airservices australia

Australian Aviation Network Overview

May 2025

We acknowledge and embrace a culture that celebrates diversity, inclusion, and equality for all. In making this statement we acknowledge Aboriginal and Torres Strait Islander peoples as the Traditional Owners and Custodians of the country on which we operate, now called Australia.

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Executive Summary

In May 2025, the Australian aviation network recorded a 2% decline, in line with seasonal trend, from the previous month in terms of daily average flights while international traffic maintained 6% year-on-year growth. However, geopolitical and trade policy uncertainty continue to pose risks to both demand and supply in the aviation sector.

Industry's on-time performance has reached another three-year high of 82% in April. This progress has been further supported by Air Traffic Flow Management (ATFM) compliance measures at Perth Airport which has significantly reduced delays.

Airport Collaborative Decision Making (A-CDM) went live at Brisbane Airport on 10 May, marking a significant milestone in enabling operational data sharing and aircraft departure optimisation. As a globally adopted system, this represents a major capability uplift in our region and is expected to deliver a range of operational benefits across the network. Early operator compliance to key A-CDM processes has surpassed the 80% European benchmark and continues to improve. Rollout at Perth, Sydney, and Melbourne airports will follow in the next five months.

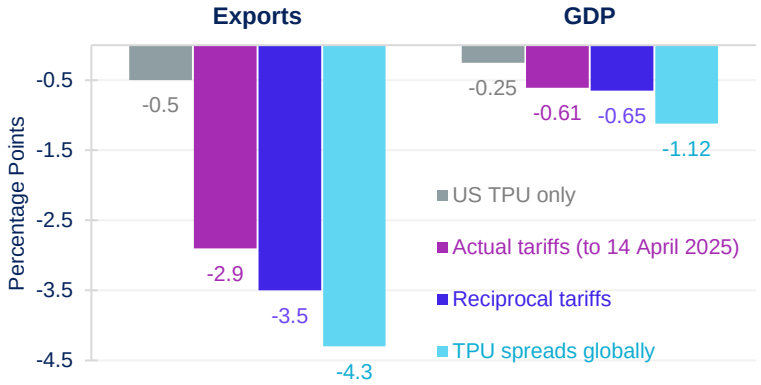
Following strong service performance during the April holiday period, airspace and tower service variations increased slightly in May but remain at one-third of 2024 levels. No ground delays were attributed to Airservices at the major airports. A Ground Delay Program (GDP) is a collaboratively-agreed industry plan to balance scheduled demand with available runway capacity. Ground delays in May reduced by over 60% compared to the same month last year. Brisbane has had no GDPs for two months, and national GDP compliance was at 86%. We remain focused on building resilience across the network and at key locations through a robust recruitment and training pipeline, and strengthening workforce deployment across major hub and regional locations to meet industry demand.

Economic and social trends

Economic factors

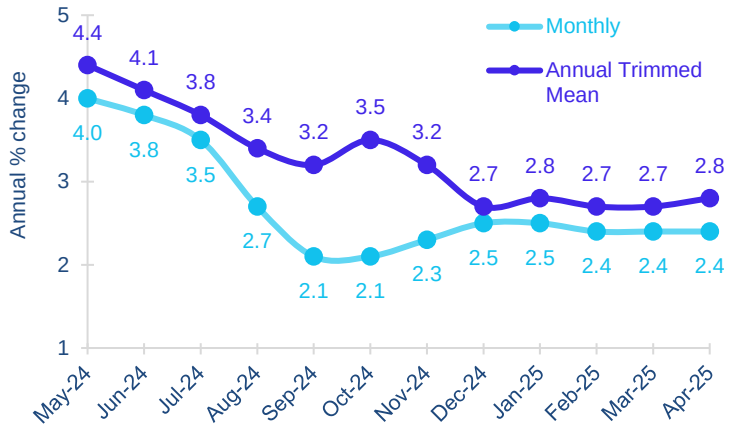
Despite global trade uncertainty weighing on exports and economic growth, the Australian aviation sector is underpinned by favourable conditions, such as easing inflation, rising consumer confidence, stable airfares, and falling jet fuel prices.

Figure 1. Projected changes in global trade and GDP growth under varying scenarios of Trade Policy Uncertainty (TPU)



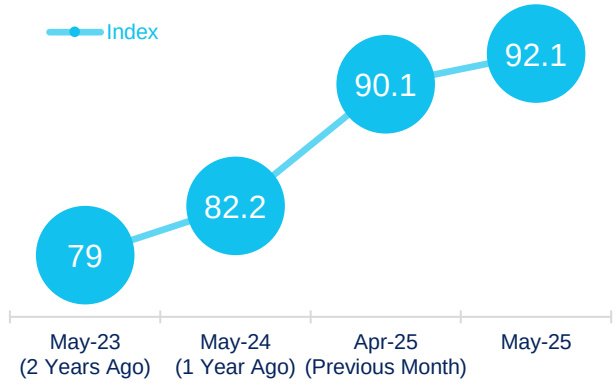
Source: WTO (website) – latest data as at 4/6/2025

Figure 2. Consumer Price Index (CPI) Indicator.



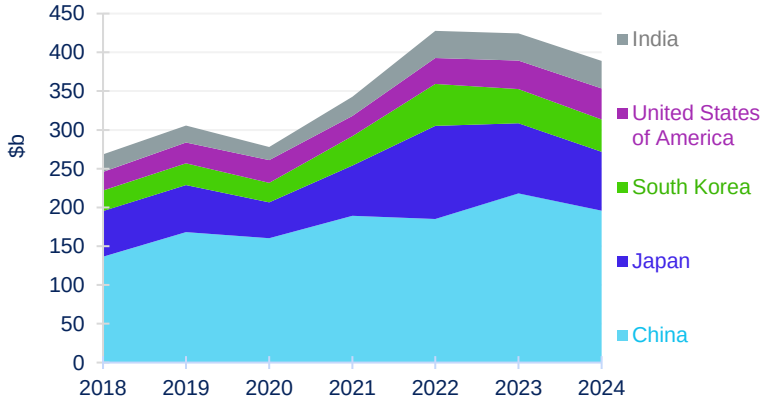
Source: ABS (website) – latest data to April 2025 as at 4/6/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.



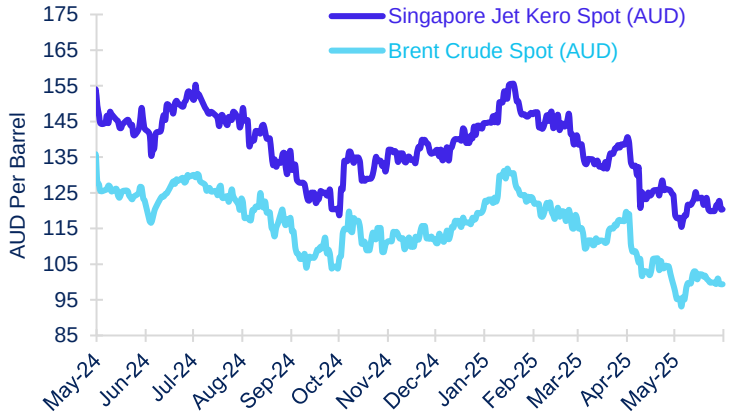
Source: Westpac Economics (website) – latest data as at 4/6/2025

Figure 4. Australia top partner countries for exports.



