Australian Aviation Network Overview

November 2025

airservices australia

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.

Published by Airservices Australia

Contents

Executive Summary

November 2025 was a challenging month for the Australian aviation industry impacted by adverse weather, a Melbourne Air Traffic Services Centre (ATSC) communications outage, a fire at Melbourne Airport, and the impact of a global Airbus A320 software directive. Lessons learned from these events are shaping the response and disruption management strategies across the industry.

Against this backdrop, the Australian aviation network still recorded its strongest monthly year-on-year growth in 2025, driven by a surge in domestic travel and strong ongoing international demand. Load factors in the domestic network have grown year-on-year, exceeding 85% on major domestic routes and projected to reach 98% on airline networks in the upcoming peak holiday period. Close collaboration across the aviation ecosystem is enhancing preparedness and disruption responses during these high-demand periods.

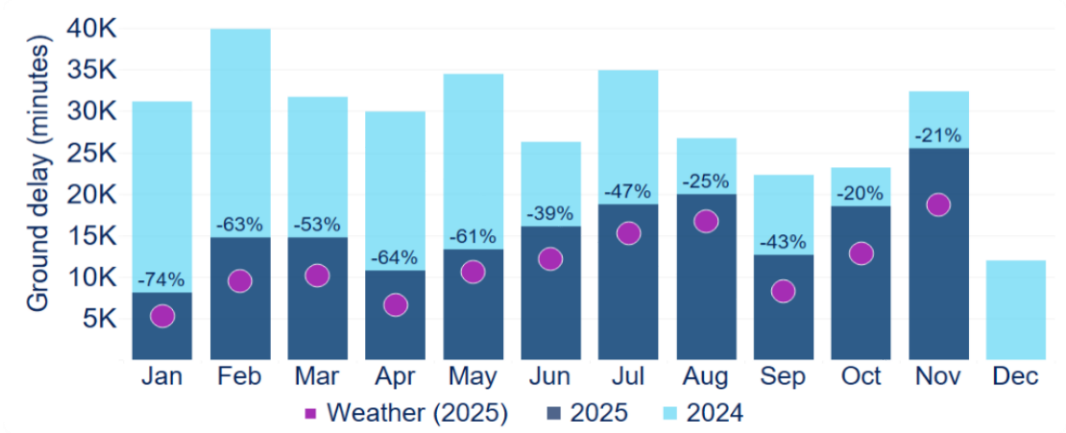
The overall industry on-time performance remained in line with last year despite adverse weather, showing the resilience of our industry. In November, thunderstorms impacted Sydney on four days and at Brisbane on five days, requiring the usage of Ground Delay Programs (GDPs) and tactical measures to minimise network impacts. Responses to these events highlighted the value of industry collaboration, with lessons learned being embedded to strengthen resilience to weather disruptions across the network, including refining Air Traffic Flow Management (ATFM) procedures and configuration of enabling technology to maximise outcomes during challenging scenarios.

Melbourne Airport joined other major capital airports in implementing Airport Collaborative Decision Making (A-CDM) on 12 November, completing the rollout nationally - a major milestone for Australia's aviation industry. This achievement marks a significant step toward enhancing predictability, efficiency, sustainability, and collaboration across the network. As A-CDM continues to embed, industry utilisation of the system and processes will be refined, and work is underway with industry partners on a national framework to track benefits and share learnings across the aviation ecosystem to maximise network outcomes.

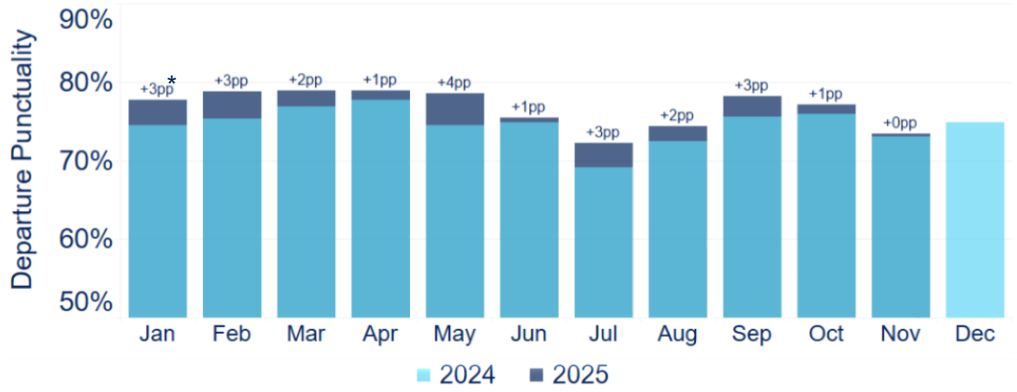
In November, airspace and tower service variations continued to show improvements year-on-year, reducing by 91%. However, unplanned staffing unavailability impacted Sydney Airport which contributed to 0.7% of total delays at the airport. In preparation for a record summer holiday period, we have proactively reviewed rosters, rescheduled training and maintenance activities to occur outside peak periods, and will maximise the use of available controllers, including cross-trained staff, to support peak period resilience.

Network performance snapshot (year-on-year comparisons)

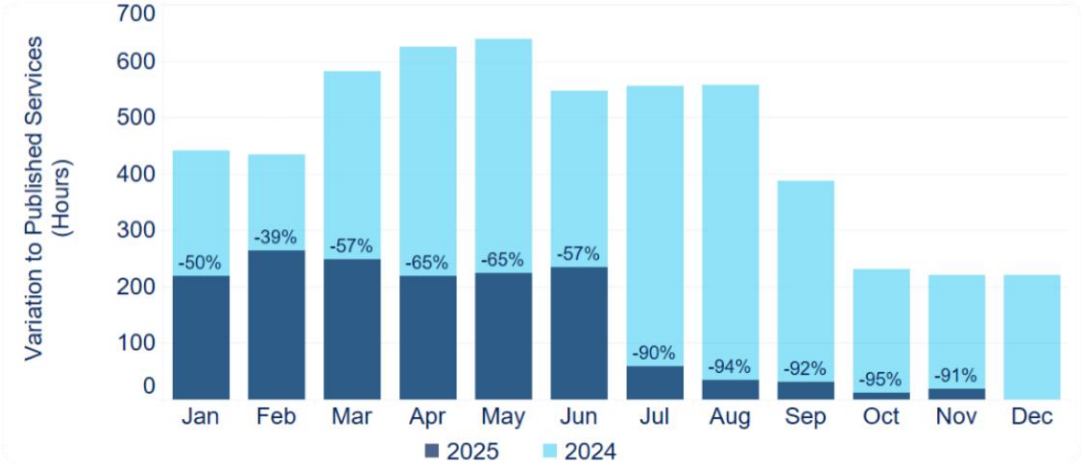
Total Air Traffic Flow Management Delays



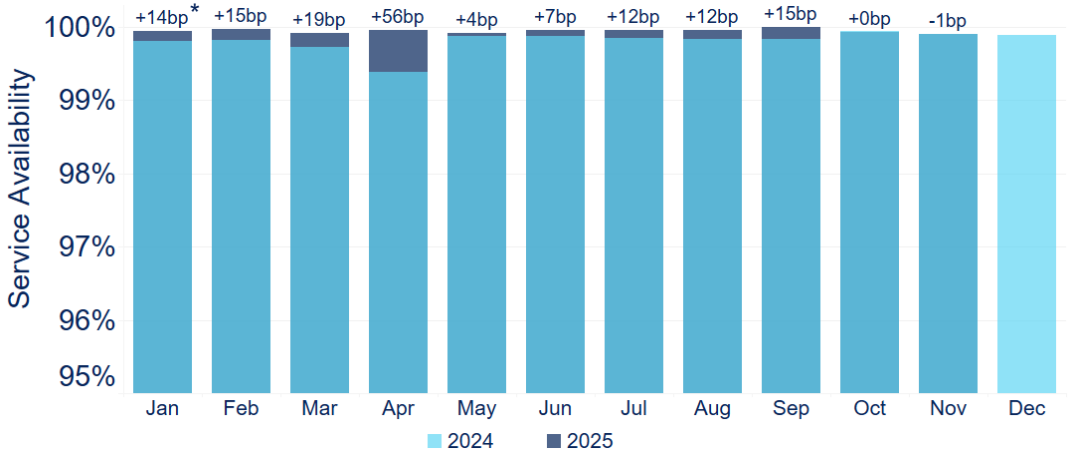
Departure Punctuality (First Flight Out)



Service Variations (Airspace & Tower)



Aviation Rescue and Fire Fighting Service Availability



*PP refers to a percentage point change, whereas BP refers to a basis point change – the latter is used to measure smaller percentage changes. For example, a change from 99.82% to 99.94% = 0.12 PP = 12 BP.
ARFF service availability is based on aircraft movements that received applicable category of ARFFS coverage.

