



Monthly Network Operations Report

Overview March 2026



1. Summary

In March 2026, traffic increased by 1.0%, totaling 838,612 flights. The rise was limited by geopolitical instability.

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

As of 06:30 CET on 28 February 2026, following military activities in the region, Israel closed its airspace with some departures and arrivals for still permitted for evacuation/repatriation purposes. Several States in the Middle East outside the EUROCONTROL zone of responsibility closed their Flight Information Regions and some airports were also closed to commercial flights. The situation remained dynamic and volatile through the month. Throughout March 2026 the European Aviation Crisis Coordination Cell - co-chaired by NM and the European Commission- remained active and operated in crisis alert mode, supporting pan-European coordination on airspace risk, rerouting and network stability in response to the widespread Middle East airspace closures and security threats. The Network Manager continued to work closely with all involved operational partners to ensure the safety of flights leaving and arriving to the Network and to limit the impact of the closures.

The network had an average of 27,065 flights/day in March, about 420 flights/day more than in March 2025. The busiest day was Friday 27 March (30,372 flights). The intra-NM southwest axis saw a 3.3% traffic increase while the intra-NM southeast axis increased by 0.6% growth, lower than overall network growth.

The Low-cost segment grew by 3.7% and was the main driver of local traffic growth in the NM area, led by strong increases in Italy, Türkiye, and the UK, despite a sharp decline in the Middle East, with Wizz Air among the most affected carriers. Meanwhile, the Mainline segment fell by 0.8%, as airspace restrictions significantly disrupted operations of several European carriers.

Five of the Top 20 ACCs—Maastricht UAC, Karlsruhe UAC, Ankara, Vienna and Budapest—had less traffic compared to the same period last year, while Roma ACC experienced double-digit traffic growth of 10.3%. London ACC was the busiest with 5,168 flights per day.

Ryanair was the busiest operator with, on average, 2,898 movements (+4.4%) per day followed by easyJet (1,573 mov/day), Turkish Airlines (1,446 mov/day), Air France (980 mov/day) and Lufthansa (906 mov/day). Six of the Top 20 airlines – Lufthansa, Vueling, Swiss, Iberia, Norwegian Air Shuttle, ITA Airways - had less traffic compared to March 2025.

Istanbul (1,369 flights/day) was the busiest airport followed by Amsterdam Schiphol (1,273 flights/day), London Heathrow (1,253 flights/day), Paris Charles de Gaulle (1,242 flights/day), and Madrid Barajas (1,201 flights/day). Several airports saw decreased traffic compared to March 2025, while Copenhagen and Dublin saw a double-digit traffic increase.

Network departure punctuality slightly increased by 0.1 p.p., while arrival punctuality decreased to 82.3%, compared to March 2025 figures. On the intra NM southwest, departure punctuality increased by 4.7 p.p. while it stayed at the same level on the southeast axis. Network first rotation departure punctuality was 86.9% (+0.4 p.p.) and first rotation arrival punctuality was 89.1% (-0.9 p.p.). Improving first rotation punctuality remains a key objective for the Network Manager (NM). Long arrival delays increased compared to March 2025, with seven days recording peaks (> 13%) for delays over 30 minutes, compared to one day in March 2025.

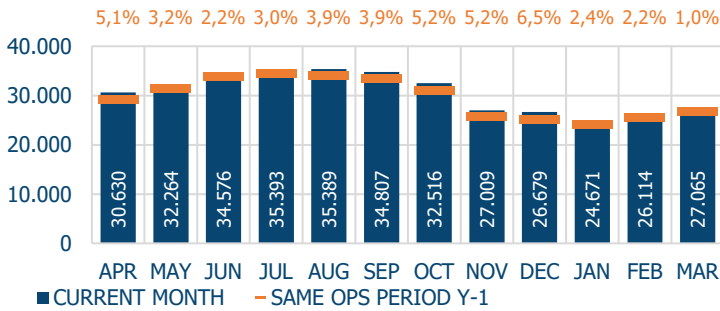
There were 726,954 minutes of ATFM delays in March 2026, a decrease of 1.5% compared to March 2025. En-route ATFM delay represented 48.3% of total ATFM delay and airport was 51.7%. The average en-route ATFM delay per flight for the network was 0.42 minutes in March. Total en-route ATFM delays decreased by 4.8% and total airport ATFM delays increased by 1.9%. The primary concern was en-route ATC capacity followed by airport weather and airport capacity.

The average en-route ATFM delay per flight for the network was 0.42 minutes in March - better than the same period last year.

NM's Operational Centre reduced en-route ATFM delays by 11.7% and airport ATFM delays by 10.3% through direct actions.

2. Traffic evolution

Last 12 months average daily traffic

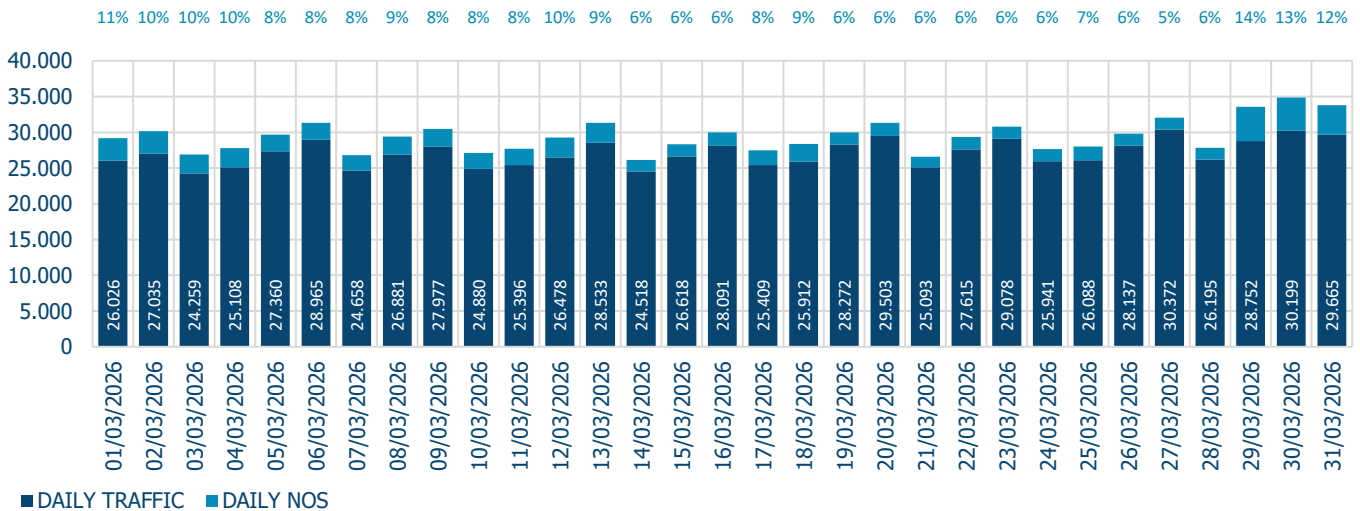


There were 838,612 flights throughout Europe in March 2026, 1.0% up compared to the same period last year. The rise was limited by geopolitical instability.

