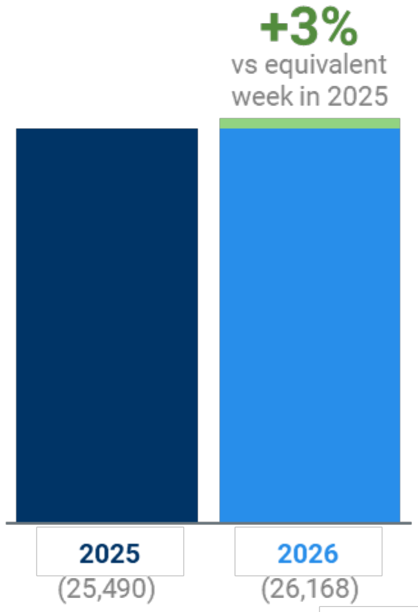
(all flights excl. overflights compared with the previous week)



Traffic situation

Average daily flights (including overflights)

Week 09-15 Feb 2026

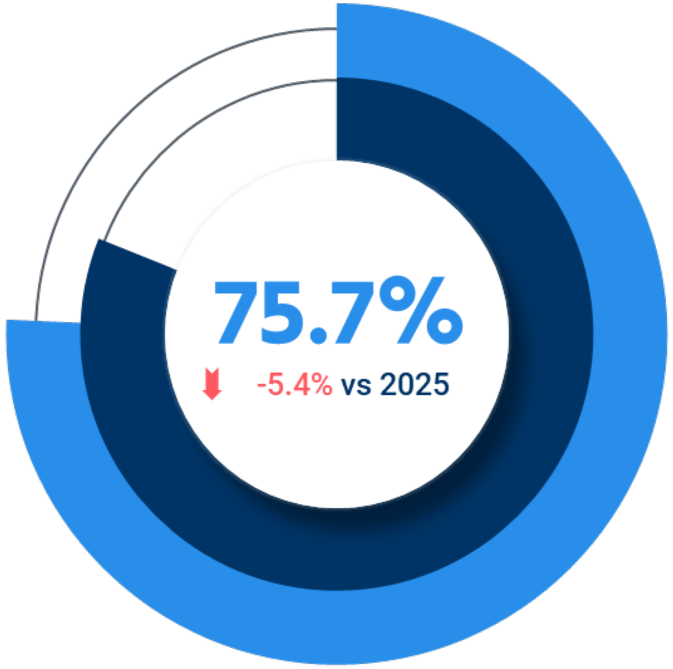


Arrival & departure punctuality

(all network scheduled flights)

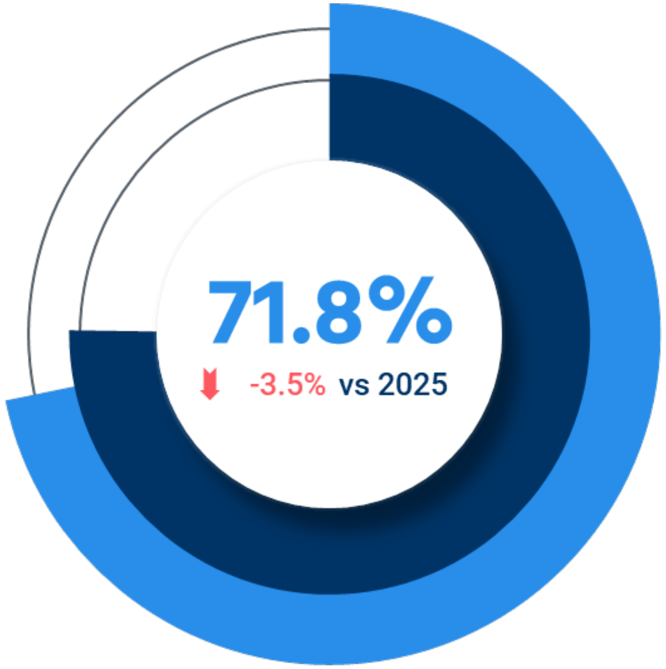
Week 09-15 Feb 2026

ARRIVAL PUNCTUALITY



81.1% ________ in 2025

DEPARTURE PUNCTUALITY



75.2% ________ in 2025

- Both arrival punctuality (75.7%) and departure punctuality (71.8%) were lower than in the same week of 2025, declining by 5.4pp and 3.5pp respectively.
- **Lisbon** was impacted by weather throughout the week, with the highest delays caused by Storm Oriana on 13 February.
- **Manchester** experienced aerodrome capacity regulations due to taxiway works in progress.
- **Amsterdam** experienced multifactor delays with weather the main reason (Low Visibility Procedure/low ceiling and snow), with high delays on 11 and 15 February. There was also a regulation due to unserviceable ground radar on 10 February, with smaller volumes caused by daily aerodrome capacity regulations during the week.
- **Barcelona** was affected by weather (in particular Storm Oriana) with high winds and thunderstorm activity causing regulations on 12 and 13 February.
- **Athens** suffered from daily ATC capacity delays, but delays were nevertheless fairly low.