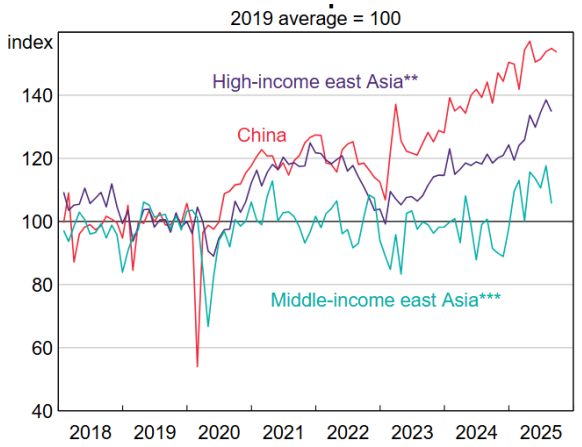
airservices australia

Economic and social trends

Economic factors

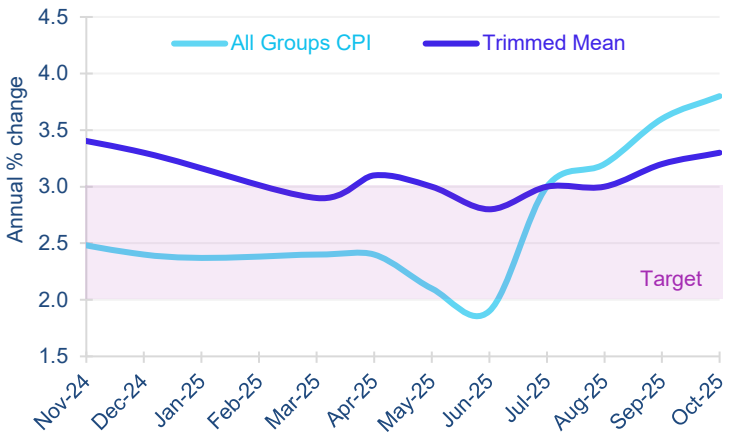
Economic conditions for Australia's aviation industry remain positive. Strong Asian exports are supporting resilience in global trade, Australia's GDP growth is improving, and international tourism spend continues to rise. Inflation, jet fuel prices, and global economic uncertainty remain key risks, with potential flow-on impacts to airfares.

Figure 1. Global goods exports - Asia.



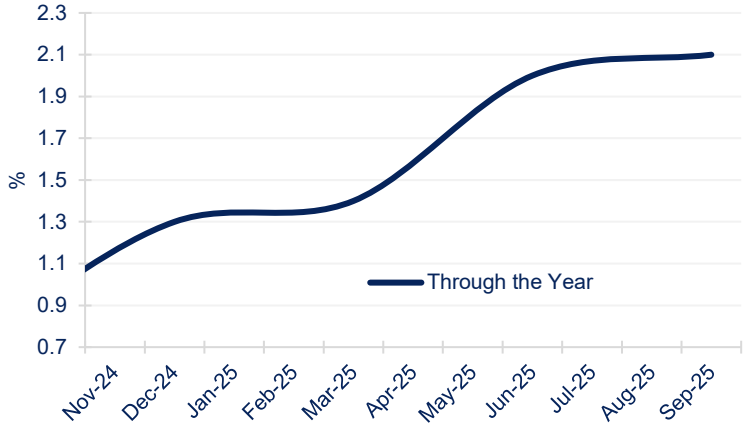
Source: Reserve Bank of Australia (website)

Figure 2. Consumer Price Index (CPI) Indicator.



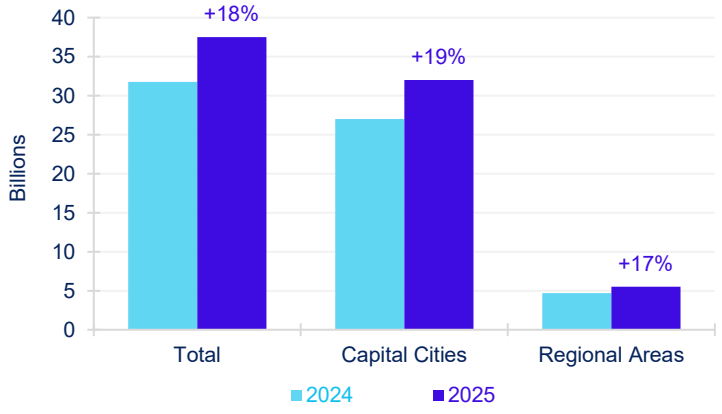
Source: ABS (website) – latest data to October 2025 as at 26/11/2025

Figure 3. Australia's GDP growth.



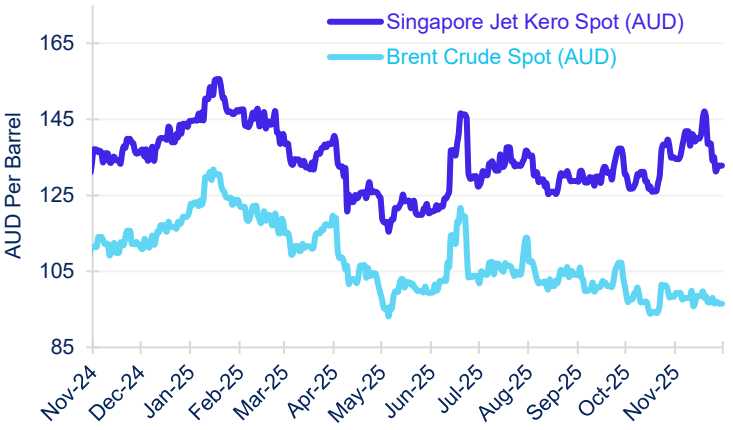
Source: ABS (website) – latest data to September 2025 as at 3/12/2025

Figure 4. International visitor spend in Australia.



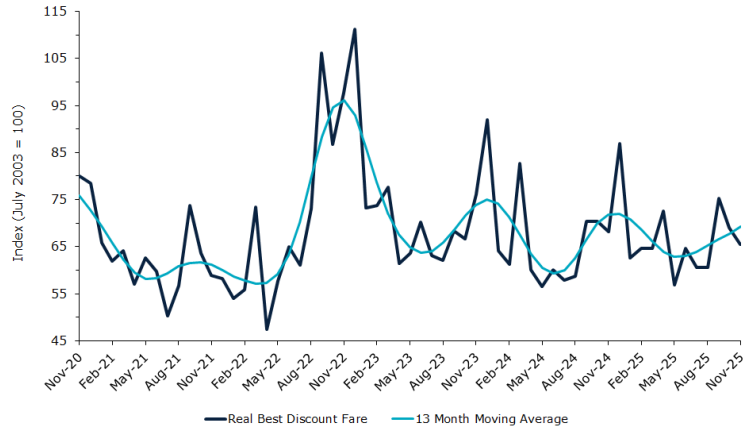
Source: TRA (website) – latest data to June 2025 as at 1/12/2025

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



Source: Bloomberg – latest data as at 5/11/2025

Figure 6. Domestic airfares (real best discount).



Source: BITRE (website) – latest data as at 30/10/2025

Social factors: aircraft noise

Monitoring and mitigating the impact of aircraft noise on the community remains a key priority. In November, engagement on Melbourne Airport's Noise Sharing Plan for the Third Runway has heightened community awareness and feedback. We are closely partnering with airports to ensure traffic growth is balanced with community needs in early design processes and working with airlines to promote adherence to Noise Abatement Procedures (NAPs).

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

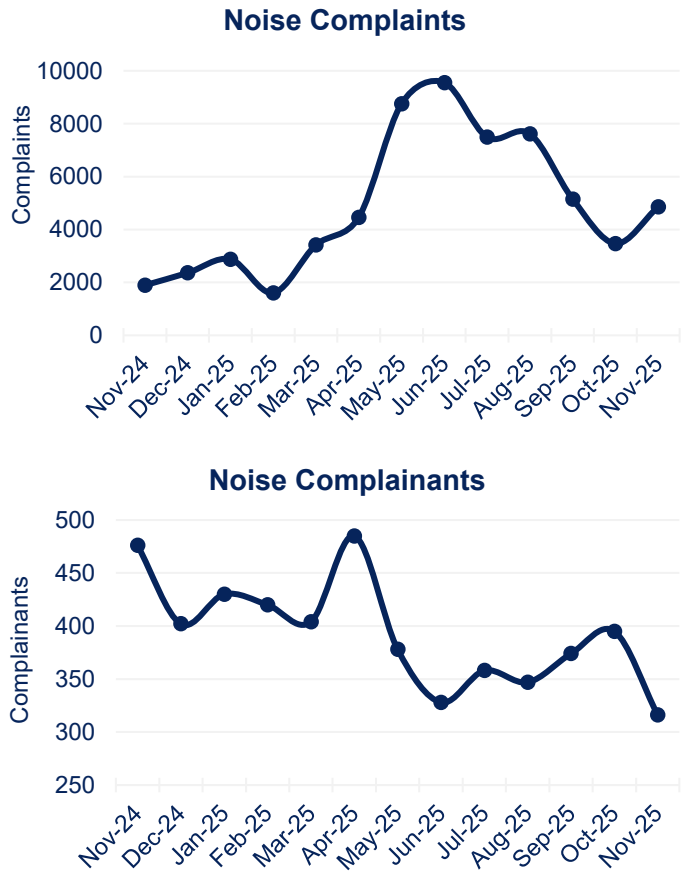


Figure 8. Aircraft noise complainants by key airports (November 2025 and November 2024, and change).