In March 2026 (compared to March 2025), the Low-cost segment (+3.7%) was the primary driver of local traffic (excluding overflights) in the NM area, adding 329 flights per day. Growth was largely led by Italy (+211 flights/day, +10.2%), Türkiye (+108 flights/day, +7.2%) and the UK (+100 flights/day, +3.9%). However, this expansion was partially offset by a sharp decrease in the Middle East (-225 flights/day, -78.6%), with Wizz Air being the most affected European low-cost carrier (-37 flights/day, -95%). The Mainline segment (-0.8%) was notably impacted by airspace restrictions following the Middle East crisis. This resulted in 473 fewer daily flights in the Middle East (-51.4%) and 154 fewer daily flights in Israel (-76.3%). Several European airlines suspended operations to these regions, including Air France-KLM (-11 flights/day), Austrian (-7 flights/day) and LOT (-7 flights/day). The Charter segment grew by 0.7% driven primarily by increased flights to/from Egypt (+27 flights/day, +26%) and Russia (+20 flights/day, +98%) along with a small contribution from repatriation flights from the Middle East (+7 flights/day, +14%). The Regional segment declined by 1.6% mainly due to fewer departures and arrivals in Denmark (-43 flights/day, -18%) and Sweden (-41 flights/day, -19%). The Business aviation segment rose by +5.1% supported by more flights in Italy (+42 flights/day, +16%) and Spain-Continental (+40 flights/day, +18%). The All-cargo segment was up 1.4% largely driven by flights between Europe to/from Continental China (+29%).

The busiest day was Friday 27 March with 30,372 flights.

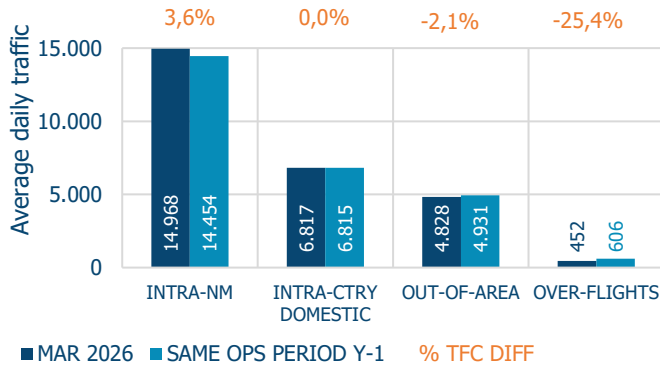
Daily network traffic evolution



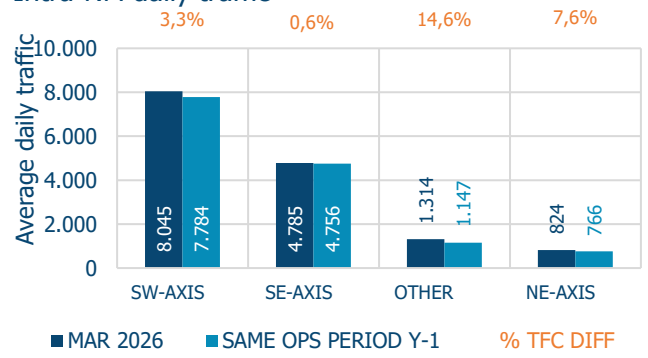
On average, 8.2% of scheduled traffic did not operate in March (see Non-Operated Schedules).

During the final week of the month, weather conditions impacted airports including Amsterdam Schiphol, Frankfurt, Gran Canaria, and Istanbul Sabiha Gokcen.