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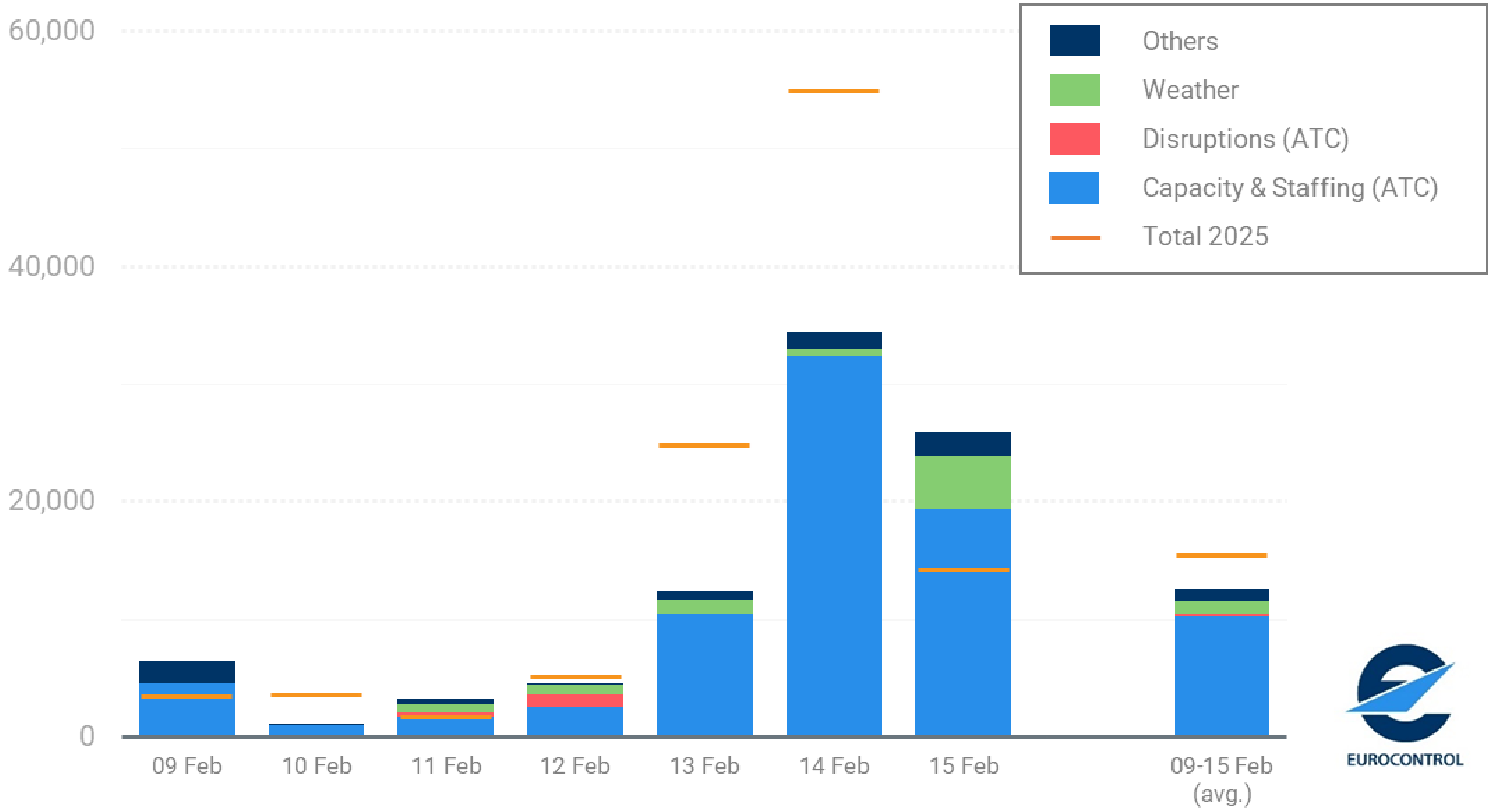
The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

En-route ATFM delays

Delays per cause (EUROCONTROL area)

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

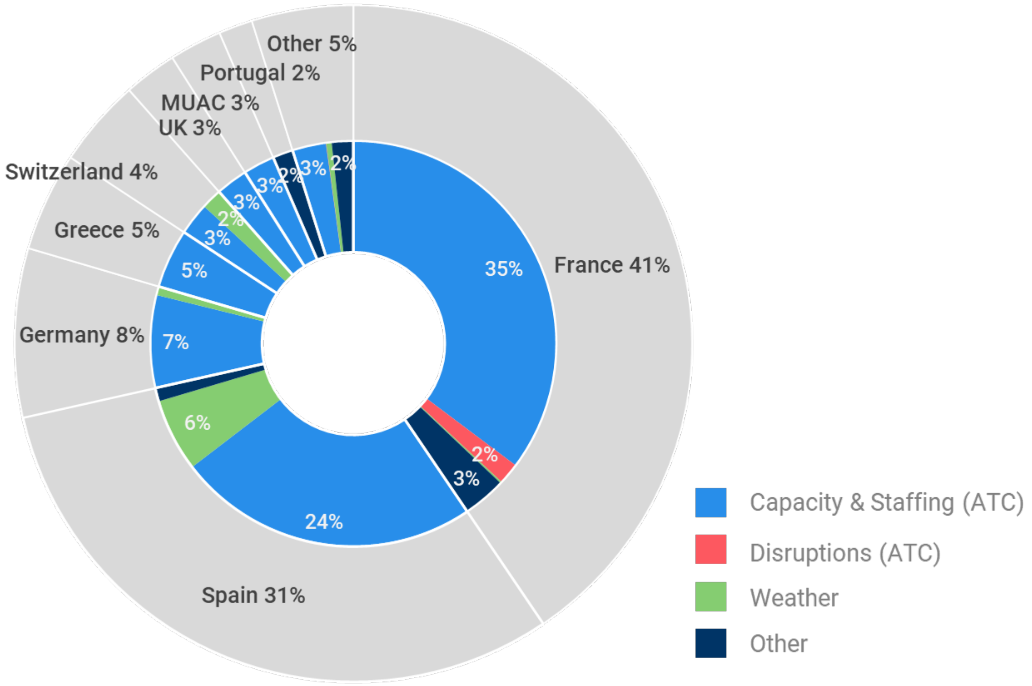


- Week 7 recorded significantly higher en-route ATFM delays than the previous week (+83%), with an average of 12,622 minutes per day. Despite this rise, delays remained 18% lower than the same operational week in 2025.
- ATC capacity/staffing were responsible for 82% of all en-route ATFM delays (notably in France and Spain).
- Weather accounted for 9% of all en-route ATFM delays (mainly Spain and, to a lesser extent, Switzerland.
- Other factors (including the ORION 2026 military exercise in France) accounted for 8% of all en-route ATFM delays.
- ATC disruption accounted for around 2% of all en-route ATFM delays, impacting France.
- There were 1.1 minutes of total ATFM delay per flight in Week 7, made up of 0.5 min/flight en-route delay, and 0.6 min/flight airport delay.

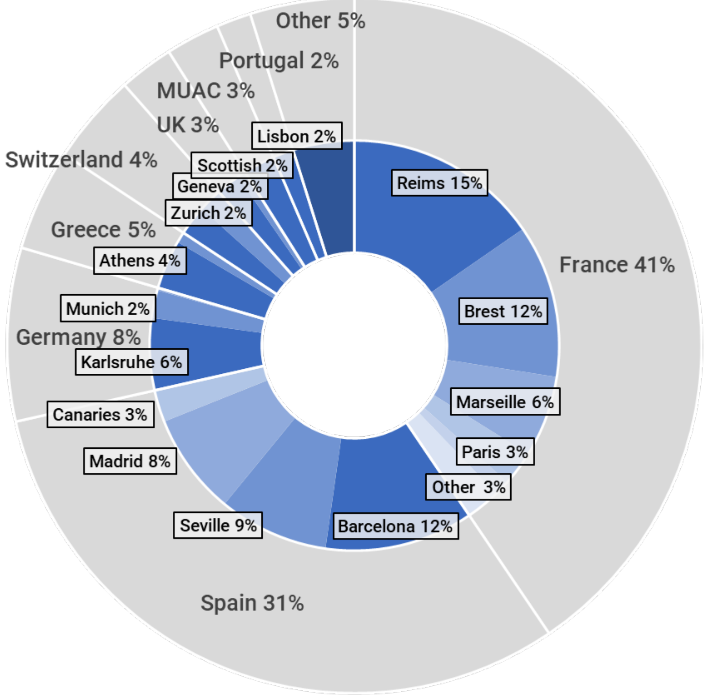
En-route ATFM delays per State, per cause & per ACC