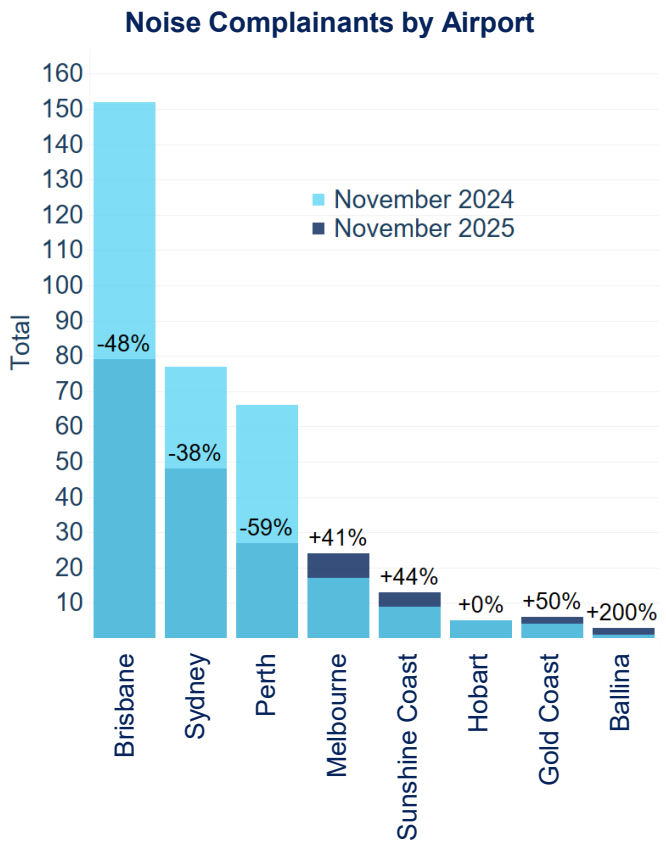
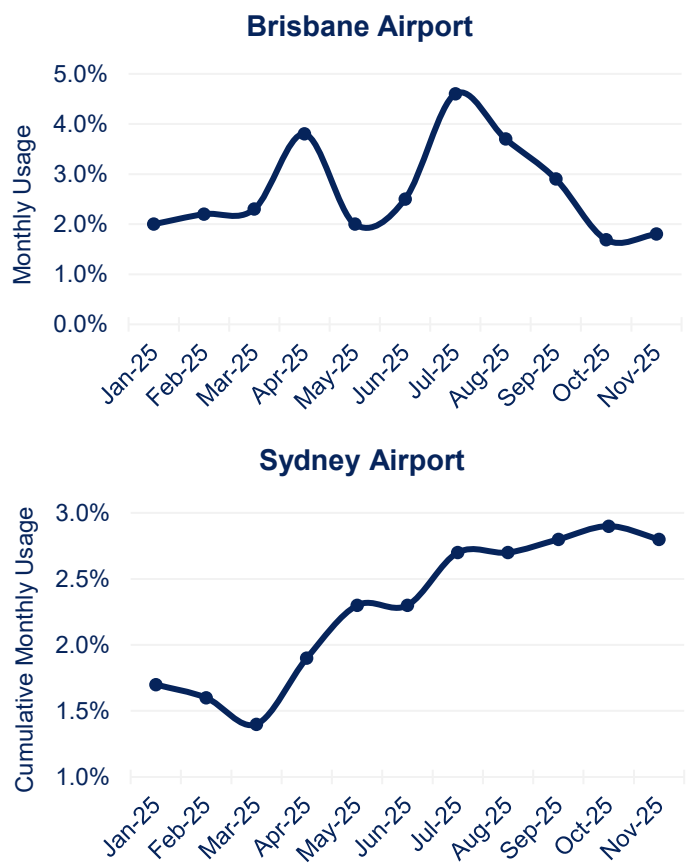


Figure 9. SODPROPs usage at Brisbane by monthly movements, and cumulative movements for year to date at Sydney.

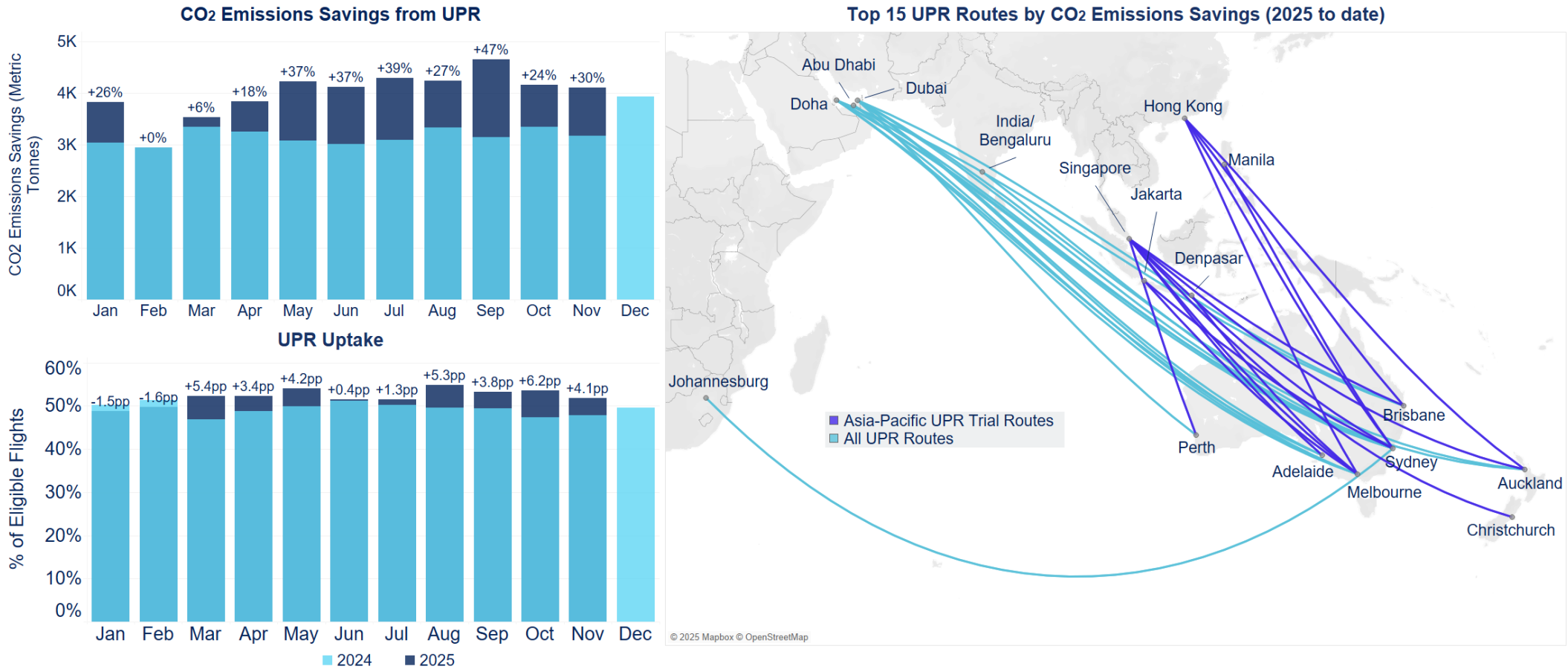


Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool (website).
The decrease in SODPROPS usage at Brisbane Airport through to November 2025 was primarily due to variable weather conditions limiting opportunities for implementation.

Social factors: aircraft emissions

Flexible routing continues to deliver year-on-year improvement in CO_2 emissions savings, particularly on Middle East and New Zealand routes. Collaboration with Asia-Pacific regional partners is further enhancing operational efficiency, especially on Singapore and Hong Kong corridors, with expanded trials set to include additional airlines and routes to unlock greater sustainability gains.

Figure 10. Monthly User Preferred Routes (UPR) metrics showing total CO_2 emissions savings (top left), share of eligible flights using UPRs (bottom left), and top 15 routes ranked by CO_2 emissions savings for the Asia-Pacific trial and all UPR routes in 2025 to date (right).



Source: Eligible flights include all jet operations over oceanic and cross-continental airspace. Eligibility is independent of technology, training, or other operational constraints. CO_2 emissions savings are measured across the entire flight segment within Australian airspace.