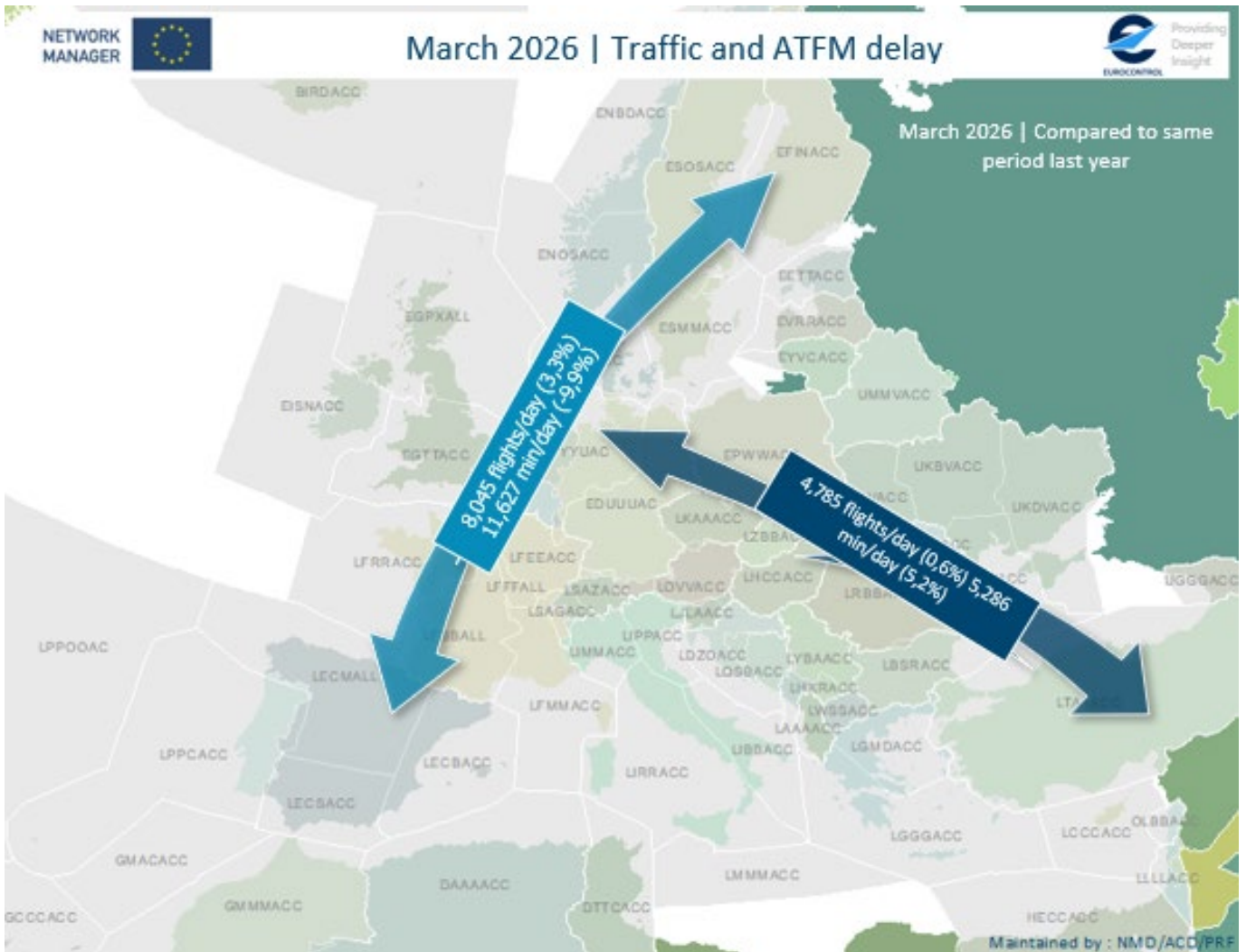
Type of traffic



Intra-NM daily traffic

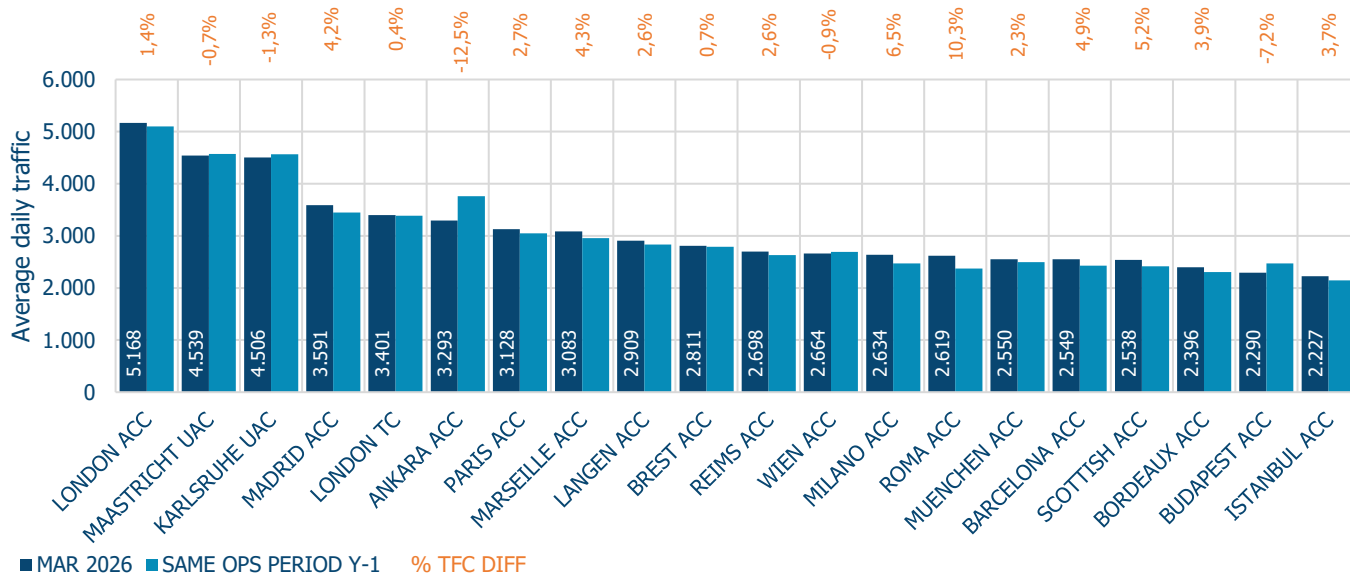


The intra-NM southeast axis saw a 0.6% traffic increase while the intra-NM southwest axis saw a 3.4% growth, lower than overall network growth.



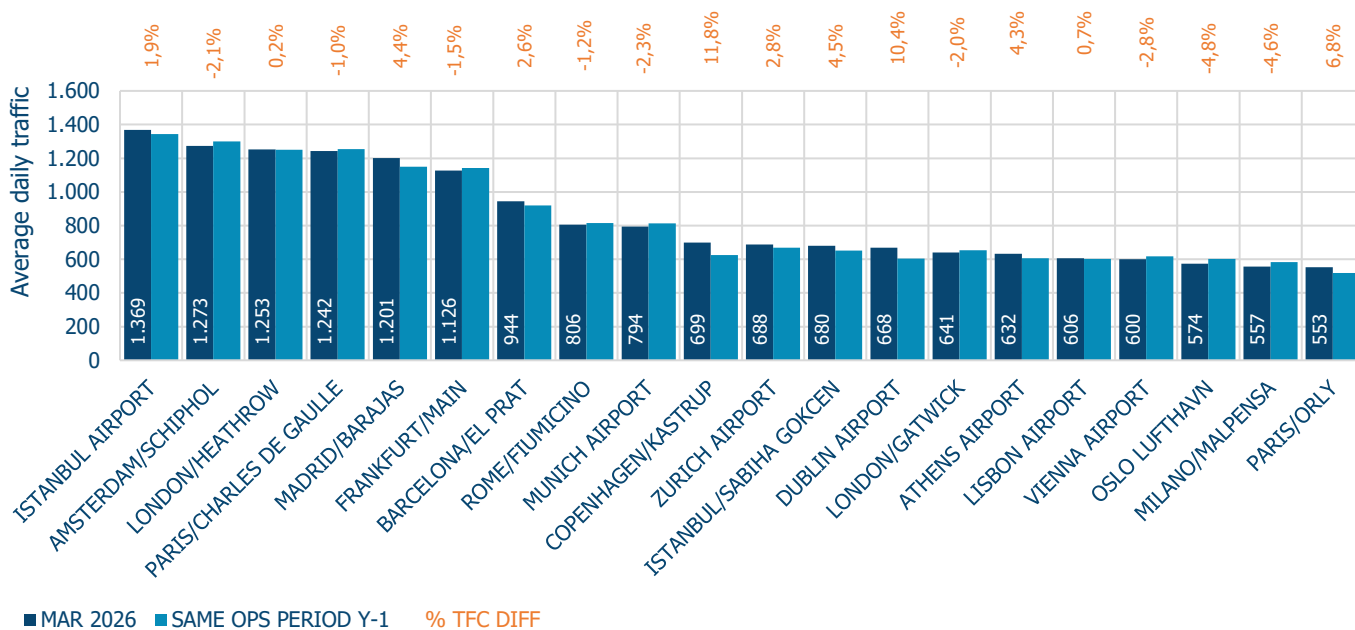
Please note that Iceland joined the NM area on 01-January 2025, which has had a modest effect on the categorisation between 'Intra-NM, Out-of-Area and Over-Flights. The designations employed do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. Percentages represent the difference in daily traffic and en-route ATFM delay compared to the same period last year.

March 2026 | Top 20 ACC daily traffic



London ACC was the busiest followed by Maastricht UAC, Karlsruhe UAC, Madrid, London TC and Ankara. Maastricht UAC, Karlsruhe UAC, Ankara, Vienna and Budapest saw a decrease in traffic compared to last year, while Roma ACC experienced double-digit traffic growth of 10.3%. This increase was partially due to route expansion by multiple carriers (easyJet, Wizz Air, Volotea) and new long-haul routes.

