

Monthly Network Operations Report

Overview March 2021



1. SUMMARY

Traffic in March was at 36.3% of March 2019 levels but increased week on week from the beginning of the month. It was above the scenario of -72% published by EUROCONTROL in January 2021. On average the network saw 9,942 flights/day. The peak day was 26 March (12,741 flights) with traffic at -57.8% of 2019 levels. Fridays were the busiest days throughout March with an average of 11,595 flights.

Turkish Airlines was again the busiest carrier in March with on average 674 flights/day, followed by Air France with 363 flights/day and Pegasus with 286 flights/day.

The busiest airport was IGA Istanbul (562 flights/day), followed by Paris/Charles de Gaulle (458 flights/day) and Frankfurt/Main (442 flights/day)

There was an excellent level of cooperation between all operational partners. There were some network flow protective measures in March that generated 13,880 minutes of ATFM delay. The measures were mainly applied in Marseille TMA due to ATC capacityⁱ.

2. TRAFFIC EVOLUTION

On 28 January 2021, EUROCONTROL published revised Traffic Scenarios taking into account [the latest available information](#).

COVID-19 continued to affect network traffic throughout the month. March traffic was -63.7% (compared to March 2019), above the -72% estimate of the revised EUROCONTROL scenarios.

Traffic has shown a positive steady trend since mid-February which has accelerated over the last week. This increase is mainly due to Easter Holidays which are almost three weeks in advance compared to 2019.

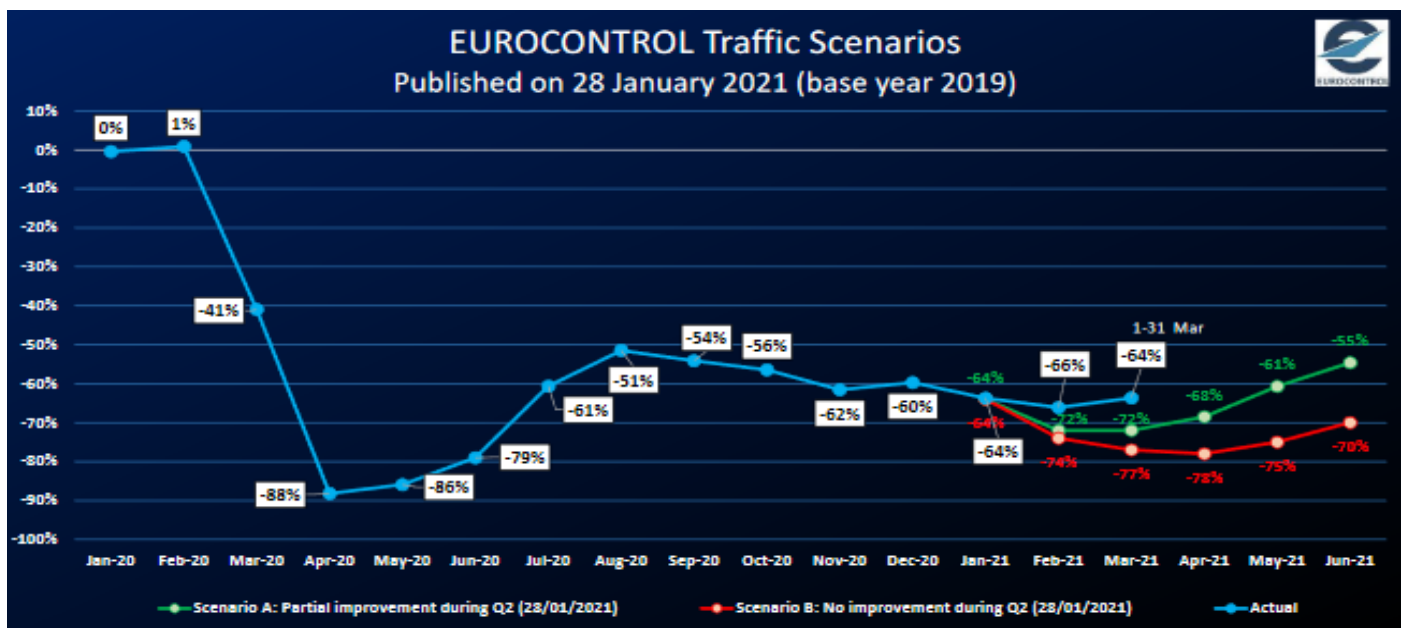
Aircraft operators such as Lufthansa, SAS and Ryanair increased their capacity compared to February 2021.