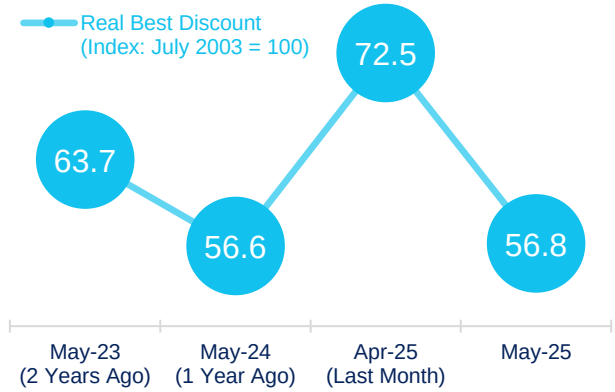
Source: ABS (website) – latest data as as at 4/6/2025

Figure 5. Jet fuel and Brent crude oil prices daily.



Source: Bloomberg – latest data as at 4/6/2025

Figure 6. Domestic airfares (real best discount).



Source: BITRE (website) – latest data as at 4/6/2025

Social factors

We released new public Noise Abatement Procedures reporting in May for capital city airports to increase transparency in how aircraft noise is mitigated through these procedures. In May, the number of individuals lodging noise complaints dropped to the lowest level in five years. However, overall complaint volumes remained high, with 80% originating from two individuals. In collaboration with airports and aircraft operators, we continue to actively incorporate community feedback in optimising the use of Noise Abatement Procedures, wherever feasible given safety and weather conditions.

Figure 7. National aircraft noise complaints (top) and complainants (bottom) per month.

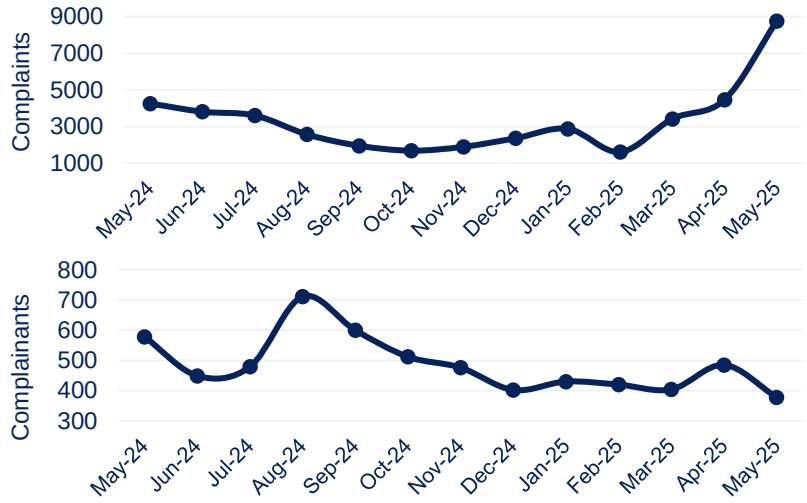


Figure 9. CO_2 emissions savings from optimised User Preferred Routes (UPR) per month.

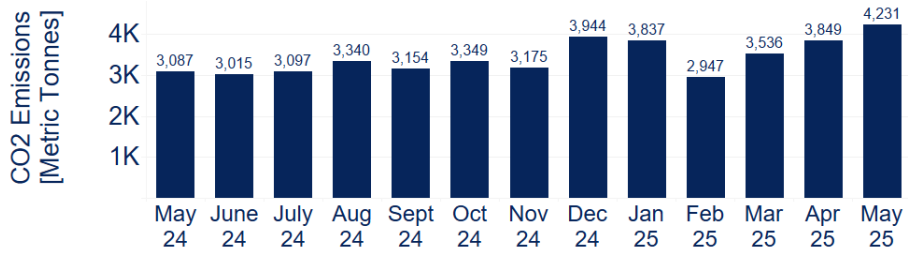
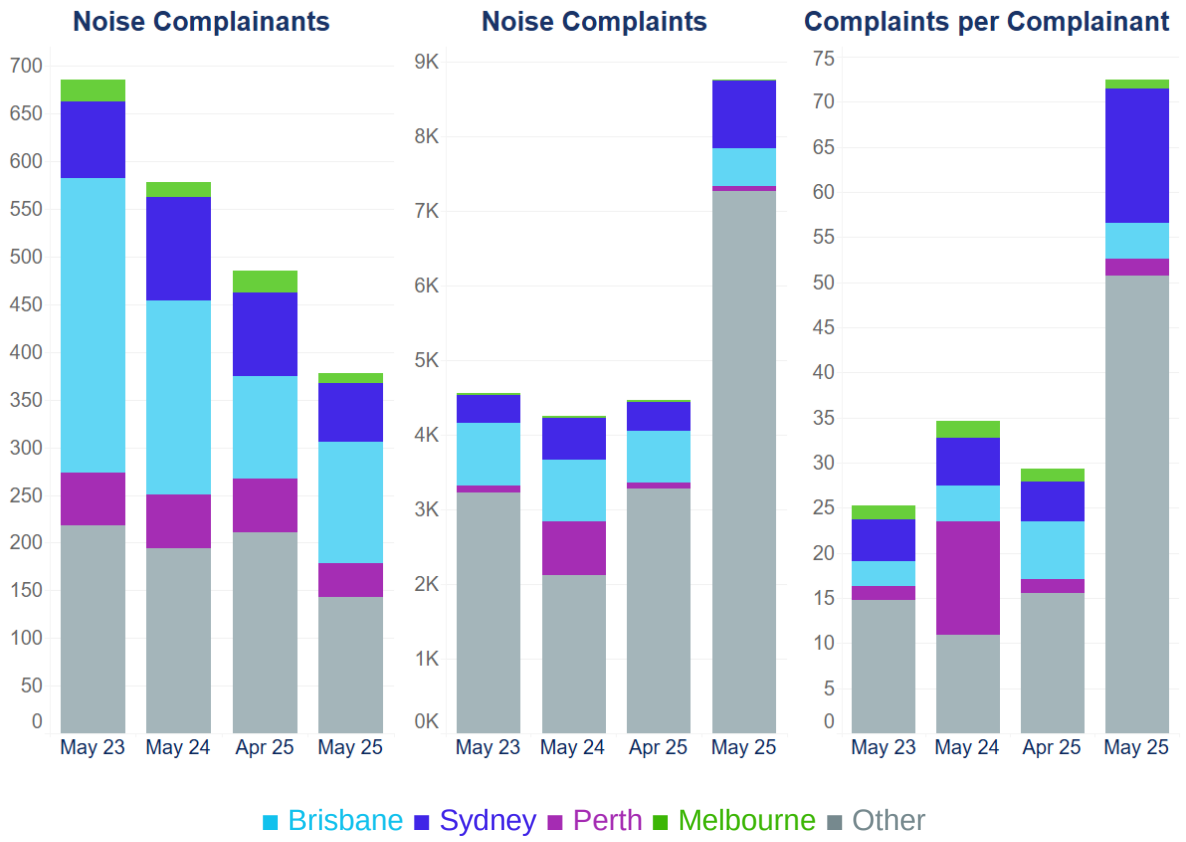


Figure 8. Aircraft noise complainants, complaints, and complaints per complainant by location for four reference periods (May 2025, April 2025, May 2024, May 2023).