March 2026 | Top 20 Airports daily traffic



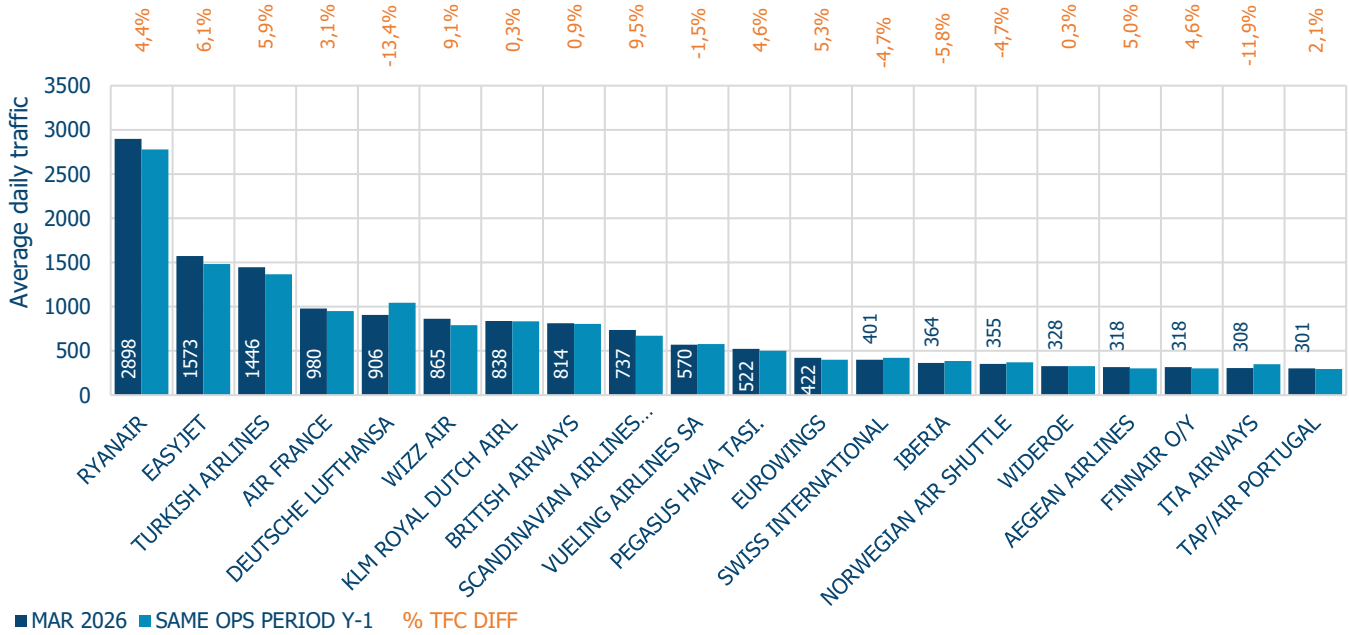
The busiest airport was Istanbul (1,369 flights/day) followed by Amsterdam Schiphol (1,273 flights/day), London Heathrow (1,253 flights/day), Paris Charles de Gaulle (1,242 flights/day) and Madrid Barajas (1,201 flights/day).

Nine airports from the top 20 – Amsterdam Schiphol, Paris Charles de Gaulle, Frankfurt, Rome Fiumicino, Munich, London Gatwick, Vienna, Oslo Gardermoen and Milano Malpensa - saw decreased traffic compared to March 2025.

Copenhagen and Dublin saw a double-digit traffic increase. The first month of spring saw continued strong demand for travel to and from Copenhagen Airport and made it the busiest March of the airport’s history.

Dublin Airport experienced its twelfth consecutive month of increased traffic. This growth is attributed to the temporary suspension of the passenger cap in April 2025, alongside sustained robust demand.

March 2026 | Top 20 Air Operator groups daily traffic

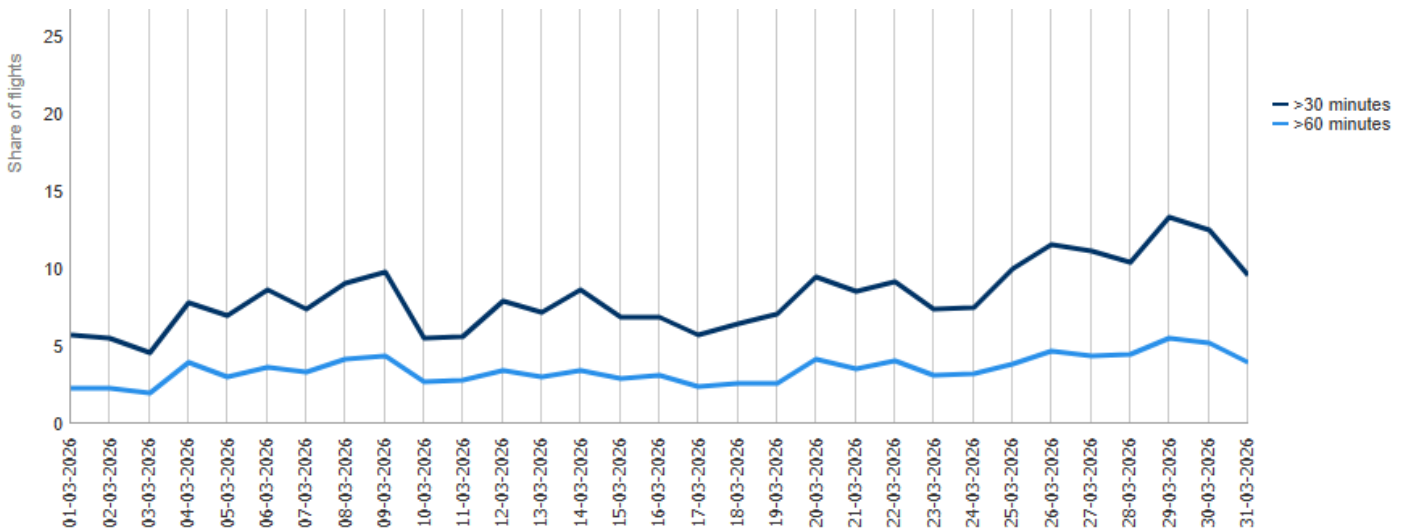


Ryanair was the busiest operator with, on average, 2,898 movements (+4.4%) per day followed by easyJet (1,573 mov/day), Turkish Airlines (1,446 mov/day), Air France (980 mov/day) and Lufthansa (906 mov/day).

Six of the Top 20 airlines - Lufthansa, Vueling, Swiss, Iberia, Norwegian Air Shuttle and ITA operated fewer flights compared to March 2025. Lufthansa experienced a drop in traffic, influenced by decreased demand for flights to the US and Industrial Action by Pilots on the 12 and 13 March.

