Australian Aviation Network Overview

December 2025

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Contents

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

December 2025 marked a strong close to the year for Australian aviation, delivering the busiest Christmas travel period in five years alongside continued improvement across key operating metrics. Record flight activity, passenger volumes and load factors reflected sustained leisure-driven demand and favourable economic conditions, reinforcing the sector's growth momentum.

On 18 December, the network recorded 2,872 daily passenger flights, including 100 more flights than the busiest day in December 2024. During the month, international connectivity also expanded significantly, with over 10 global carriers introducing new routes and services, highlighting Australia's critical role in supporting tourism and trade.

Operational reliability remained a top priority, underpinned by proactive planning and transparent communication across airlines, airports and air traffic services. The senior-level industry roundtable forum proved pivotal, enabling real-time network visibility and coordinated decision-making to improve passenger experience. Aviation Rescue and Fire Fighting services maintained a high standard of availability across most locations as an essential part of the airport emergency response capability during this critical period.

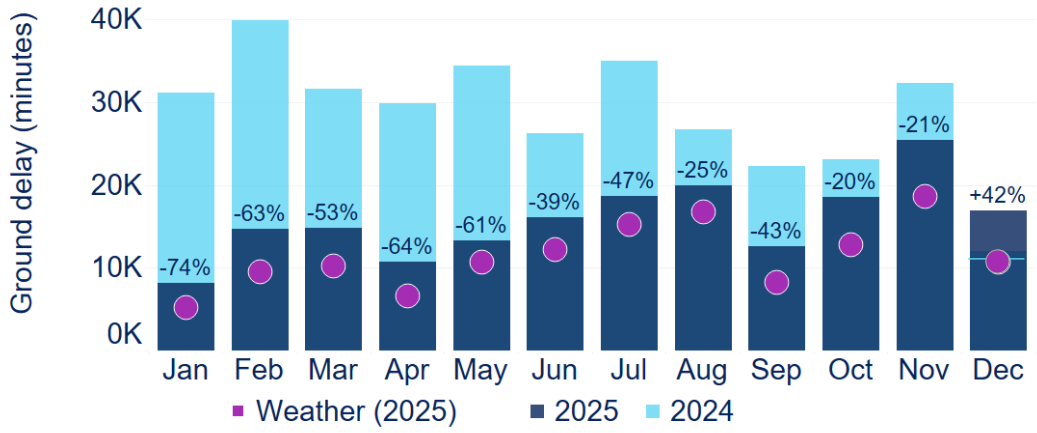
Airport Collaborative Decision Making (A-CDM) is now fully operational at the four busiest airports, delivering early industry benefits through more predictable turnarounds, improved fleet and crew planning, better gate and taxiway utilisation, and reduced congestion via data-driven traffic flow management. We are working with airline and airport partners to quantify these benefits holistically.

Strengthening workforce capacity remained our core focus throughout 2025, with 91 additional air traffic controllers endorsed over the last 12 months, exceeding the target of 85. Air traffic service variation hours in December were 74% lower than last year, and Airservices Air Traffic Flow Management (ATFM) attribution to total network delays remained low at 0.2%.

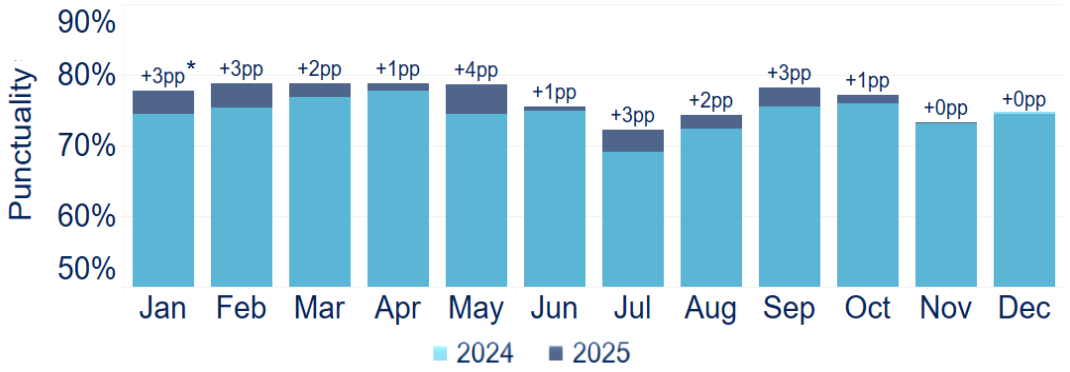
Despite our heightened focus on holiday resilience, unplanned absences resulted in some adhoc flow restrictions and service variations around Perth, Brisbane and Sydney. We are focused on active recruitment, training and cross-skilling to improve service outcomes for our customers and partners as we move into 2026.

Network performance snapshot (year-on-year comparisons)

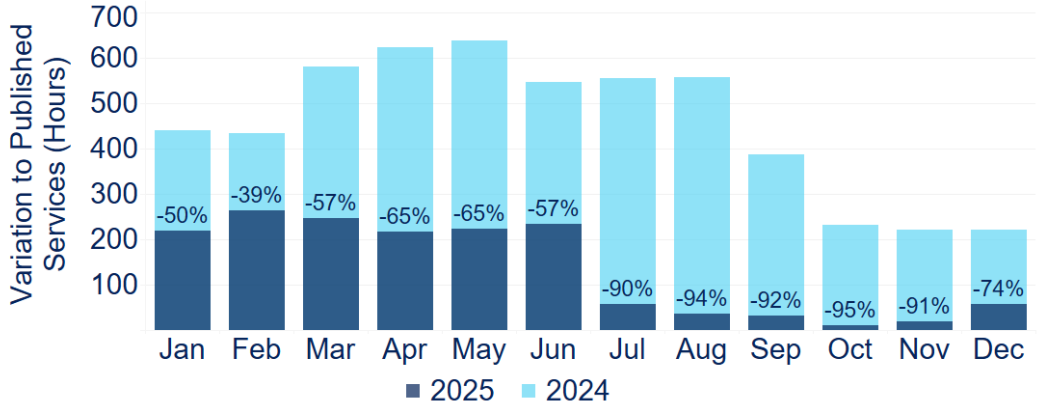
Total Air Traffic Flow Management Delays