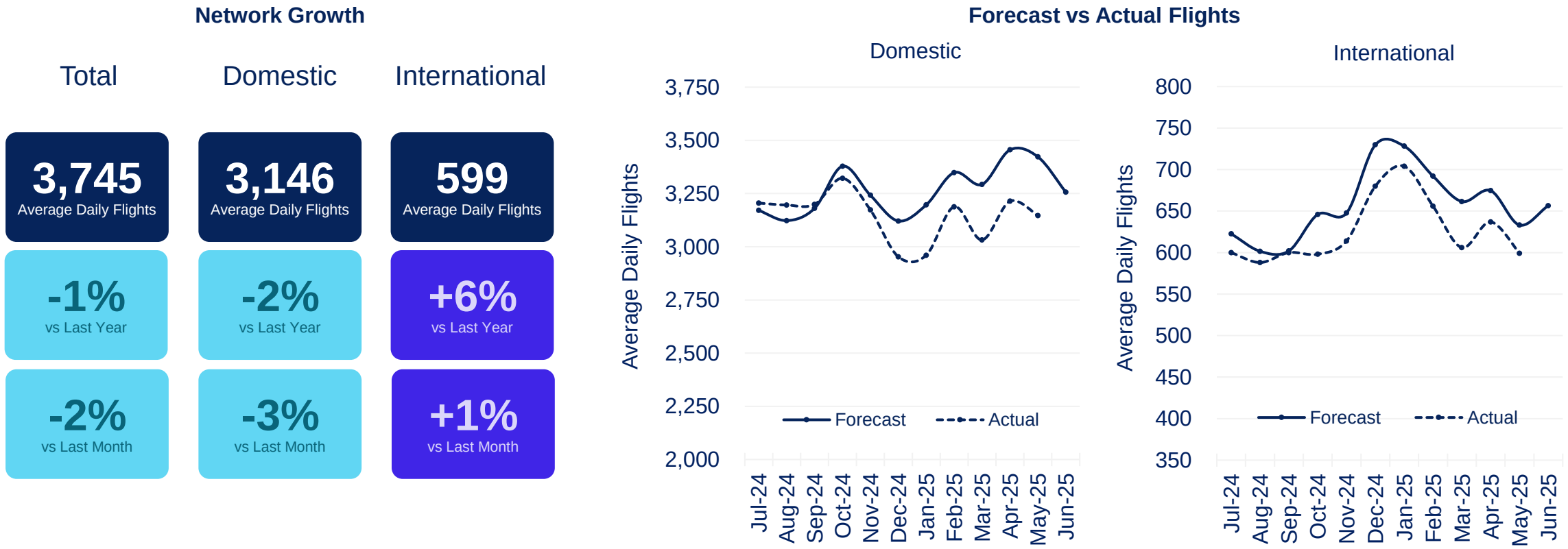
Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS. CO_2 emissions savings from UPR are across oceanic and cross-continental airspace.

Australian aviation and regional context

State of Australian aviation growth

In May, the network in terms of daily average flights declined 2% from the previous month in line with seasonal trend while international traffic grew 6% year-on-year reflecting robust demand for overseas travel. However, the overall traffic volume remains below Airservices' forecast, largely due to structural shifts in the domestic airlines sector and fleet deployment.

Figure 10. Network growth for May 2025 against two reference periods (left) and actual flights compared to Airservices' forecast per month.

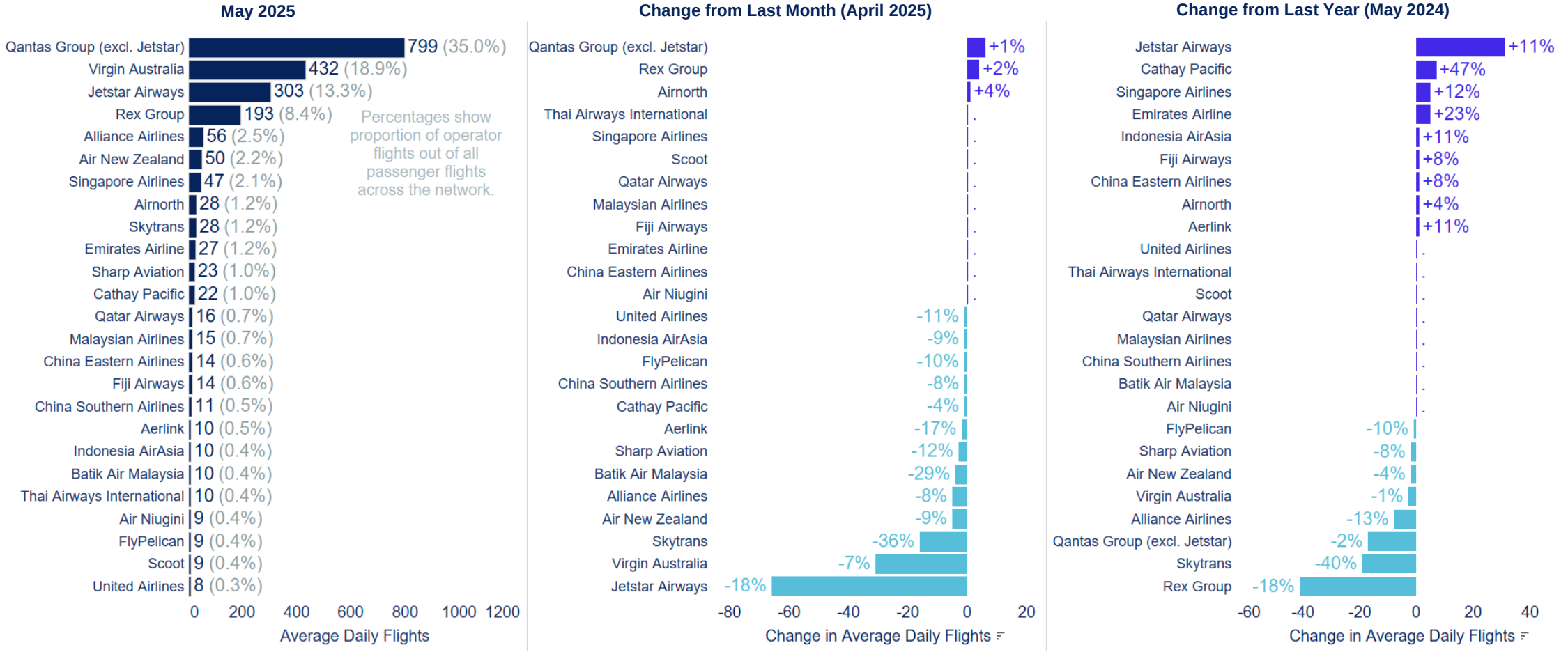


Source: Airservices aeronautical charge database. Excludes some general aviation flights that are not subject to Airservices aeronautical charges. Airservices' forecast proposed as of July 2024.

Top aircraft operators

Year-on-year growth continues to be led by domestic low-cost carriers and major hub airlines across Hong Kong, Asia, and the Middle East, driven by sustained demand for leisure travel. Meanwhile, the contraction in regional operators' activities indicates challenges such as volatile demand, ageing fleet and workforce deployment especially in remote areas.

Figure 11. Average daily flights by top operators (May 2025) and comparisons across two reference periods.