The traditional and low-cost segments, while accounting the majority of flights, recorded a slight improvement on last month reaching -69.9% and -85.9% respectively in March 2021 (vs March 2019).

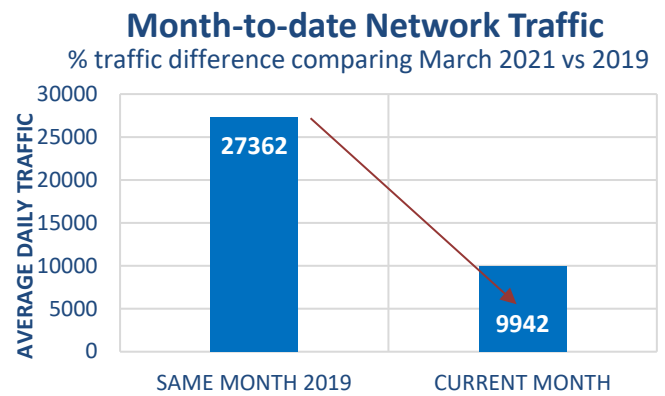
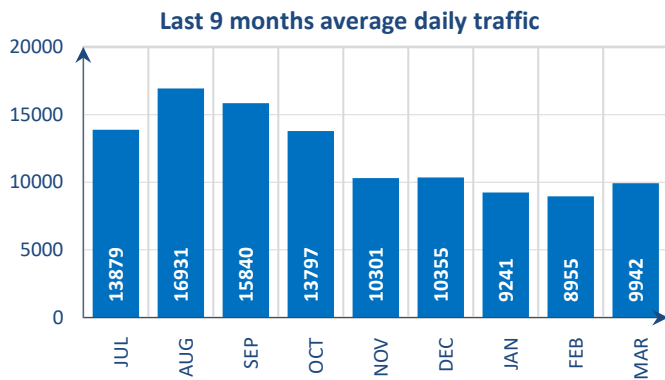
All-Cargo continued to show an upward trend and posted a 14.8% increase in March 2021 compared to March 2019.

The charter segment decreased by -2.2% and was almost back to the 2019 levels partly due to traditional scheduled airlines filing ICAO flight type N.

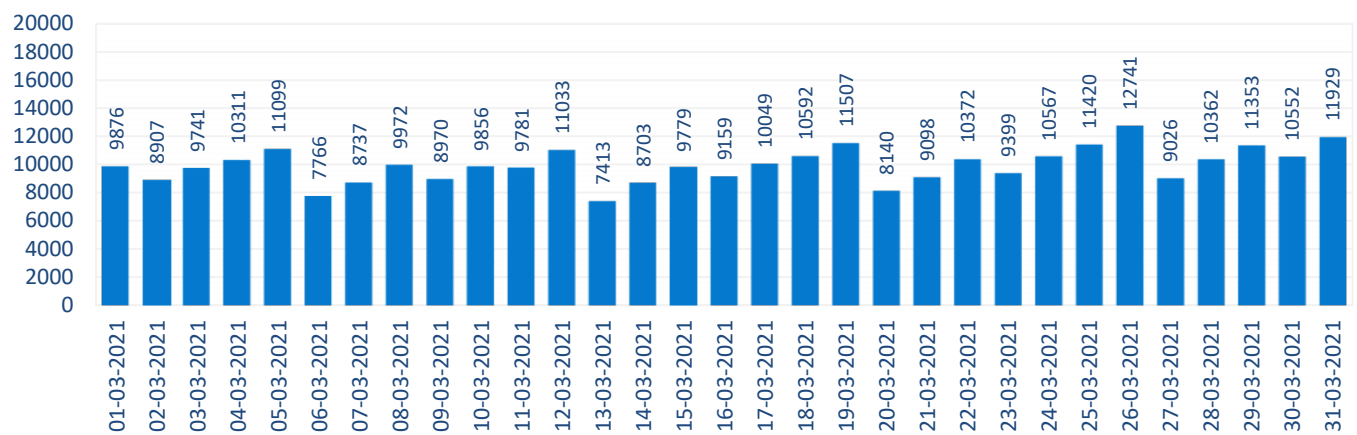
The business aviation segment recorded a decrease of -18.1% in March 2021 (vs March 2019) but in certain countries business aviation was getting close to 2019, some of them were even higher than pre-Covid numbers in Israel, Greece, Serbia/Montenegro, Spain and Turkey.