3. Punctuality

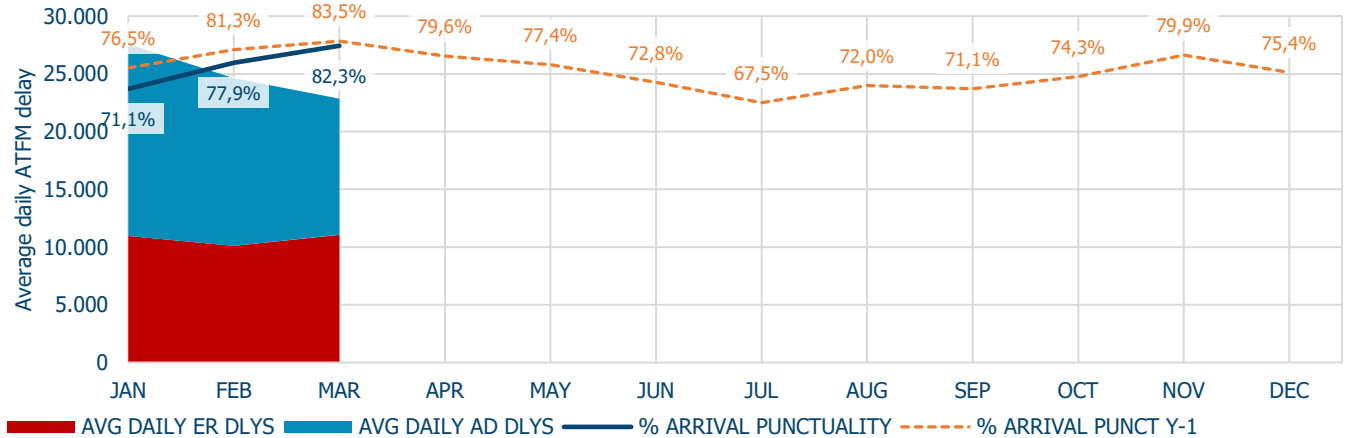
Percentage of long delays on arrival (vs the scheduled time)



The graph above shows the daily evolution of longer arrival delays (>30 and >60 minutes) compared to the Scheduled Time of Arrival. Overall, days with long arrival delays >30mins increased (7 days vs 1 day in March 2025), but this was mainly driven by an increase in delays towards the end of the month where weather affected airports such as Amsterdam Schiphol, Frankfurt, Gran Canaria and Istanbul Sabiha Gökçen.

3.1 Arrival Punctuality

Network arrival punctuality and ATFM delay



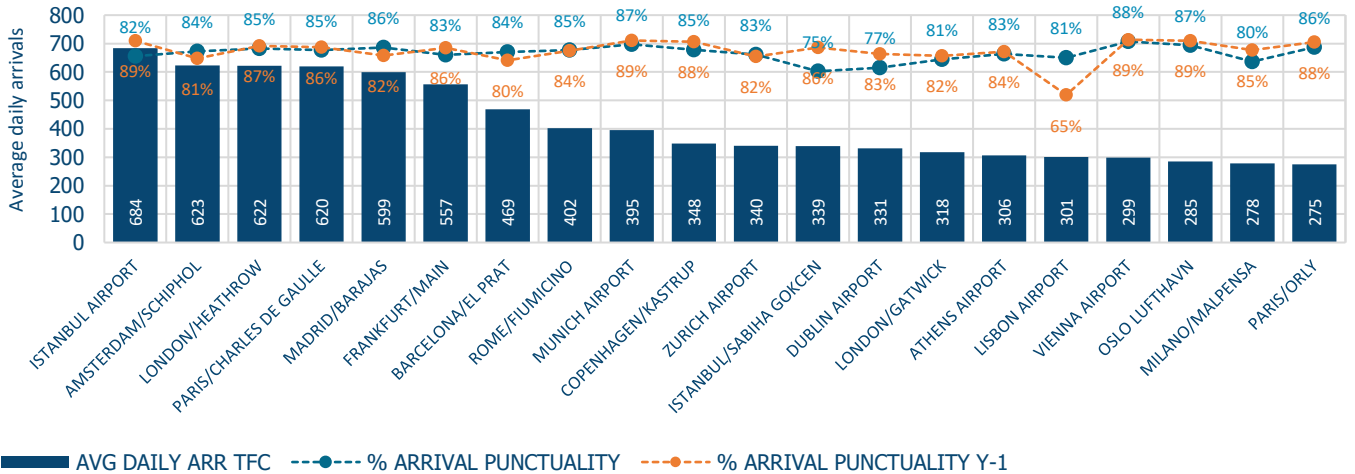
Network arrival punctuality (82.3%) was lower than March 2025 (-1.2 p.p.).

Domestic routes (85.5%) arrival punctuality was higher than the network level. Domestic routes represented 25.2% of the total traffic.

Punctuality on the intra NM southeast axis was lower than March 2025, -0.2 p.p., while it increased by 1.4 p.p. on the intra NM southwest axis

First rotation punctuality (89.1%) decreased by 0.9 p.p. compared to March 2025.

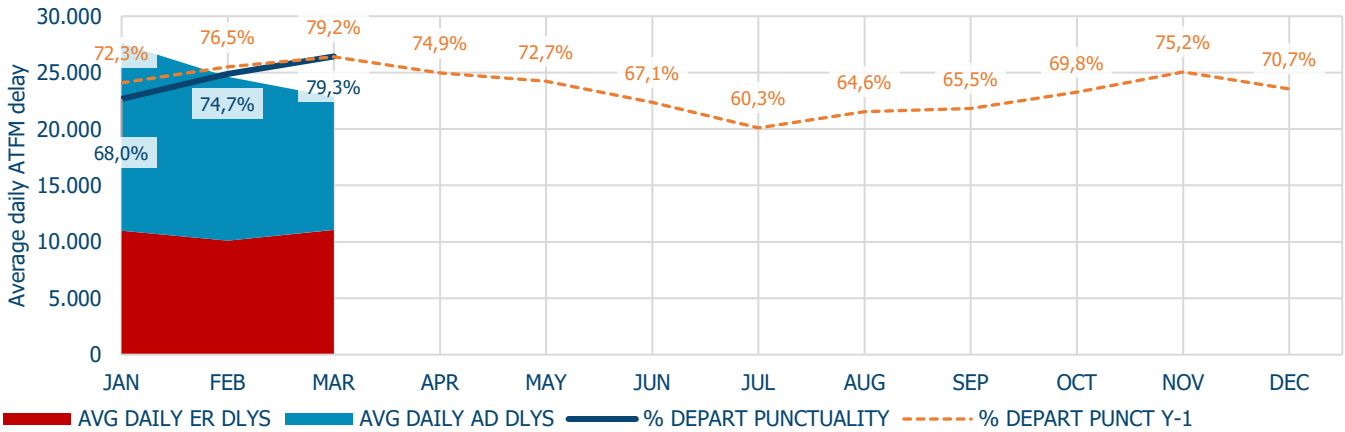
March 2026| Top 20 Airport arrival traffic and punctuality



Airport punctuality at many of the Top 20 airports remained relatively stable when compared to March 2025, weather at airports did influence performance during the month, with highs in delay observed at Amsterdam Schiphol on 09 March due to LVP, the airport also suffered from weather (high winds and rain) towards the end of the month. Barcelona was also affected by weather with high delays for CB/TS recorded on 06 March. Lisbon saw arrival punctuality improve as fewer weather days impacted the airport.

