



Monthly Network Operations Report

Overview March 2025



1. Summary

In March, there were 825,848 flights, reflecting a 4.5% traffic increase compared to March 2024.

The network had an average of 26,640 flights/day in March, about 1,182 flights/day more than in March 2024. The busiest day was Monday 31 March (29,637 flights), which exceeded the busiest day of March 2024 (28,581 flights). The intra-NM southwest axis saw 5.7% growth while the southeast axis saw a 4.1% increase, contributing to the overall network growth of 4.5%.

The conflict in Ukraine still affects overflights in several countries. EUROCONTROL continues to help manage the war's impact on aviation.

The low-cost segment saw the highest growth, increasing by 7.4% with an additional 601 daily flights compared to March 2024.

All Top 20 ACCs, except Reims, had more traffic in March 2025 compared to March 2024.

Ryanair was the busiest operator with, on average, 2,763 movements (+15.3%) per day followed by easyJet (1,474), Turkish Airlines (1,362), Lufthansa (1,041) and Air France (947).

The busiest airport was Istanbul airport (1,341 flights/day) followed by Amsterdam Schiphol (1,296 flights/day), Paris Charles de Gaulle (1,249 flights/day), London Heathrow (1,246 flights/day) and Madrid (1,147 flights/day). The traffic decrease at London/Heathrow airport was due to two major incidents impacting operations on 10 and 21 March. The closure of London Heathrow Airport on 21 March significantly affected operations at London Heathrow and connected airports, notably Dublin, resulting in approximately 1,200 flight cancellations.

Network departure punctuality was at 79.2% and arrival punctuality was 83.5%, both better than in March 2024. Domestic routes had a departure punctuality of 84.4%, which was higher than the network level. Punctuality on the south-west axis was 77.7% which is higher than March 2024. Network first rotation departure punctuality was 86.5%, which is 2.2 p.p higher than 2024 and arrival punctuality increased by 1.5 p.p. Improving first rotation punctuality remains a key objective for the Network Manager (NM).

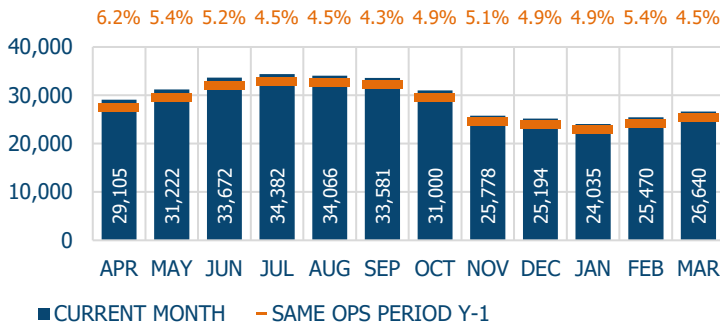
There were 763,604 minutes of ATFM delay in March 2025, a 2.3% decrease compared to March 2024. En-route ATFM delay was 50.4% of the ATFM delay and airport was 49.6%. The average en-route ATFM delay per flight for the network was 0.5 minutes in March – a similar level to last year. Total en-route ATFM delays decreased by 4.8% and total airport ATFM delays increased by 0.4% in March. En-route ATC capacity and airport weather were the main issues. High delays were caused by ATC capacity issues in Sevilla, Lisbon, Madrid, and Barcelona ACCs due to demand exceeding capacity. Similar issues occurred in Munich, Langen, and Karlsruhe UAC with demand surpassing available sectors. Misty conditions, followed by convective activities and strong winds at Lisbon airport, also significantly impacted operations. Low visibility at London/Heathrow and Amsterdam/Schiphol further contributed to high delays.

NM's Operational Centre reduced en-route ATFM delays by 10.3% and airport ATFM delays by 9.3% through direct actions.

NM estimates that 2.8 million tonnes of fuel was burnt in the en-route flight phase in the NM area in March 2025.

2. Traffic evolution

Last 12 months average daily traffic

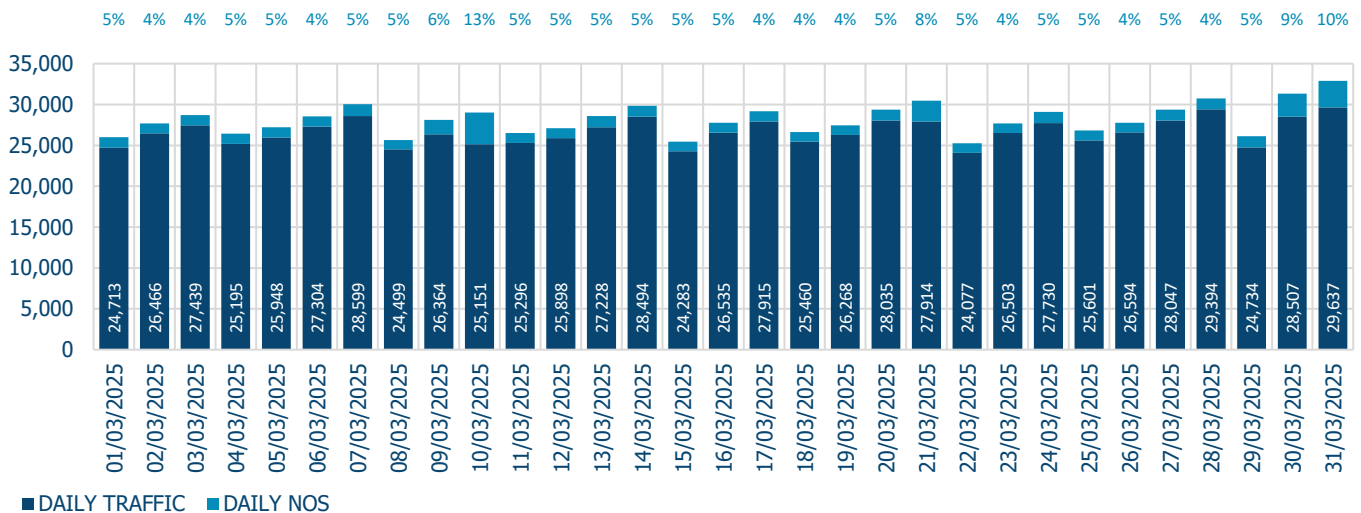


There were 825,848 flights throughout Europe in March 2025, 4.5% up compared to the same period last year.