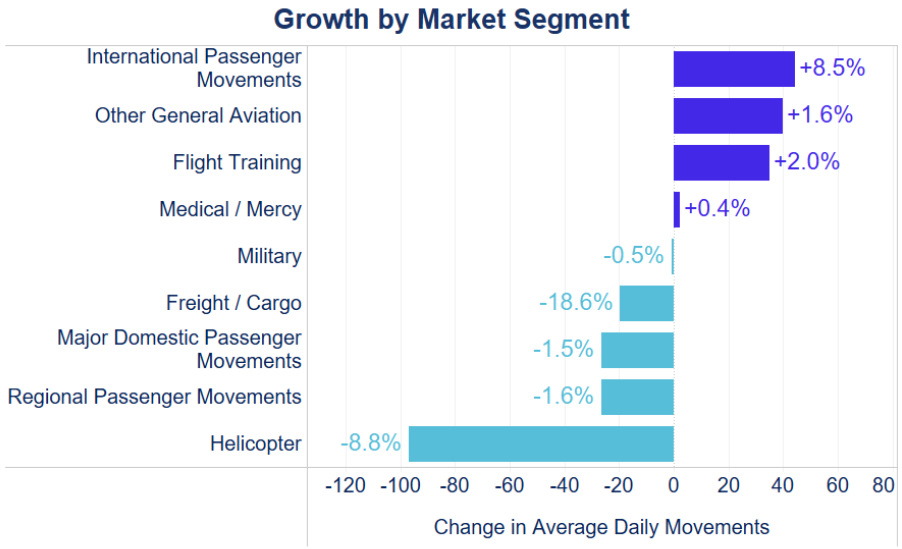


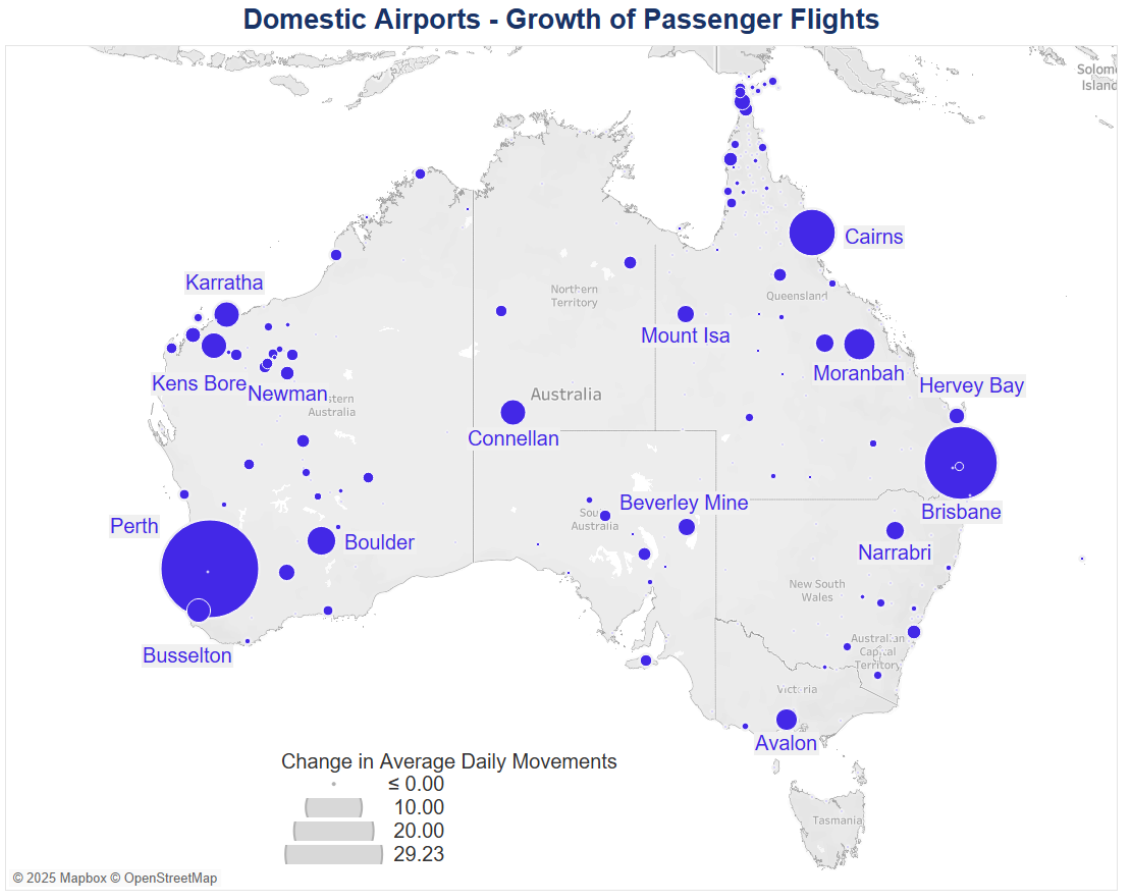
Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.

Domestic network

We continue to observe mixed growth trends across the domestic network. Leisure travel and mining growth remain key drivers of demand in locations such as Brisbane, Cairns, and Perth. In contrast, there is a decline in aircraft movements for cargo/freight, likely influenced by increased use of belly-hold capacity on passenger services and competition from sea freight. The recovery of flight training at Metropolitan D and uncontrolled aerodromes underscores the need for investment in regional airport infrastructure and services.

Figure 12. Growth of aircraft movements at domestic airports (May 2024 to April 2025 vs May 2023 to April 2024) including by market segment (top left) airport category (bottom left) and airport location (right).





Source: Airservices ODAS. Only passenger flight movements are included in the map (domestic and international).
Data is reported one month in arrears due to availability of flight training activity reporting.

International markets

International markets saw a seasonal contraction in May, with the exception of the Middle East. By June, for the first time since 2020, six Australian cities will have direct connections to this region, led by Melbourne benefitting from operators' wet-lease partnership arrangement.

Figure 13. International markets traffic share in May 2024 and May 2025

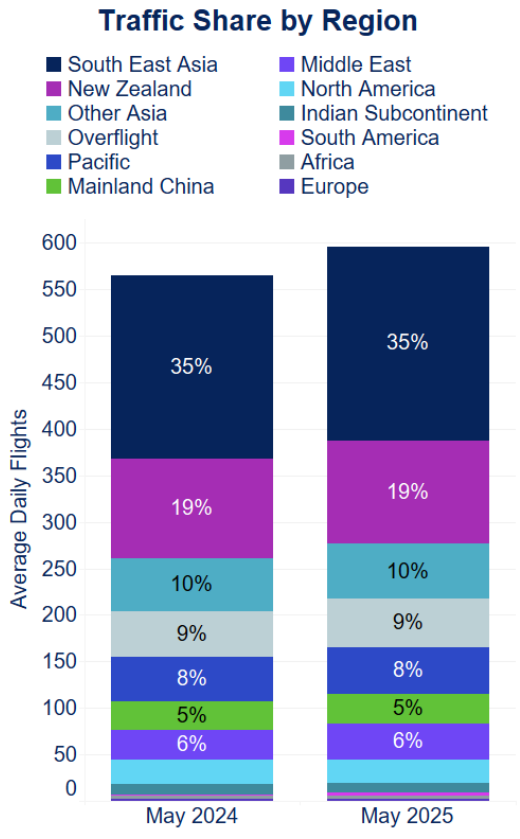
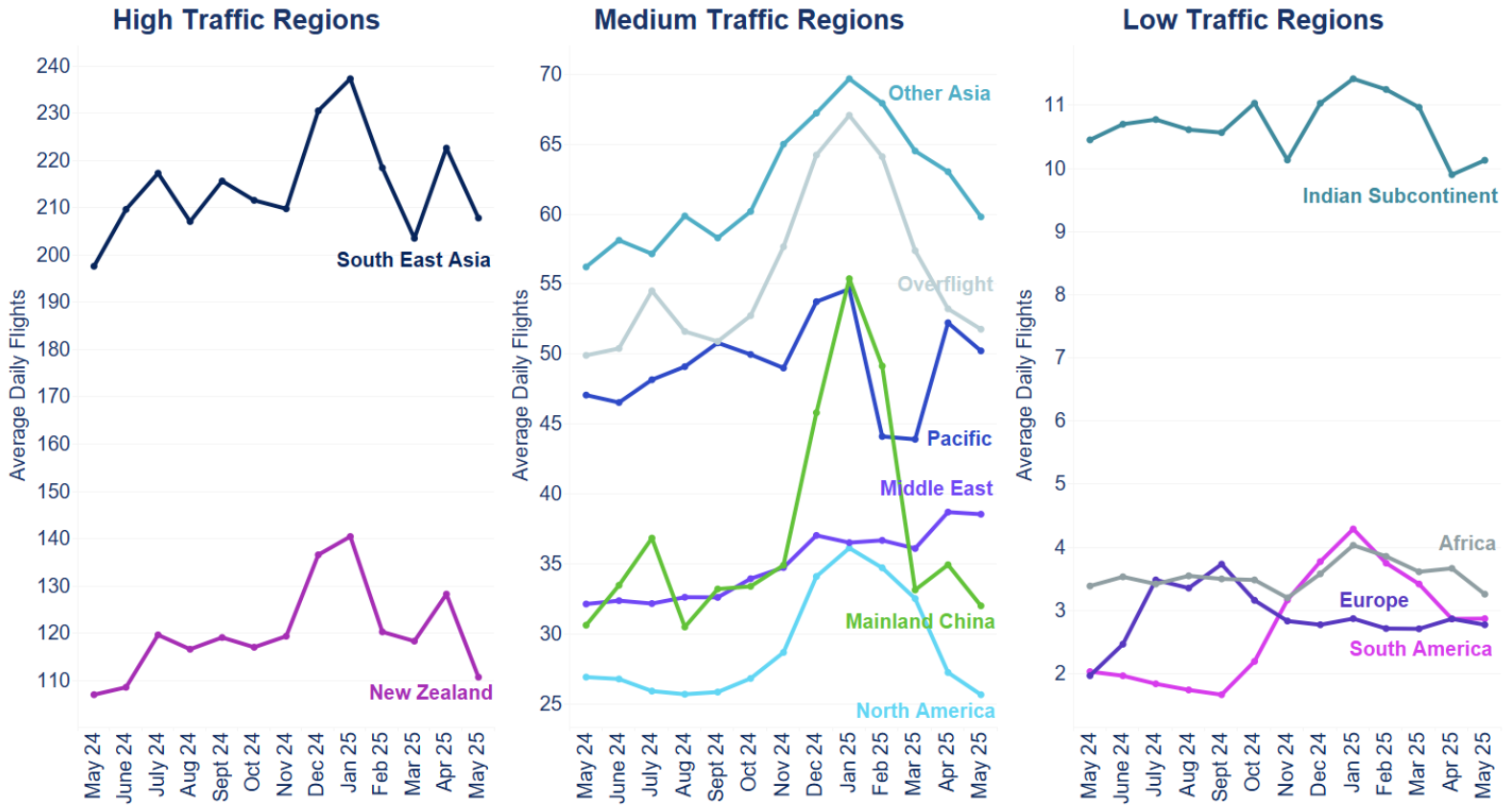


