

Megahubs: OAG's take on the world's most connected airports

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Speakers



John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.



Angie Kocerka

Deputy Commissioner, Chicago
Department of Aviation

Angie leads the teams responsible for marketing, air service development, and partnerships across Chicago's airport system. Her strategic direction strengthens and expands the routes served at O'Hare and Midway, bolstering Chicago's world-class connectivity to domestic and international markets. She also develops key industry partnerships and leads marketing and engagement efforts to elevate the airports' global presence and enhance the passenger experience.



Deirdre Fulton

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.

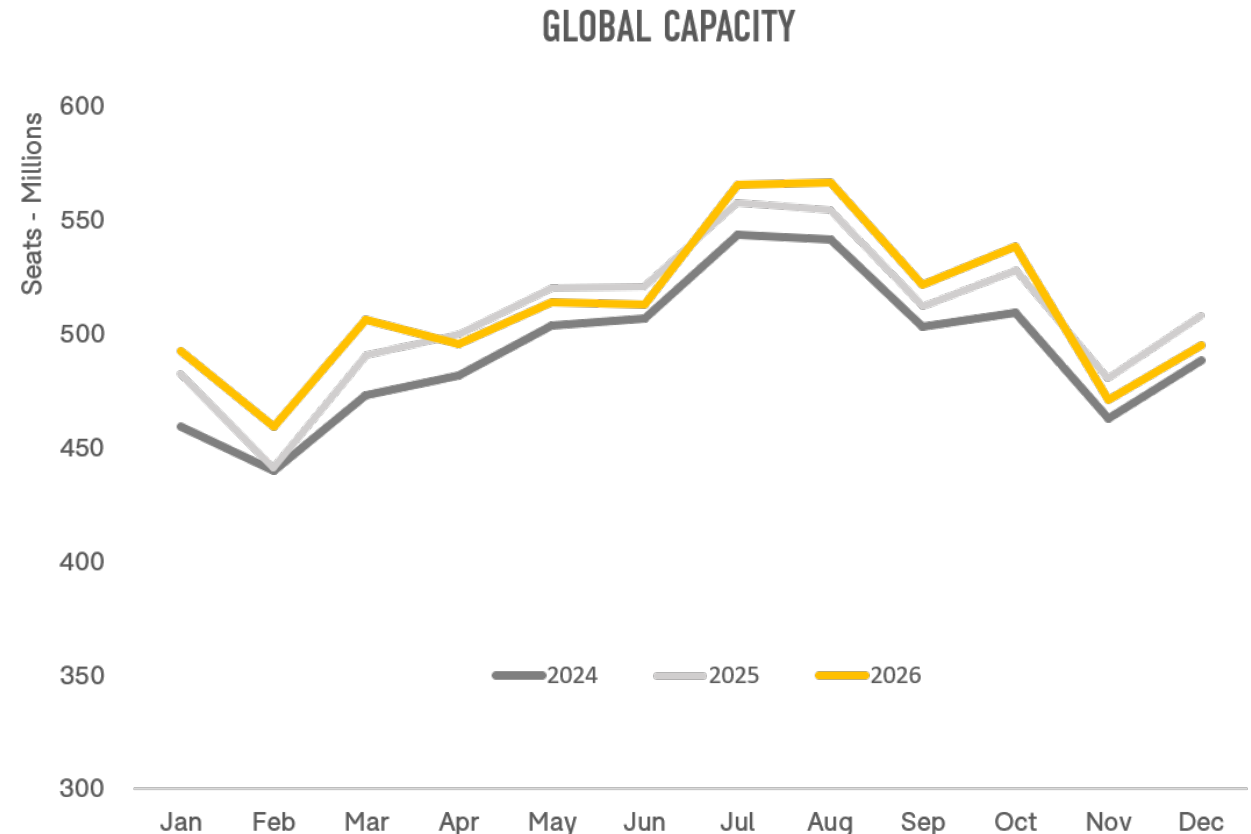
Today's discussion

Join us as we discover which airports lead the world in connectivity and what's driving the shifts as we reveal OAG's 2026 Megahubs rankings live.