In March 2025 the Mainline segment remained the primary driver of flight growth, averaging 9,714 flights per day (+390 flights/day, +4.2% vs. March 2024). However, the Low-cost segment recorded the highest growth, adding 601 flights/day (+7.4% 2024). The Regional segment grew by 2.1% (+73 flights/day) while the Charter segment saw a modest increase of 0.6% (+3 flights/day) despite notable decreases on flows between Germany <-> Egypt (-10 flights/day), Germany <-> Türkiye (-10 flights/day) and Türkiye <-> the Middle East (-8 flights/day). Altogether, passenger flights rose by 5.0% (+1,068 flights/day) in March 2025 compared to March 2024. The All-cargo segment grew by 2.4% (+23 flights/day) driven by an increase of 26 daily flights between ECAC <-> Continental China compared to March 2024. Conversely, the Business aviation segment decreased by -2.3% (-42 flights/day) due to reductions in domestic flights within Germany (-18 flights/day), Türkiye (-9 flights/day), France (-5 flights/day) and UK (-5 flights/day). Compared to pre-pandemic levels, two segments exceeded March 2019 flights: Low-cost (+5.2%) and Business aviation (+2.5%). Overall total flights in March 2025 reached 97.3% of March 2019 levels.

The busiest day was Monday 31 March (29,637 flights), which exceeded the busiest day of March 2024 (28,581 flights).

Daily network traffic evolution

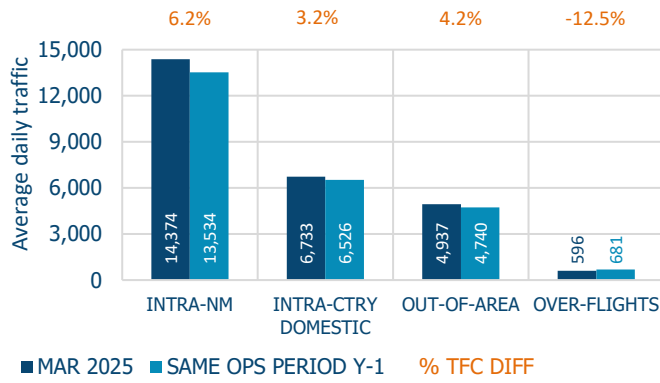


On average, 5.5% of scheduled traffic did not operate in March (see Non-Operated Schedules).

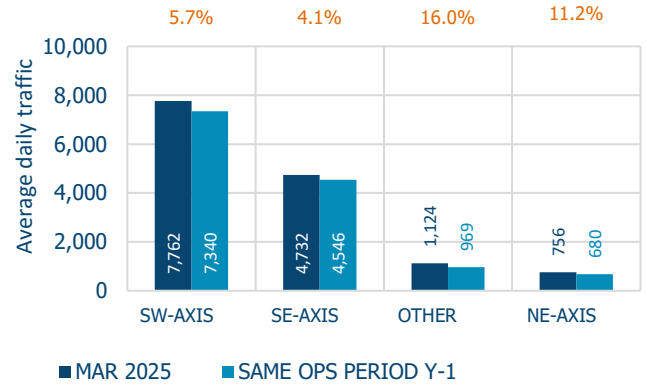
On 10 March, there was non-ATC Industrial Action disrupting key airport processes such as screening, immigration and ground handling at all major German airports, with NOS at 13%.

The 10% NOS increase on 31 March was due to non-ATC Industrial Action in Belgium with significant disruption to key airport processes such as screening, immigration and ground handling at Brussels and Charleroi Airports.