Figure 14. Average daily flights by international markets per month.

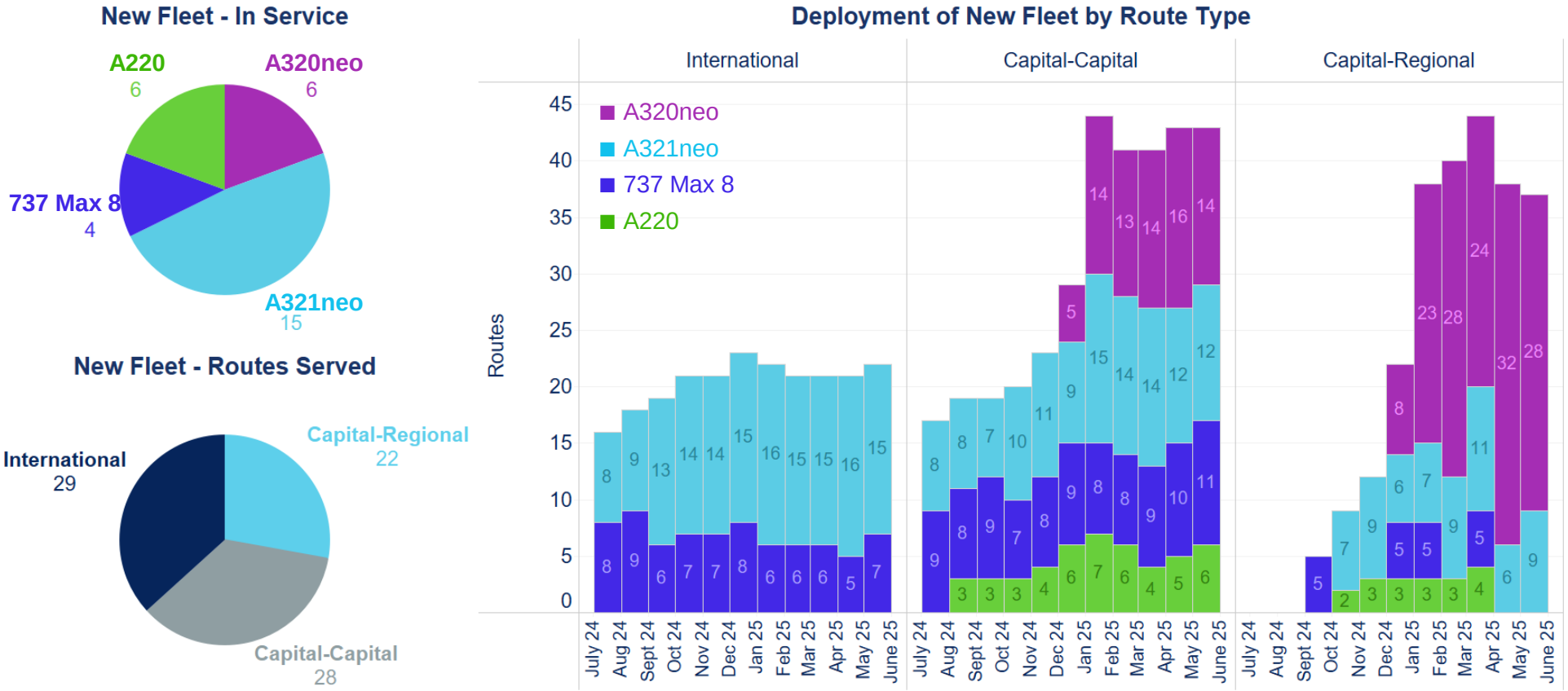


Source: Airservices ODAS (includes airline flights only).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Domestic fleet

Over the past year, next-generation narrowbody aircraft such as the A220, A320neo, A321neo, and 737 Max 8 have been introduced on existing routes for domestic and international demand. However, overall fleet renewal remains gradual. Ongoing global supply chain challenges and trade policy uncertainty continue to constrain aircraft production, tightening supply and potentially driving up demand and prices in both the new purchase and leasing markets.

Figure 15. New passenger aircraft in service (June 2024 to May 2025), including aircraft types (top left) total routes served (bottom left) and monthly routes served (right).



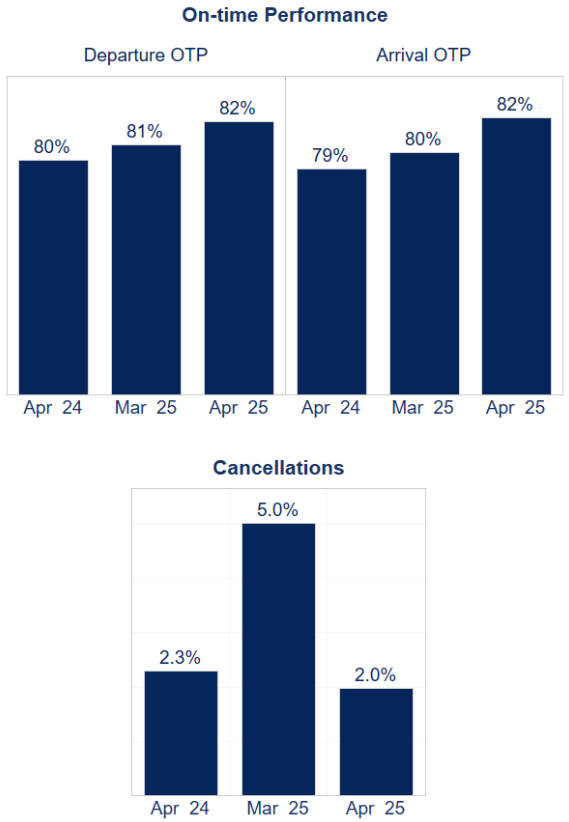
Source: Centre for Aviation Fleet (CAPA) data, as of 4 June 2025. New fleet refers to new build aircraft under 5 years old.
Includes only passenger aircraft with more than 20 seats.