There were 308,210 flights in March 2021 – 63.7% reduction compared to March 2019.

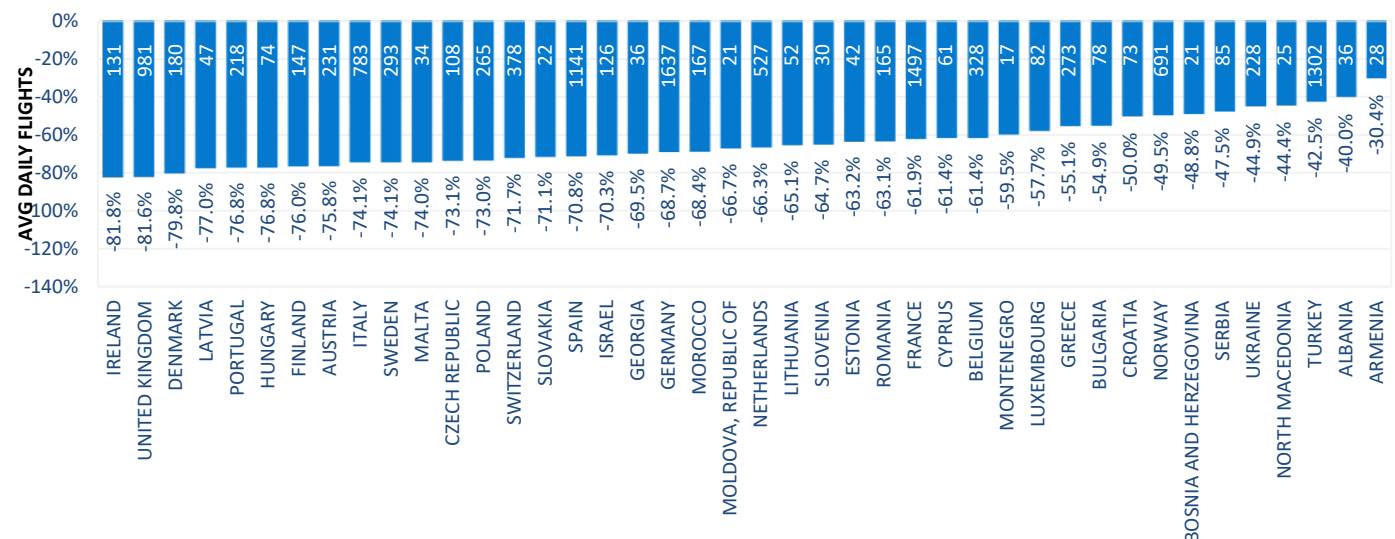


Daily Network Traffic Evolution



The largest traffic reduction (compared to the same operational day of 2019) was 68.6% on 13 March 2021 with 7,413 flights. Friday 26 March was the busiest traffic day with 12,741 flights.