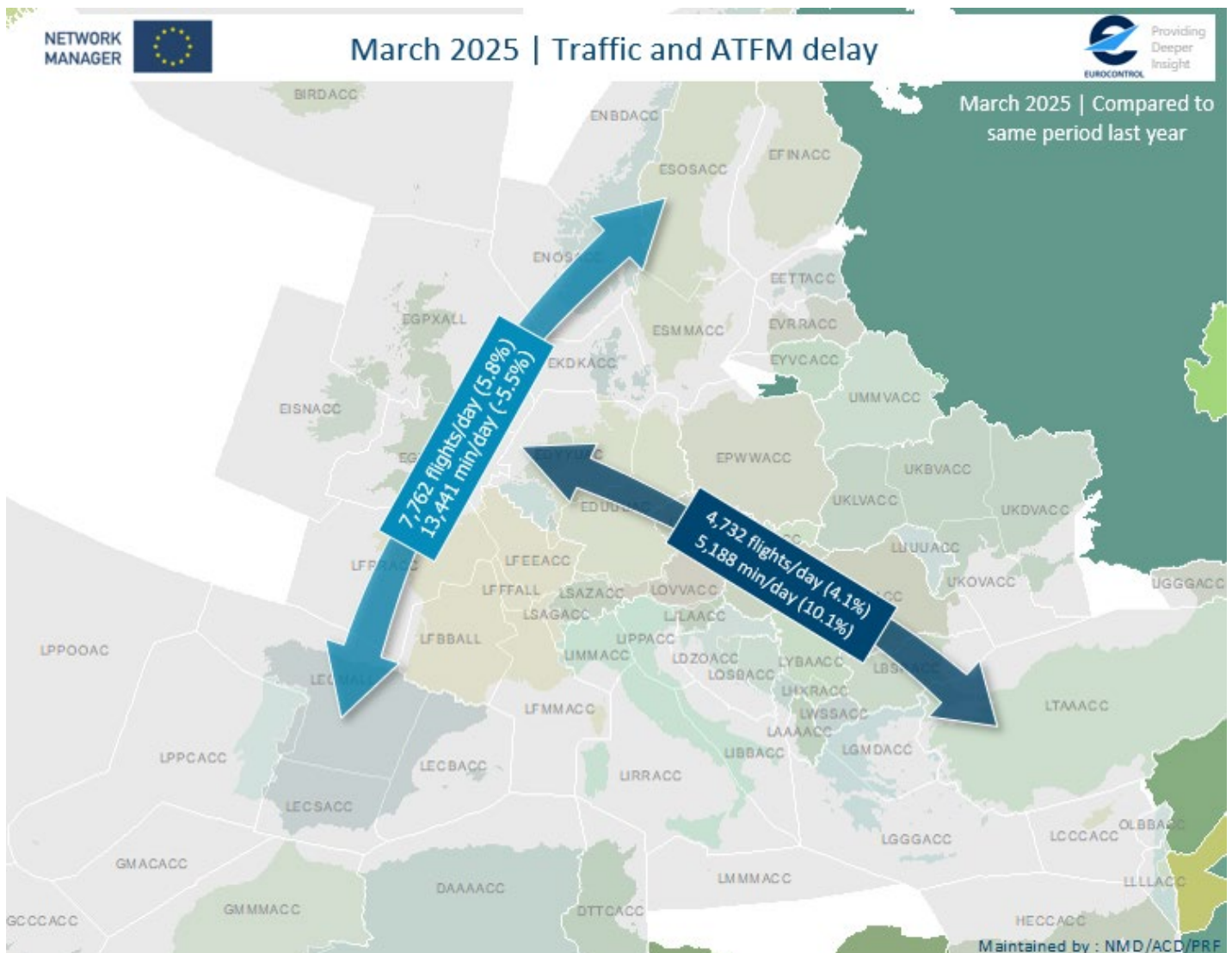
Type of traffic



Intra-NM daily traffic

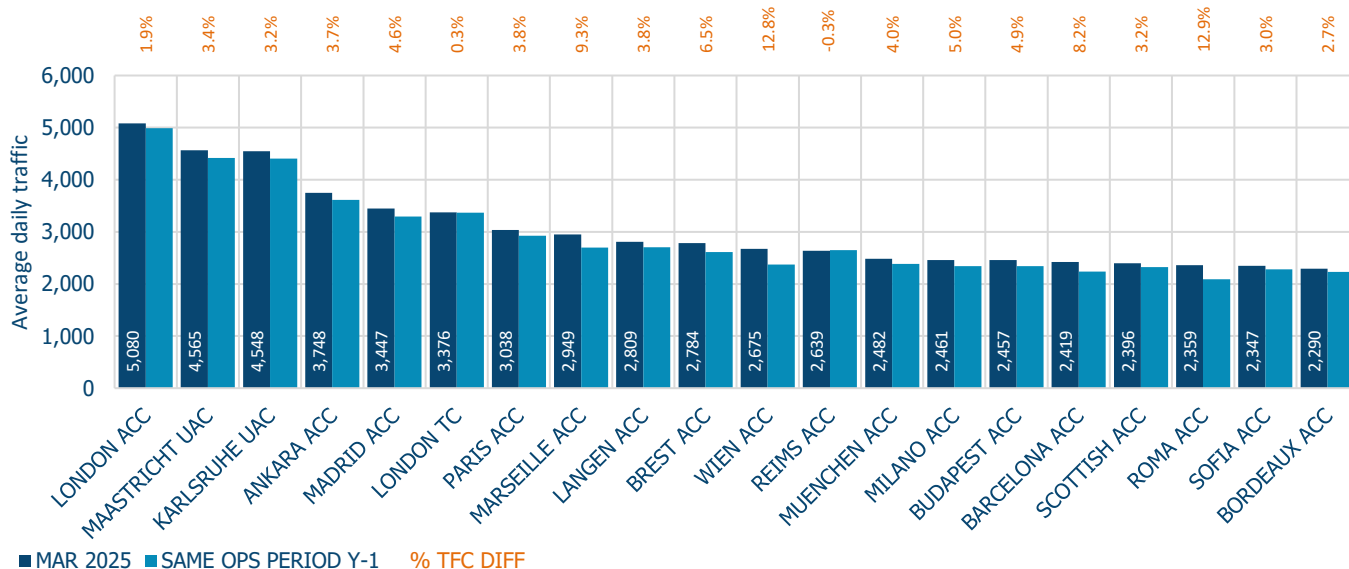


The intra-NM southwest axis saw 5.7% growth compared to 2024 while the southeast axis saw a 4.1% increase, contributing to the overall network growth of 4.5%. Overflight traffic decreased by 12.5% partially due to Iceland joining the NM Area on 01 January.



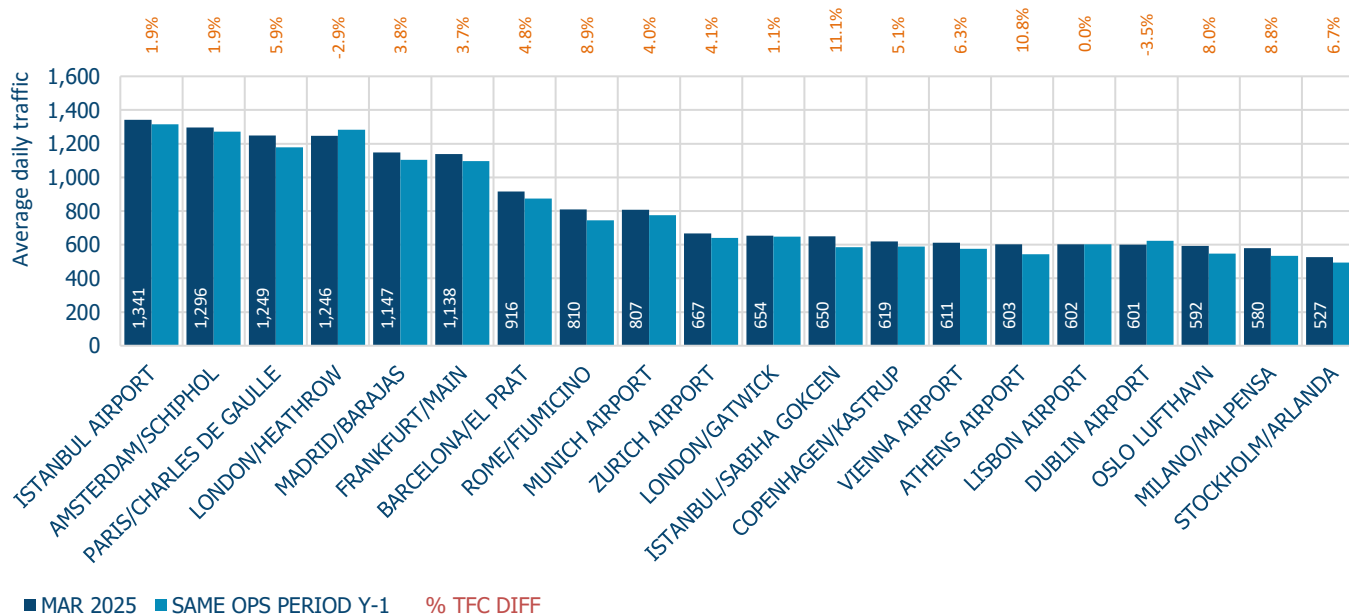
The designations employed do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. ¹
 Percentages represent the difference in daily traffic and en-route ATFM delay compared to the same period last year. ⁱⁱ

