Air & Sea Access

Planned Capacity for Summer 2026 (29th March - 24th October)

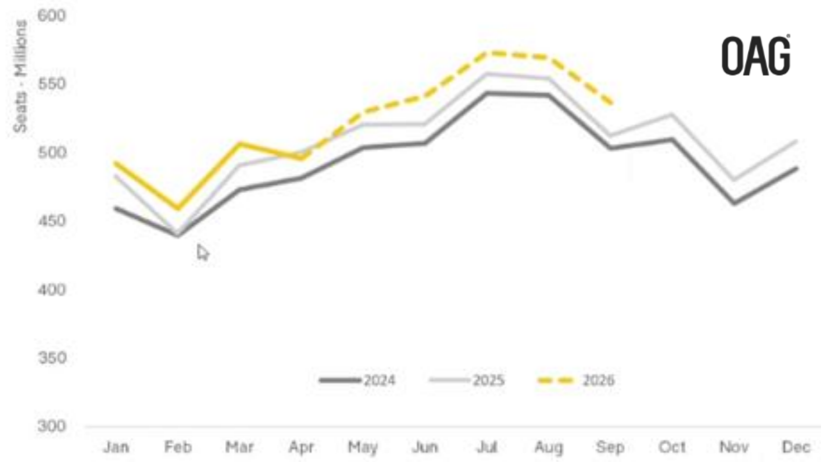
Fáilte Ireland

Overview of Summer Air Capacity

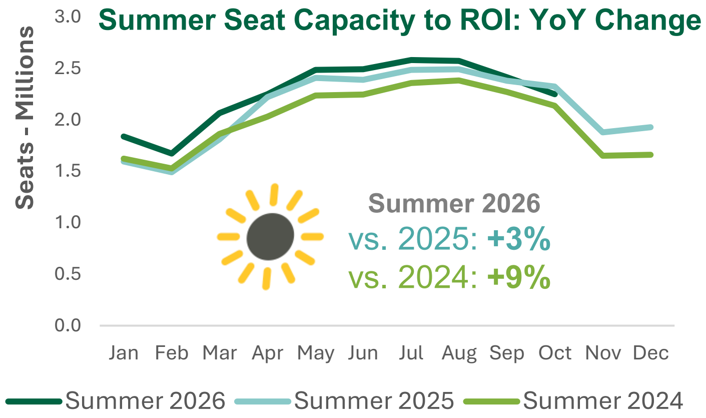
Global Air Travel

- Despite global seat capacity for 2026 showing above 2025 levels (as of April), capacity is likely to be similar to last year according to OAG. This is due to the ongoing geopolitical tensions in the Middle East and the impact on aviation, among other sectors.
- Scheduled capacity for April is down year-on-year due to a combination of Easter holidays being earlier this year and the impact of the conflict in the Middle East.

Year-on-Year Change of Global Seat Capacity – as of April 2026

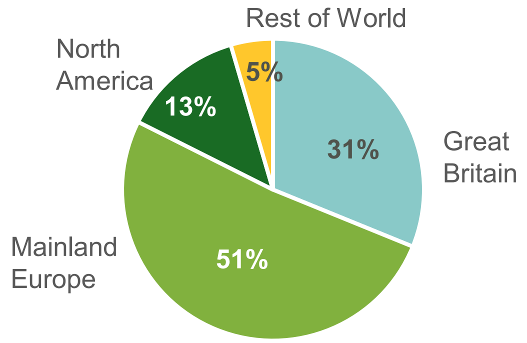


Summer Air Access to Republic of Ireland (ROI)



- Seat capacity over the Summer season is expected to be +3% above last summer's levels with close to 17 million scheduled seats to ROI.
- Year-on-year growth is looking to be between +3% and +4% in the peak season (May-August).
- While growth from Mainland Europe is expected to remain flat, other market areas are due to increase their seat capacity.

Share of Seats by Main Market Area (Summer 2026)



YoY Change in Capacity by Main Market Area

Main Market	Change vs. Summer 2025
Great Britain	+5%
Mainland Europe	+0%
North America	+7%
Rest of World	+8%
All Markets	**+3%**

Source: OAG, May 2026

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Summer Access to Republic of Ireland (ROI): Capacity by Key Market

Summer Air Access to ROI

Seat capacity from GB this summer is scheduled to be +5% higher than last summer with all three main airlines – Ryanair, Aer Lingus and British Airways - adding capacity to the schedule.

After reaching record high capacity growth in summer 2025, continued growth is expected from the US (+7%) to reach just under two million seats, representing 14% of all capacity to ROI. This summer's schedule is particularly marked by added capacity on Aer Lingus flights and the addition of two new routes (Raleigh/Durham and Pittsburgh to Dublin).

Seat capacity from France is expected to be -5% this summer, following a -3% decline in Summer 2025. The decrease in seats (net loss of 48,000 seats) is mainly driven by the reduction in capacity from Ryanair (-14%, equating to 57,000 seats) and Vueling Airlines ceasing its service on the Paris Orly-Dublin route (31,000 seats).

Capacity from Germany is also down by -2% compared to last summer. Despite recent adjustments made by Lufthansa City Airlines (-1%), the majority of changes are led by Ryanair (-17% equating to 33,000 fewer seats vs. Summer 2025) ceasing its operations from Frankfurt Hahn Airport to Dublin and reducing capacity from Memmigen (-32%, equating to a loss of 6,000 seats).