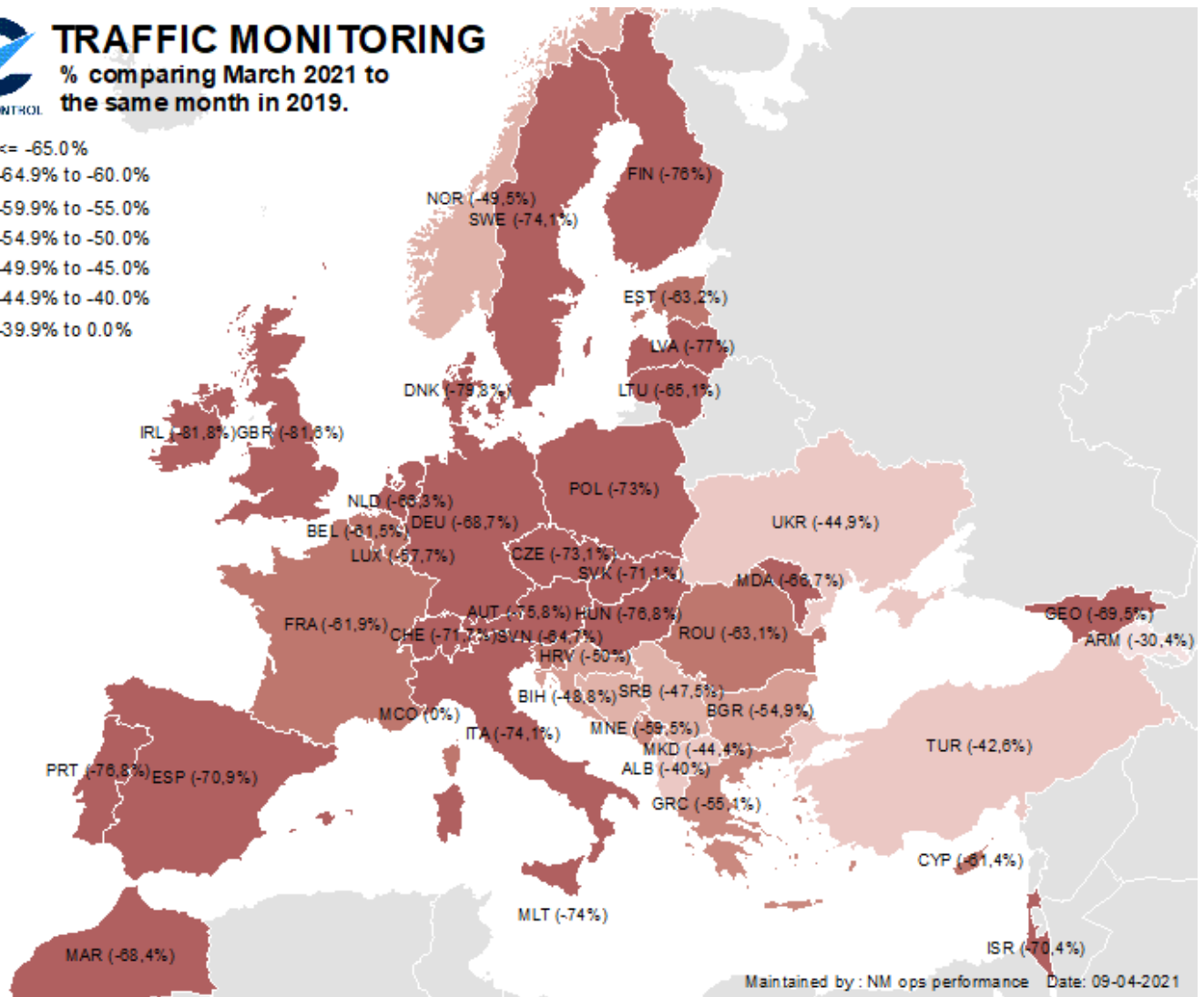
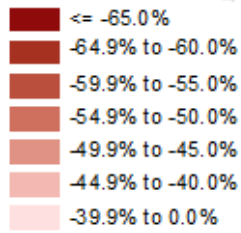
March 2021 country level traffic compared to the same period in 2019



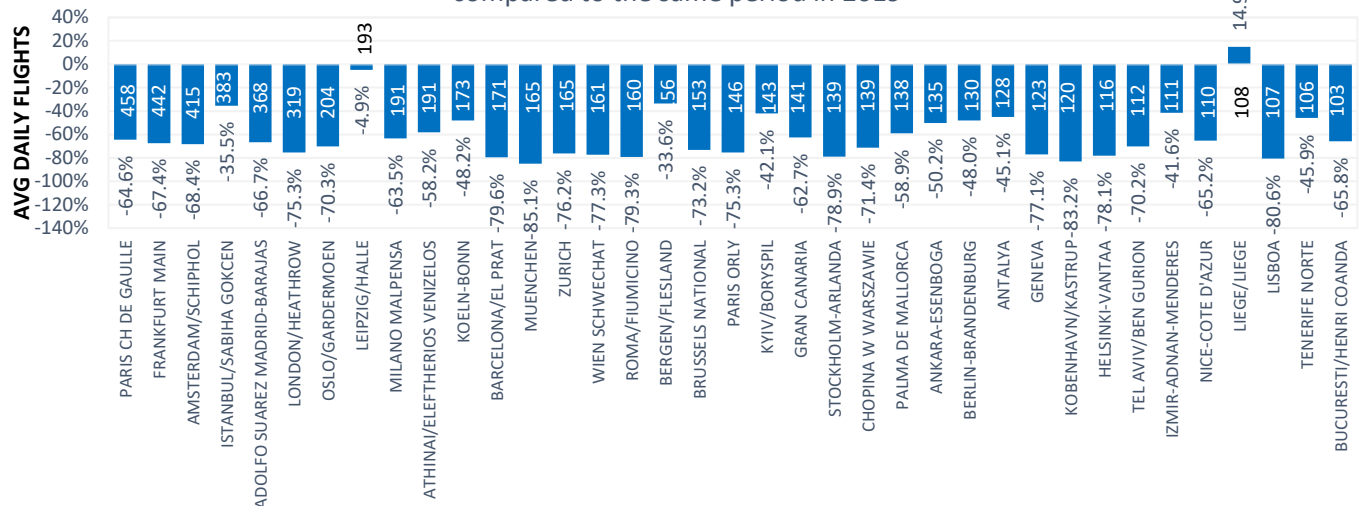
Germany (1,637 flights/day), France (1,497 flights/day) and Turkey (1,302 flights/day) recorded the highest traffic levels in the network. These levels are well below 2019 levels.