- What is driving changes in the rankings this year
- Focusing on the Top 50 most connected Megahubs, we'll be exploring geography, airline strategy and other key drivers behind the rankings
- We'll also take a deep dive into some of the biggest regions in aviation terms to understand whether regional dynamics drive differences in connectivity

Global capacity position remains steady

- This summer global capacity is now tracking at just 0.6% ahead of Summer 25 according to the latest schedules data.
- The peak summer months have been slightly ahead of that trend, with capacity up by 1.8% for the months of July – September, compared to last year.
- Looking into the winter season, capacity looks flat, and declining at the moment year on year, but this position is likely to improve as we get closer to the start of the winter season in late October.



Megahubs – the definition

OAG coined the term ‘Megahubs’ back in 2015 when we released our first ranking of airport connectivity. Intended to provide a baseline measure of the connectivity of the world’s busiest airports, using OAG’s connections analyser, Megahubs has become a regular annual fixture in OAG’s publication calendar.

Using a connectivity index, OAG Megahubs 2026 ranks the connectivity of the world’s leading international airport hubs – globally and regionally – as well as gateways into domestic markets and provides a platform for comparison.

The rankings are generated by comparing the **number of scheduled connections** to and from international flights with the **number of destinations served** from the airport, on the busiest day of the year.

Megahubs is created using OAG’s flight data platform, which contains the world’s most comprehensive airline schedules and global flight connections database .



Megahubs 2026 – Categories and Criteria

There are 3 main categories in OAG Megahubs

Top 50 Most Connected Airports

Top 25 Most Connected LCC Airports

Top 25 Most Connected US Domestic Airports

We also provide insights into the most connected Megahubs by Region

The connectivity index has used the in-built business rules within OAG Connections Analyser, plus the following customisable criteria were chosen for all operating flights:

- Single international* connections only to/from the chosen airports
- Maximum circuitry of 150
- Maximum connection window of six hours

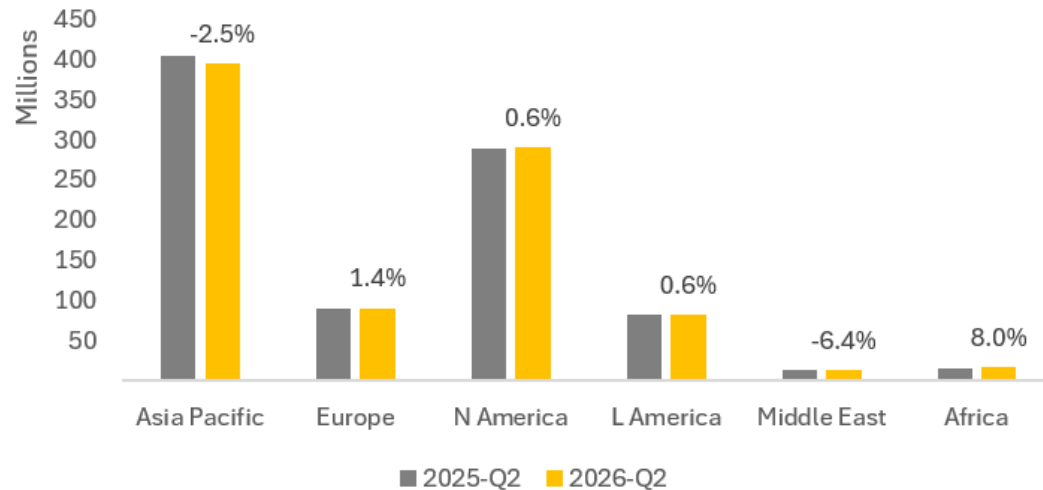
Global Megahubs 2026 – the results

#1 IST	#2 LHR	#3 AMS	#4 KUL	#5 ORD
Dominant Carrier Turkish Airlines	Dominant Carrier British Airways	Dominant Carrier KLM-Royal Dutch Airlines	Dominant Carrier AirAsia	Dominant Carrier United Airlines
Share of Flights 80%	Share of Flights 50%	Share of Flights 56%	Share of Flights 34%	Share of Flights 49%