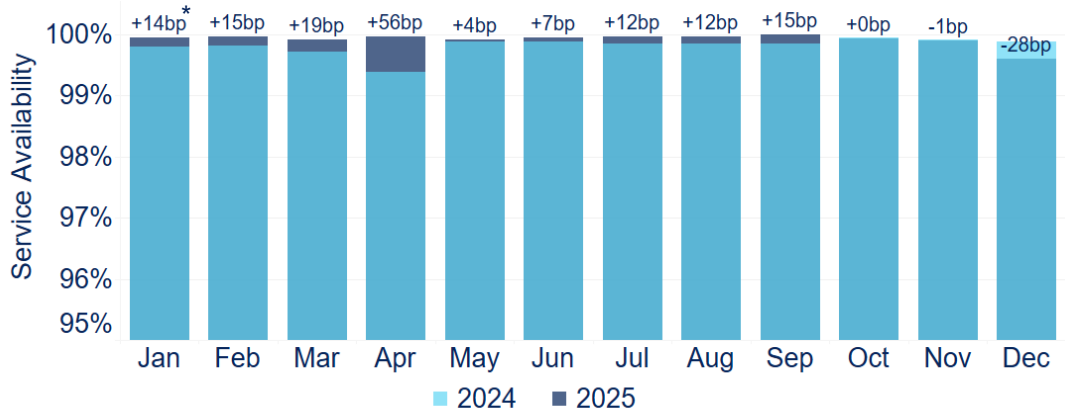
Departure Punctuality (First Flight Out)



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.

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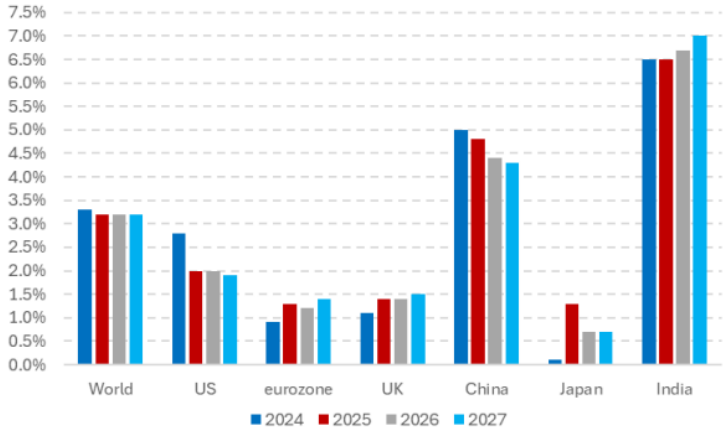
Economic and social trends

Economic factors

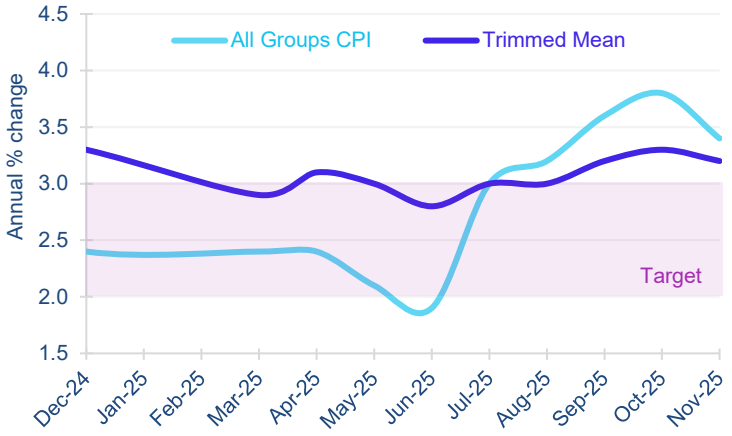
The Australian aviation sector is experiencing resilient growth, supported by low unemployment, sustained private consumption and moderating inflation, despite mixed global economic conditions. However, capacity and supply chain constraints and geopolitical uncertainty remain key risks for the sector.

Figure 1. Global economic outlook for major economies.



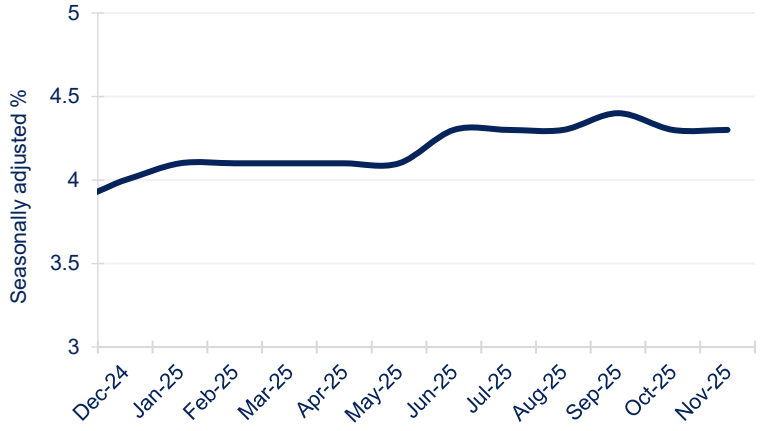
Source: S&P Global Ratings via CAPA.

Figure 2. Consumer Price Index (CPI) Indicator.



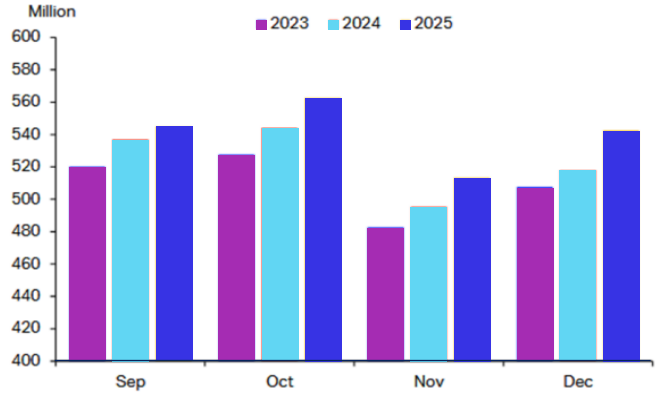
Source: ABS (website) – latest data to November 2025 as at 7/01/2026

Figure 3. Unemployment rate.