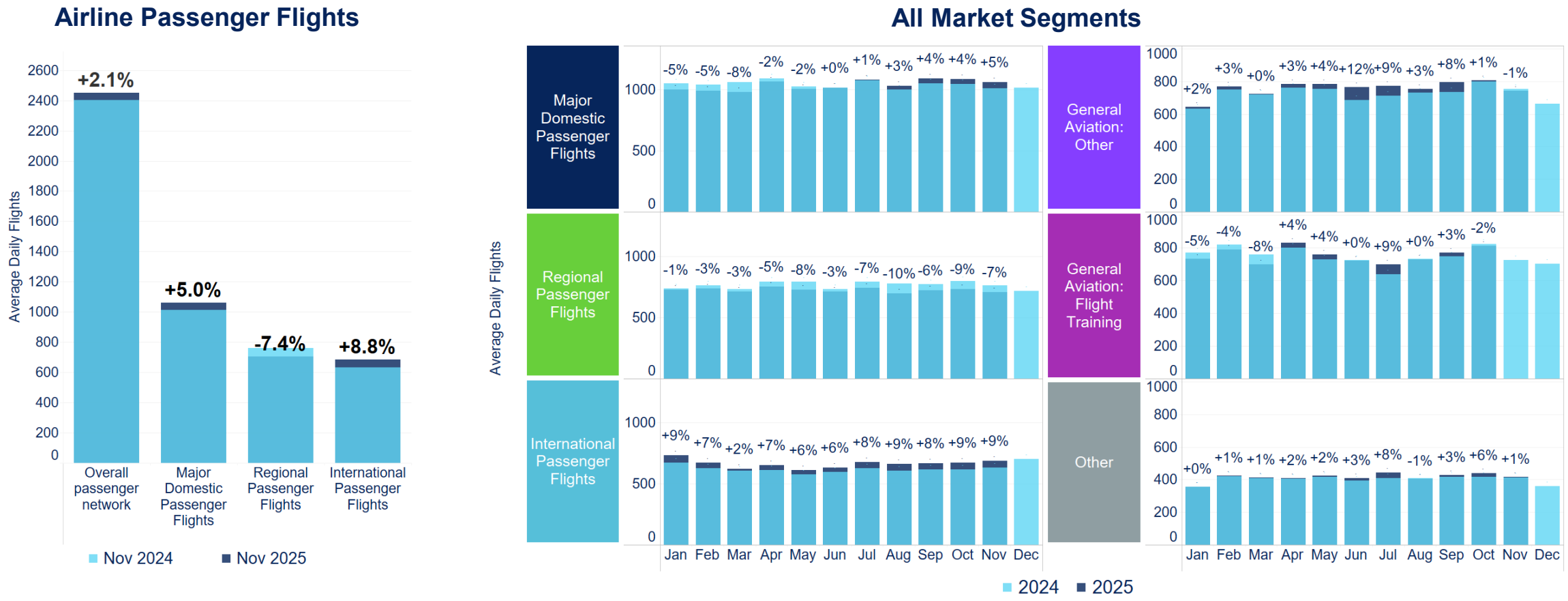
airservices australia

Australian aviation: domestic and international markets

State of Australian aviation growth

In November, the network recorded its strongest year-on-year flight growth for 2025, showing a trend of shoulder period growth outside of peak seasons. Melbourne, Brisbane, and Adelaide saw 5–8% higher flight volumes, driven by major domestic leisure events such as the Spring Racing Carnival, music tours, motor sports finals, and strong international demand. Throughout 2025, peak demand has become more frequent, led by leisure travel, small and medium-sized business activity, and the resources sector.

Figure 11. Year-on-year growth in average daily flights by for the passenger flight network in November 2025 (left) and monthly for all market segments (right).

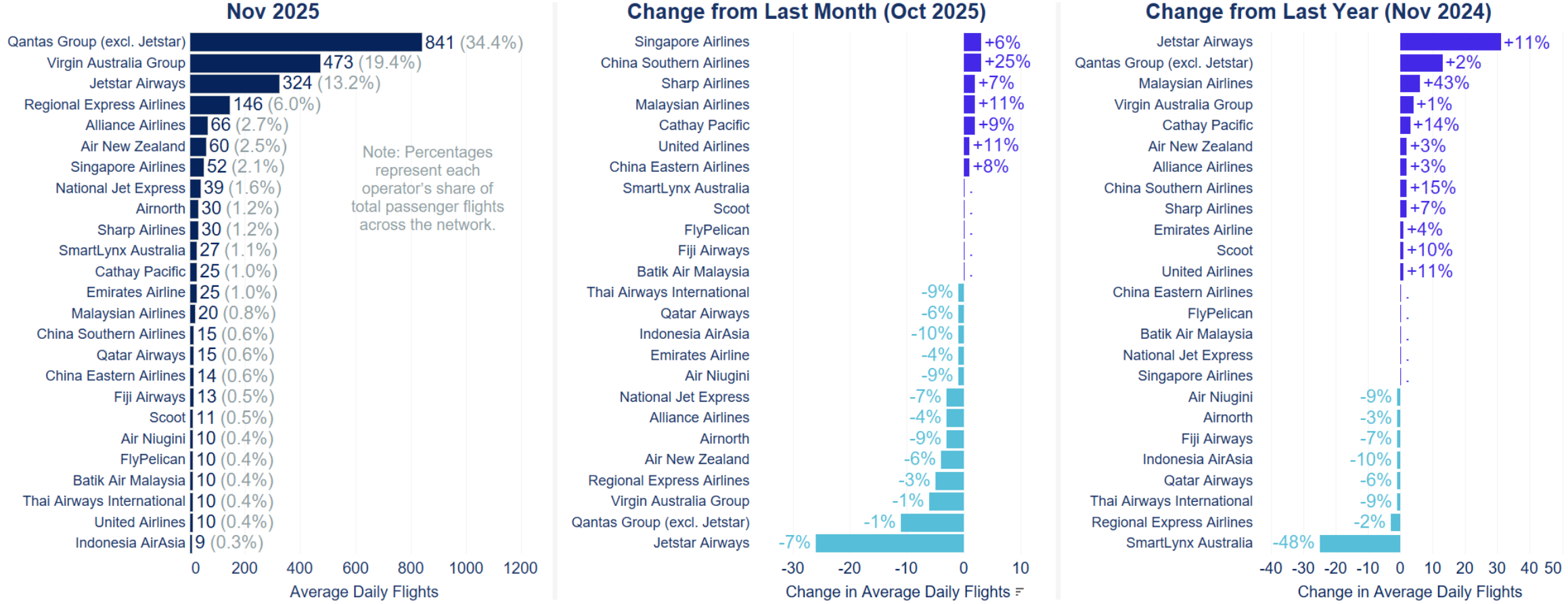


Source: Airservices ODAS (excludes helicopters).*General Aviation: Flight Training* is one month in arrears.

Top aircraft operators

Operators serving short-haul international markets are accelerating growth, responding to strong demand for affordable travel. Chinese carriers have added flight frequency this month, ahead of launching new routes to capture a surge in leisure, visiting-friends-and-relatives, and trade demand for the peak holiday season. Long haul activity is set to increase, with U.S. carriers launching new transpacific routes in December to meet peak travel demand and boost freight connectivity.

Figure 12. Average daily flights by top operators (November 2025) and comparisons across two reference periods.

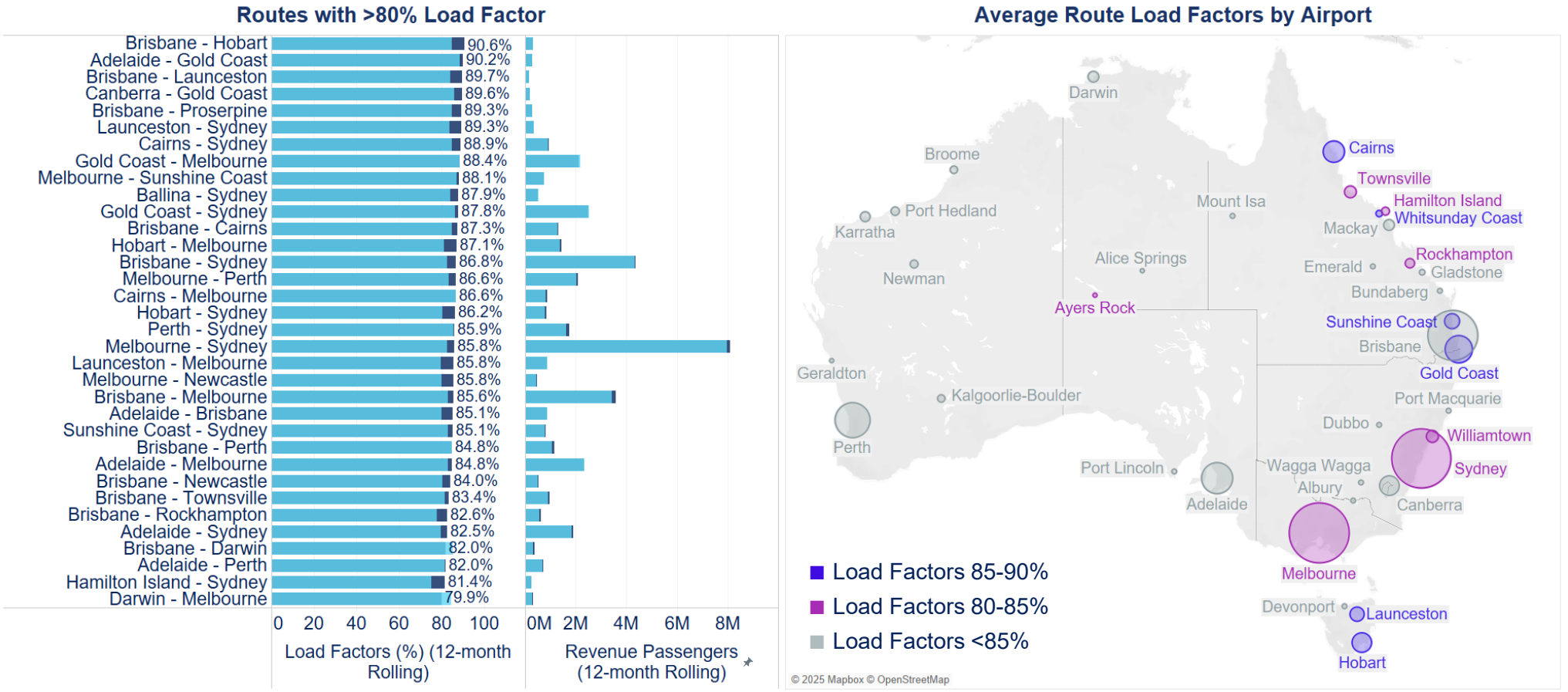


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

Passenger load factors in the domestic network have grown year-on-year, exceeding 85% on major domestic routes and projected to reach 98% on airline networks in the upcoming peak holiday period. Proactive sharing of peak demand insights and close collaboration across the aviation ecosystem are enhancing preparedness and response to network disruptions.