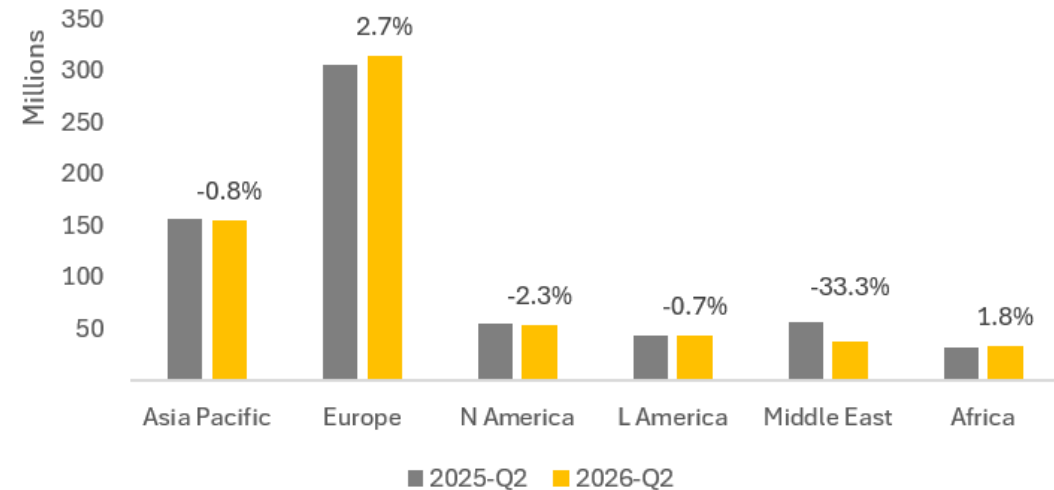
- Istanbul takes the lead – most connected global Megahub in 2026
- London Heathrow drops from 1st to 2nd with Middle East capacity still down 25% this summer
- Amsterdam holds steady with growth in capacity and destinations
- Kuala Lumpur is Asia's most connected Megahub, and continues to grow
- Chicago O'Hare moves up into the Top 5 and is the most connected hub in the Americas

Connectivity in 2026 impacted by geopolitics

Domestic Capacity by Region
Q2 (Apr-Jun) 2025 v 2026



International Capacity by Region
Q2 (Apr-Jun) 2025 v 2026



This year continues to see geopolitics impacting on air travel.

- Domestic capacity globally is 0.7% below Q2 2025, with reductions in Asia Pacific and the Middle East most evident.
- Internationally, capacity in the Middle East was a third lower than Q2 2025 this year. International capacity in North America is also down, by 2.3% and in Asia Pacific by 0.8%.

Key movements in the 2026 rankings

Megahubs moving up

Airport	Code	2026 Rank	2025 Rank	Change in position
Baiyun	CAN	19	36	17
Rome Fiumicino	FCO	27	40	13
Delhi	DEL	28	39	11
Beijing	PEK	44	54	10
Addis Ababa	ADD	50	60	10
Istanbul Sabiha Gokcen	SAW	21	29	8
Hanoi	HAN	49	57	8
Madrid	MAD	18	25	7
Panama	PTY	34	41	7
Shanghai Pudong	PVG	14	19	5

Three major Chinese airports climb up the rankings this year, finally shaking off the impacts of the Covid pandemic.

Rome has also seen a considerable increase in position, up from 40 to 27 this year.