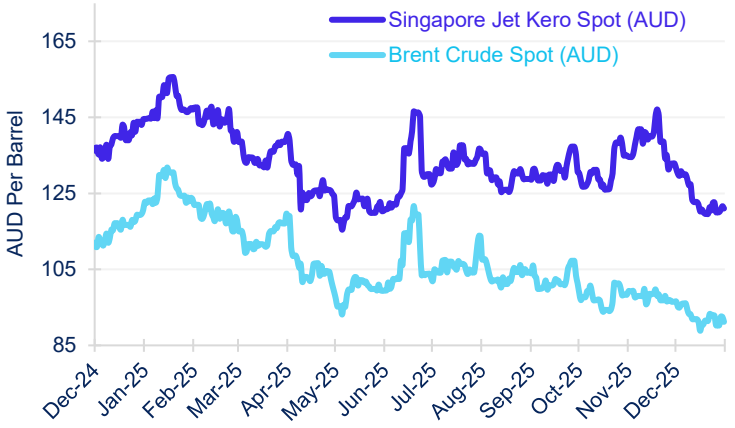
Source: ABS (website) – latest data to November 2025 as at 11/12/2025

Figure 4. Global airline industry scheduled seats.



Source: IATA Sustainability and Economics + OAG schedules via CAPA.

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



Source: Bloomberg – latest data as at 7/1/2026

Figure 6. Domestic airfares (real best discount).

Source: BITRE (website) – latest data as at 31/12/2025

Social factors: aircraft noise

Despite the holiday peak travel period, the overall number of aircraft noise complainants nationally declined in December. Community feedback remained active at locations with engagement activities, including the Melbourne Airport Noise Sharing Plan consultation and Sunshine Coast Post Implementation Review (PIR) recommendations implementation. Encouraging quieter aircraft technology, promoting operational compliance to noise abatement procedures and transparent engagement are ongoing priorities for the aviation ecosystem.

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

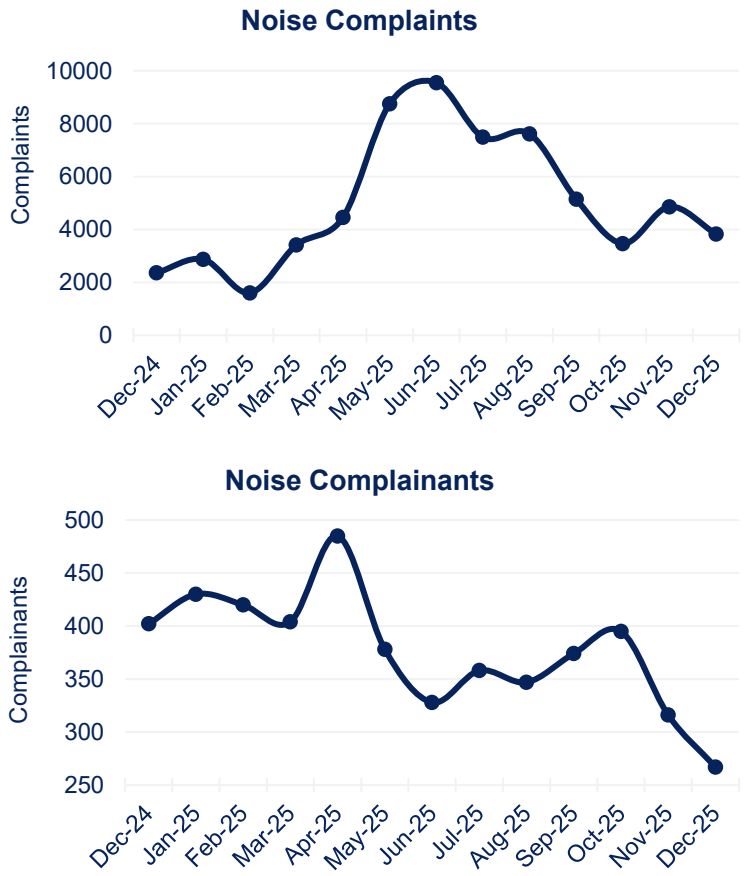


Figure 8. Aircraft noise complainants by key airports (December 2025 and December 2024, and change).