March 2025 | Top 20 ACC daily traffic



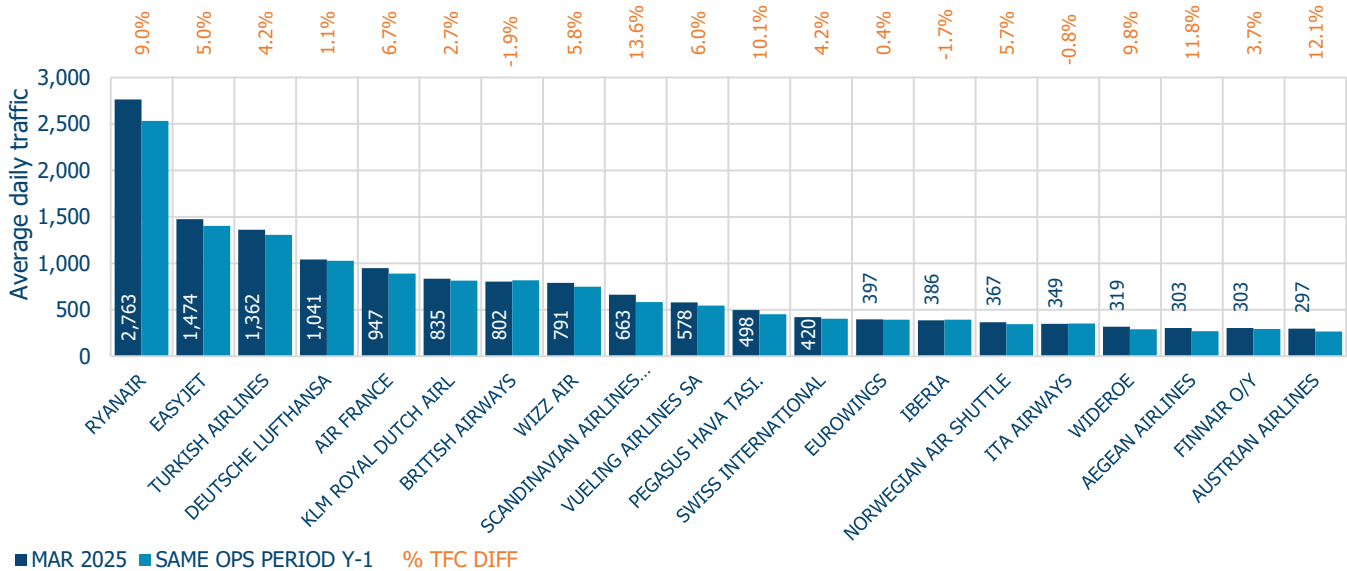
London ACC was the busiest ACC followed by Maastricht UAC, Karlsruhe UAC, Ankara and Madrid ACCs. All Top 20 ACCs, except Reims, saw more traffic compared to March 2024. Vienna and Roma ACCs had double digit traffic growth. The 12.9% traffic growth in Vienna ACC was partly accounted for by the relaxation of route restrictions which had previously been protecting Karlsruhe UAC Sector Group South. Roma's increase resulted from integrating Brindisi's northern sectors since June 2024.

March 2025 | Top 20 Airports daily traffic



Istanbul Airport was the busiest airport with an average of 1,341 flights per day, followed by Amsterdam Schiphol (1,296 flights/day), Paris Charles de Gaulle (1,249 flights/day), London Heathrow (1,246 flights/day) and Madrid (1,147 flights/day). London/Heathrow and Dublin had less traffic compared to the same period last year. The traffic decrease at London/Heathrow airport was due to two major incidents impacting operations on 10 and 21 March. The closure of London Heathrow Airport on 21 March significantly affected operations at connected airports, resulting in numerous flight cancellations. The Dublin-Heathrow route is the second busiest air route in Europe.

March 2025 | Top 20 Air Operator groups daily traffic



Ryanair was the busiest operator with, on average, 2,763 movements per day, followed by easyJet (1,474), Turkish Airlines (1,362), Lufthansa (1,041) and Air France (947).

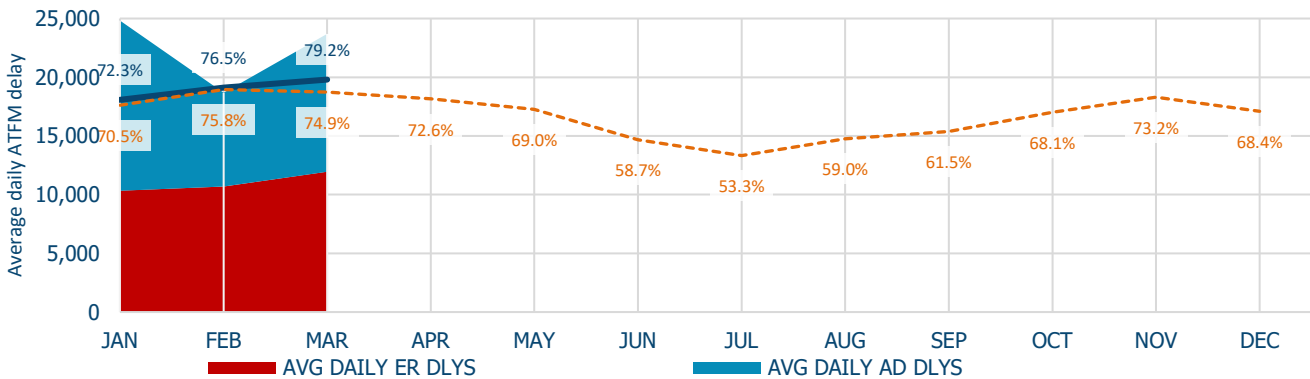
Scandinavian Airlines (SAS), Pegasus and Aegean airlines had a double-digit growth compared to March 2024.