3.2 Departure punctuality

Network departure punctuality and ATFM delay



Network departure punctuality (79.3%) was slightly above the level of March 2025 (+0.1 p.p.).

Punctuality on domestic routes was higher (84.5%) than punctuality at the network level.

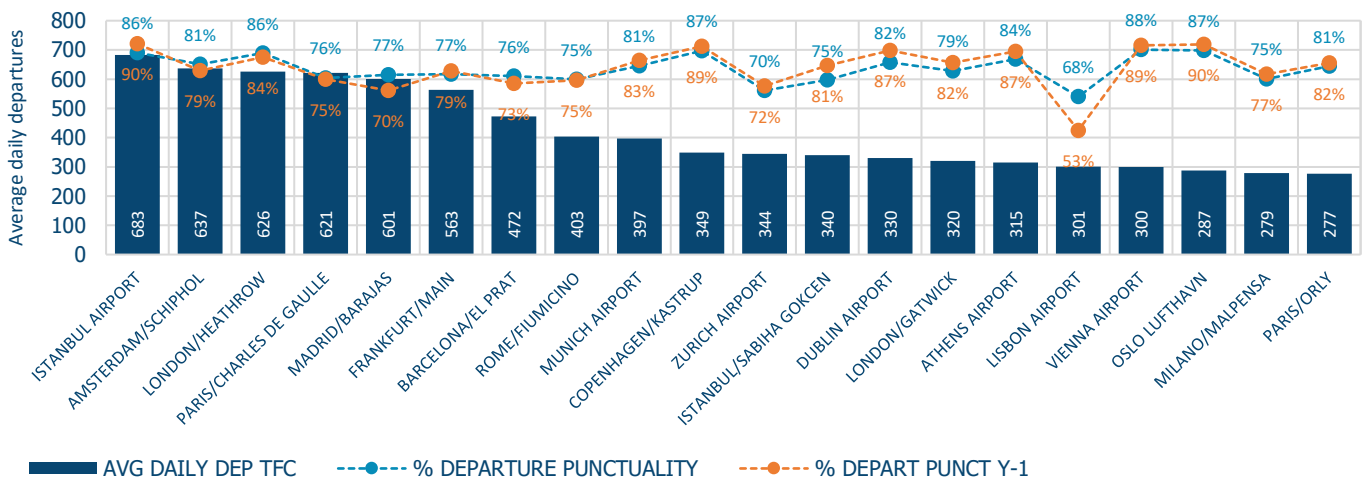
Punctuality on the intra NM southeast axis reached 82.2% (+0.1 p.p.) and 80.4% (+3.7 p.p.) on the southwest axis in March 2026.

Network first rotation departure punctuality was 86.9% and was higher (+ 0.4 p.p.) than the 2025 level.

*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 2026 | Top 20 Airport departure traffic and punctuality



Departure punctuality at many of the Top 20 airports also remained relatively stable when compared to March 2025. The Top 3 by flights saw punctuality above 80%. Madrid Barajas saw an improvement as the airport saw less weather-related delay in March 2026. As mentioned in the arrival section, Lisbon saw improved performance, however departure punctuality did remain lower than the other Top 20 airports, with many departing flights incurring ATFM en-route regulations.

4. Operations

4.1 Network Manager

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

As of 06:30 CET on 28 February 2026, following military activities in the region, Israel closed its airspace with some departures and arrivals for still permitted for evacuation/repatriation purposes. Several States in the Middle East outside the EUROCONTROL zone of responsibility closed their Flight Information Regions and some airports were also closed to commercial flights. The situation remained dynamic and volatile through the month.

Throughout March 2026 the European Aviation Crisis Coordination Cell - co-chaired by NM and the European Commission- remained active and operated in crisis alert mode, supporting pan-European coordination on airspace risk, rerouting and network stability in response to the widespread Middle East airspace closures and security threats. The Network Manager continued to work closely with all involved operational partners to ensure the safety of flights leaving and arriving to the Network and to limit the impact of the closures.

The Flight Dispatcher Days 2026 took place at EUROCONTROL Headquarters in Brussels from 17 to 18 March 2026 and formed part of the Network Manager’s operational preparations for Summer 2026. The event brought together airline operations and flight dispatch experts alongside Network Manager (NM) specialists with the objective of strengthening operational coordination and shared understanding ahead of the busy summer season.

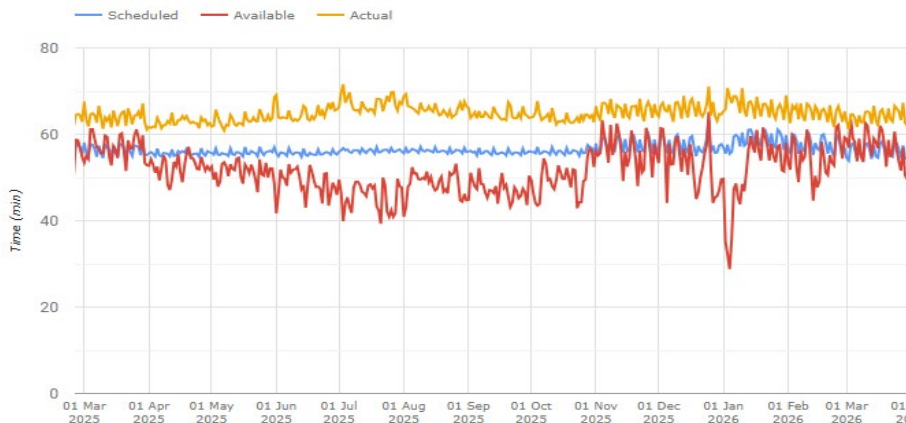
The number of requests received by NMOC’s E-Helpdesk increased from 17,700 in February to 23,700 in March. Of these, 13,100 were submitted by Airlines, 7,600 by FMPs and 3,000 by Towers. Among all requests, 2,000 related to flights identified as “critical” by the airlines.

NM’s Operational Centre reduced en-route ATFM delays by 11.7% and airport ATFM delays by 10.3% through direct actions.