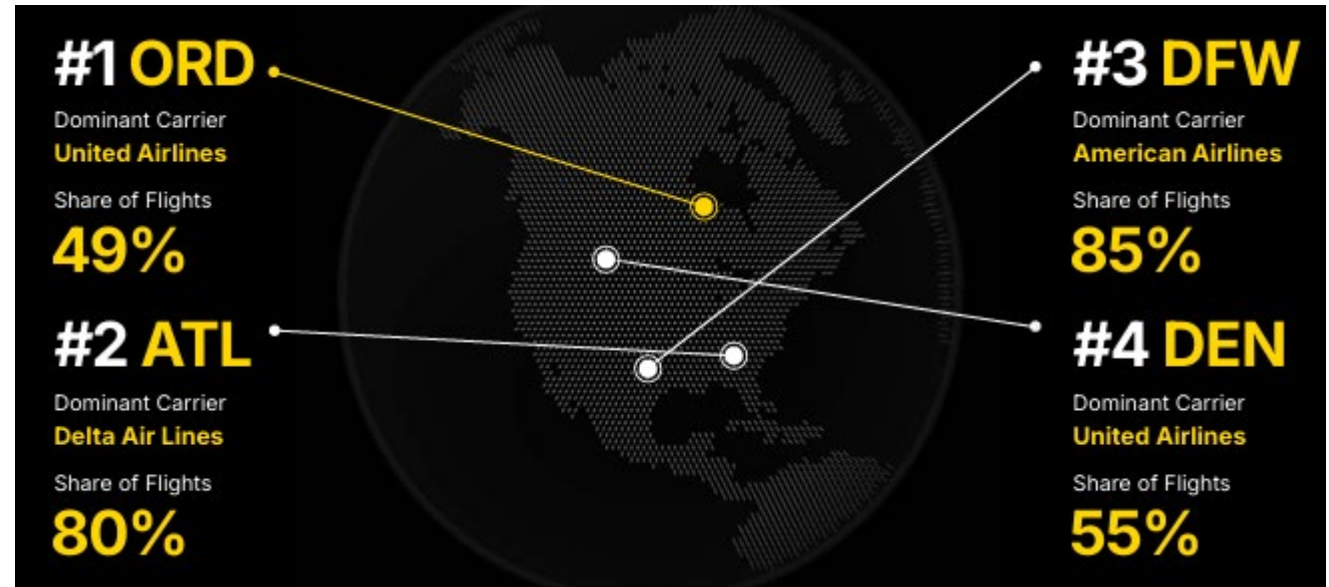
Megahubs moving down

Airport	Code	2026 Rank	2025 Rank	Change in position
Dubai	DXB	31	15	-16
Doha	DOH	46	34	-12
Riyadh	RUH	43	32	-11
Manila	MNL	30	21	-9
Houston	IAH	25	18	-7
Munich	MUC	23	17	-6
Jakarta	CGK	29	23	-6
Fukuoka	FUK	33	28	-5
Sydney	SYD	35	30	-5
Newark	EWR	36	31	-5

Unsurprisingly the effects of conflict in the Middle East continue to impact on connectivity for hubs in the region – Dubai, Doha and Riyadh have all dropped down the rankings this year.

US Domestic Megahubs 2026 – the results

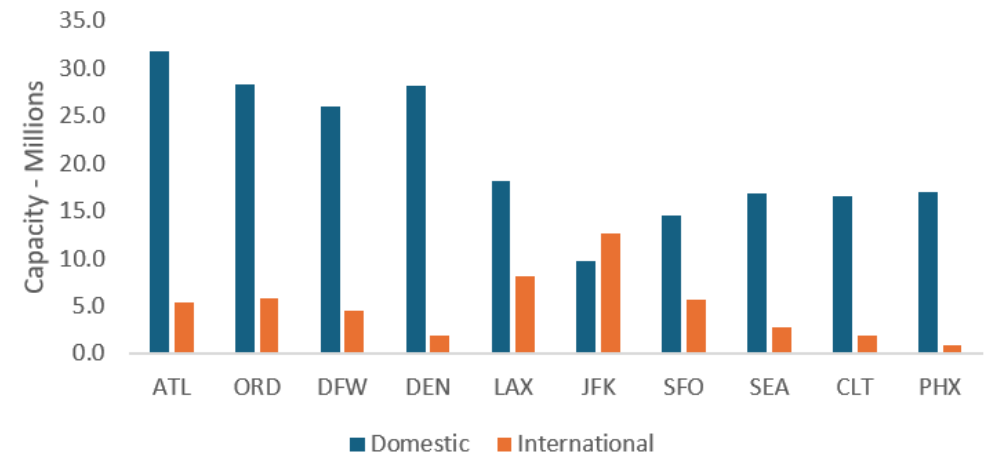
- Chicago O'Hare retains first place again this year as the most connected domestic airport in the United States. ORD now has services to 227 domestic destinations with almost 84,000 potential connections on the busiest day. ORD is the major hub for United, who operate 49% of capacity.
- Atlanta moves from 1st last year to 2nd place this year, with 170 destinations. Delta Air Lines dominate at ATL with 80% of capacity.
- The Top 25 US domestic hubs remain unchanged this year but there have been some changes in the rankings. LAX moves up from 10th to 7th place, switching places with BOS. SFO records the biggest jump, up from 17th to 11, and is one of the fastest growing hubs in the US, with a 4% increase in capacity for the year to August 2026.