British airways, Iberia and ITA Airways operated fewer flights. British Airways was impacted by two major disruptions at London/Heathrow on 10 and 21 March. Industrial action in Italy on 08 and 24 March impacted operations for ITA Airways with some cancellations.

3. Punctuality

3.1 Departure Punctuality

Network departure punctuality and ATFM delay



Network departure punctuality (79.2%) was above the level of March 2024 (+4.3 p.p.).

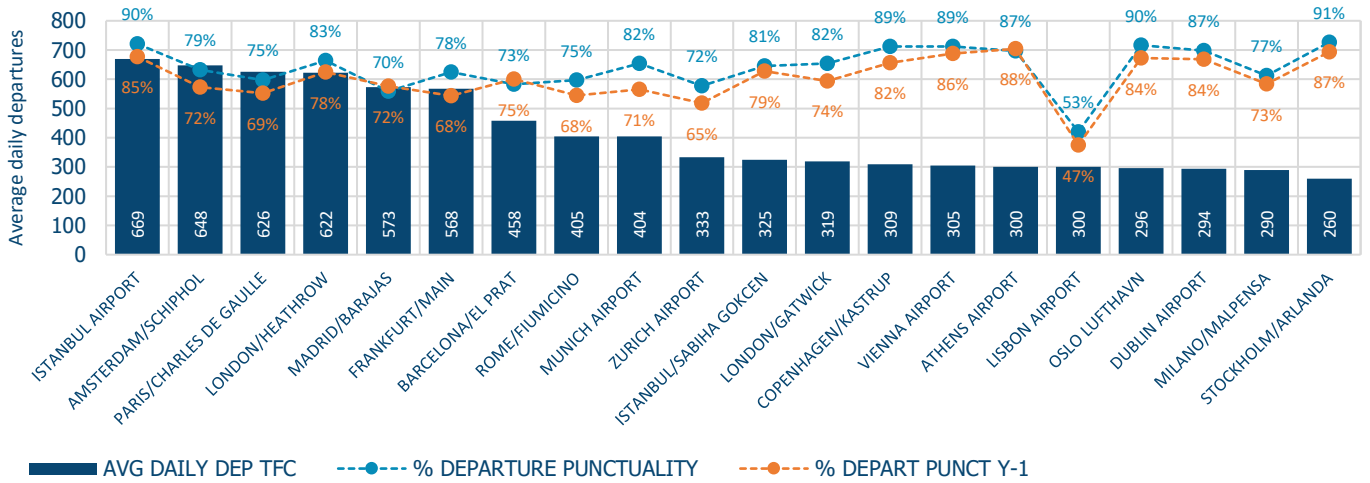
Punctuality on the domestic routes was higher (84.4%) than punctuality at network level. Punctuality on the south-east axis was 82.1% which is an increase of 4.2 p.p. compared to March 2024.

Network first rotation departure punctuality was 86.5% and was higher (2.2 p.p.) than the 2024 level. Improving first rotation punctuality remains a key objective for NM.

*This view of operational punctuality can be tracked in near real-time by aircraft operator and airport level in the [NORTI Dashboard](#) and in [MIRROR](#). Archived data can be found in the [FATHOM interactive dashboard](#).

The Central Office for [Delay Analysis CODA reports](#) provide further detailed analysis of airline reported delay reasons.

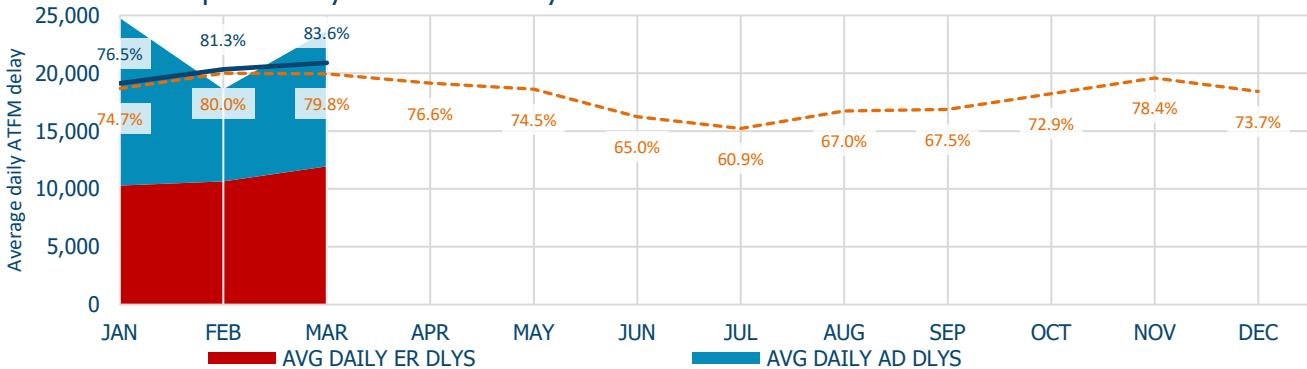
March 2025 | Top 20 Airport departure traffic and punctuality



Many of the Top 20 airports (by traffic) saw similar or better punctuality than March 2024 however weather remained a factor for airports. Amsterdam Schiphol suffered from low visibility seeing very high delays, the airport also continues to suffer from daily aerodrome capacity regulations. London Heathrow saw better punctuality despite the airport seeing high delays due to a vehicle fire in the tunnel used for accessing the terminals on 10 March.