4.2 Ground

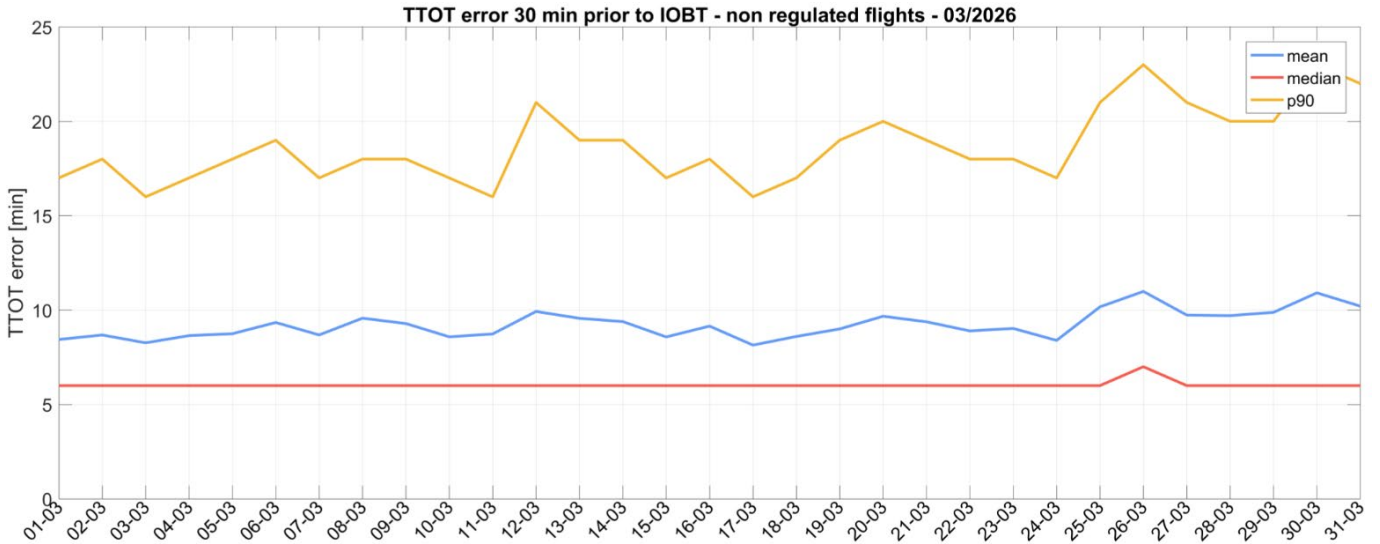
4.2.1 Turnaround

MIRROR’s indicator shows that in March 2026 the network’s average available turnaround time followed a similar trend to March 2025, remaining stable. There were some days mainly towards the end of the month, where available turnaround times decreased, such as 27 and 30 March where weather affected Frankfurt and Istanbul Sabiha Gökçen airports.



4.2.2 TTOT

NM is monitoring TTOT calculation quality for the 33 A-CDM airports. The average error at a network level was 9.2 minutes in March 2026, i.e. decreased by 0.5 minutes compared to March 2025. The value was also lower than in February 2026, when the error was equal to 10.5 minutes. The decrease correlates with lower weather impact than in February, except towards the end of the month, as indicated in the Punctuality section. Helsinki (EFHK) showed the lowest error value among the airports (6.9 minutes), while Naples (LIRN) recorded the highest error, 12.0 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

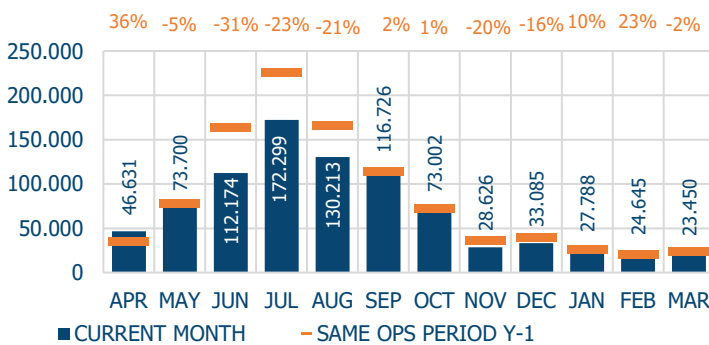
There were 726,954 minutes of ATFM delay in March, a decrease of 1.5% compared to March 2025.

En-route ATFM delay represented 48.3% of total ATFM delay and airport was 51.7%. Total en-route ATFM delays decreased by 4.8% and total airport ATFM delays increased by 1.9% compared to March 2025. En-route ATC capacity was the principal concern, despite a reduction of 5.1%. Airport weather was the second most significant contributing factor and saw a decrease of 5.7%. The third major reason was aerodrome capacity, which rose by 32.5% compared to the previous year.

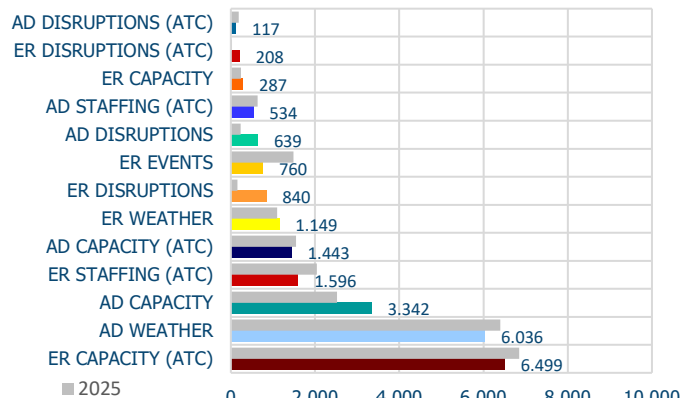
The average en-route ATFM delay per flight for the network was 0.42 minutes in March - better than the 0.5 minutes per flight in the same period last year.

The network departure schedule delay was 12.5 minutes/flight in March, +0.8 minutes/flight compared to March 2025.

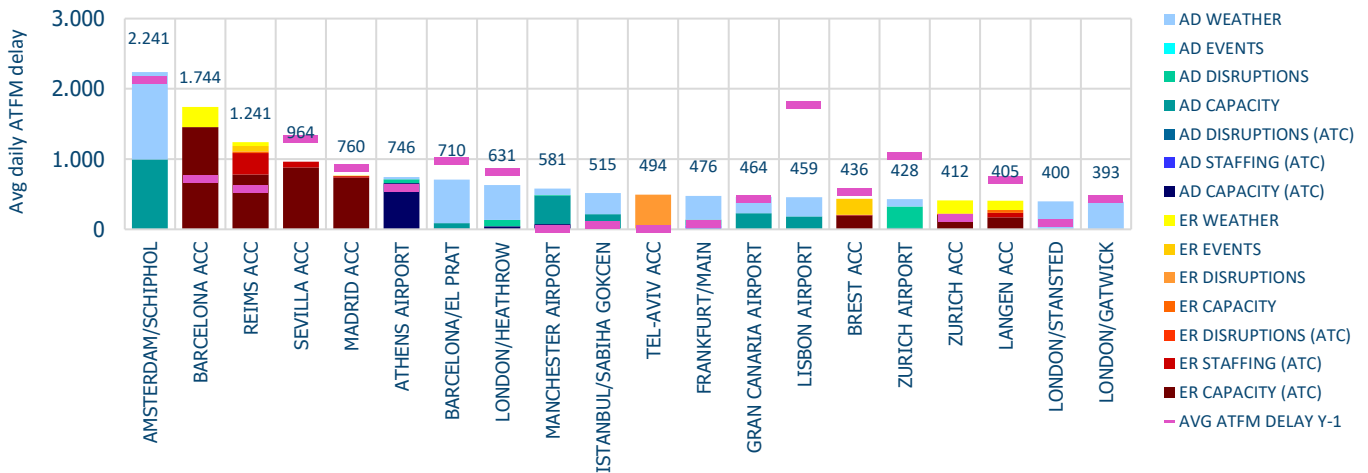
Last 12 months average daily ATFM delays