Figure 13. Domestic passenger routes with at least 80% load factor in 2025, including load factors and revenue passengers in 2024 and 2025 and change (left) and load factors by airport in 2025 (right).



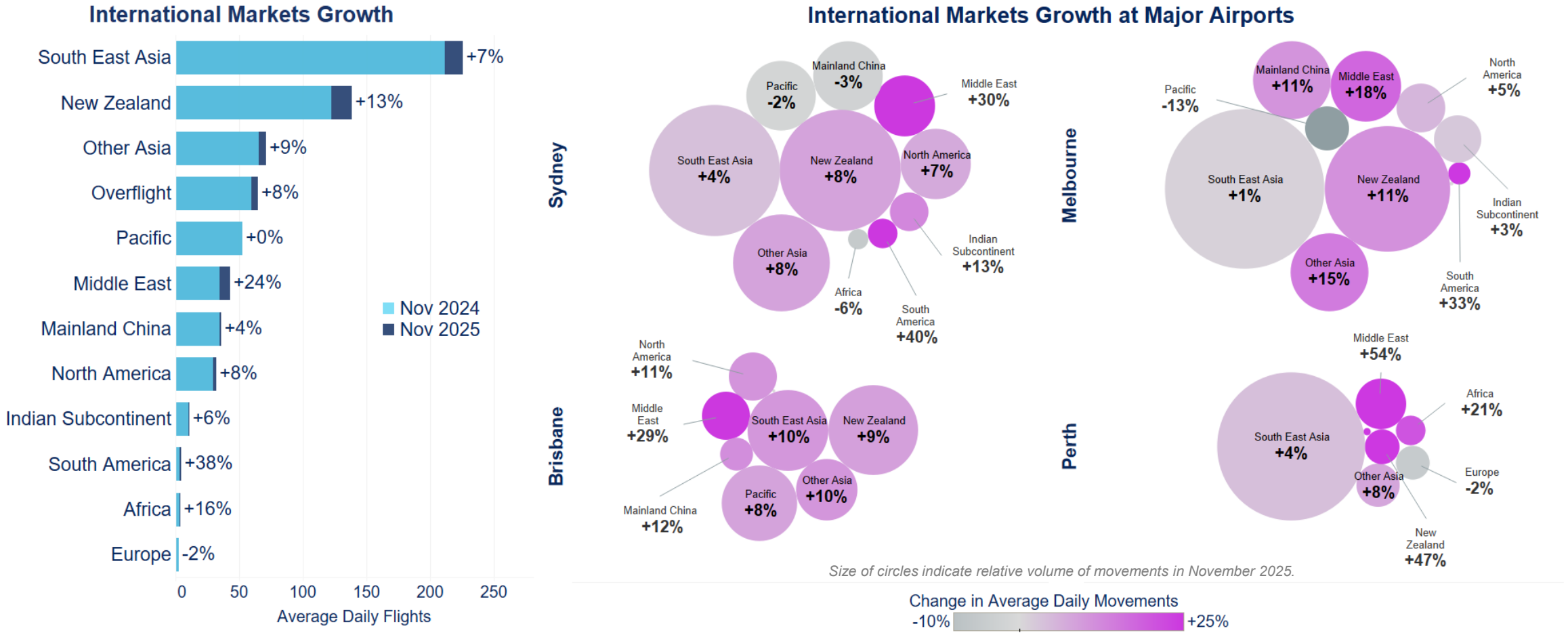
Size of circles indicate relative volume of passengers in 2025.

Source: BITRE (website) with data to September 2025, as at 4/12/2025.
BITRE data only includes top domestic routes with an average exceeding 8,000 passengers per month over the previous six months where two or more airlines operate in competition.

International markets

International travel continued to grow strongly in November, led by long-haul markets to the Middle East and across near-neighbour destinations such as New Zealand and Southeast Asia across major capital city airports. Airlines are introducing new routes to capture rising leisure and trade flows, including a West Coast - Philippines service enabled by next-generation aircraft.

Figure 14. Comparison of international markets growth (left) and international markets growth at major airports (right) for November 2025 vs November 2024 by movements.

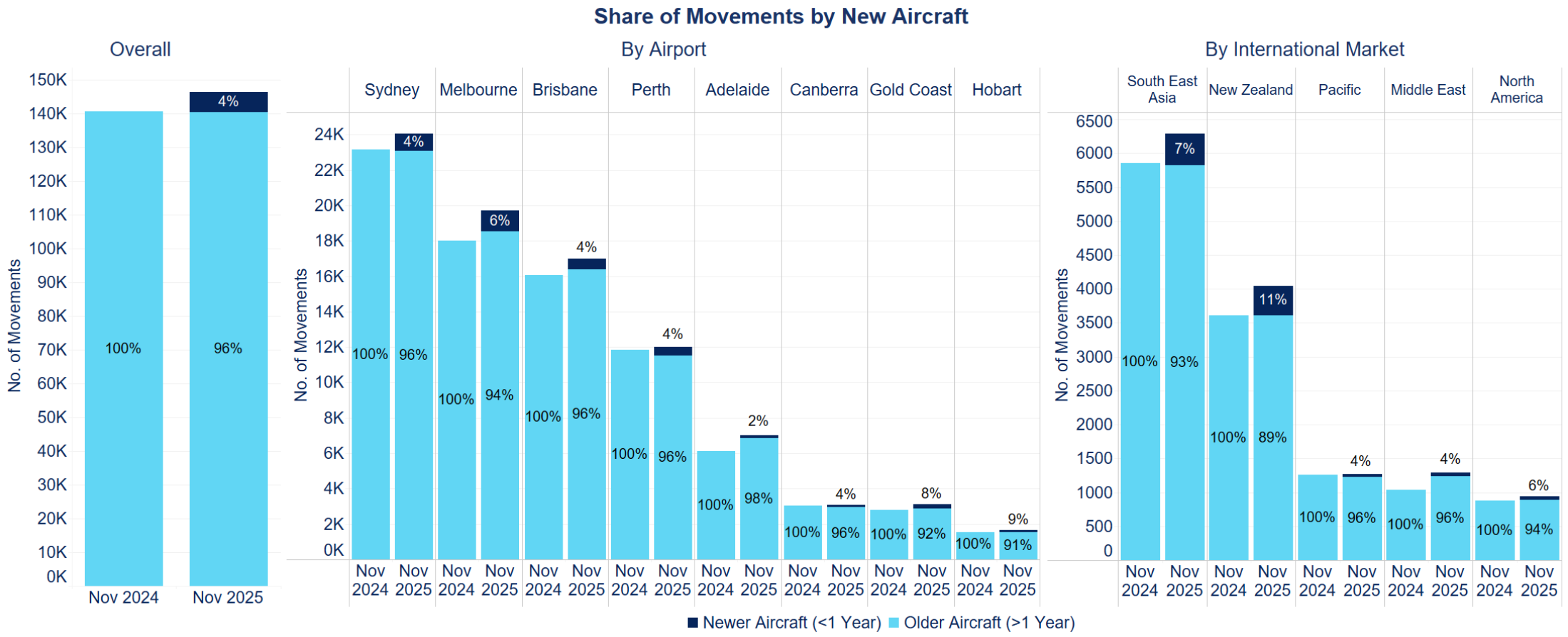


Source: Airservices ODAS (includes airline flights only). Overflights are those transiting the airspace without landing.
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

November continued Australia's fleet renewal as ERJ190-E2, A220, and A321XLR entered service, with new aircraft less than 1 year old accounting for 4% of total flight volumes this month. On 29 November, a global A320 software issue caused service disruptions ahead of the holiday peak; however, domestic operations were restored the following day. Globally, carriers remain focused on maintaining capacity and efficiency as more A320s return to service and managing potential industry impact of future A320 deliveries.

Figure 15. Share of movements by new aircraft between November 2025 and November 2024 for the overall network (left) by airport (middle) and by international market (right).



Source: Airservices ODAS (includes airline flights only) and Centre for Aviation Fleet (CAPA) data, as of 4 December 2025.