Week 09-15 Feb 2026

En-route ATFM delays per cause for the 8 main contributing States

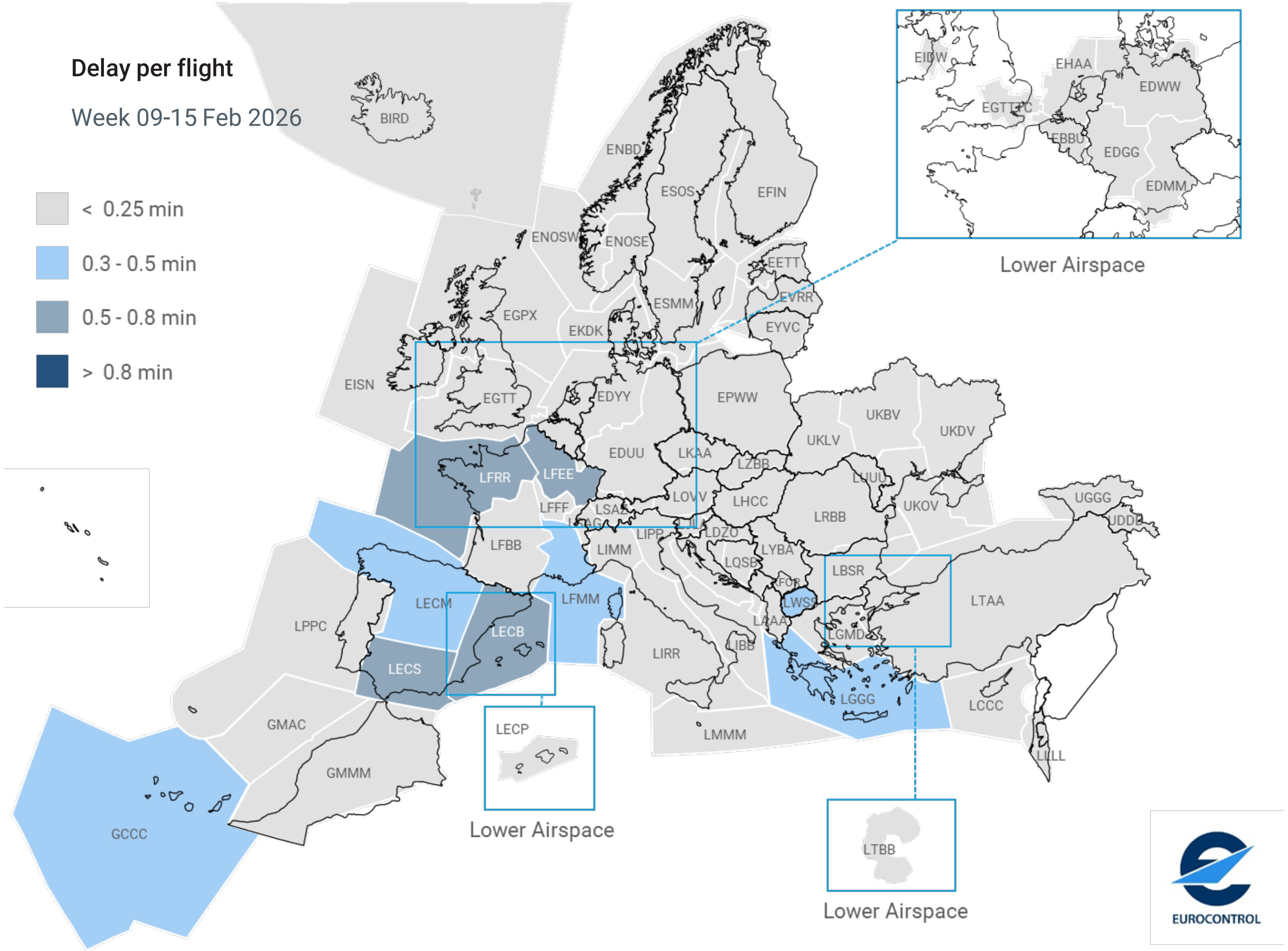


En-route ATFM delays per ACC for those States



- France accounted for 41% of en-route ATFM delays, mainly attributed to Reims ACC (15%) and Brest ACC (12%), and primarily due to ATC Capacity & Staffing (35%).
- Spain made up 31% of en-route ATFM delays, mainly attributed to Barcelona ACC (12%), Seville ACC (9%) and Madrid ACC (8%) and driven by ATC Capacity & Staffing (24%) and Weather in the shape of Storm Oriana (6%).
- Germany accounted for 8% of en-route ATFM delays, attributed to Karlsruhe ACC (6%) and Munich (2%), and owing to ATC Capacity & Staffing (7%).

En-route ATFM delayed flights per Area Control Centre



- In Week 7, four ACCs recorded en-route ATFM delays between 0.6 and 0.8 min/flight: Reims ACC (0.77 min/flight), Seville ACC (0.75 min/flight), Barcelona ACC (0.64 min/flight) and Brest ACC (0.59 min/flight).
- The main contributing ACCs in terms of en-route ATFM delay minutes per flight were as follows:
- Reims ACC generated ATC capacity delays daily with the exception of Tuesday and Wednesday. Sector availability was notably limited on Saturday due to an ATC staffing issue.
- Seville ACC produced ATC capacity delays through most of the week (traffic +5% vs 2025 levels). Turbulence associated with Storm Oriana added complexity on Saturday.
- Barcelona ACC experienced ATC capacity delays throughout the week, increasing from Friday onwards.
- Brest ACC experienced, in addition to the usual ATC capacity delays, delays in training controllers in preparation for the migration to the 4-Flight system, which combined on Saturday and Sunday with some ATCO short-term sick leave to limit sector availability.
- Madrid ACC was adversely affected on Monday by airspace reservations in the Bay of Biscay facilitating the ORION military exercise. This displaced traffic and added congestion and complexity to Madrid ACC sectors, prompting ATFM delays. Sectors were regulated for capacity daily with the exception of Tuesday, while turbulence associated with Storm Oriana complicated traffic management on Sunday.