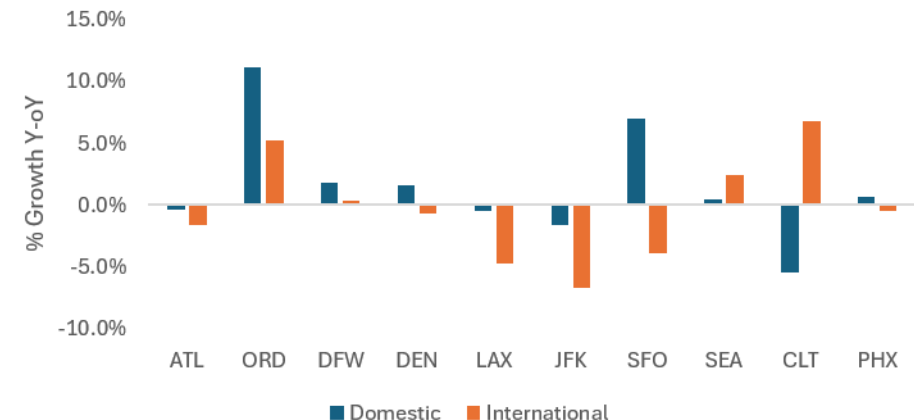
US Domestic Megahubs 2026 – ORD leads the way

- Looking across the Top 10 US hubs, ORD is fastest growing this summer v's last summer, with strongest growth in domestic capacity amongst its peers, up by 11.1%. Both United and American are driving growth at ORD, adding 3.5m seats this summer between them. United operates 52% of ORD's domestic capacity, and American 39%.
- Amongst the rest of the big US hubs, SFO is also seeing strong growth this summer, benefitting from United's growth where they are adding just over 0.6m seats this summer.
- At most other US hubs domestic capacity is flat or growing more slowly with the average of 0.5%

US Top 10 Hubs
Summer 2026 Capacity



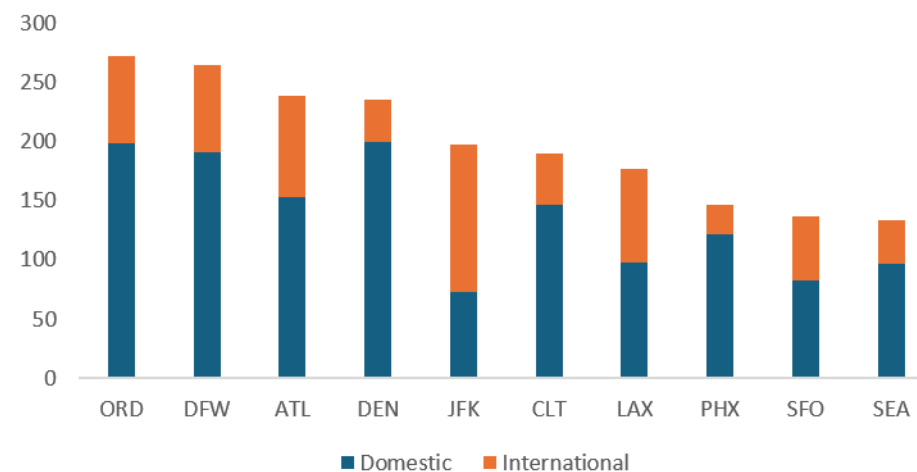
US Top 10 Hubs
Capacity Growth S26 v S25