3.2 Arrival Punctuality

Network arrival punctuality and ATFM delay

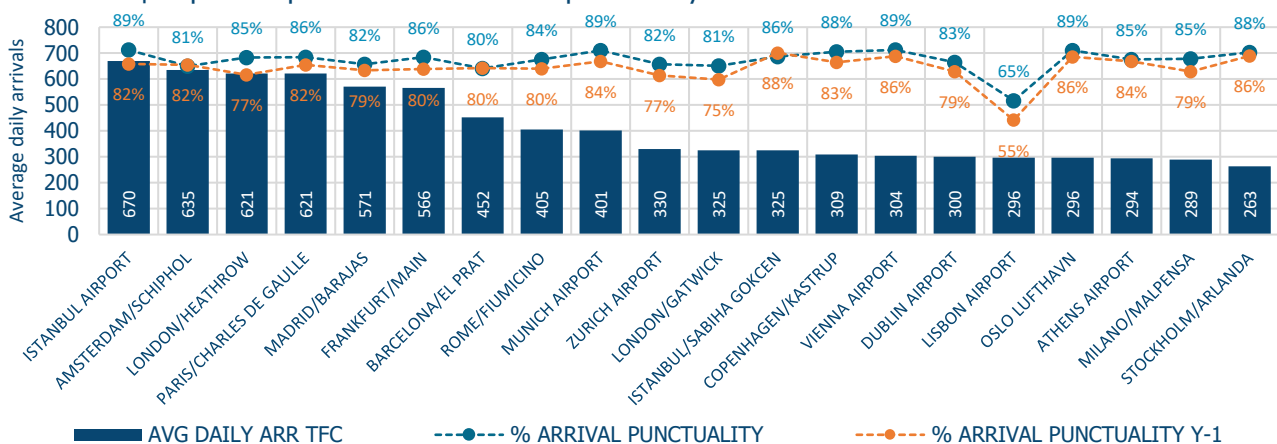


Network arrival punctuality (83.6%) was higher than March 2024 level (+3.8 p.p.).

Domestic routes (85.6%) arrival punctuality was higher than the network level. Punctuality on the south-east axis and south-west were higher than March 2024, +3.4 p.p. and +4.7 p.p. respectively.

First rotation arrival punctuality (90.0%) increased by 1.5 p.p. compared March 2024.

March 2025 | Top 20 Airport arrival traffic and punctuality



As per the departure section 3.1 above, arrival punctuality at many of the Top 20 airports improved, however seasonal weather (mainly low visibility and winds) influenced performance. Lisbon suffered lower punctuality amongst the Top 20, with weather driving ATFM regulations (mainly due to multi-factors of low visibility, CBs and high winds), with the 01 and 17 seeing notably high delays. Barcelona saw some weather days during the month, with 23 March being notably high when CB activity caused delays.

4. Operations

4.1 Network Manager

NM continued to support operations affected by the Ukrainian war. It maintained airspace closures and NM systems supporting EU Sanctions Regulation for the Russian Federation and Belarus.

For Tel-Aviv FIR the NM provided a consolidated view of relevant NOTAMs on the NOP Portal and the EUROCONTROL Network Manager Operations Centre (NMOC) continues working 24/7 to implement State required airspace restrictions and in support to daily airline operations for routings and delay mitigation. The CZIB for Lebanon has been extended to the end of July 2025, and for Syrian airspace remains unchanged and valid until 30 April 2025 unless reviewed earlier.

The Network Manager (NM) hosted a “Weather Workshop’ on Wednesday 12 March to discuss with the various types of stakeholder how weather impacts their operations, how to mitigate the effect, and how the NM might improve Network Weather Management performance in 2025. An all Axis meeting to present the outlook for the Summer 2025, including weather scenarios, Network traffic distribution measures and Special events took place on 31/03 – 01/04 2025 in EUROCONTROL HQ.

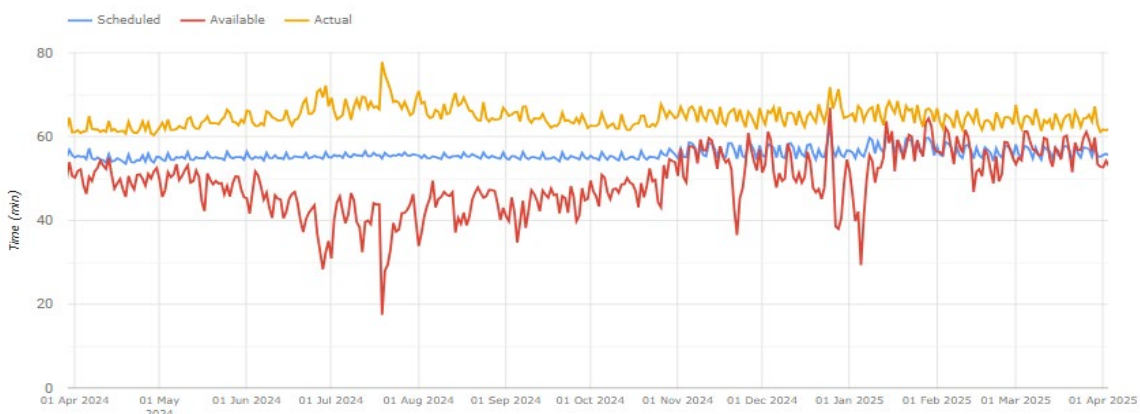
Flight Dispatchers Days 2025 from 18 to 20 March took place in EUROCONTROL HQ. This event was designed to foster collaboration and knowledge-sharing among flight dispatchers and flight planners from Aircraft Operators (AOs) and our Network Manager (NM) experts.

NMOC’s E-Helpdesk received 20,500 requests in March: 14,500 from AOs, 4,000 from FMPs and 2,000 from Towers. 1,100 of these requests were about flights that the AO considered “critical”. The average delay saved per processed request was 22 minutes.

NMOC reduced en-route ATFM delays by 10.3% and airport ATFM delays by 9.3% through direct actions.

4.2 Ground

MIRROR’sⁱ indicator shows that in March the network (average) available turnaround time increased as punctuality improved. There were a few drops during the month, mainly associated to airport weather one example being the 23 March were thunderstorms caused delays at Barcelona.



NM is monitoring TTOTⁱⁱⁱ calculation quality for the 33 A-CDM airports. The average error at a network level maintains a positive trend, lowering down to 9.7 minutes, a decrease of 0.5 minutes as compared to February 2025. Oslo (ENGM) presented the lowest error value among the airports – 7.2 minutes. Lisbon (LPPT) notices the highest error value at 16.6 minutes. NM is providing the details of the TTOT error to the A-CDM airports and is working with selected airport operators to improve the TTOT quality.

4.3 Network

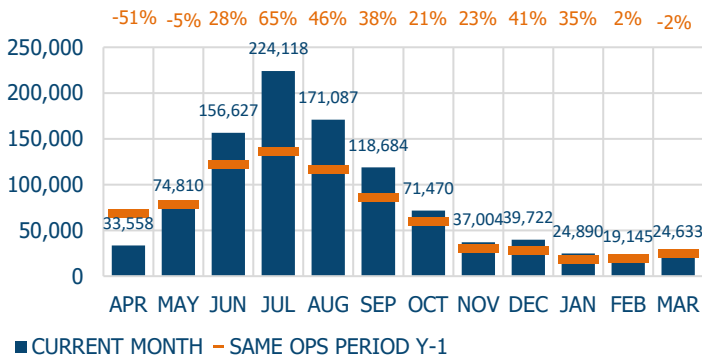
There were 763,604 minutes of ATFM delay in March, 2.3% lower than March 2024.