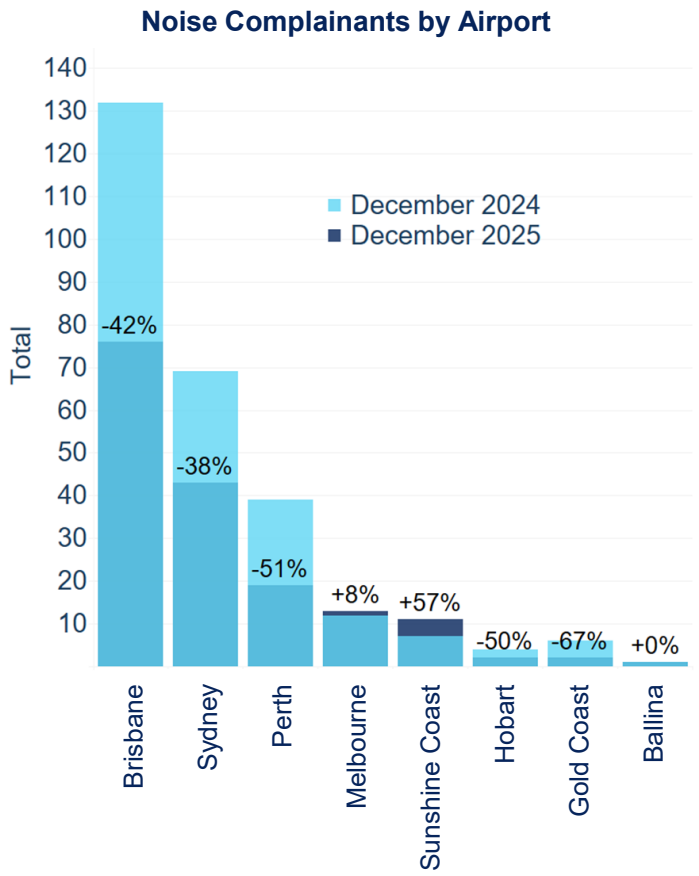
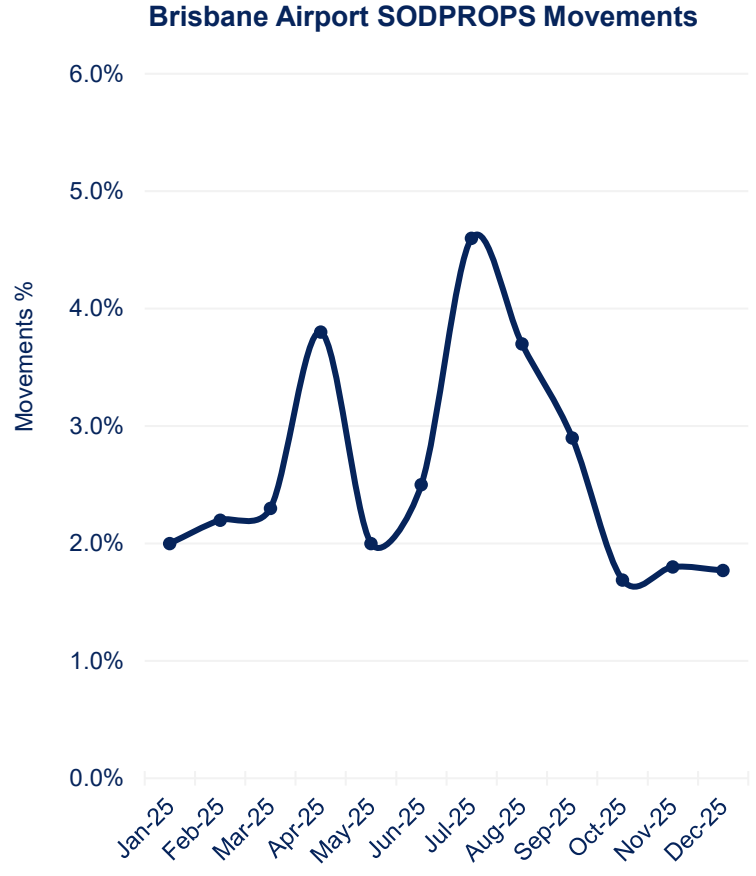


Figure 9. Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) usage by movements at Brisbane.

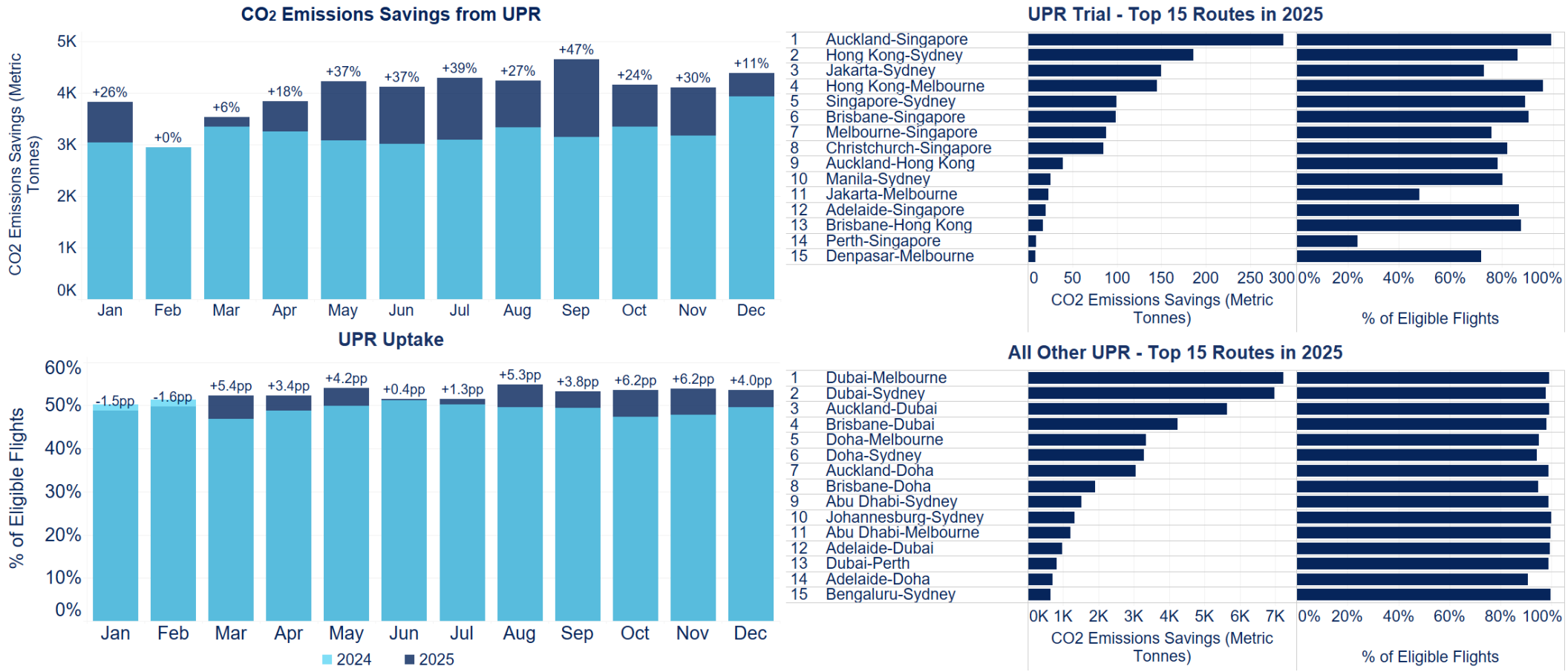


Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool (website).
The decrease in SODPROPS usage at Brisbane Airport between July to December 2025 was primarily due to variable weather conditions limiting opportunities for implementation.

Social factors: aircraft emissions

In upper airspace away from residential areas, the focus on operational efficiency such as the expansion of User Preferred Routes (UPRs) is delivering sustainability benefits. Despite higher international traffic volumes, December saw an 11% year-on-year increase in CO_2 savings from UPRs, with most Asia Pacific trial routes achieving savings exceeding 100 tonnes.

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 other UPR routes in 2025 (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.