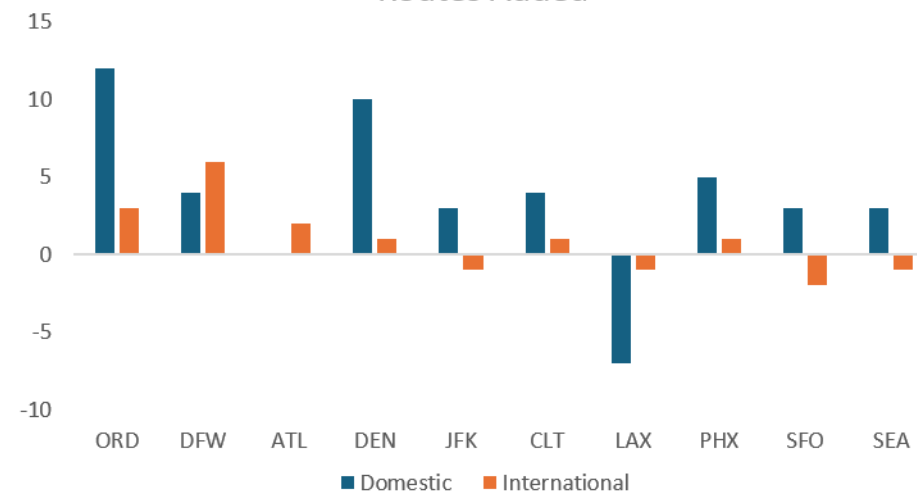
US Domestic Megahubs 2026 – ORD leads the way

- ORD is also largest by routes served, with a total of 272 destinations this summer, 199 of which are domestic, and 73 international.
- JFK has the largest international route network of this group, with services to 124 international markets.
- DEN has the largest domestic network, just ahead of ORD with 200 destinations.
- ORD has added most domestic routes this summer, with 12 new domestic routes, and 3 international routes
- DEN has also seen strong domestic route growth with 10 new destinations this summer, benefitting from United's country wide growth. At DEN, United accounts for 55% of capacity.

Top 10 US Hubs - S26 Route Count

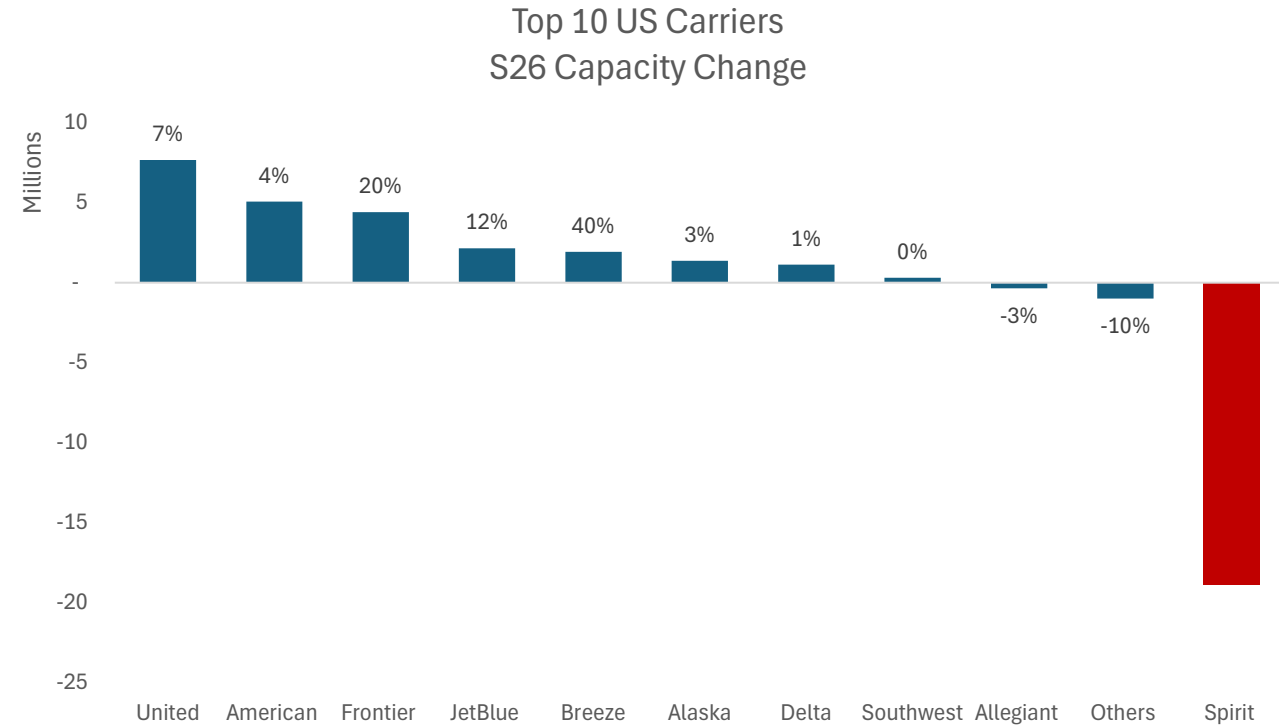


Routes Added



US Airline Capacity Changes in Summer 2026 offset Spirit gaps

- The loss of Spirit removed 18.9m seats from the US domestic market this summer, although this is more than offset by capacity growth from other US major carriers.
- Overall S26 domestic capacity is 3.7m ahead of S25.
- United has added most capacity, with 7.6m more seats and American has also recorded strong growth, with 5m more seats.
- Although much smaller, Frontier have increased capacity by 20%, and Breeze by 40%



