

Week commencing 26 October 2026

COVERAGE

12 – 25 October 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...

Boeing's MAX 10 certification hands Ryanair a 300-aircraft growth lever that Airbus could not supply.

The FAA certified the 737 MAX 10 on 20 October, four years late, clearing deliveries to Ryanair's 150 firm aircraft plus 150 options from spring 2027 — the first capacity lever outside Airbus's order book for Europe's largest low-cost carrier. Ask your team: does our 2027 plan still assume Airbus as the only growth option?

FORTNIGHT IN REVIEW

Developments and sector activity

PRIORITY

14 OCT

Belgian national strike grounds Brussels and Charleroi departures

A nationwide pension-reform strike grounded all departures at Brussels and Charleroi on 14 October, disrupting an estimated 70,000 passengers. It followed a smaller 9 October walkout that cancelled around 140 flights after a ground handler cut staffing.

So what: national strikes now hit aviation directly, not just through handling contracts. Confirm your Belgian ground exposure and build the rebooking plan before the next notice.

WATCH

17 – 19 OCT

Barcelona Groundforce strike ends, but the dispute is not settled

The CGT union called off its ten-week indefinite strike at Groundforce, handler for close to 20 airlines at Barcelona-El Prat, on 17 October after a deal on shift lengths and workload reviews. Three dismissed staff remain reinstated, and CGT began fresh terminal protests on 19 October.

So what: a ten-week dispute over, but not closed. Protest risk at Spain's fourth-busiest airport can resume on short notice; keep contingency plans live through winter.

PRIORITY

20 OCT

FAA certifies the Boeing 737 MAX 10, clearing Ryanair's growth order

The FAA granted final certification to the 737 MAX 10 around 20 October, four years after Boeing's original target, after a campaign of nearly 1,000 test flights. Ryanair holds 150 firm orders plus 150 options and still expects first delivery in spring 2027.

So what: a bottleneck on European low-cost growth has eased. Revisit 2027–28 seat-cost and delivery assumptions now Boeing has a credible narrowbody alternative in build.

WATCH

16 OCT

UK CAA data show Heathrow and Gatwick traffic still softening

CAA figures released 16 October put August Heathrow traffic at 7.87 million passengers, down 2 per cent, and Gatwick at 4.61 million, down 1 per cent. Gatwick's first-half total fell 4.7 per cent, which it attributes largely to the Middle East conflict's effect on long-haul routes.

So what: two straight quarters of Middle East-driven softness at the UK's two largest hubs. Stress-test winter long-haul yields against a conflict showing no sign of resolving.

ACTION QUEUE

Developments to act on this fortnight

DEVELOPMENT	WHO IT AFFECTS	CONSEQUENCE	ACT BY
Belgian national strike	Carriers at BRU and CRL	Rebooking and crew cost from c.70,000 disrupted passengers.	Immediate
Barcelona Groundforce dispute	c.20 airlines at BCN	Renewed protest risk through the winter season.	Immediate
737 MAX 10 certified	Ryanair, lessors, MAX customers	Unlocks 2027 delivery and seat-cost planning.	This quarter
CAA H8 final proposals	Airlines at Heathrow	Charge cap of £27.20–£30.50 per pax from Jan 2027.	Nov 2026
Traffic softening on ME routes	LHR and LGW network planners	Winter long-haul yield pressure continues.	This quarter

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 CAA's Air Navigation Directions and revised airspace-change process, CAP1616 version 6, took effect on 1 October.
- The CAA's July decision letting Heathrow recover up to £320m of 2025–26 expansion costs through airline charges remains in force.

Approaching

- The CAA's H8 final proposals for Heathrow's 2027–31 price control are due in November 2026, Final Decision in April 2027.
- The EU's reformed passenger-rights package, Council-approved in July, is expected in force in mid-2027 after a one-year preparation window.

Standing watch — ATC capacity. EUROCONTROL attributes 63 per cent of early-October en-route delay to ATC capacity and staffing, concentrated in France, Spain, Germany and Greece, with no resolution in prospect this winter.

RECOMMENDED

Three things to do before the next edition

- Map Belgian and Spanish ground-handling exposure at your top ten European stations and confirm remedies.
- Review 2027 fleet plans for scenarios where Boeing's MAX 10 supplements, not replaces, Airbus orders.
- Model the CAA's proposed Heathrow charge increase into 2028 route economics before November's proposals.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely that further ground-handling or national strike action disrupts a major European hub before the next edition, given live disputes in Belgium and Spain. It is a realistic possibility that the CAA opens its Heathrow post-2026 expansion-cost consultation within the same period.

NEXT EDITION

Monday 9 November 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