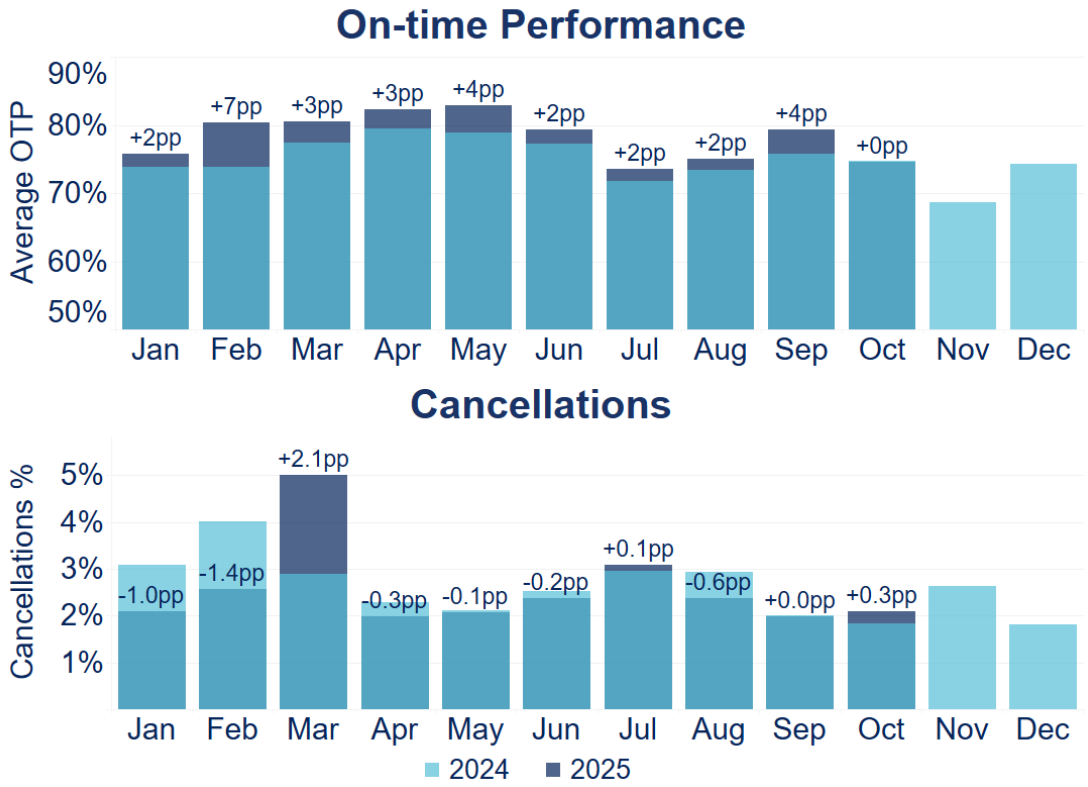
airservices australia

Australian aviation: network performance

Industry performance

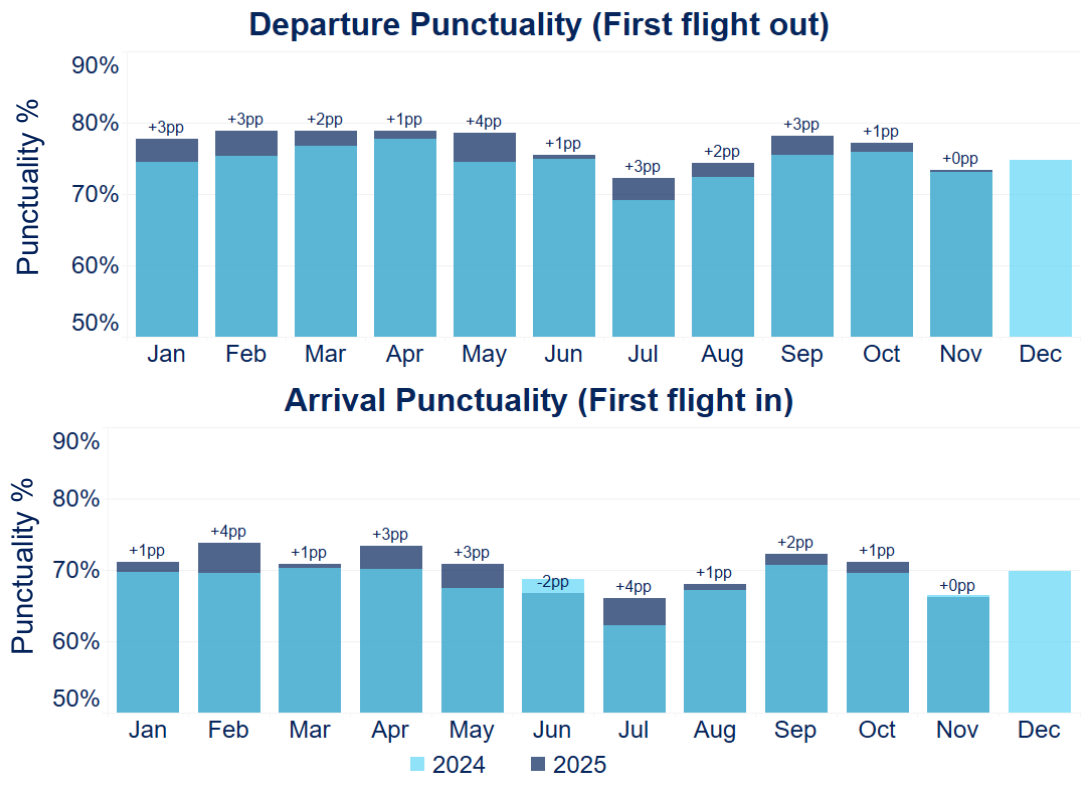
Industry on-time performance held steady compared to last year despite challenging weather. Weather-related disruptions are occurring earlier and more often this season, a key driver impacting network performance and reliability. Senior-level industry roundtables are meeting regularly, sharing insights and coordinating responses, ensuring cross-industry resilience to weather disruptions remains a consistent priority.

Figure 16. Total industry OTP* and cancellations, up to October 2025.



Source: BITRE (website). Data available up to October 2025 based on latest BITRE data release.
March 2025 performance was impacted by Tropical Cyclone Alfred.
* Average of departure and arrival OTP.

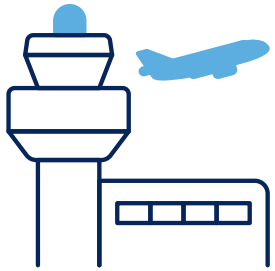
Figure 17. First wave punctuality to November 2025 as a lead indicator for OTP.

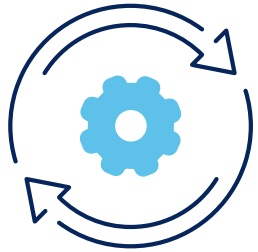


Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the Air Traffic Flow Management process.

Network management process

Airservices collaborates closely with airlines and airports to balance scheduled demand with available runway capacity. The Ground Delay Program (GDP) is an agreed industry plan activates as required for Sydney, Melbourne, Brisbane or Perth Airports, to enhance operational predictability and reduce airborne holding. The recently completed rollout of Airport Collaborative Decision Making (A-CDM) at Brisbane, Perth, Sydney and Melbourne is a significant change focussed on improving airport operations efficiency by changing the way that airports, airlines and air traffic control share accurate, real-time information. Improved local and national situational awareness, gate allocations, and take-off predictability is leading to better tactical planning and recovery, with time, cost and emissions reductions now being realised.





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** through 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. A-CDM is delivering on the ground efficiencies.

Air Traffic Flow Management (ATFM)

November brought several operational challenges, including a Melbourne Air Traffic Services Centre (ATSC) communications outage (18 Nov), a fire at Melbourne Airport (28 Nov), and a global Airbus A320 software issue (29 Nov). Severe weather such as thunderstorms in Sydney (on 3, 8, 15, 20 Nov) and Brisbane (on 1, 8, 24, 26, 27 Nov) also required the usage of Ground Delay Programs and tactical measures to minimise impacts in the network. Responses to these events highlighted the value of strong industry collaboration which are embedding lessons learned from challenging scenarios to strengthen network resilience and outcomes.

Figure 18. Key Ground Delay Program (GDP) metrics.

