

MIDDLE EAST CONFLICT DECREASES THE AVAILABLE SEAT CAPACITY



Summer 2026 sees air traffic at its highest, yet global carriers face strain due to the unrest in the Middle East. Because of shifting airspace access, some flights now take longer paths, limiting available seat capacity. Fuel expenses climb steadily under pressure from regional instability.

Ticket rates shift unpredictably week by week, reflecting underlying tensions. To retain passengers, companies adjust offerings - extra flexibility, revised policies - not out of generosity but necessity. **Operating amid uncertainty means choices are narrow, responses reactive.** Travelers feel it most during booking delays and route changes. Airlines adapt slowly, caught between cost burdens and demand.

Midway through the third month of disruption, flight operators find themselves steering without fixed reference points - evidence drawn straight from sector reports. With outlooks now compressed to about a single lunar cycle, carriers adjust routes and schedules on short notice, reacting to border tensions even as they try to preserve summer revenue streams. Decisions unfold in real time, shaped less by forecasts than by unfolding events across unstable regions.

Sharp Seat Capacity Cuts Across Regions

Though early forecasts suggested steady growth, seat availability across airlines has sharply declined. By May, Middle Eastern carriers reported a drop of nearly 35% in seat capacity, according to figures from aviation data firm OAG. This shift followed unexpected adjustments in planned routes for 2026. Regional impacts appeared clearly in South Asia, where supply fell almost 10%. A similar trend emerged in Southeast Asia, down 8.3%. These changes reflect broader recalibrations in network planning.

Among Gulf airlines, budget operators faced sharper cuts. Air Arabia removed 34.3% of its flights in May - roughly 100,000 seats lost. Meanwhile, Flydubai saw a deeper drop: about 167,000 seats trimmed from its network.

Some big global airlines are pulling back too. By October, Lufthansa scrapped around 20,000 flights - targeting a reduction of almost 40,000 tons of fuel use. Across the Atlantic, Delta dialed down its scheduled operations by 3.5%; United followed with a 5% dip. Moving into Asia, AirAsia X lowered flight numbers by one-tenth. Down under, Qantas shrank its local routes by half a tenth.

Midway through spring, shifts emerged across carriers based in Europe and France. Around 400 flights vanished from Transavia's calendar between May and June - a small fraction, just two percent. Growth at Air France slowed down noticeably; however, no large-scale cuts were made official. Instead of cutting routes outright, French Bee redirected planes: fewer trips now head to New York or L.A., more go north to Montreal, south to Tahiti, eastward toward Réunion. At Corsair, changes stayed narrow in scope - small adjustments only, carefully timed.

Rising Costs Passed to Passengers

Fuel costs climbing pushed many airlines to adjust fees. In April, Air France raised its fuel levy twice as high, tacking on €100 to €400 per long-distance return flight based on cabin type. Not far behind, Air Caraïbes followed a comparable path. French Bee brought in an extra charge near €50 per seat, while Corsair moved prices up by about €100 each way.

Because profits have dipped, changes were made to balance higher kerosene prices.

Reassuring Hesitant Travelers

The way airlines keep travelers interested? By adjusting ticket rules. TAP Air Portugal removed change costs on bookings made from May 15 through June 15. Instead of charging, Etihad and Emirates now allow one complimentary date update per booking. Meanwhile, easyJet rolled out something called Ultimate Flexibility - optional for those who want it. Over at French Bee, sources say a "zen pass" might launch soon, aimed at reducing travel stress.

These steps seek to keep customers who worry about possible interruptions - drawing them in through reliability. While uncertainty pushes some away, consistent service pulls others closer instead. A steady approach builds trust over time, especially when changes feel likely elsewhere. People stay where surprises happen less often, even if better deals exist nearby sometimes.

A Looming Winter Challenge for the Aviation Sector

Summer changes have begun pressuring daily workflows, yet warnings point toward deeper issues looming beyond. Notably, a new assessment by Bernstein flags challenges likely to intensify during winter months, typically slower for the aviation sector.

Profitability during summer months usually rises, thanks to strong travel demand that does not push expenses upward at the same rate. Now, though, rising fuel costs are eating into those gains. With older hedging agreements - signed before conflict drove up kerosene prices - reaching their end, carriers lose protection against surging energy bills. Without such safeguards, operating flights grows more expensive. **Narrower profit margins appear likely; travelers may respond by cutting back on trips. Some routes might soon operate at a loss.**

Looking ahead, the 2026 summer period acts like a stress test for worldwide air travel. Should tensions in the Middle East carry on, this peak season could turn out to be just the opening stage of wider instability, followed by deeper consequences later. Managing flights wisely, keeping expenses in check, while also maintaining passenger trust - these remain priorities amid ongoing unpredictability.

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