Australian aviation network performance

Industry OTP and first wave performance

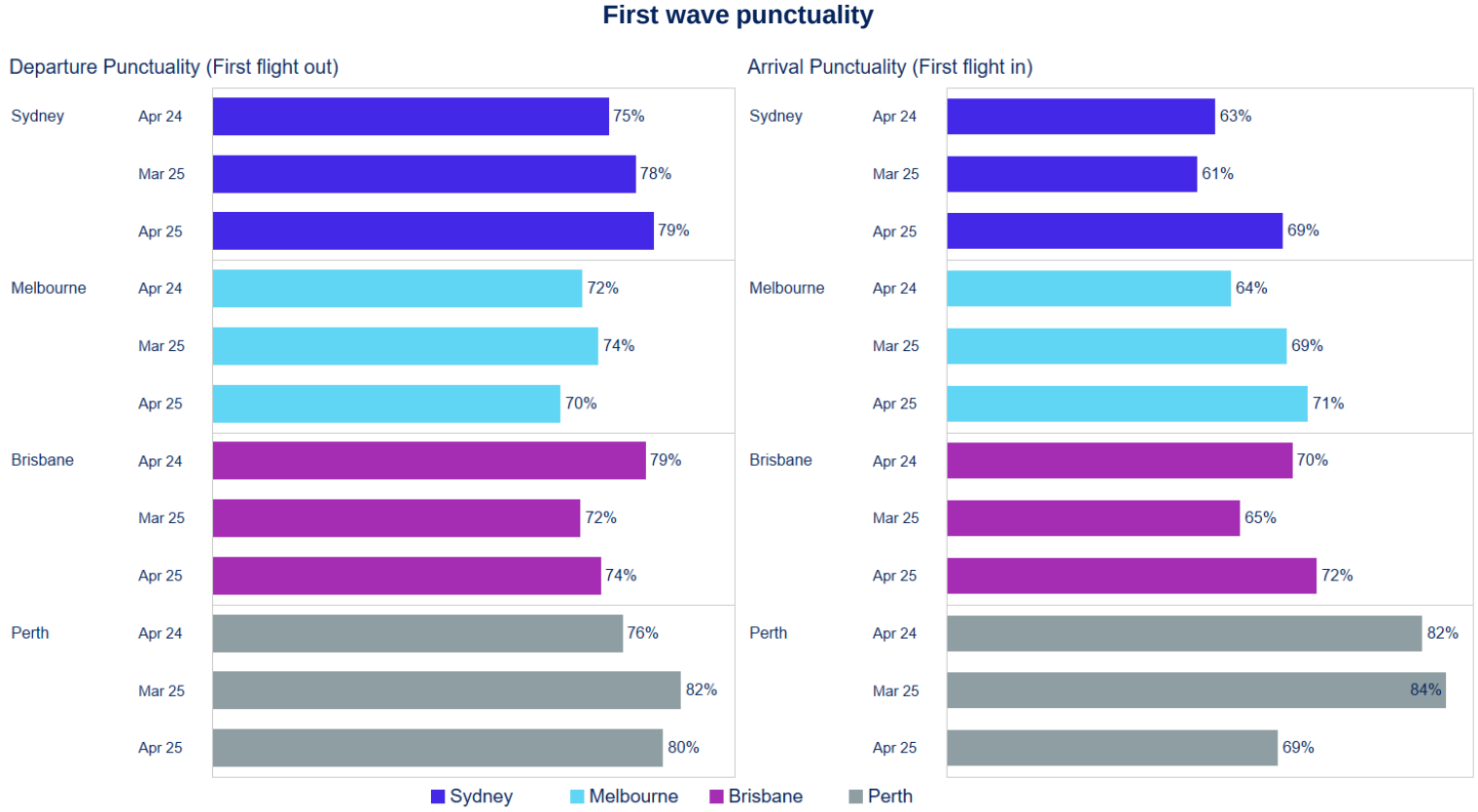
April marked the third consecutive month of the industry's best on-time performance in three years. This demonstrates the sustained sector-wide efforts to improve operational reliability through coordination across airlines, airports and air traffic service for collaborative network decisions and greater resilience focus.

Figure 16. Total industry OTP and cancellations for three reference periods (April 2025, March 2025, and April 2024) based on latest BITRE data release.



Source: BITRE for Australian data (website).
Data available up to April 2025 based on latest BITRE data release.

Figure 17. First wave punctuality at major airports for three reference periods (April 2025, March 2025, and April 2024). Note that arrival punctuality at Perth is determined on a small number of flights, as few flights have their first rotation inbound to Perth.



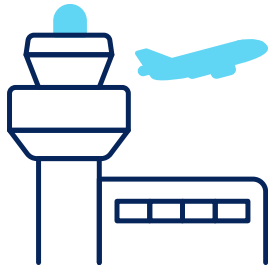
Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the ATFM process.

Network management process

Airservices collaborate closely with airlines, airports, and industry stakeholders to balance scheduled demand with available runway capacity. A key tool in this effort is the Ground Delay Program (GDP), which can be implemented at Sydney, Melbourne, Brisbane, and Perth Airport, to enhance operational predictability and reduce tactical airborne holdings. The GDP is an agreed industry plan and requires careful coordination and compliance to deliver optimal network outcomes. We are increasing engagement with all airports, not just the major hubs, to build shared understanding of GDP drivers and network-wide impact.

Flight Schedules

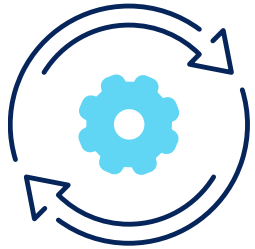
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management Centre (NOMC) the day prior to operations.



Capacity

Airservices facilitates the **available airport capacity** though a collaborative process with airlines and the Bureau of Meteorology. Factors which impact available capacity include:

- adverse weather, including fog, thunderstorms, and strong/gusty winds
- airport infrastructure and systems unserviceability, such as runway and taxiway pavement conditions, airport lighting systems and gate facilities
- Airservices' services and enabling infrastructure and systems.



Balancing

Airservices publishes the agreed-industry plan as a **Ground Delay Program** (GDP) to balance the demand with the available capacity. The GDP instructs aircraft to wait on the ground for their turn to depart, aiming to reduce excessive airborne holding at the destination. This increases predictability of operations and reduces risks of disruptions and tactical holdings.

Operations

Throughout the day of operations, industry **stakeholders work collaboratively** to monitor the aviation network performance to respond to events which put the network plan at risk. These include unforeseen adverse weather events, system or infrastructure outages. In instances when these events impact the network performance to a sufficient degree to warrant action, an update to the GDP will be agreed-upon by industry.

Air Traffic Flow Management (ATFM)

In May, most Ground Delay Programs (GDPs) were applied at Perth Airport (about 300 hours) as part of ongoing measures agreed with industry to improve demand/capacity balance and reduce overall delays. On the East Coast, GDPs were only applied to manage adverse weather. Nationally, ground delays in May reduced by over 60% compared to the same month last year. Industry compliance with GDP remains strong at 86%.

On 10 May, Airport Collaborative Decision Making (A-CDM) went live at Brisbane Airport, with operator compliance to key metric (Target Off Block Time) already surpassing the 80% European benchmark. A-CDM, as a key enabler for reducing taxi time and predictable departure operations, is being implemented at Australia's four busiest hubs in partnership with major airlines and airports, with Perth, Sydney and Melbourne to progressively follow over the next five months.

Figure 18. GDP application hours, arrival airborne delay, and GDP compliance.

