AVIATION BRIEFING · EDITION 01

Week commencing 24 August 2026

ClearPath Partnership

COVERAGE
10 — 23 August 2026

AUDIENCE
Executive and programme leadership · airports, carriers, suppliers

HANDLING
Internal use — not for onward distribution

IF YOU JUST REMEMBER ONE THING FROM THIS BRIEFING…

Ground handling, not airspace, was the binding constraint on European operations this fortnight.

An indefinite Groundforce strike at Barcelona and a parallel Swissport dispute at Palma put roughly two million seats at risk and spilled into Heathrow, Schiphol and Frankfurt on 11 August. Ask your team: which single handler could stop our operation tomorrow, and what is the contracted remedy.

FORTNIGHT IN REVIEW

Developments and sector activity

PRIORITY
11 AUG

Barcelona and Palma ground-handling strikes spread disruption across northern Europe

Indefinite walkouts by Groundforce staff at Barcelona El Prat and Swissport staff at Palma, begun on 4 August, covered check-in, boarding and baggage. Combined with storms, around 2,400 flights were delayed or cancelled on 11 August, reaching Schiphol, Charles de Gaulle, Frankfurt, Heathrow and Barajas.

So what: a single handler at one Spanish base propagated into five hub operations. Concentration risk in handling contracts is now an operational, not a procurement, question.

PRIORITY
15 — 16 AUG

easyJet French cabin crew strike hits Paris, Nice, Lyon and Bordeaux over a peak weekend

France-based easyJet cabin crew struck on 15 and 16 August in a dispute over rosters and working conditions, disrupting flights at four French bases at the height of the transfer weekend. It follows strike action across Spanish and Belgian handling and crew groups earlier in the month.

So what: labour action is now concentrated on peak weekends by design. Build the recovery plan around the fifteen highest-load days, not around average demand.

WATCH
FORTNIGHT

Engine availability, not airframes, remains the constraint on widebody delivery

Rolls-Royce said on 7 August that durability work had eliminated engine-related aircraft-on-ground cases, with improved blades rolling out across Trent 1000 and 7000 fleets and a retrofit campaign running in the UK, Germany and Singapore after EASA cleared the redesigned parts.

So what: shop-visit slots, not order books, set your 2027 fleet plan. Confirm contracted turnaround times and spare-engine cover before committing to new schedules.

WATCH
AUGUST

European capacity grows 4.5 per cent, but not at the constrained UK hubs

OAG puts August European capacity at 181.2m seats, up 4.5 per cent year on year. Ryanair leads on 22.2m seats (up 6 per cent) and Wizz Air grew fastest at 27.7 per cent. Istanbul is now Europe's busiest airport at 4.8m seats; Heathrow fell 0.7 per cent to 4.5m.

So what: growth is moving to low-cost carriers and to unconstrained hubs. Slot-held UK positions gain scarcity value, and lose network relevance, at the same time.

ACTION QUEUE

Developments to act on this fortnight

DEVELOPMENT	WHO IT AFFECTS	CONSEQUENCE	ACT BY
Iberian handling strikes	Carriers at BCN and PMI	Turnaround failure spreading to connecting hubs.	Immediate
easyJet France crew action	French-base operations	Peak-weekend cancellations and rebooking cost.	Immediate
Heathrow £320m recovery	Airlines at LHR	Charges rise about 15p per passenger from 2028.	This quarter
Gatwick runway consent	LGW airlines, suppliers	Delivery phase begins; slot and stand planning moves.	This quarter
Trent retrofit campaign	787 and A330neo operators	Shop-visit slots constrain 2027 fleet availability.	60 days

Timings are as reported. Check each against your own network, contracts and slot holdings.

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- The Court of Appeal dismissed the remaining challenge to Gatwick's northern runway on 4 August. The September 2025 development consent stands and delivery begins.
- The CAA's final decision of 29 July lets Heathrow recover up to £320m of 2025–26 expansion costs through airline charges, capped and independently scrutinised.

Approaching

- A further CAA consultation on Heathrow's post-2026 expansion costs is expected later this year.
- The UK SAF mandate rises on a linear path from 2 per cent in 2025 to 10 per cent in 2030.

Standing watch — French ATC capacity. France has again accounted for the largest single share of European en-route delay this summer. Staffing, not weather, is the structural cause and no resolution is in prospect this season.

RECOMMENDED

Three things to do before the next edition

- Map single-handler dependencies at your top ten stations and confirm the contracted service remedy.
- Model the Heathrow charge increase into 2028 route economics before the next consultation closes.
- Ask your lessors and MRO for written 2027 shop-visit and spare-engine commitments.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely that further handling or crew industrial action affects a major southern European base before the next edition, given three live disputes. It is a realistic possibility that the CAA opens its post-2026 Heathrow cost consultation within the same period.

NEXT EDITION

Monday 7 September 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

ClearPath Partnership