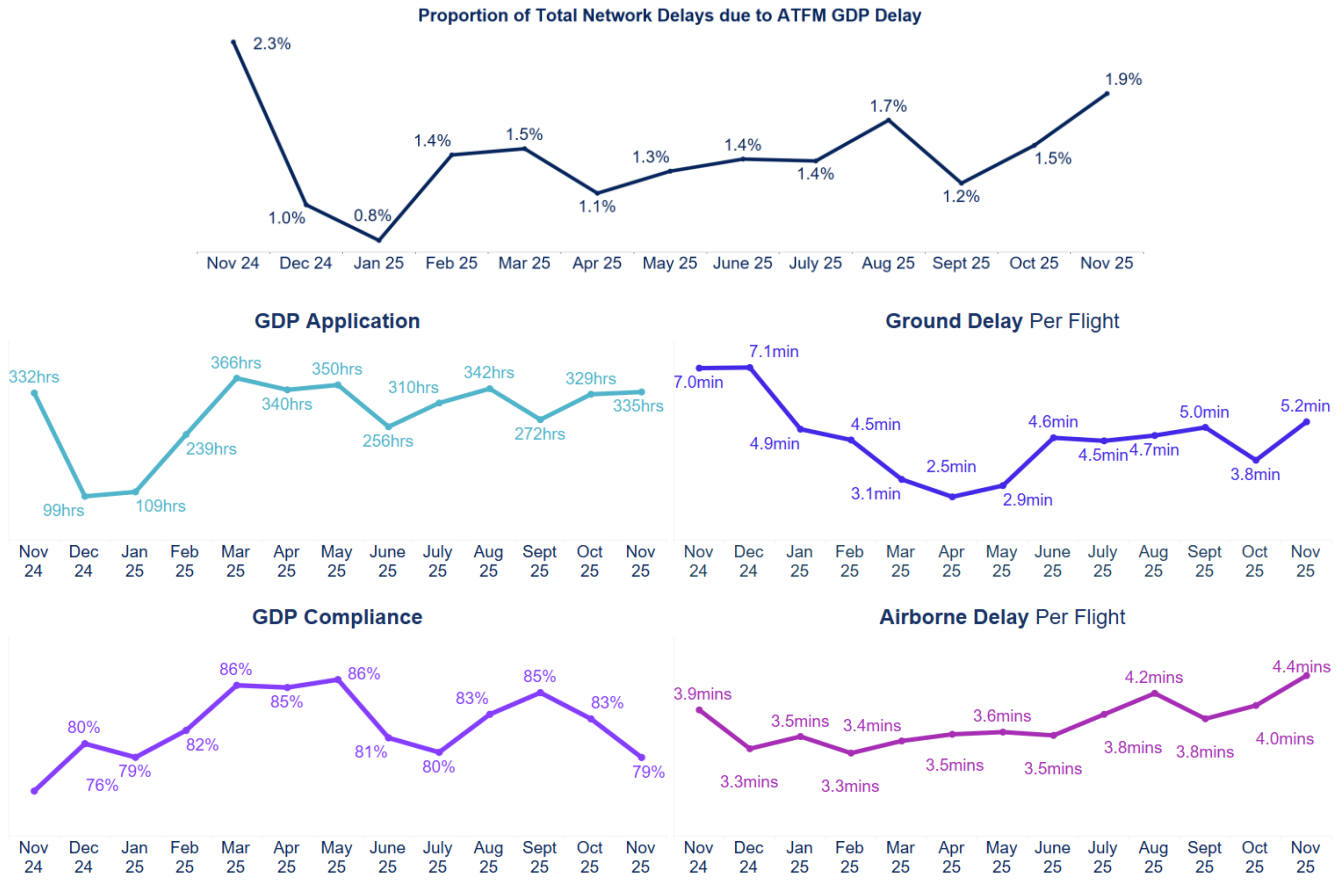
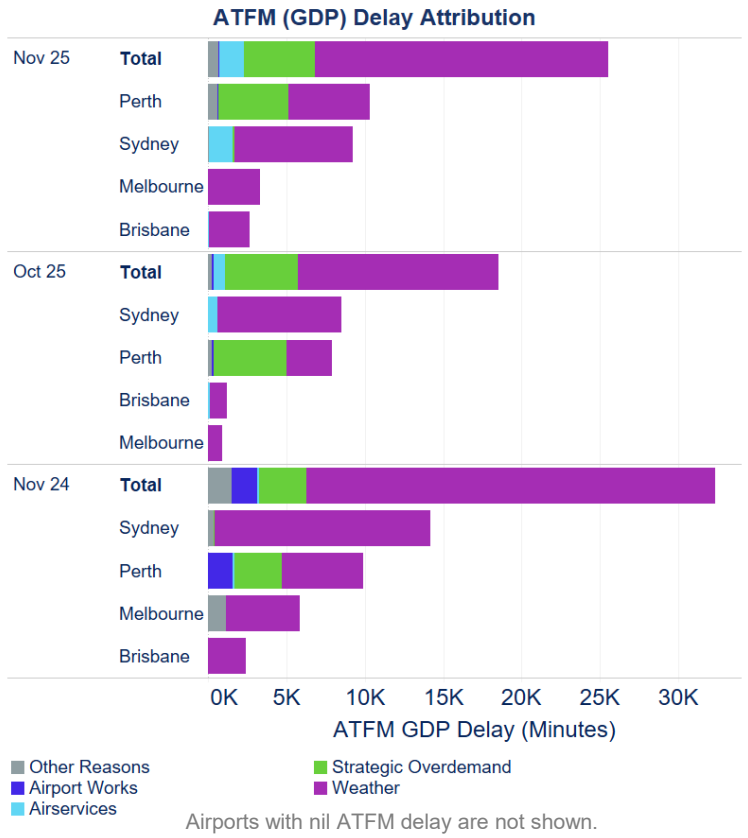


Figure 19. ATFM (GDP) delay by attribution overall and by airport.



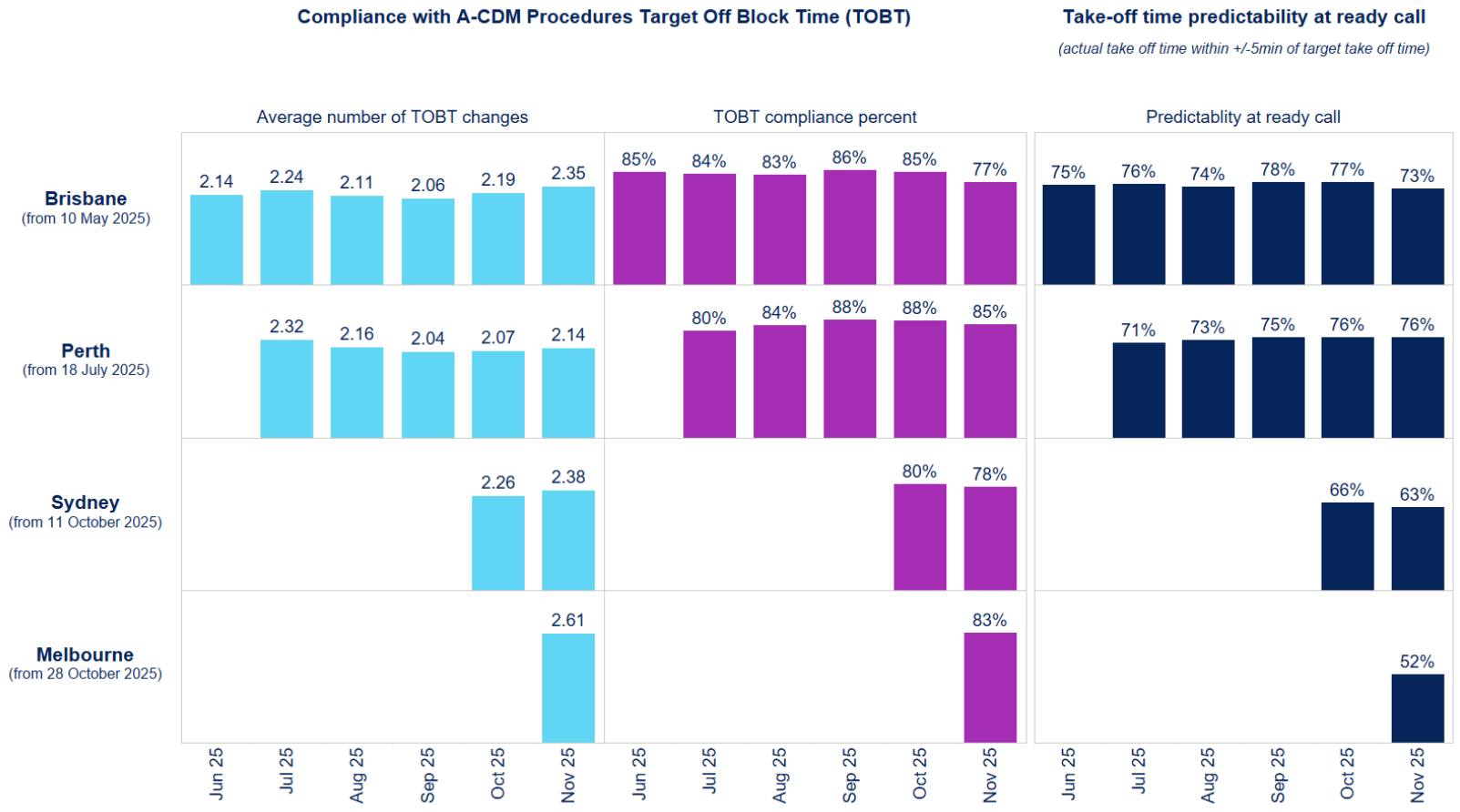
Airports with nil ATFM delay are not shown.

Source: Airservices ODAS. GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.
Airborne delay per flight is measured by the 75th percentile, ground delay per flight is measured by the average.

Airport Collaborative Decision Making (A-CDM)

The national rollout of A-CDM is now complete, with Melbourne Airport joining the program on 12 November. Industry partners have reported significant reductions in ground wait and taxi times, greater situational awareness for airline operations at capital city hubs and reduced manual workload. Airservices continues to work with airport and aircraft operators to track benefits, share lessons learned and refine system usage to optimise the benefits. Consistently strong airline compliance with Target Off Block Time (TOBT) has exceeded the global benchmark of 80%, and fewer TOBT changes has enabled increased take-off-time predictability.

Figure 20. A-CDM metrics at airports.