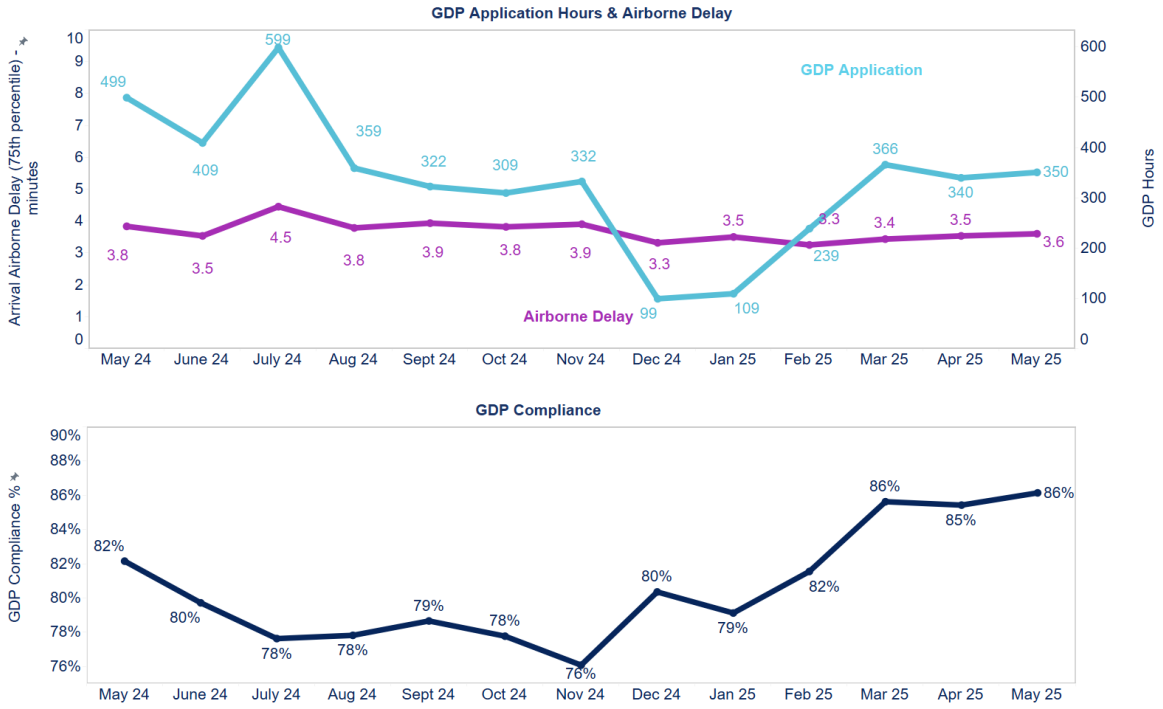
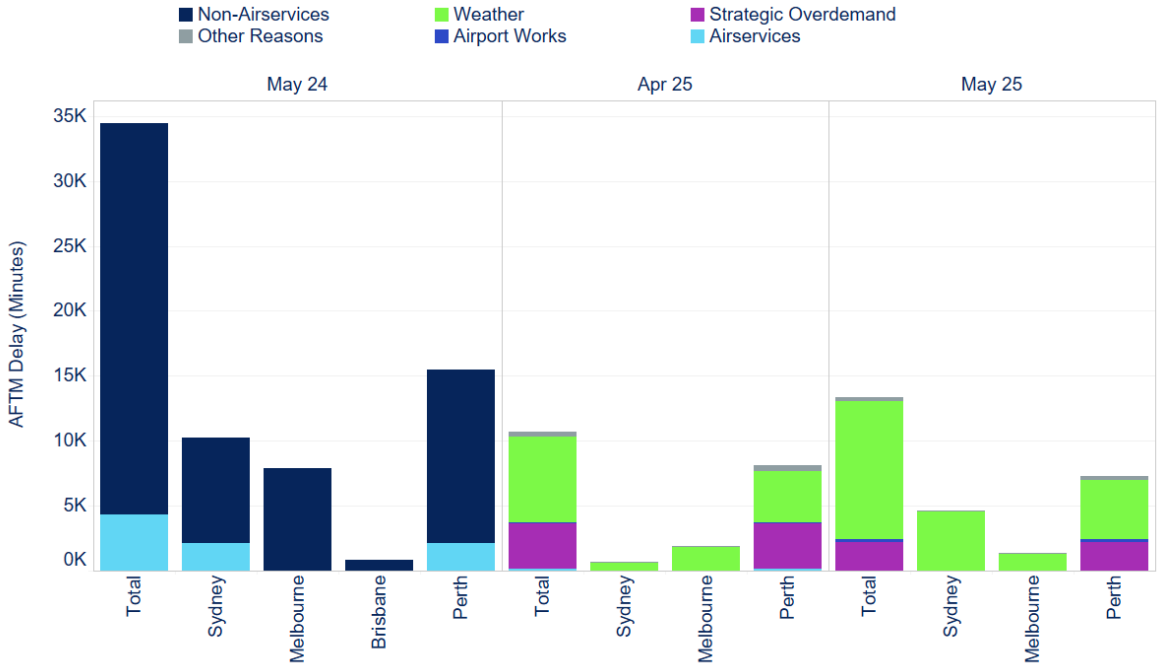


Figure 19. ATFM (GDP) delay by attribution and airport for three reference periods (May 2025, April 2025, and May 2024).



Airports with nil ATFM delay are not shown.

Source: Airservices ODAS. GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.

Air traffic service provision

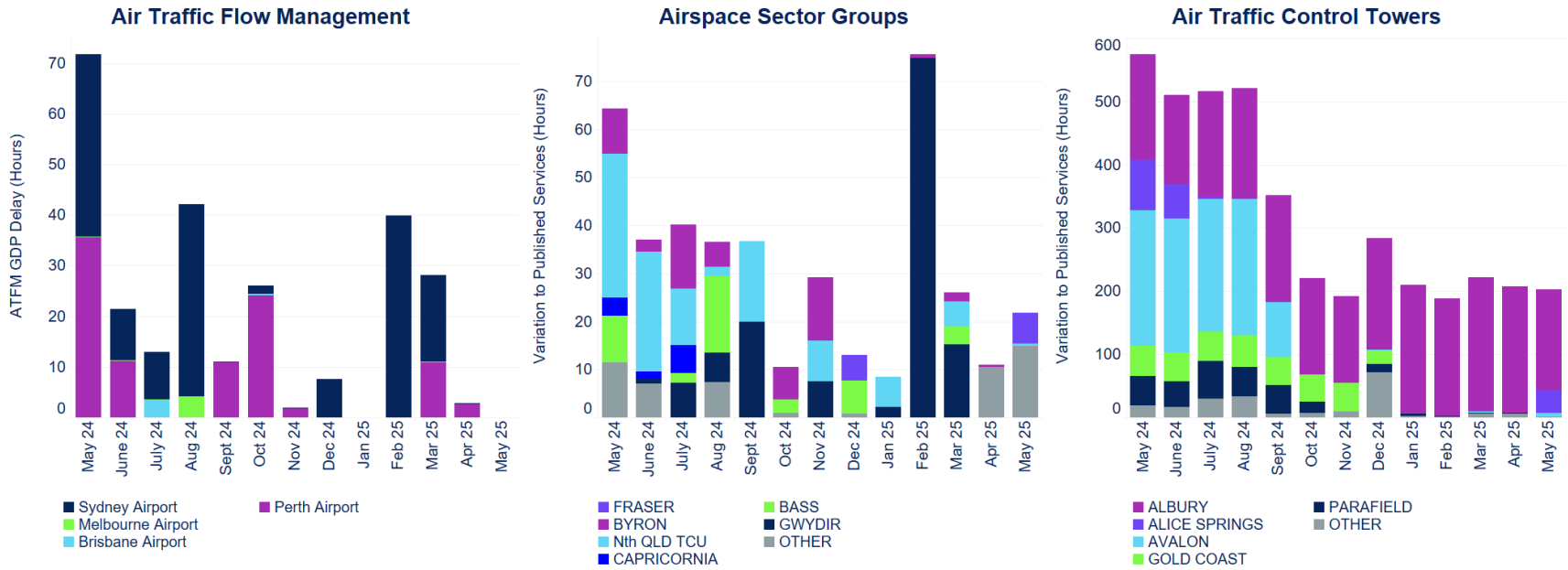
There were no Airservices attributable ATFM delays in May. However, unplanned staff unavailability led to alternative routing for flights from Brisbane to Sydney on two occasions; and impacted tower services at Alice Springs. Airspace service variations were confined to low-demand periods to minimise industry impact. This outcome fell short of expectations, and strengthening workforce resilience remains a top priority, particularly through roster planning and flexible resource deployment. Regional tower service consistency is improving, with Albury Tower on track to return to full published operations by the end of July.