Summer Sea Access to ROI

- Sea access to ROI is due to increase this summer, after a decline in 2025 (-16%).
- The growth is attributed to added capacity on the Cross-Channel corridor.
- Passenger capacity on the Continental corridor is down on last summer and remains below its Summer 2024 levels.

Weekly Summer Passenger Capacity to ROI by Sailing Corridor

Corridor	One-way Weekly Passenger Capacity	Change vs. Summer 2025
Cross Channel	119,700	+25%
Continental	12,150	-9%
All	**131,850**	**+21%**

Source: Ferry operators, March 2026

For more detail on the Inbound Air & Sea Access dashboard: **click here**

Source: OAG, May 2026

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Summer Capacity to ROI by Key Source Market: YoY Change – Excluding Scheduled Seats on Sun Routes

Summer Access to ROI

81% of scheduled access to Ireland comes from **air capacity**.

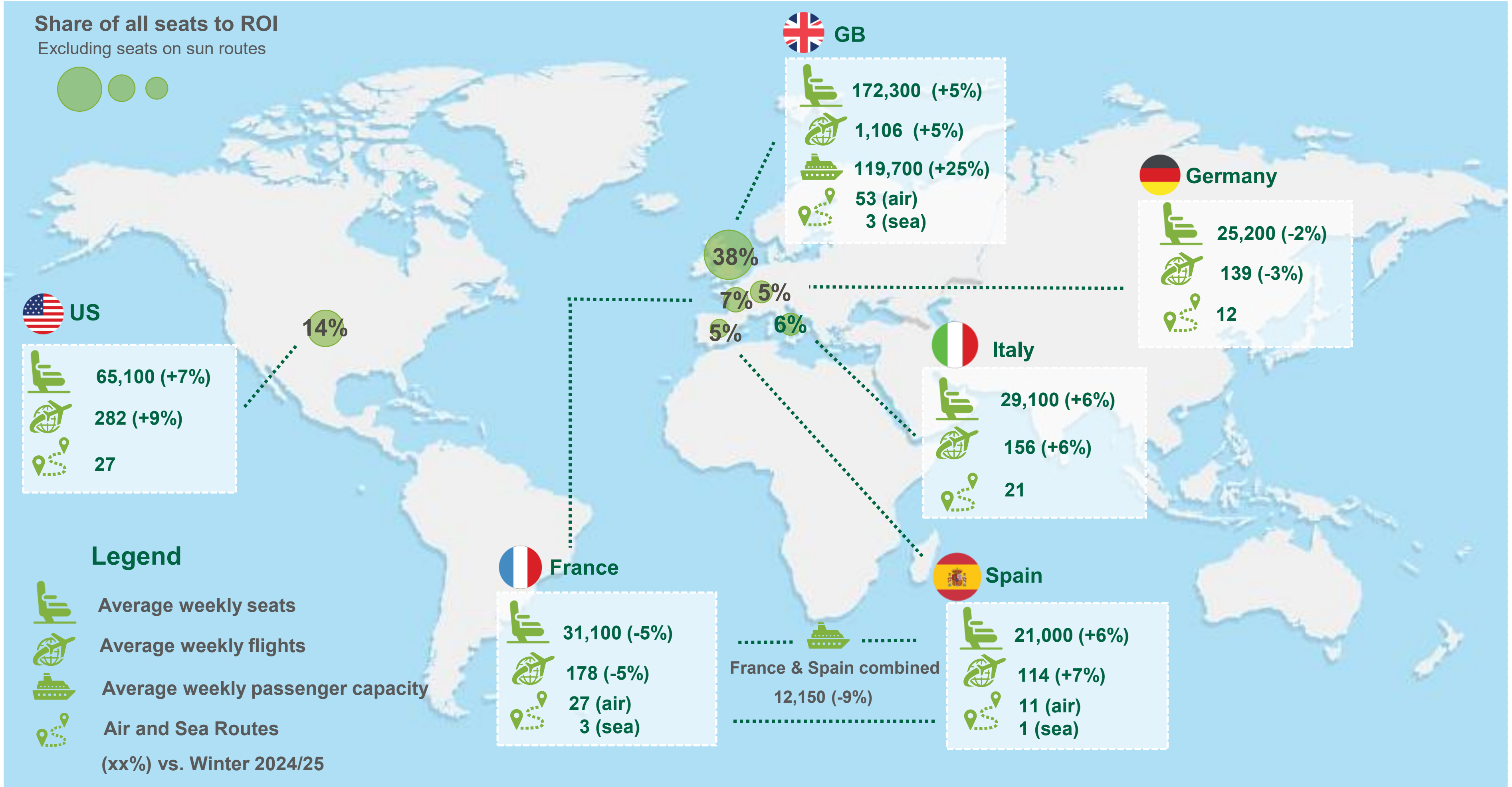
18% of air capacity is scheduled on **sun routes** and is therefore more directed towards domestic outbound travel *(this is excluded from the map).*

458,800
Average weekly seats

2,571
Average weekly flights

131,850
Average weekly passenger capacity

299 air and **7** sea
Routes



Source: OAG, May 2026; Ferry operators, March 2026