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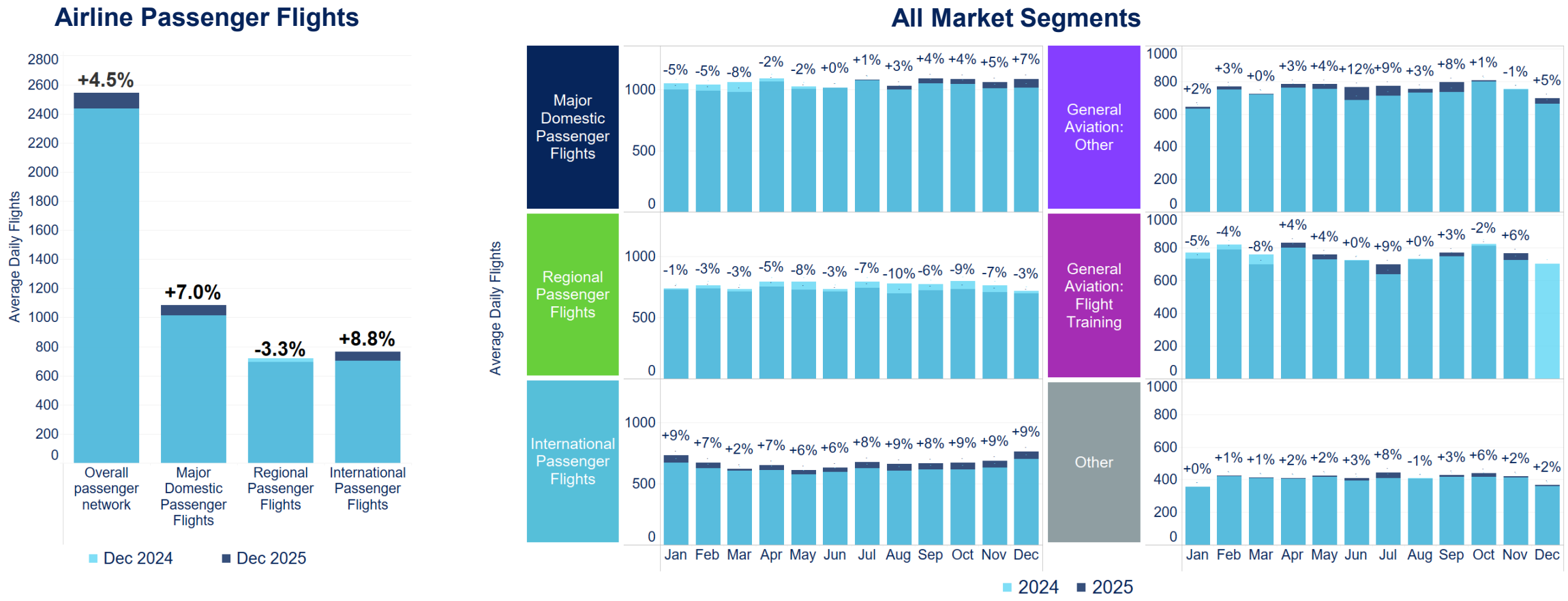
Australian aviation: domestic and international markets

State of Australian aviation growth

December 2025 marked a standout month for Australian aviation, with domestic and international passenger traffic recording their strongest year-on-year growth and national network activity at its busiest level in the last five years. Holiday travel and entertainment events (such as Lady Gaga, AC/DC concerts and the Ashes) continue to drive leisure-led growth across the industry.

Figure 11. Year-on-year growth in average daily flights – airline passenger flights in December 2025 compared to December 2024 (left) and monthly for all market segments (right).

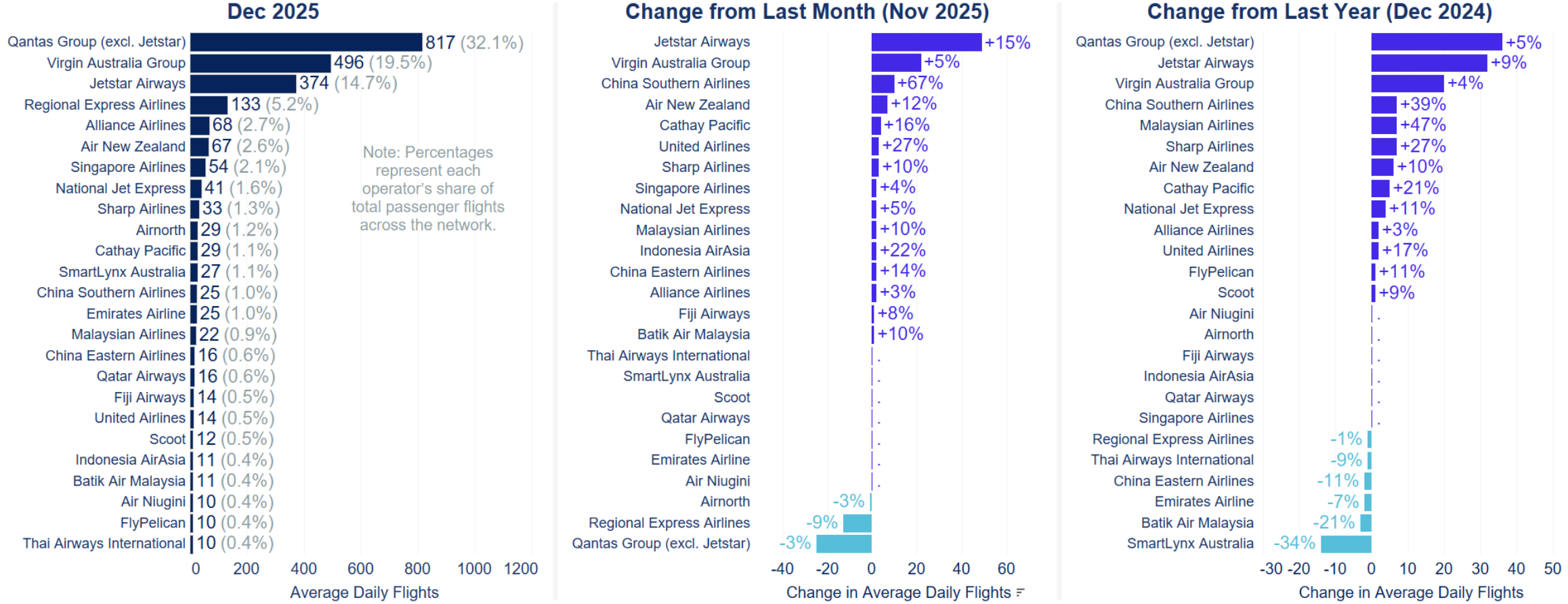


Source: Airservices ODAS (excludes helicopters).*General Aviation: Flight Training* is one month in arrears.