Busiest 10 States

Departures and arrivals

Week 09-15 Feb 2026

No.	Country	Average daily flights	% prev week	% prev year
1.	United Kingdom	4,941	+9%	-1%
2.	Spain	4,311	+5%	+1%
3.	Germany	3,939	+4%	-1%
4.	France	3,605	+4%	-4%
5.	Italy	3,285	+5%	+7%
6.	Türkiye	2,683	+0%	+8%
7.	Netherlands	1,351	-2%	-9%
8.	Switzerland	1,325	+7%	+0%
9.	Norway	1,224	+2%	+1%
10.	Poland	1,184	+1%	+12%

See all States

- The busiest 10 States, in aggregate, recorded 4.5% more flights in Week 7 compared to the previous week.
- The **Netherlands** was the only State to record a week-on-week decrease in arrivals and departures (-2%), mainly due to reduced traffic flows with Germany and the UK.
- The **UK** recorded the largest week-on-week increase (+9%) driven by stronger flows with Spain and France as well as growth in domestic flights.
- **Switzerland** saw a +7% increase led by increasing flows with the UK and Germany; just behind are **Spain** and **Italy** which grew 5% week-on-week.
- Compared to 2025, six States recorded increases in arrival and departure flights, led by Poland (+12%), Türkiye (+8%) and Italy (+7%), while four States saw declines ranging from -1% in the UK and Germany to -9% in the Netherlands.

Busiest 10 aircraft operators

Week 09-15 Feb 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	2,725	+1%	+8%
2.	Turkish Airlines Group	1,509	+1%	+11%
3.	easyJet Group	1,431	+25%	-1%
4.	Air France Group	948	+0%	-1%
5.	Wizz Air Group	855	+0%	+9%
6.	Lufthansa Airlines	826	-2%	-19%
7.	British Airways Group	818	+6%	+1%
8.	SAS Group	727	+2%	+19%
9.	KLM Group	712	-5%	-11%
10.	Pegasus	565	+0%	+14%

See top 40 airlines

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- The busiest 10 aircraft operators collectively operated 2.9% more flights than in the previous week.
- Two however reduced capacity compared to the previous week: KLM Group (-5%), and Lufthansa Airlines (-2%).
- The main increases compared to the previous week were recorded for:
- easyJet Group (+25%): expanded capacity to accommodate the half-term holiday weekend and the Winter Olympics in Italy. Increases mainly on the flows Spain ↔ UK, France ↔ UK, UK ↔ UK., France ↔ Italy and Italy ↔ UK.
- British Airways Group (+6%): increases mainly on the flows Germany ↔ UK, UK ↔ UK and Spain ↔ UK.
- Compared to 2025, six of the busiest 10 aircraft operators recorded higher flight volumes, led by SAS Group (+19%), Pegasus (+14%), Turkish Airlines Group (+11%), Wizz Air Group (+9%), Ryanair Group (+8%) and British Airways Group (+1%). In contrast, Lufthansa Airlines (-19%) and KLM Group (-11%) saw notable declines.

Europe’s 6 largest airline groups

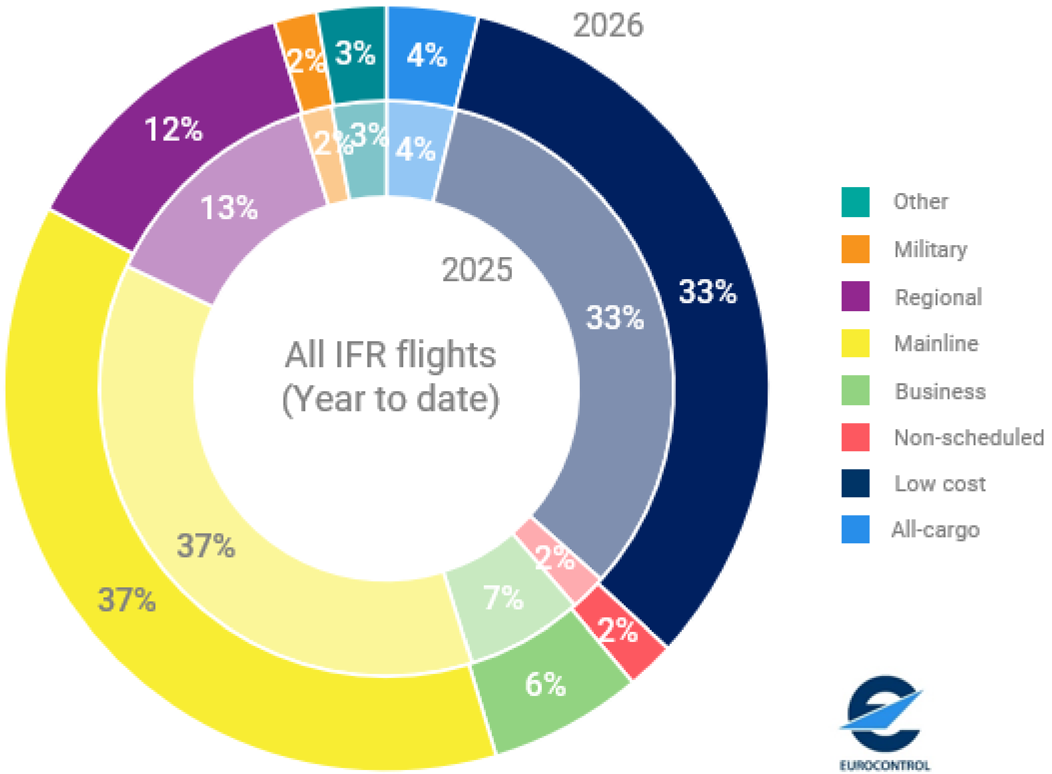
Week 09-15 Feb 2026 (average daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year
1.	Ryanair Group	2,725	+1%	+8%
2.	Lufthansa Group	2,108	+4%	-8%
3.	IAG Group	2,059	+4%	-3%
4.	Air France-KLM Group	1,660	-2%	-6%
5.	Turkish Airlines Group	1,509	+1%	+11%
6.	easyJet Group	1,431	+25%	-1%

- The 6 largest European airline groups – i.e. aggregating the constituent members of the Lufthansa, IAG and Air France-KLM groups to join the Ryanair, easyJet and Turkish Airlines groups from the previous slide – in aggregate recorded a higher number of flights (+3.9%) compared to the previous week.
- All six except the Air France-KLM Group (-2%) increased capacity compared to the previous week, ranging from +1% for the Ryanair and Turkish Airlines Groups, to +25% for the easyJet Group.
- Compared to 2025, only two groups operated more flights; Turkish Airlines (+11%) and Ryanair (+8%). All other groups recorded declines, with easyJet down 1%, IAG down 3%, Air France-KLM down 6% and Lufthansa down 8%.