TRAFFIC MONITORING

% comparing March 2021 to the same month in 2019.



March 2021 TOP 40 most impacted airports by average daily flights compared to the same period in 2019

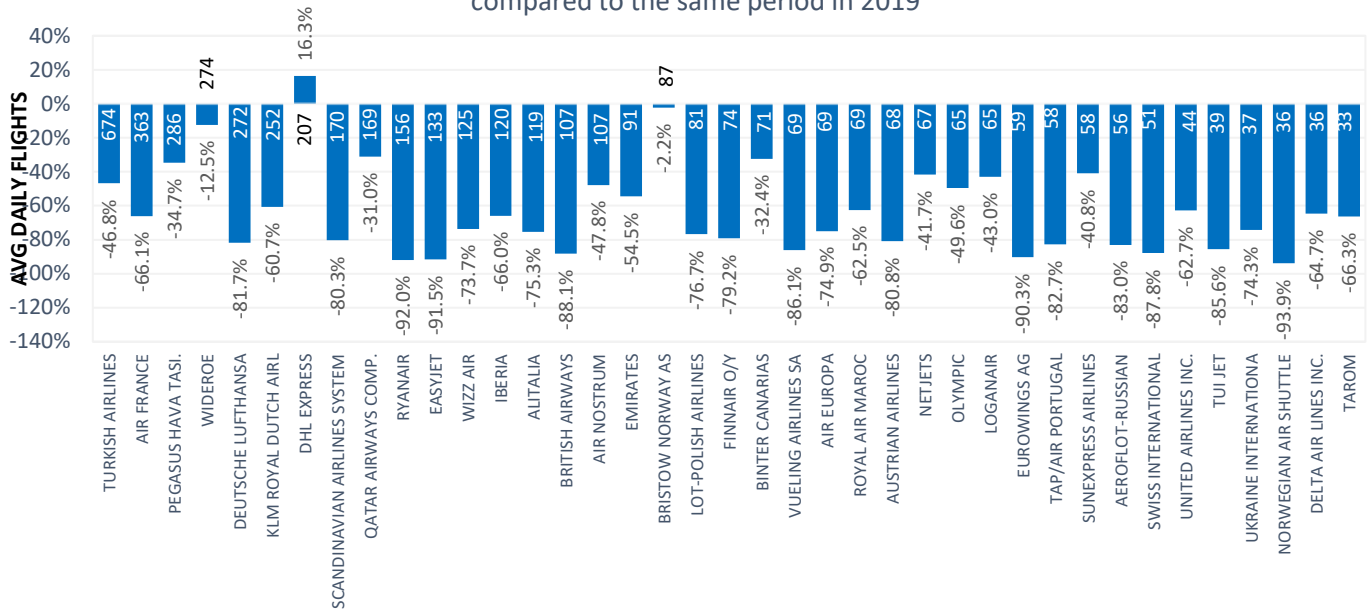


¹ IGA Istanbul was the busiest airport with 562 movements per day followed by Paris/Charles de Gaulle (458), Frankfurt/Main (442) and Amsterdam/Schiphol (415).

Traffic increase at Liege airport was due to more Cargo traffic.

¹ IGA Istanbul is not represented in the graph because it was not yet in operations early 2019.

January 2021 Air Operator Network Traffic compared to the same period in 2019



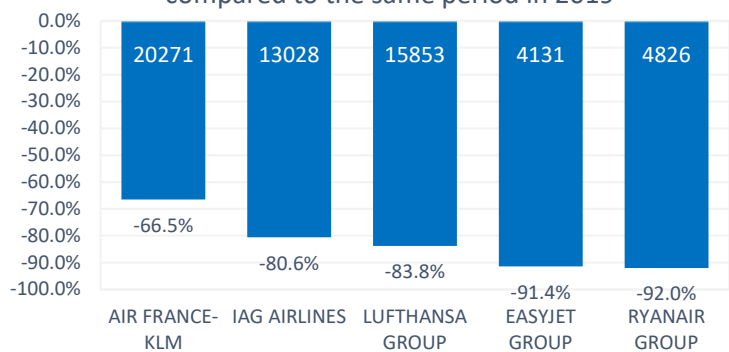
Turkish Airlines was the busiest operator with, on average, 674 movements per day, followed by Air France (363), Pegasus (286) and Wideroe (274).