Top aircraft operators

Growth this month has been supported by major network carriers expanding services across China, Malaysia, New Zealand, Japan and United States. This reflects seasonal strength in short and medium-haul travel and recovery in key long-haul markets.

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

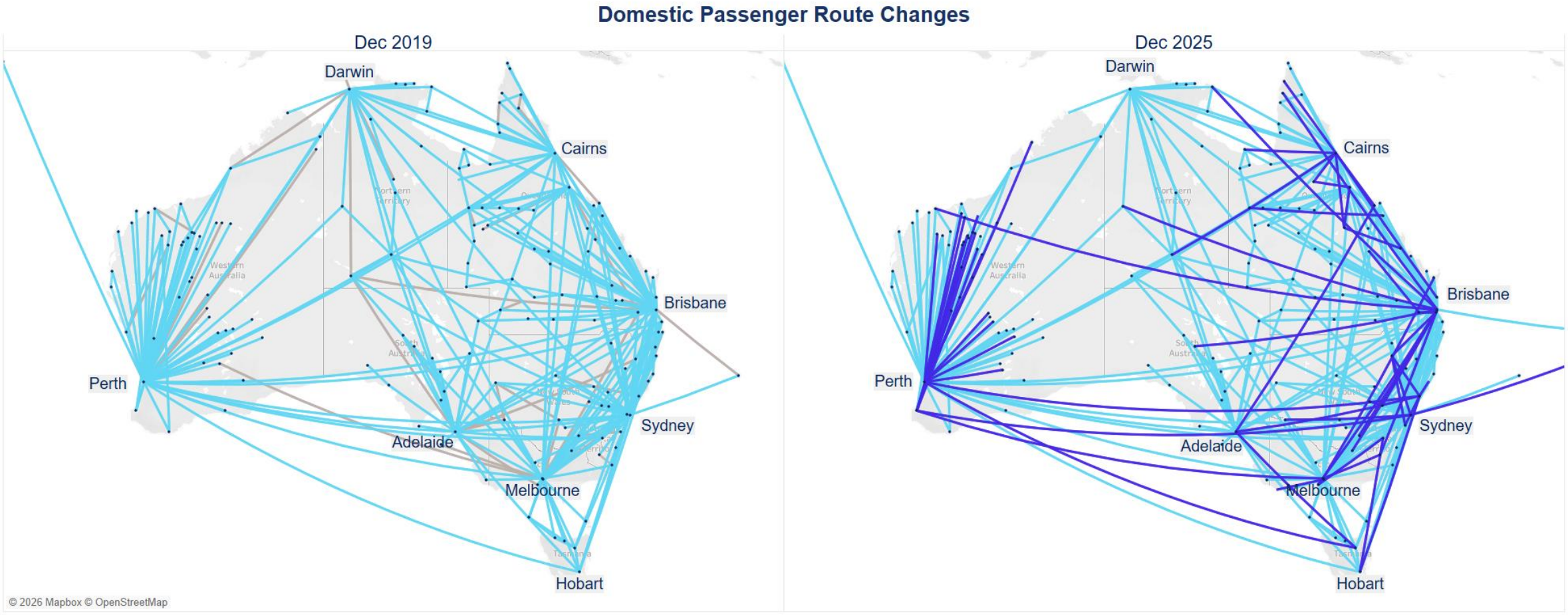


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

As the network reaches its busiest level in five years, its structure is also evolving. Compared to the pre-pandemic hub-and-spoke model, strong east-coast corridors are now complemented by expanded point-to-point services, particularly direct capital-to-regional routes, east-west links and coastal tourism gateways.

Figure 13. Domestic passenger route changes between December 2025 and December 2019.