The Chicago story – strong growth and more to come?



LCC Megahubs 2026 – the results

Rank 2026	Airport	Airport Name	Country	Rank in 2025	Dominant LCC Carrier	LCC Carrier Share of Flights	% LCC Capacity
1	KUL	Kuala Lumpur	Malaysia	1	AirAsia	34%	44%
2	ICN	Seoul Incheon	Korea Republic of	2	Jeju Airlines	10%	38%
3	SAW	Istanbul Sabiha Gokcen	Turkiye	7	Pegasus Airlines	61%	64%
4	BCN	Barcelona Apt (ES)	Spain	9	Vueling Airlines	40%	72%
5	SIN	Singapore Changi	Singapore	10	Scoot	20%	32%
6	MNL	Manila Ninoy Aquino	Philippines	3	Cebu Pacific Air	36%	51%
7	CGK	Jakarta Soekarno-Hatta	Indonesia	-	Citilink	14%	45%
8	FUK	Fukuoka	Japan	13	Skymark Airlines	7%	35%
9	DEL	Delhi	India	11	IndiGo	40%	57%
10	DXB	Dubai	United Arab Emirates	5	Flydubai	29%	38%

Kuala Lumpur holds onto the top spot again this year as the most connected LCC Megahub globally, and is also Asia's most connected Megahub.

Megahubs by Region

Regional Rank	Airport	Airport Name
1	KUL	Kuala Lumpur
2	ICN	Seoul Incheon
3	HND	Tokyo Intl (Haneda)
4	SIN	Singapore Changi
5	BKK	Bangkok Suvarnabhumi
6	PVG	Shanghai Pudong
7	CAN	Baiyun Intl (CN)
8	HKG	Hong Kong
9	DEL	Delhi
10	CGK	Jakarta Soekarno-Hatta

Asia Pacific

Regional Rank	Airport	Airport Name
1	ORD	Chicago O'Hare
2	ATL	Atlanta Hartsfield-Jackson
3	DFW	Dallas Dallas/Fort Worth
4	JFK	New York J F Kennedy
5	MIA	Miami International
6	YYZ	Toronto Lester B Pearson
7	IAH	Houston George Bush Intercont.
8	LAX	Los Angeles
9	EWK	Newark Liberty
10	SFO	San Francisco

North America

Regional Rank	Airport	Airport Name
1	BOG	Bogota
2	PTY	Panama City Tocumen
3	MEX	Mexico City Juarez
4	GRU	Sao Paulo Guarulhos
5	LIM	Lima (PE)
6	SCL	Santiago (CL)
7	SJU	San Juan Luis Munoz Marin
8	AEP	Buenos Aires Aeroparque J. Newbery
9	GIG	Rio de Janeiro Galeao-A.C.Jobim
10	MDE	Medellin

Latin America

Regional Rank	Airport	Airport Name
1	IST	Istanbul
2	LHR	London Heathrow
3	AMS	Amsterdam
4	FRA	Frankfurt
5	CDG	Paris Charles de Gaulle
6	MAD	Madrid Adolfo Suarez-Barajas
7	SAW	Istanbul Sabiha Gokcen
8	ATH	Athens (GR)
9	MUC	Munich
10	FCO	Rome Fiumicino

Europe

Regional Rank	Airport	Airport Name
1	DXB	Dubai
2	JNB	Johannesburg O.R. Tambo
3	RUH	Riyadh King Khalid
4	DOH	Doha (QA)
5	ADD	Addis Ababa
6	CAI	Cairo
7	AUH	Zayed
8	JED	Jeddah
9	CMN	Casablanca
10	SHJ	Sharjah

Middle East

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