March 2026 | Reasons for ATFM delays



Top 20 delay reference locations in March 2026



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:

- Low visibility and strong winds impacted operations at Amsterdam Schiphol, Barcelona and London airports.
- ATC capacity issues generated high delays in Spanish ACCs and were mainly due to a combination of traffic growth, staffing issues and weather complexity.
- Aerodrome capacity issues at Amsterdam Schiphol due to high demand and Manchester airports due to work in progress.

4.4 Significant Events

Events

- On-going training and live trials in Brest ACC in preparation for the transition to 4-Flight system generated 7,133 minutes of ATFM delay throughout the month.
- 4-Flight system upgrade in Reims ACC on 12 and 15 March combined with ATC capacity issues generated 2,396 minutes of ATFM delay.
- On-going free route airspace implementation over UK upper airspace from 19 March generated 6,797 minutes of ATFM delay in London ACC and 4,563 minutes of ATFM delay in Scottish ACC.
- Migration to a temporary operations room in Sofia ACC on 17 and 18 March was successful and generated 1,900 minutes of ATFM delay.
- Target Time Management System (TTMS) live trials at London Heathrow airport generated 2,251 minutes of ATFM delay throughout the month.
- Target Time Management System (TTMS) live trials combined with aerodrome capacity issues at Zurich airport generated 9,417 minutes of ATFM delay throughout the month.

Technical

- Work in progress in Brest control tower combined with the implementation of a new airspace design in the TMA generated 6,211 minutes of ATFM delay throughout the month.
- Work in progress on runway 25R at Brussels airport from 19 March generated 1,749 minutes of ATFM delay.
- Air display in combination with ATC capacity issues at Athens airport on 25 March generated 1,656 minutes of ATFM delay.

Other

- French military activity limited airspace availability in Marseille West ACC and generated 4,354 minutes of en-route ATFM delay and 2,891 minutes of airport ATFM delay.
- The additional complexity due to the Middle East crisis generated 15,368 minutes in Tel Aviv ACC and 4,910 minutes of ATFM delay in Tbilisi ACC.
- Arrival measures related to the progressive roll-out of the European Union's Entry/Exit System (EES) were applied for Grenoble airport for the last three Saturdays of the month, prompting 841 min of ATFM delay.

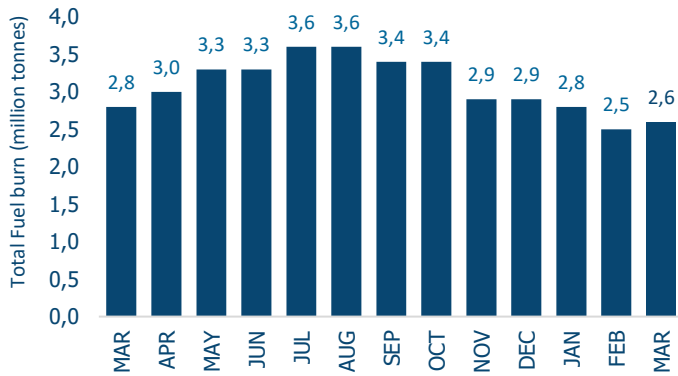
Industrial action

- A 48-hour Lufthansa pilot strike took place from 12 to 13 March. Lufthansa estimated that 80-90% of flights departing from German airports were cancelled over the two days.
- National industrial action in Belgium on 12 March impacted traffic with:
 - All departing passenger flights cancelled from Brussels airport and very limited arrivals.
 - All departing and arrival passenger flights cancelled at Charleroi airport.

5. Flight Efficiency

5.1 Fuel Burn

En-route fuel burn within NM area (tonnes)



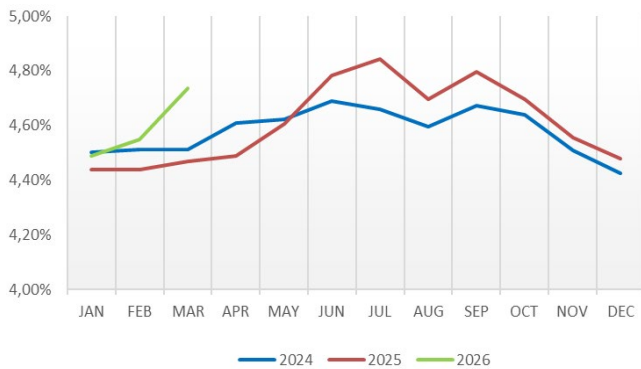
NM estimates that 2.6 million tonnes of fuel were burnt in the en-route flight phase in the NM area in March 2026.

5.2 Horizontal Flight Efficiency

There are two horizontal flight efficiency KPIsⁱ. 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 and KEA both increased in March 2026 and were higher than 2025 levels. Moreover, the sharp rise in both indicators was partially attributed to developments in the Middle East, which led to airspace closures and necessitated rerouting.

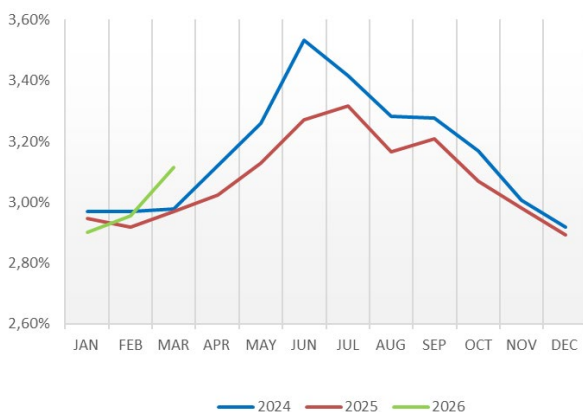
KEP evolution in NM Area



KEP indicator (4.74%) exceeded both 2024 and 2025 levels.

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

KEA evolution in NM Area



KEA indicator (3.11%) exceeded 2024 and 2025 levels.

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 <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>

Operational Performance Unit,

Network Management Directorate (NMD), EUROCONTROL,

96 Rue de la Fusée,

B - 1130 Brussels

<mailto:nm.ops.perf@eurocontrol.int>

<https://www.eurocontrol.int/>

ⁱ More information on KEP and KEA, see [ANS performance page](#).



SUPPORTING
EUROPEAN
AVIATION

© EUROCONTROL - April 2026

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