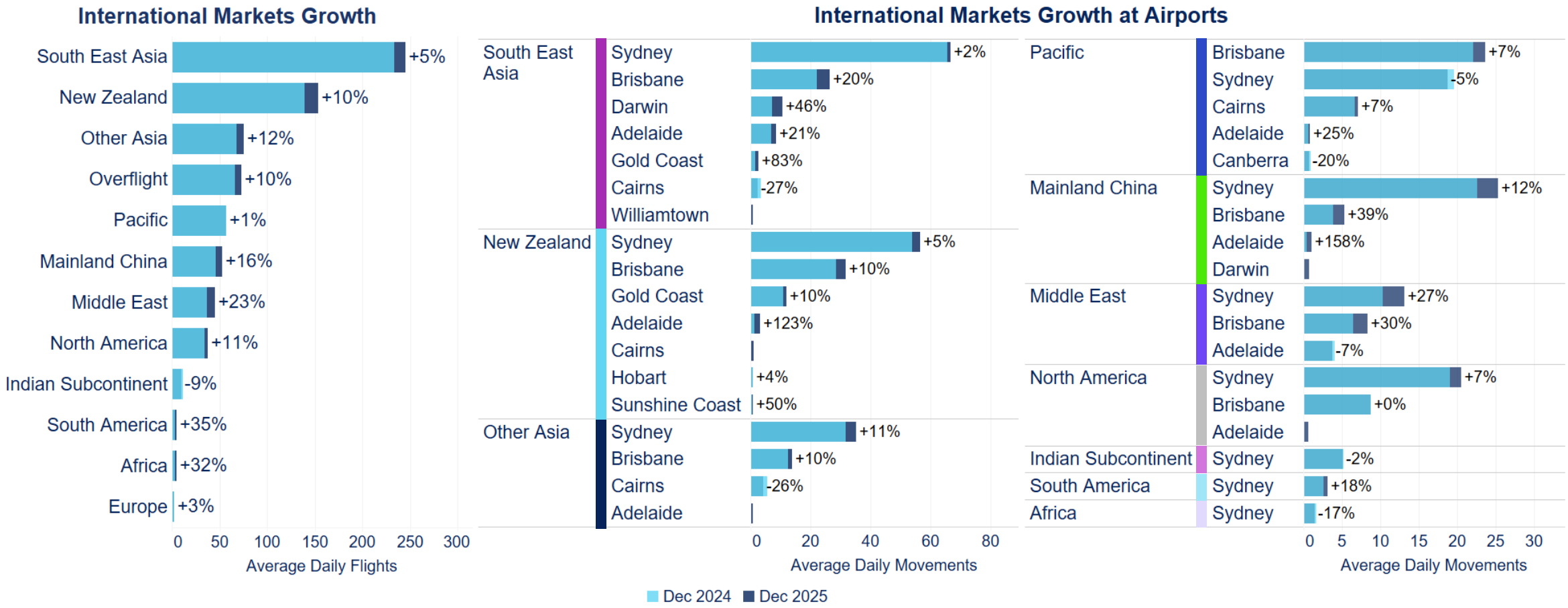


Source: Airservices ODAS (includes airline flights only). Routes with less than 8 flights per month are not shown.

International markets

December 2025 saw strong ramp-up in capacity and demand from the Asia Pacific and Middle East markets, benefiting not only the major hubs but also secondary gateways such as Adelaide and Darwin. This is consistent with the global trend where international travel growth is being led by these two regions.

Figure 14. Growth of international flights at key airports for December 2025 vs December 2024.

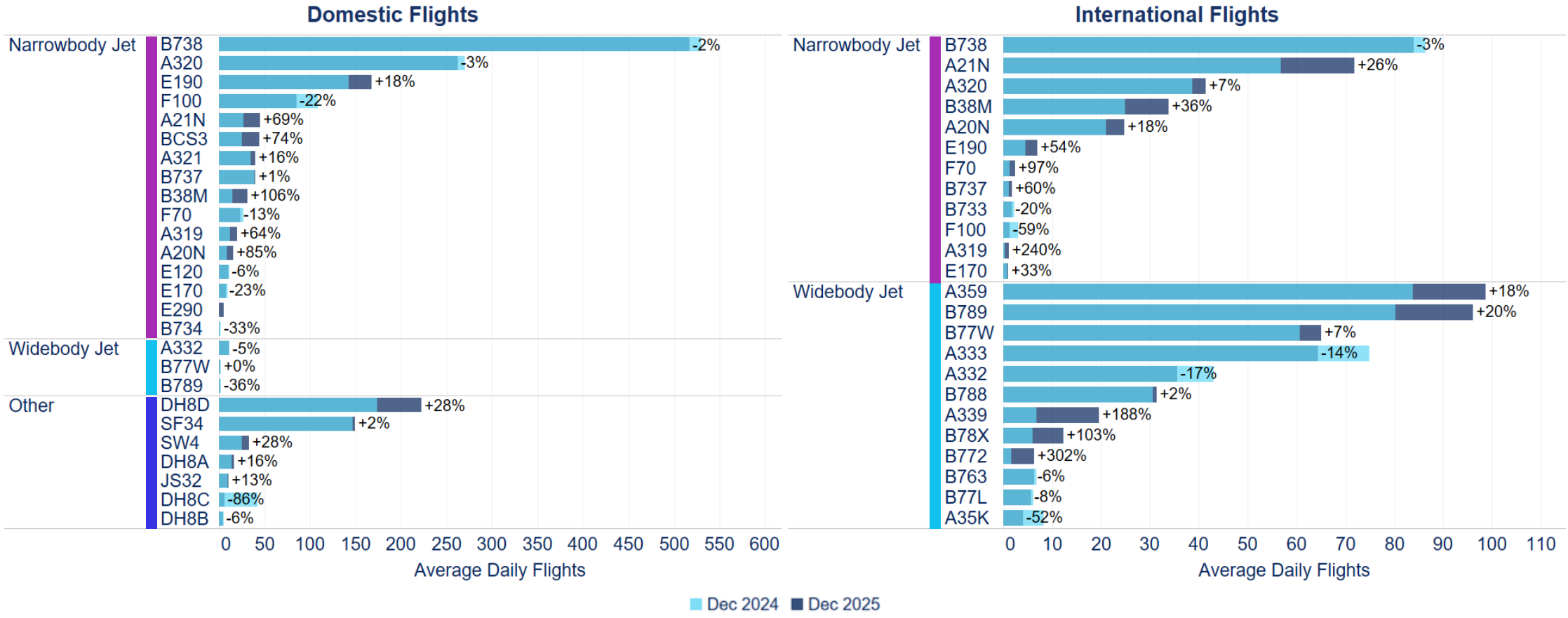


Source: Airservices ODAS (includes airline flights only). Overflights are those transiting the airspace without landing.
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

Notwithstanding the ongoing aircraft supply constraints, some airlines are increasing capacity by deploying newer aircraft such as the Airbus A350 and Boeing 787 to cater to customer demand, which in turn deliver quieter and greener operations than older aircraft types. In the domestic network, 23 new* aircraft are now operating on 60 routes as fleet modernisation progresses.

Figure 15. Change in aircraft types between December 2025 and December 2024 by domestic flights (left) and international flights (right).



Source: Airservices ODAS (includes airline flights only). Only aircraft with at least 1 average daily flight are shown.
* New aircraft less than 1 year old.