Figure 20. Overall Airservices' attributable impacts (May 2025)

Flights Impacted*	Total Network Delays
0.2%	0.0%

ATFM (GDP) Delays	Arrival Cancellations
0%	0

Figure 21. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).



Source: Airservices ODAS (general aviation, military, and government flights are excluded).

Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information and safety alerting). Service variations are with respect to published services as per ERSA including any approvals by the Civil Aviation Safety Authority (CASA) for temporary amendments. Flights shown are estimated approximations by historic airline, charter, cargo and medical flights that typically operate during the periods of variations to published services, noting the exact impacts to flights cannot be directly inferred from information on flight times or tracks. Airservices is working with airlines to refine the estimation method to better understand the impact of variations to published services.

* Excludes general aviation.

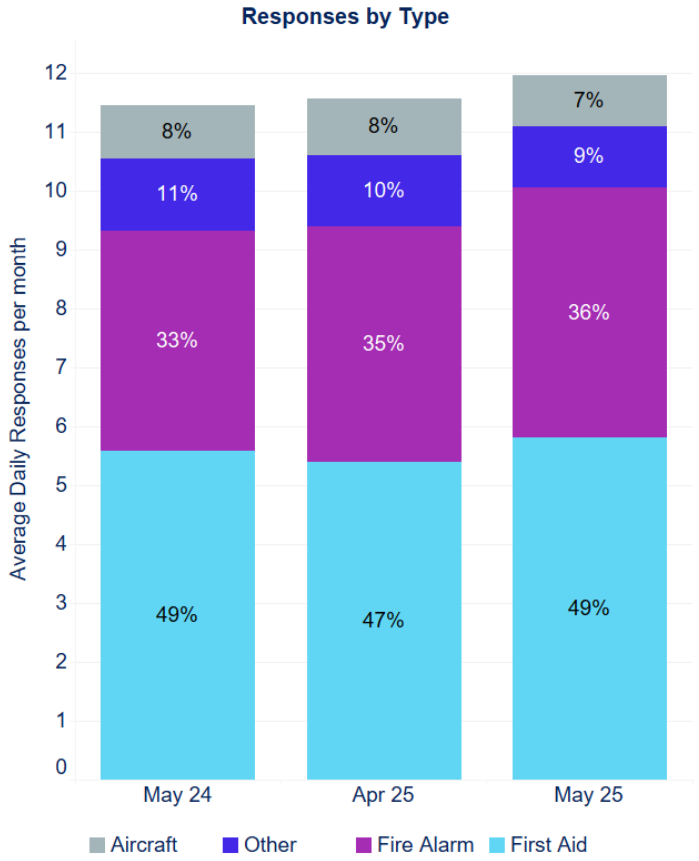
Aviation Rescue Fire Fighting Service (ARFFS)

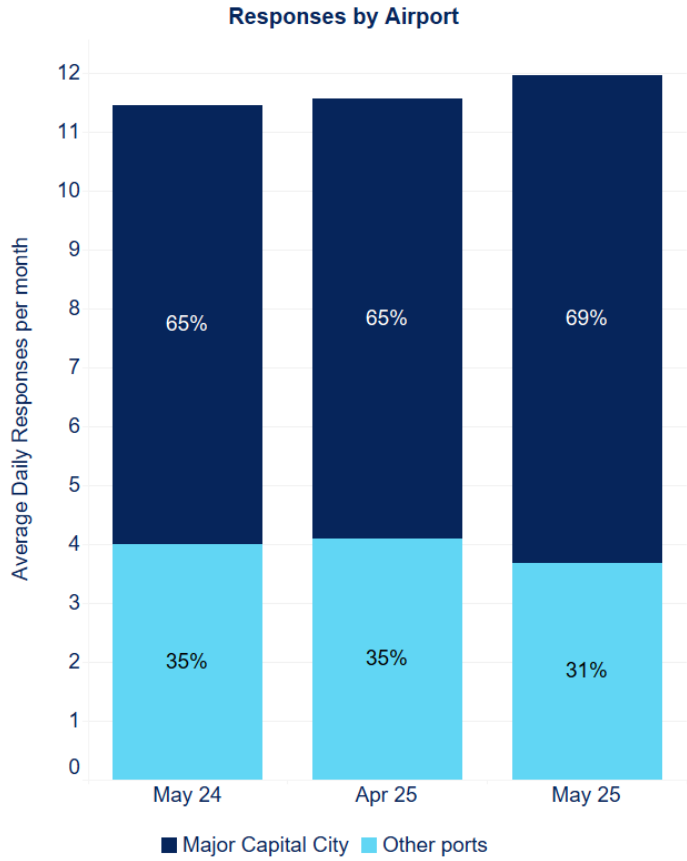
In May, Aviation Rescue Fire Fighting Services (ARFFS) handled 373 (up 26 calls from April) emergency calls across 27 airports. Across all locations, we continue to maintain consistent coverage of these essential services to aircraft and airports.

Figure 22. ARFFS service delivery by airport and total (left) emergency responses by type (middle) and by airport category (right) for three reference periods.

Service Delivery

	May 24	Apr 25	May 25
Sydney	100.0%	100.0%	100.0%
Melbourne	100.0%	100.0%	99.9%
Brisbane	99.9%	100.0%	100.0%
Perth	100.0%	100.0%	100.0%
Adelaide	99.9%	100.0%	100.0%
Cairns	84.0%	100.0%	99.9%
Canberra	100.0%	100.0%	100.0%
Gold Coast	99.8%	100.0%	100.0%
Darwin	100.0%	100.0%	100.0%
Townsville	100.0%	100.0%	100.0%
Hobart	97.7%	100.0%	97.4%
Launceston	99.8%	99.9%	100.0%
Sunshine Coast	97.4%	98.1%	100.0%
Mackay	100.0%	99.7%	100.0%
Rockhampton	100.0%	100.0%	100.0%
Karratha	100.0%	99.7%	100.0%
Broome	100.0%	100.0%	100.0%
Alice Springs	100.0%	100.0%	100.0%
Coffs Harbour	100.0%	100.0%	100.0%
Port Hedland	95.6%	100.0%	100.0%
Avalon	100.0%	100.0%	100.0%
Newman	98.7%	100.0%	98.9%
Ballina	100.0%	100.0%	100.0%
Gladstone	99.7%	90.4%	89.3%
Proserpine	95.8%	100.0%	100.0%
Hamilton Island	93.0%	100.0%	97.1%
Ayers Rock	100.0%	100.0%	100.0%
All Airports	99.2%	99.9%	99.9%





Source: Airservices ODAS and ARFFS TRAX. Service delivery is based on flights that received ARFFS coverage as published.
Major capital city airports are Sydney, Melbourne, Brisbane, and Perth.

For more information:

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