DHL was the only airline with a traffic increase in March (+16.3%).

Air France/KLM was the busiest aircraft operator group with a total of 20,271 flights, which was a decrease of 66.5% compared to 2019.

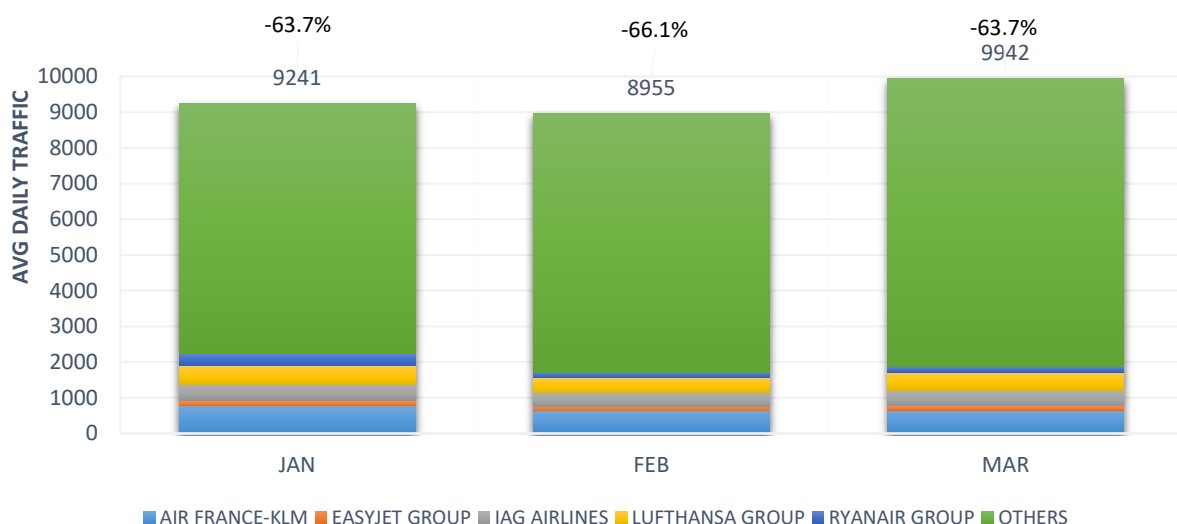
Compared to February 2021, Air France/KLM total flights increased from 17,722 flights to 20,271 flights (+14.4%), IAG Airlines increased by 22.1%, Lufthansa group increased by 40.0%, Easyjet group increased by 7.8% and Ryanair group increased by 14.4%.