Market segments in the EUROCONTROL network

Average share of total flights (year to date)



No.	Market segment	Avg. flights	% prev week	% prev year
1.	Mainline	9,385	+1%	+4%
2.	Low Cost	8,869	+6%	+4%
3.	Regional	3,239	+1%	-3%
4.	Business	1,832	+13%	+2%
5.	All-cargo	1,029	-3%	+4%
6.	Other	794	+0%	+1%
7.	Military	526	+2%	+7%
8.	Non-Scheduled	504	+4%	+1%

- Since the beginning of the year, the largest market segment (Mainline) has had a 37% share, in line with the same period in 2025. The second-largest segment (Low-cost) at 33% has also remained unchanged. The shares of the Regional and Business aviation segments have both declined by 1pp to 12% and 6% respectively, while All-cargo remained stable at 3%.
- Except for All-cargo (-3%), all market segments posted week-on-week growth: Business aviation (+13%), Low-cost (+6%), Non-scheduled (+4%), Military (+2%), Mainline (+1%) and Regional (+1%).
- Compared to 2025, only the Regional segment has declined (-3%). Mainline, Low-cost and All-cargo each increased by 4%, followed by Business aviation (+2%) and Non-scheduled (+1%).

Busiest 10 airports

Week 09-15 Feb 2026 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year
1.	Istanbul	1,437	+0%	+7%
2.	London Heathrow	1,285	+3%	-0%
3.	Paris Charles de Gaulle	1,203	+1%	-2%
4.	Madrid Barajas	1,167	+2%	+4%
5.	Amsterdam	1,137	-4%	-10%
6.	Frankfurt	1,021	+2%	-6%
7.	Barcelona	854	+2%	-2%
8.	Munich	753	+4%	-9%
9.	Rome Fiumicino	746	+3%	-2%
10.	Istanbul Sabiha Gokcen	741	+1%	+14%

See top 40 airports

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- The busiest 10 airports, in aggregate, recorded 1.4% more flights compared to the previous week.
- Amsterdam was the only airport to record a decline (-4%), mainly due to reduced traffic with Sweden, the UK and France, primarily as a result of weather disruption caused by heavy snowfall on 15 February.

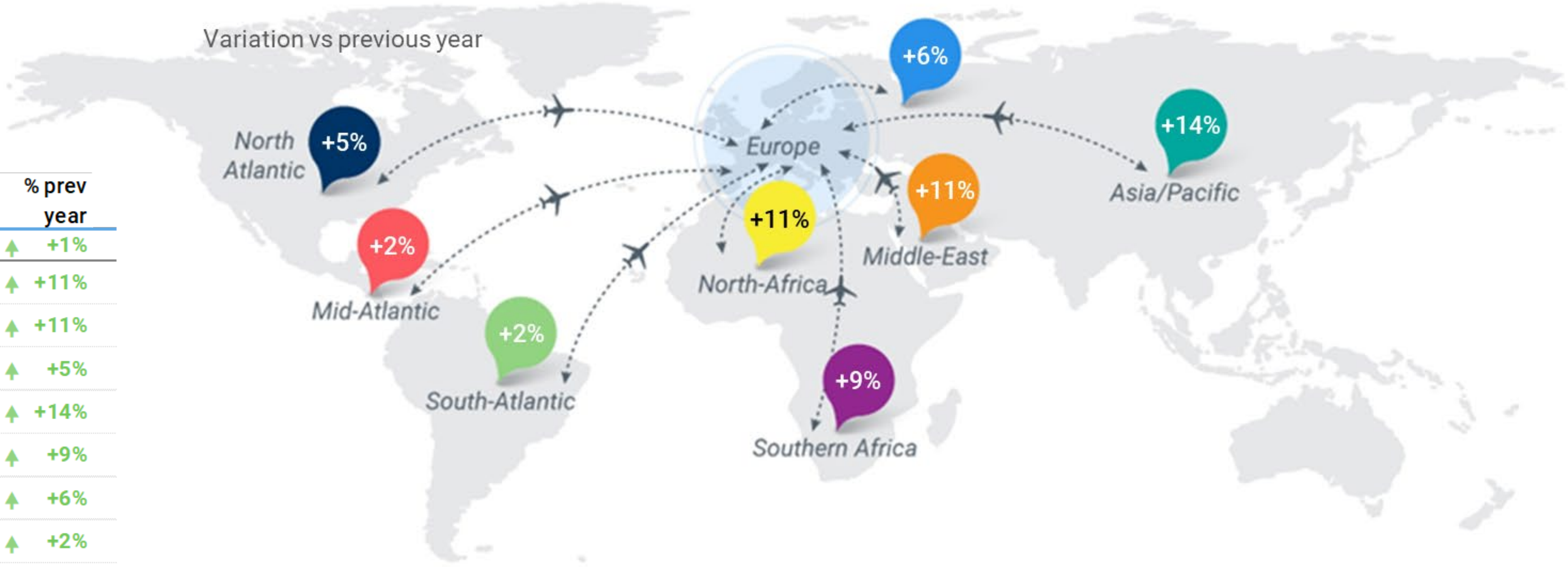
The largest increases compared to the previous week were recorded at:

- Munich (+4%): increases mainly on its flows with the UK and Italy.
- Rome Fiumicino (+3%): increases on its flows with Italy and for the easyJet Group.
- London Heathrow (+3%): increases on its flows with the US, Germany along with its domestic flows, and mainly for British Airways.
- Compared to 2025, only three of the busiest 10 airports handled more flights, led by strong growth at Istanbul-Sabiha Gökçen (+14%), followed by Istanbul (+7%) and Madrid Barajas (+4%). Traffic declined at the remaining airports ranging from -2% at Rome Fiumicino and Paris CDG to -10% at Amsterdam.

