

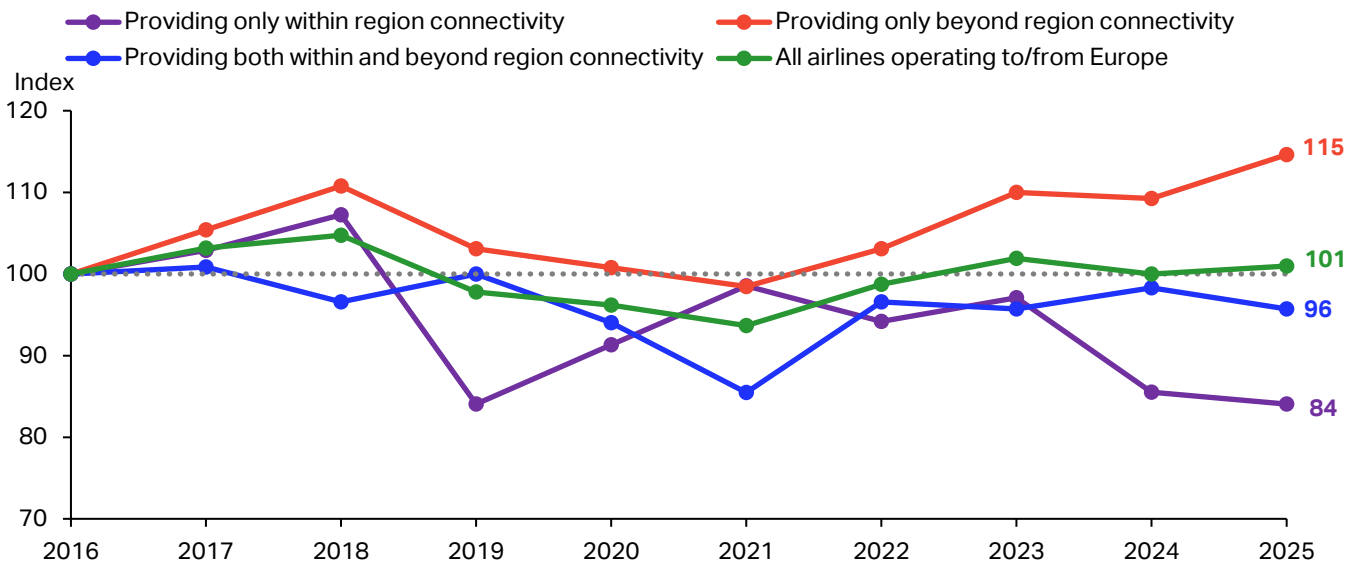


Chart of the Week

2 April 2026

Loss of Within-Europe Regional Connectivity

Number of airlines operating scheduled flights to, from, and within Europe, index 2016=100



Source: IATA Sustainability and Economics, OAG

Note: The data is based on public schedules, listed published airline information, and excludes wet lease usage.

- The aviation market in Europe is expanding significantly, as passenger numbers were 26% higher in 2025 than in 2016. The growth is supported by a network of 22,000 routes, a 9% increase over the decade. Excluding the impact of the conflicts in Russia and Ukraine, the European network has grown by 15% since 2016.
- Long-haul options for European travelers have flourished. The number of airlines serving other continents rose to 261 in 2025, up from 247 in 2016. Notably, as many as 149 airlines offered only beyond-Europe connectivity in 2025, a 15% increase. Routes to the Asia-Pacific region surged by 61%, and routes to the Middle East and Africa also gained as much as 45%. This expansion provides European passengers with greater choice, more destinations, and enhanced scheduling flexibility.
- Within Europe, however, the picture is more challenging. While the number of routes within the region increased by 15% since 2016, the number of airlines operating them dropped by nearly 9%. Airlines operating solely within Europe declined by 16% to 58 - a 28% decrease from the 2018 peak of 74. As a result, a smaller pool of airlines is now managing a larger portion of the regional network.
- Maintaining service between less populated areas is becoming increasingly difficult. Of all routes canceled in the 2025 schedule, 91% had offered fewer than 20,000 seats in 2024. This highlights that "thin" routes are the most vulnerable to shifting market conditions and rising external financial burdens.
- Of the 108 airlines active in 2016 that no longer serve Europe, nearly half (52) closed due to bankruptcy. Another 8 ceased operations following major restructuring or mergers, while 17 remain active but no longer offer scheduled flights. Additionally, 31 airlines withdrew from Europe to focus on other global markets. This wave of bankruptcies explains most of the recent market consolidation, representing a shift away from strategic mergers and toward a more challenging operating environment that risks leaving smaller communities without essential connectivity.

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