Air Operator Group Traffic - March 2021 compared to the same period in 2019

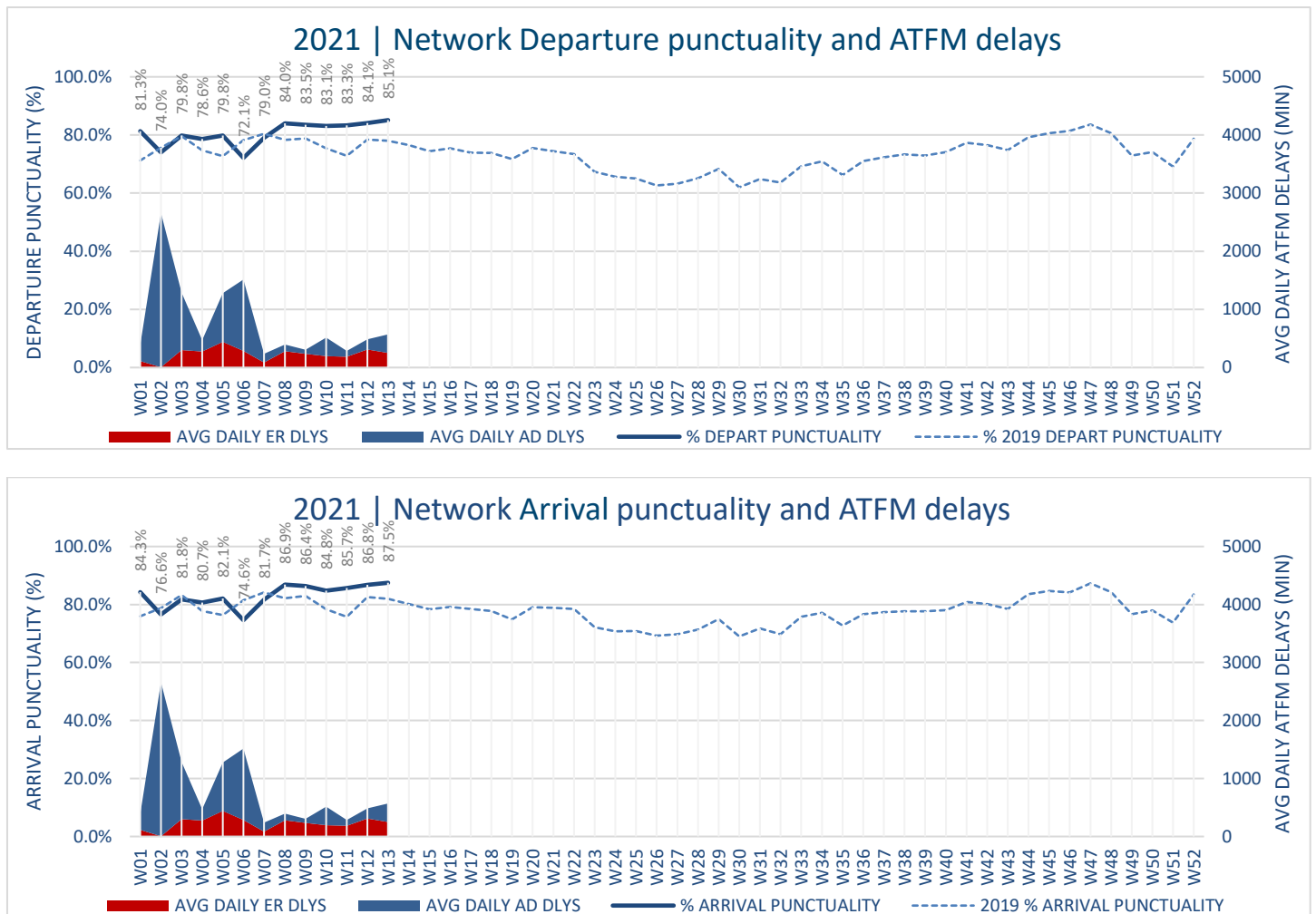


Air Operator Group | Monthly Network Traffic

compared to the same period in 2019



3. PUNCTUALITY



There was a marked increase in both departure and arrival punctuality during March.

*This view of operational punctuality can be tracked by aircraft operator and airport level in the [NORTI Dashboard](#).
The Central Office for Delay Analysis [CODA reports](#) provide further detailed analysis of airline reported delay reasons.

4. OPERATIONS

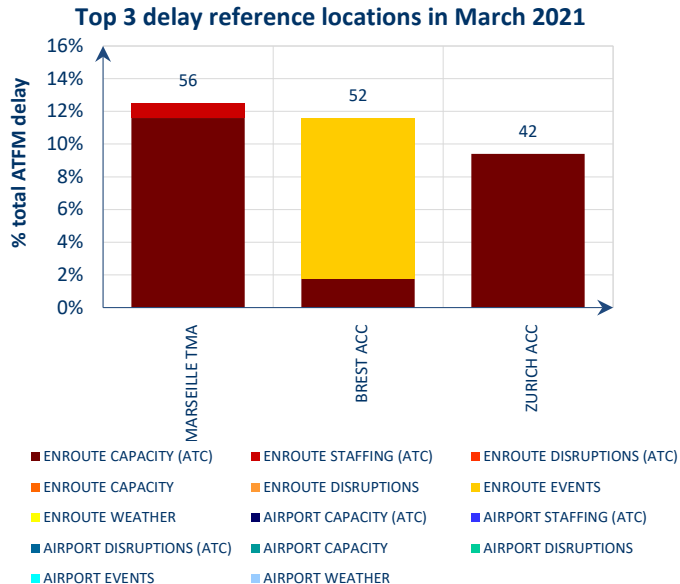
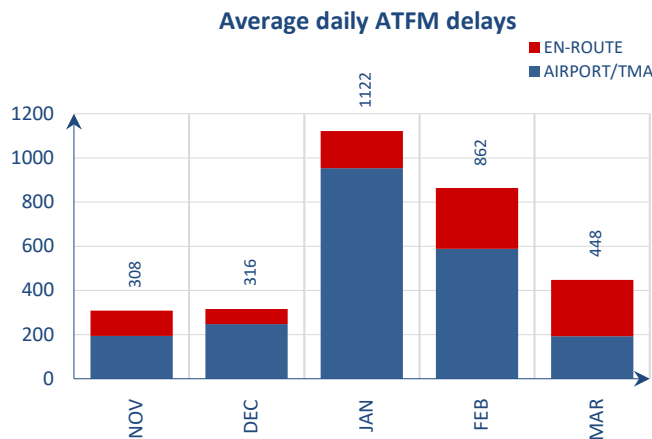
The EUROCONTROL Network Manager continued monitoring the operational situation and held weekly Ad-hoc Coordination meetings to share network status.