Traffic flows

(average daily departure/arrival flights for Week 09-15 Feb 2026)

Region	Average daily flights	% prev week	% prev year
Intra-Europe	19,446	+4%	+1%
Europe ↔ Middle-East	1,521	-0%	+11%
Europe ↔ North-Africa	1,350	+6%	+11%
Europe ↔ North Atlantic	995	+1%	+5%
Europe ↔ Asia/Pacific	990	-1%	+14%
Europe ↔ Southern Africa	352	+1%	+9%
Europe ↔ Other Europe	212	-5%	+6%
Europe ↔ Mid-Atlantic	211	+1%	+2%
Europe ↔ South-Atlantic	206	-1%	+2%
Non Intra-Europe	5,838	+1%	+9%



- Intra-European traffic saw 19,446 daily flights on average during Week 7, +4% vs the previous week. Intercontinental flows amounted to 5,838 daily flights on average, +1% vs the previous week.
- The top intercontinental flows were between Europe and the Middle -East, followed by to/from North Africa, North America and Asia/Pacific.
- The highest increase compared to the previous week was recorded by North Africa (+6%), driven mainly by the France↔ Morocco flow. In contrast, the highest decrease was recorded for Other Europe (-5%), primarily on the Türkiye ↔ Russian Federation flow.
- All intercontinental flows recorded more flights than in 2025 (+9% overall), with the largest increases between Europe and As ia/Pacific (+14%), the Middle East (+11%) and North Africa (+11%).

Top 10 long-haul country pairs

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

Week 09-15 Feb 2026

No.	Country pair	Average daily flights	% prev week	% prev year
1.	UK ↔ US	245	+5%	▲ +1%
2.	Germany ↔ US	127	-2%	▲ +1%
3.	France ↔ US	87	+2%	▼ -3%
4.	UAE ↔ UK	71	+2%	▲ +7%
5.	Netherlands ↔ US	64	-3%	▼ -1%
6.	Germany ↔ UAE	57	+2%	▲ +25%
7.	India ↔ UK	53	-1%	▲ +6%
8.	Russia ↔ UAE	51	+17%	▲ +2%
9.	Spain ↔ US	51	-1%	▲ +15%
10.	Egypt ↔ Russia	49	+1%	▲ +38%

- Five of the top 10 long-haul country pairs involved the US, with the largest three being US ↔ UK, US ↔ Germany and US ↔ France.
- The non-US long-haul flows within the top 10 were between UAE ↔ UK, Germany ↔ UAE, India ↔ UK, Egypt ↔ Russia and Russia ↔ UAE (i.e. overflying the network).
- Compared to the previous week, four long-haul flows declined, most notably Netherlands ↔ US (-3%), Germany ↔ US (-2%), UK ↔ India (-1%) and Spain ↔ US (-1%). The largest increases were recorded on Russia ↔ UAE (+17%) and UK ↔ US (+5%).
- Compared to the same week of 2025, all but two of the top 10 long-haul flows posted positive growth, led by Egypt ↔ Russia (+38%), Germany ↔ UAE (+25%), Spain ↔ US (+15%), UK ↔ UAE (+7%), UK ↔ India (+6%), Russia ↔ UAE (+2%), UK ↔ US (+1%) and Germany ↔ US (+1%).

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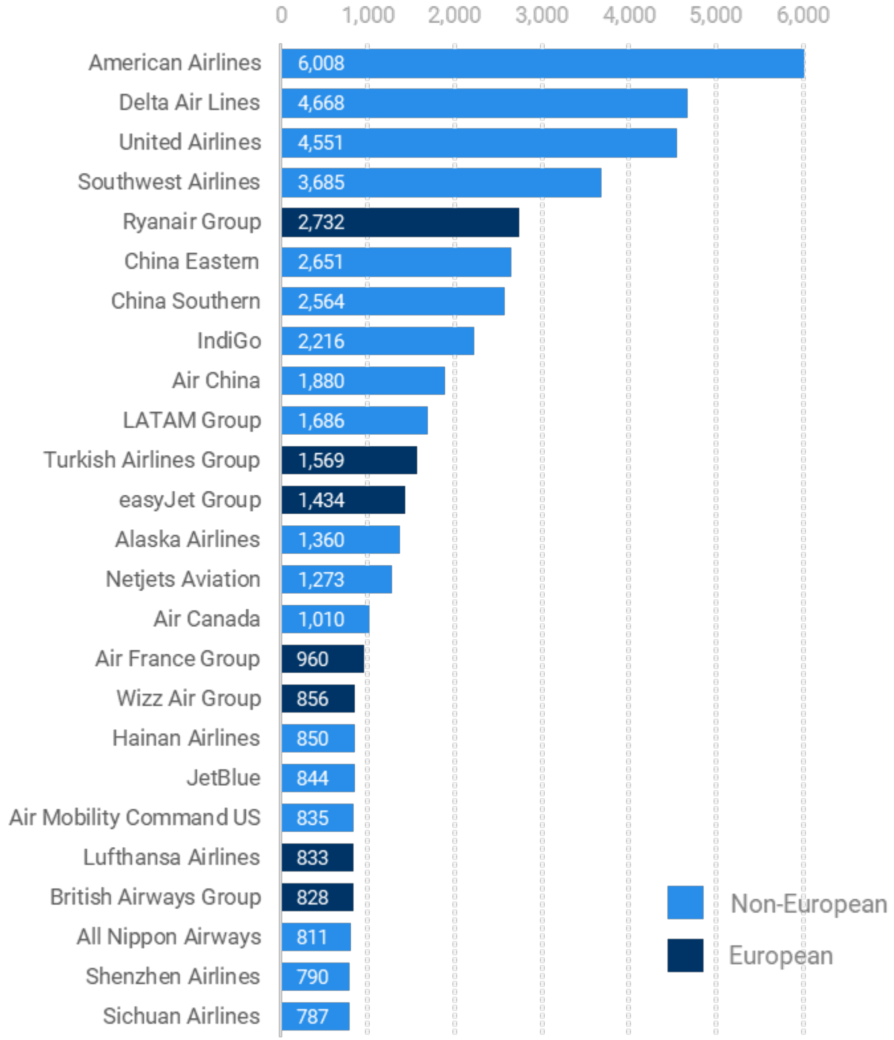
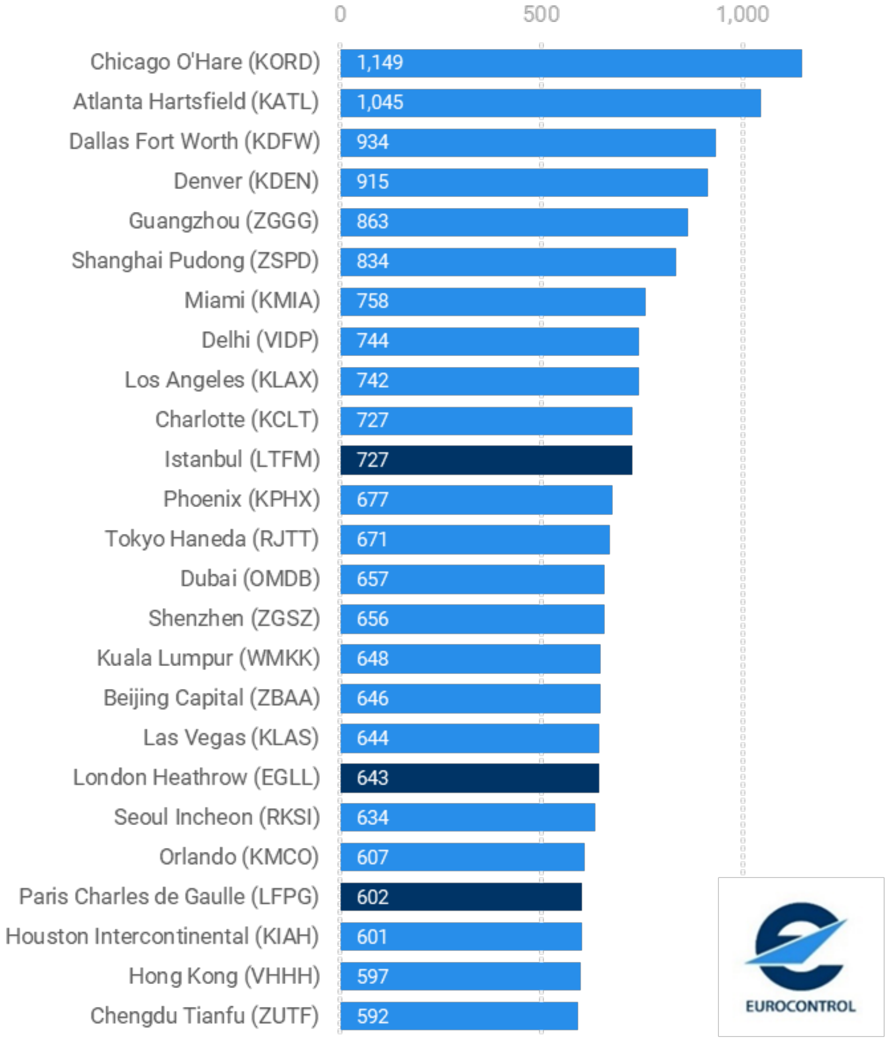
Top 25 global aircraft operators and airports (measuring departures)