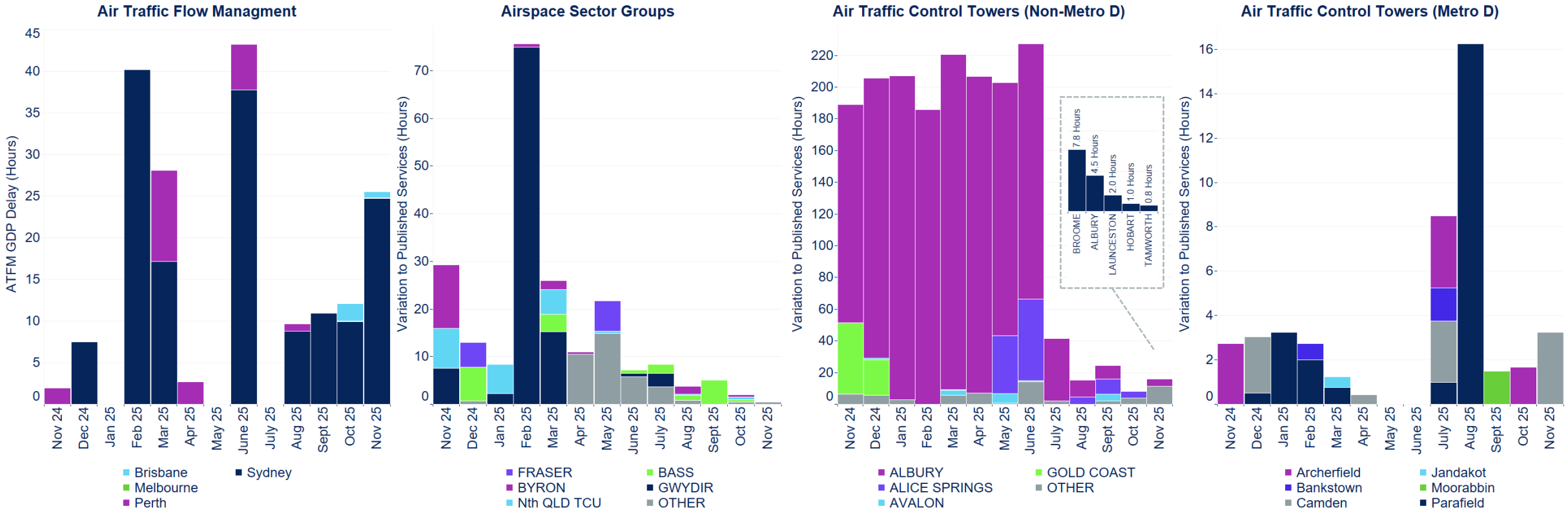


Source: Airservices ODAS and A-CDM.

Air traffic service provision

In November, airspace and tower service variations continued to show improvements year-on-year, reducing by 91%. Airspace service variations were limited to one location and tower service variations isolated to a few airports for short periods. However, unplanned staffing availability impacted Sydney Airport which contributed to 0.7% of total delays at the airport in November. Maximising controller availability by moving training outside of peak periods and utilising cross-trained staff are measures taken to further strengthen resilience for industry priority periods.

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

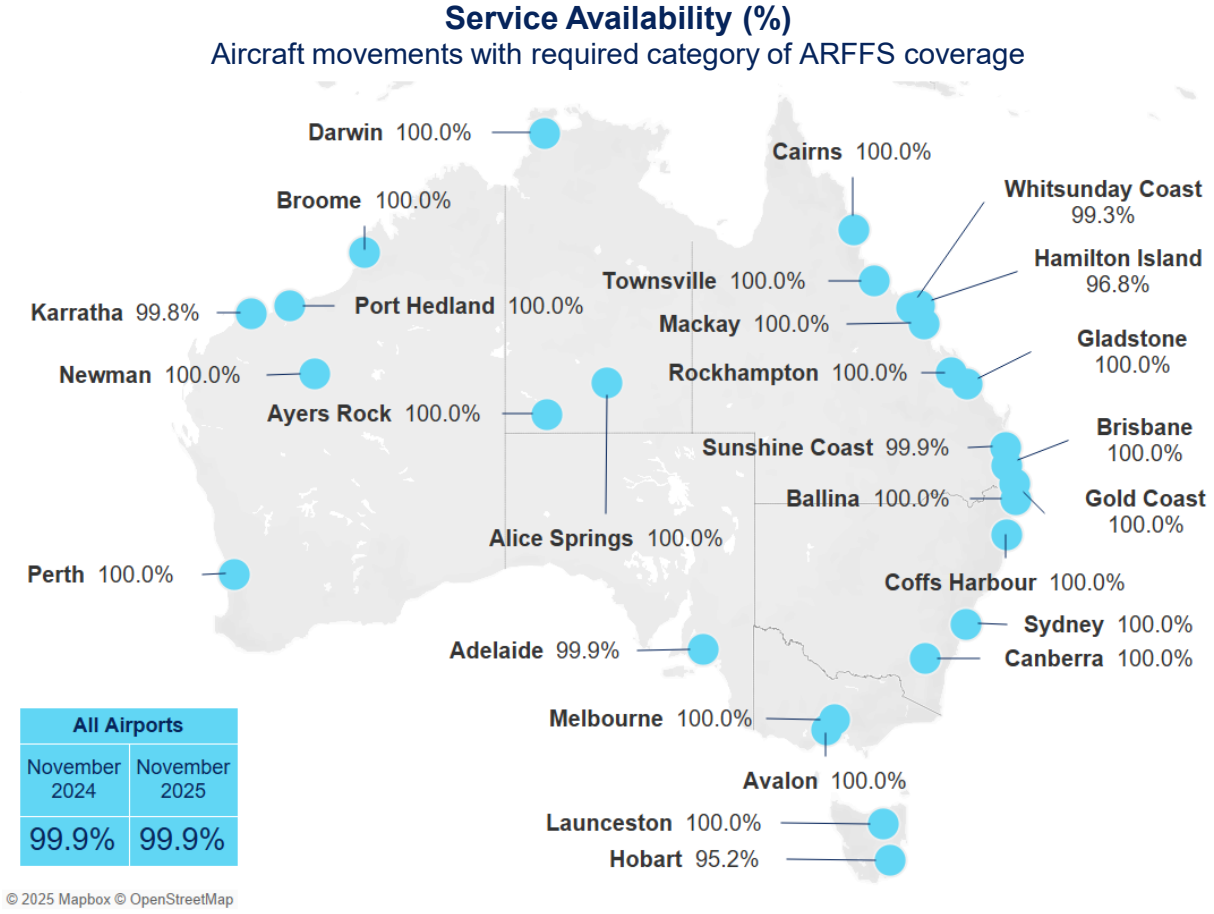


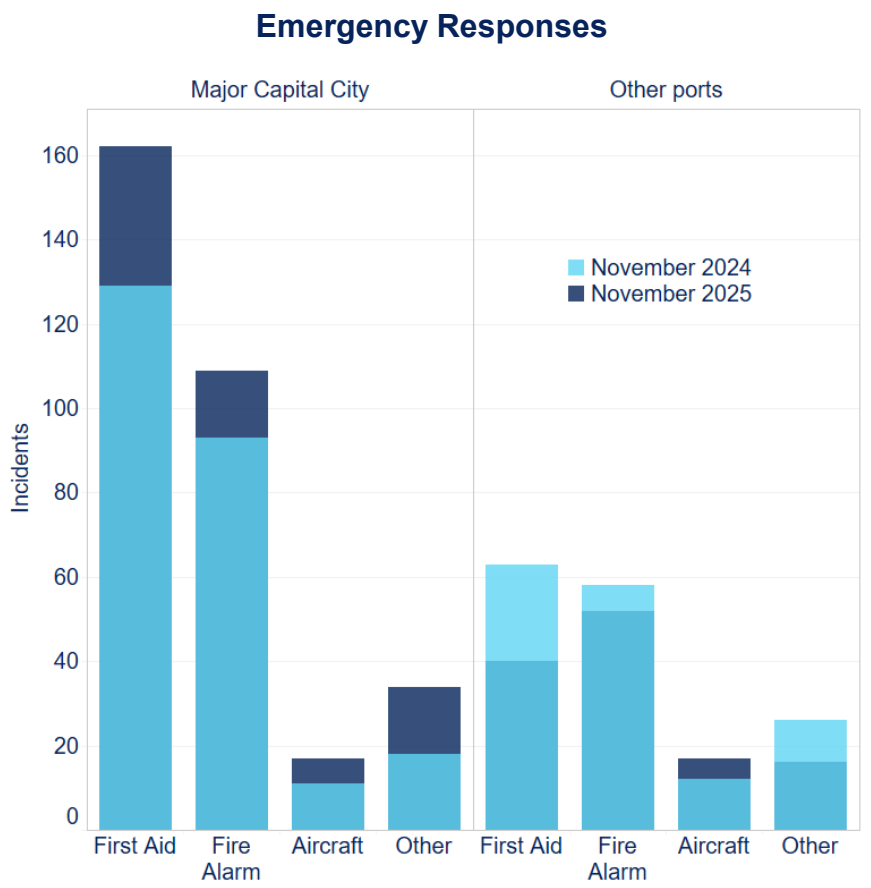
Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic 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.

Aviation Rescue Fire Fighting Service (ARFFS)

In November, ARFF service availability was at 100% across major capital city airports, ensuring essential support as emergency responses increased 30% year-on-year. On 28 November, ARFF crews provided response to a fire at Melbourne Airport, establishing incident command and coordinating evacuation, airside operations, and stakeholder engagement. Proactive resilience measures are being implemented to mitigate the impact of unplanned staffing unavailability and support high network-wide service availability.

Figure 22. ARFFS service delivery metrics, including service availability by airport and overall (left) and number of emergency responses by type (right).





Source: Airservices ODAS and ARFFS TRAX. Service availability is based on aircraft movements that received applicable category of ARFFS coverage. Airservices attributable causes in reduction of service include staffing and equipment (e.g. vehicles). Major capital city airports include Sydney, Melbourne, Brisbane, and Perth. In addition to aircraft-related incidents, fire alarms, and first aid, ARFF units also respond to a wide range of events - including hazardous materials, medical emergencies, security threats, non-aircraft fires, and mutual aid requests.

For more information

stakeholder@airservicesaustralia.com