There were some protective measures in March and 13,880 minutes of ATFM delay.

En-route delays accounted for 56.9% of these ATFM delays and airports 43.1%.

The measures were mainly applied in Marseille TMA due to ATC capacity issues and in Brest ACC to new airspace design in Nantes TMA.

EUROCONTROL NM provided a consolidated view of relevant NOTAMs on the NOP Portal and issued weekly versions of the Rolling Seasonal Plan. This focusses on the next six weeks plan and on managing the execution and implementation of the five year NOP.

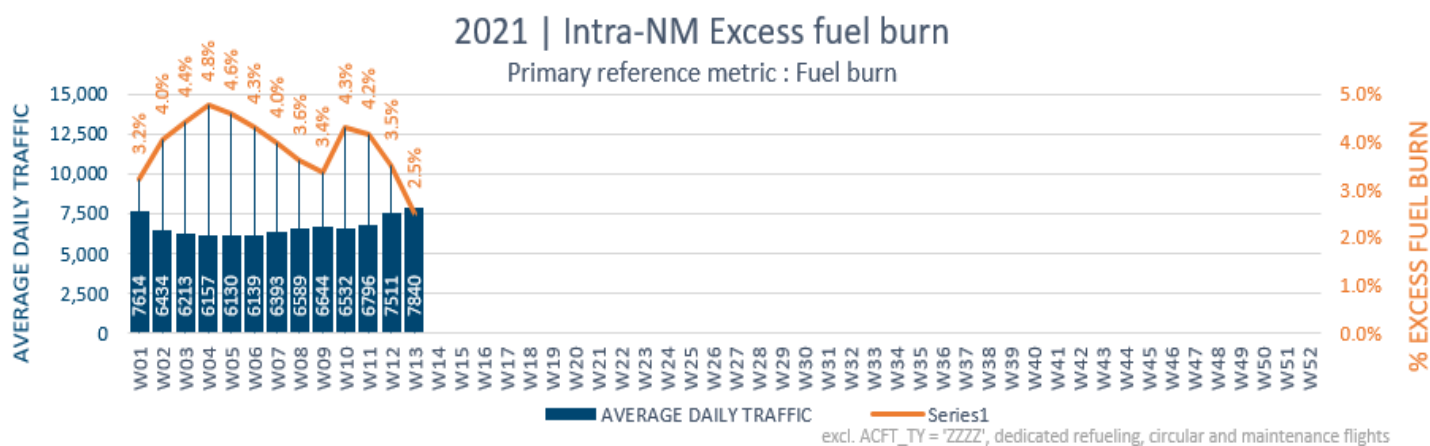


ATFM DELAY AND ATTRIBUTIONS

- ATC capacity issues in Marseille TMA and Zurich ACC throughout the month;
- New airspace confirmation and extension of Nantes TMA generated delays in Brest ACC.

5. FUEL BURN

REF [ENVIRONMENTAL ASSESSMENT: EUROPEAN ATM NETWORK FUEL INEFFICIENCY STUDY](#)



The Network Fuel Efficiency study introduced the Excess Fuel Burn indicator. During the COVID period, with fewer flights and airspace restrictions, the network is relatively more fuel efficient than the 2019 period (over 9%). The indicator has fluctuated during 2021 due to the changing mix of routes flown at low traffic levels. NM will monitor excess fuel burn as traffic returns.



© EUROCONTROL - April 2021

This document is published by EUROCONTROL for information purposes. It may be copied in whole or in part, provided that EUROCONTROL is mentioned as the source and it is not used for commercial purposes (i.e. for financial gain). The information in this document may not be modified without prior written permission from EUROCONTROL.

www.eurocontrol.int