(average daily departure flights) **(Week 09-15 Feb 2026)**

Top 25 global aircraft operators



Top 25 global airports



Source: Flightradar24 Historical Global Utilisation data

- Aircraft operators: Over the last week, seven European aircraft operators were ranked in the top 25 global aircraft operators.
- Among them only one airline appears in the global top 10: Ryanair, now ranked 5th, up from 8th place in Week 6.
- Six more European carriers made the top 25, starting with Turkish Airlines Group (11th), easyJet Group (12th), Air France Group (16th), Wizz Air Group (17th), Lufthansa Airlines (21st) and British Airways Group (22nd).
- Airports: Three European airports ranked among the top 25 in terms of global airport departures in Week 7, two fewer than in Week 6 (Amsterdam and Madrid).
- No European airport ranked in the top 10 in Week 7: Istanbul was placed 11th (down from 10th in Week 6), followed by London Heathrow in 19th and Paris CDG in 22nd.
- The top 10 global airports continued to be dominated by the US (7/10). China was a distant second with 2 airports, while India secured one place in the ranking.

Jet fuel price (Europe)

Week 09-15 Feb 2026

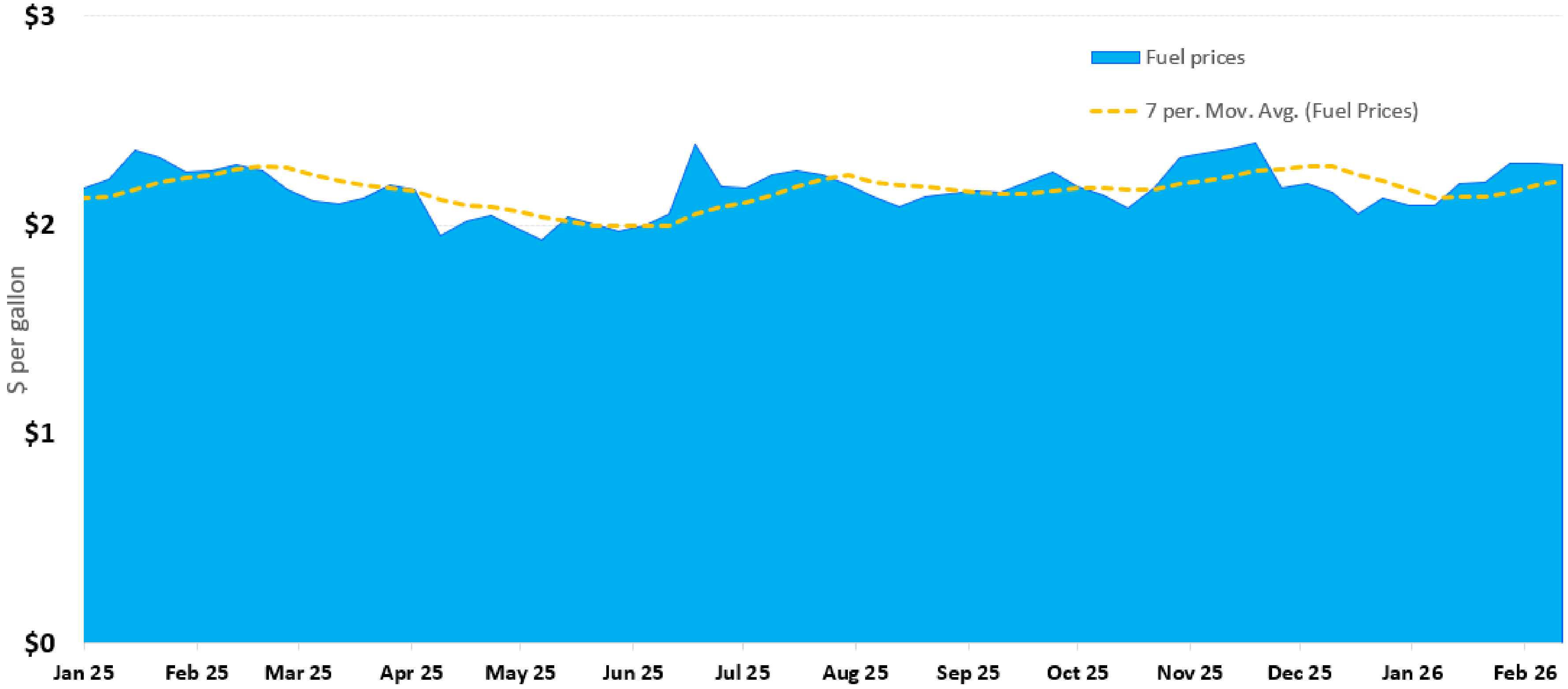
13 Feb 2026
avg fuel price:

$2.29 /gallon

-0%

vs. $2.29 /gallon
on 30 Jan 2026

Source: IATA/Platts



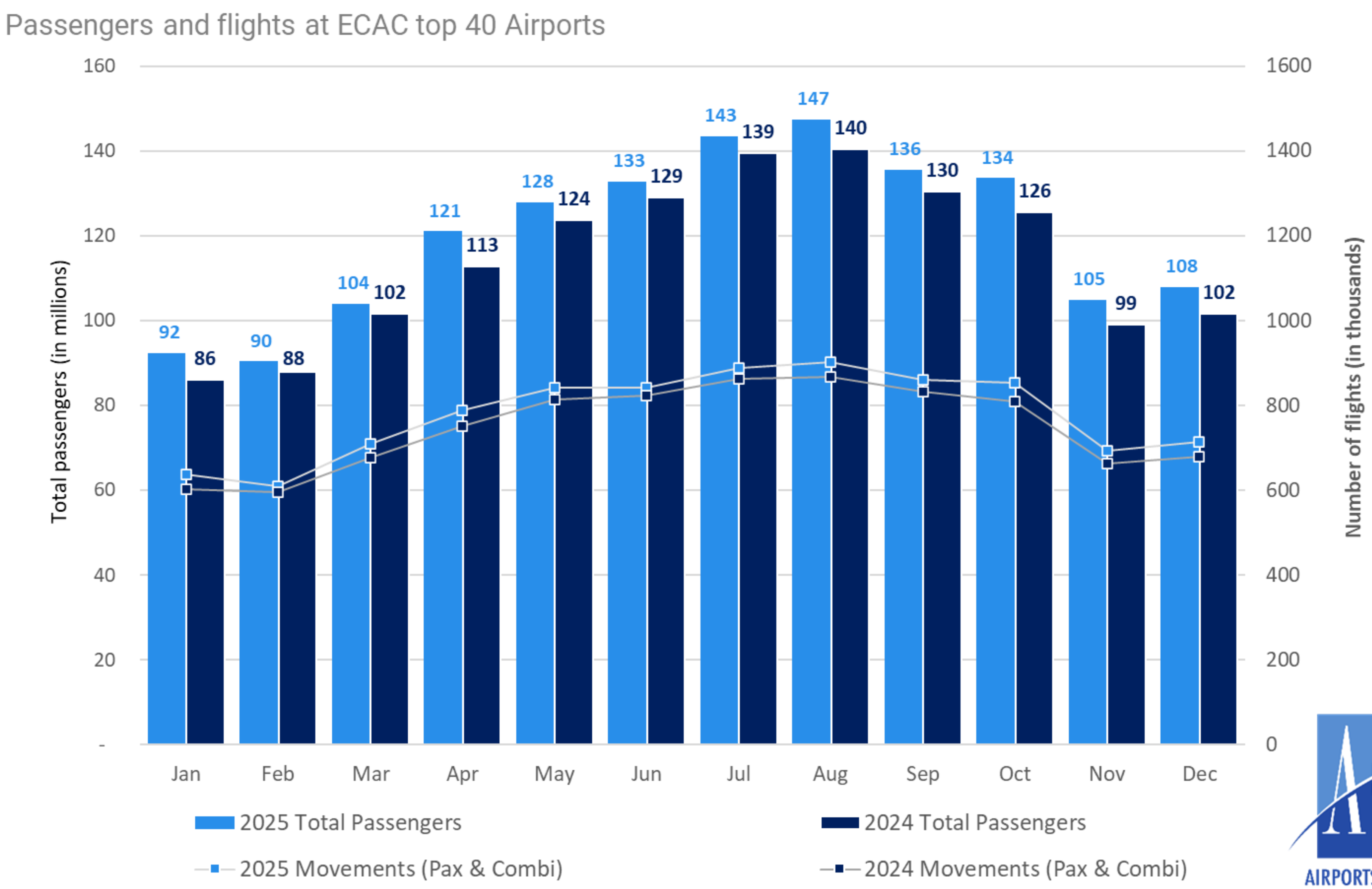
Source: IATA/Platts

- The average jet fuel price stood at $2.29/gallon on 13 February, unchanged from two weeks earlier, but up 4.9.% vs the beginning of the year.
- Context: In 2025, the eight OPEC+ countries shifted their strategy from defending prices through cuts to gradually increasing oil output. From mid-2025 onward, the group began unwinding earlier production curbs with phased monthly supply increases, responding to weaker demand growth and rising non-OPEC supply. Jet fuel prices in 2025 were generally lower or more stable than in 2024. At the OPEC+ meeting on 1 February 2026, the group agreed to keep production increases unchanged for January through March 2026, a decision driven by seasonal demand weakness and geopolitical uncertainties.
- It is reported that in their next 1 March 2026 meeting, OPEC+ members are expected to decide whether to resume oil output increases.

Busiest 40 European airports in terms of passengers

Passengers and Flights at ECAC Top 40 airports

2025 vs 2024



Airports Council International Europe (ACI EUROPE) estimates that 2025 will close with 2.6 billion passengers flown in Europe*, 4.4% more than in 2024. Europe's airport network as a whole had already exceeded pre-pandemic passenger levels in 2024.

Based on ACI EUROPE passenger data and for the busiest 40 European airports:

- The number of passengers** reached 1.44 billion in 2025, 4.6% more than in 2024, while the number of corresponding flights amounted to 9.34 million, a 4.1% increase on 2024. The respective recovery rates on 2019 levels were 106% in passenger numbers and 99% for flight movements.

ACI EUROPE anticipates that passengers at European* airports will grow by 3.3% in 2026.

*: Europe for ACI covers 55 States, ACI EUROPE has recently expanded their monthly coverage to include over 450 airports, representing over 95% of European airport traffic.

**: Passengers comprise International enplaned + deplaned, domestic enplaned + deplaned, as well as transit passengers (counted once).

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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.

For more information please contact aviation.intelligence@eurocontrol.int

www.eurocontrol.int