En-route ATFM delay represented 50.4% of these ATFM delays and airport 49.6%. Most of ATFM delays were due to en-route ATC capacity and airport weather issues.

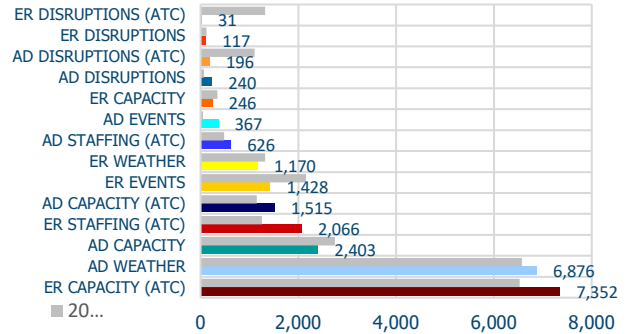
The average en-route ATFM delay per flight for the network was 0.5 minutes in March – a similar level to last year.

Network departure schedule delay was 11.7 minutes/flight in March, lower than the same period last year (13.7 minutes/flight).

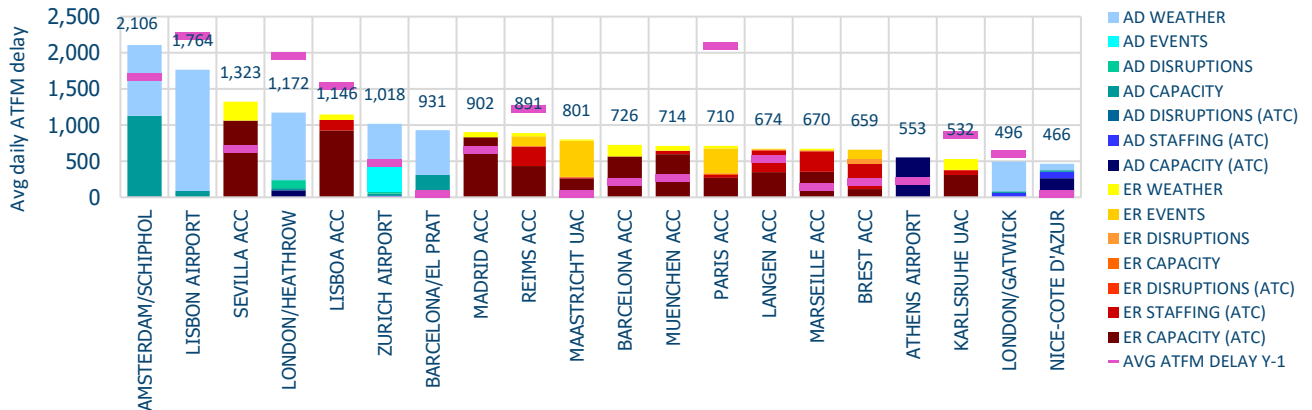
Last 12 months average daily ATFM delays



March 2025 | Reasons for ATFM delays



Top 20 delay reference locations in March 2025



The chart above shows the Top 20 delay generating locations for the reporting month with respect to total ATFM delays. Figures are the average daily ATFM delays in minutes for the individual locations:

- ATC capacity issues in the south-west Axis – Sevilla, Lisbon, Madrid and Barcelona ACCs - due to demand exceeding capacity. ATC capacity issues in Munich, Langen and Karlsruhe UAC due to demand exceeding available sectors.
- Misty conditions in early March followed by convective activities and strong winds at Lisbon airport; Low visibility operations at London/Heathrow and Amsterdam/Schiphol; Fog and thunderstorms at Barcelona airport; Westerly winds reducing arrival capacity at Zurich airport.

4.4 Significant Events

Events

- Phase 2 of the new ATM system 4-Flight in Paris ACCs continued until 16 March, with capacity reduction of -10% in en-route sectors. The constraints on limited overflight options with the purpose of off-loading some traffic to adjacent ACCs were lifted on 17 March. ATFM delays attributed to 4-Flight implementation totaled 10,700 min in March.
- Implementation of the ZEBRA and PYXIS2A airspace restructuring projects aimed at optimising the airspace usage above the Netherlands and northwest Germany began on the 20 March,

generating 6,582 minutes of ATFM delay in Bremen ACC and 14,904 minutes in Maastricht UAC. An initial capacity reduction of -20% in Bremen ACC sectors was planned until April 4, 2025, however the increase to -10% has been postponed until 21 April. Normal operations are expected from 30 April 2025.

- Transfer of airspace below FL195 from Reims ACC to Basel and Strasbourg approach sectors generated 3,844 minutes of ATFM delay.
- Bordeaux and Brest ACCs have started the training and live trial periods in preparation for the implementation of the 4-Flight system with 1,143 minutes of ATFM delay and 4,015 minutes respectively.
- The Zurich TMA redesign project started on 20 March. The arrival capacity for the airport has been reduced by 20% for the duration of the 4-week implementation phase. This generated 11,076 minutes of airport ATFM delay and 1,617 minutes of en-route ATFM delay.

Technical

- Radar maintenance limited arrival capacity at Naples airport from 11 to 13 March generated 3,938 minutes of ATFM delay.
- A radar antenna issue in Brest ACC on 13 March generated 1,570 minutes of ATFM delay.

Other

- On 10 March a fire generated structural damage to tunnels allowing passengers to access central airfield at London/Heathrow airport and generated 3,498 minutes of ATFM delay until shortly after midday.
- On 20 March evening, a fire in a high voltage substation near London/Heathrow airport led to a loss of electrical power and the closure of the airfield. The airfield remained closed until early evening 21 March. Approximately 114 inbound airborne flights diverted to alternate destinations, and approximately 1,200 expected flights did not operate.

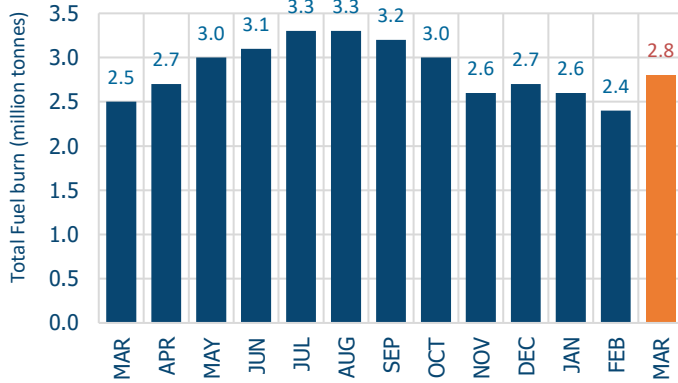
Industrial action

- On Saturday 08 March airport services were disrupted either directly due to non-ATC strike action or due to an interruption of local public transport services affecting staff availability. 88 fewer movements were recorded week-on-week at Italian Airports. Industrial action from ground handling company at Italian airports on Monday 24 March generated cancellations. Overall movements at Italian airport reduced by 162 flights week-on-week.
- Ground handling industrial action at nearly all major German airports on Monday 10 March impacted operations strongly. NM estimated that 2,424 did not operate on this date.
- A national strike in Belgium on 31 March led to airlines canceling all passenger flights at Charleroi with disruption to passenger departures from Brussels airport. -584 fewer movements were recorded at Belgian Airports compared to the previous Monday.

5. Flight Efficiency

5.1 Fuel Burn

Total fuel burn within NM area (tonnes)

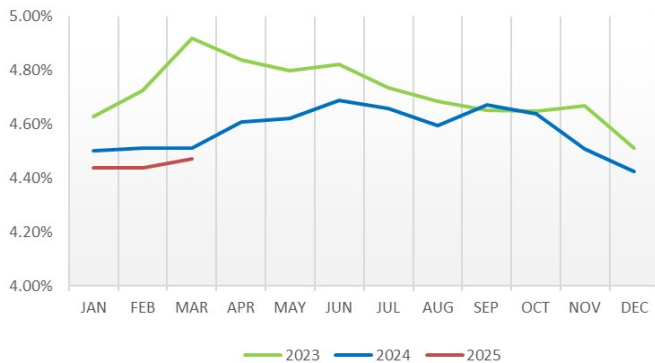


NM estimates that 2.8 million tonnes of fuel was burnt in the en-route flight phase in the NM area in March. This increase was partially due to Iceland’s inclusion in NM Area and 5.4% more narrow body aircraft than in March 2024, resulting in an additional 835 flights/day.

5.2 Horizontal Flight Efficiency

There are two horizontal flight efficiency KPIs^{iv}. The indicators provide a measure of the average en-route additional distance with respect to the great circle distance. One is based on the last filed flight plan (KEP) and the other on actual trajectory (KEA). KEP remained below 2024 and 2023 levels. KEA reached the 2024 level in March.

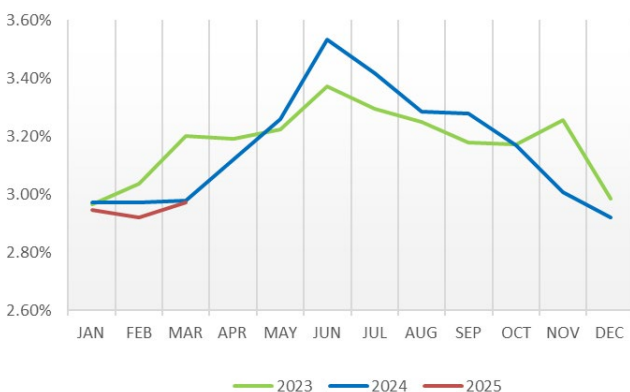
KEP evolution in NM Area



KEP indicator (4.47%) was lower than 2023 and 2024 levels.

NM Flight Efficiency Taskforce continues to support AOs to further improve their flight planning.

KEA evolution in NM Area



KEA indicator (2.97%) was at the same level as 2024.

6. Notice

Traffic and Delay Comparisons

All traffic and delay comparisons are between report month and equivalent operational period of the previous year.

Traffic Monitoring

Country traffic counts are based on arrival and departure traffic, overflights are excluded.

NM Area

All figures presented in this report are for the geographical area that is within Network Manager's responsibility (NM area). For further information on the NM Area go to the Reporting Assumptions and Descriptions document available on the EUROCONTROL website at <https://www.eurocontrol.int/network-performance>

Regulation Reason Groupings

For further information on the NM Area and the regulation reason groupings, go to the Reporting Assumptions and Descriptions document available on the EUROCONTROL website at <https://www.eurocontrol.int/network-performance>

Airline Groupings

Description and definition available on the EUROCONTROL website at <https://www.eurocontrol.int/directory/airline-groups-lookup>

ATFM Statistics dashboard

More detailed information available via the [ATFM Statistics dashboard](#)

FATHOM dashboard

Interactive analysis tool to access archived data [FATHOM interactive dashboard](#)

Network Operations Analysis document

ATFM statistics provides an alternative source of network traffic and ATFM delays. <https://www.eurocontrol.int/dashboard/air-traffic-flow-management-statistics-dashboard>

And stakeholders can use FATHOM for a more detailed view of their operational performance. <https://www.eurocontrol.int/tool/network-manager-interactive-analysis-tool>

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ⁱ The growth in traffic for Tbilisi and Baku FIRs is partly due to a change in air operators routings resulting from the situation in the Middle East. Brindisi ACC traffic decrease was due to a new sector configuration: The northern sectors of Brindisi ACC are under Roma ACC control since 13 June 2024.

ⁱⁱ The growth in traffic for Tbilisi and Baku FIRs is partly due to a change in air operators routings resulting from the situation in the Middle East. Brindisi ACC traffic decrease was due to a new sector configuration: The northern sectors of Brindisi ACC are under Roma ACC control since 13 June 2024.

ⁱⁱⁱ Target Take-Off Time (TTOT) calculation quality at A-CDM airports is the average absolute difference between ATOT and TTOT at IOBT-30 minutes for non-regulated flights. The metrics follows the latest AICH WG guidance. The 2024 values provided in the current report were recalculated accordingly, securing comparability between the previous and the current year. The TTOT is defined as the earliest TTOT, or if not provided the turn-around TTOT, or else the ATC TTOT; the IOBT is the earliest IOBT.

^{iv} More information on KEP and KEA, see [ANS performance page](#).



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