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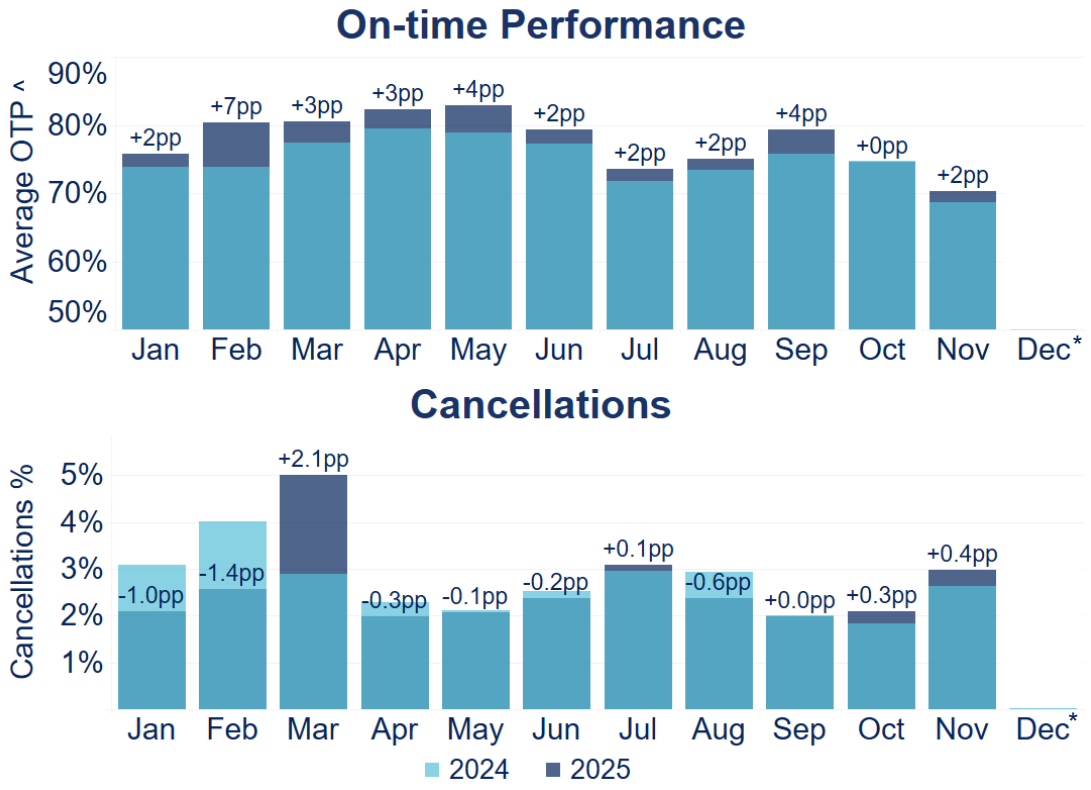
Australian aviation: network performance

Industry performance

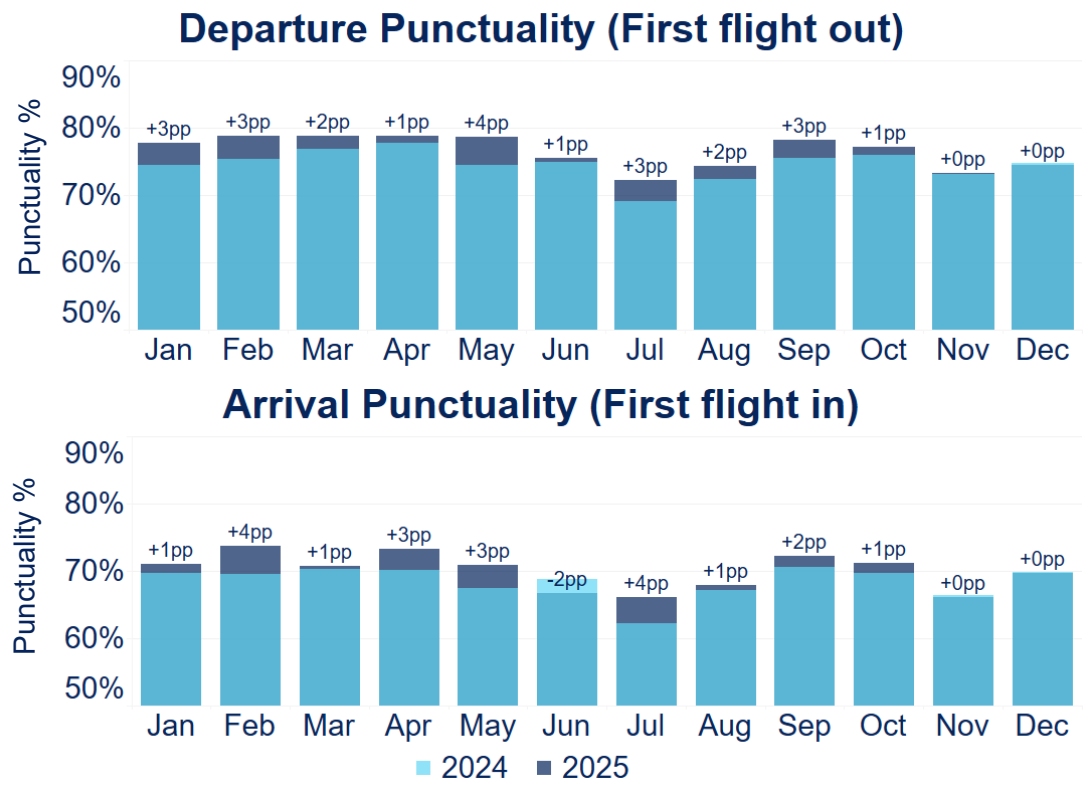
Early summer operations faced more frequent weather disruptions than last year, but overall industry on-time performance remained stable around 70%. This outcome reflects strong cross-industry collaboration, including the senior-level industry roundtable forum activated for peak demand and disruption events. It also demonstrates a continued focus on traveller experience supported by schedule buffers, additional operational resources and proactive passenger communication during the peak travel season.

Figure 16. Total industry OTP^ and cancellations, up to November 2025.



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

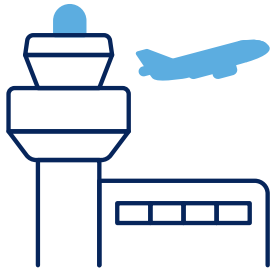
Figure 17. First wave punctuality to December 2025 as a lead indicator for OTP.

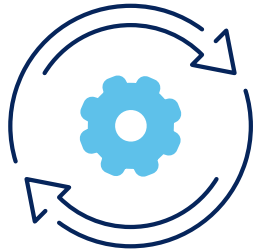


Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the Air Traffic Flow Management process.

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 activated 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)

In collaboration with airlines and airport partners, ATFM decision-making and governance were further strengthened throughout December. As summer afternoon weather disruptions became more frequent, the senior-level roundtable focused on adapting plans to changing conditions. On some occasions, Ground Delay Programs (GDPs) were applied in the morning rather than the previous night to optimise network capacity and disruption responses. Ground delay per flight remained low at 4.3 minutes on average for the month.

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

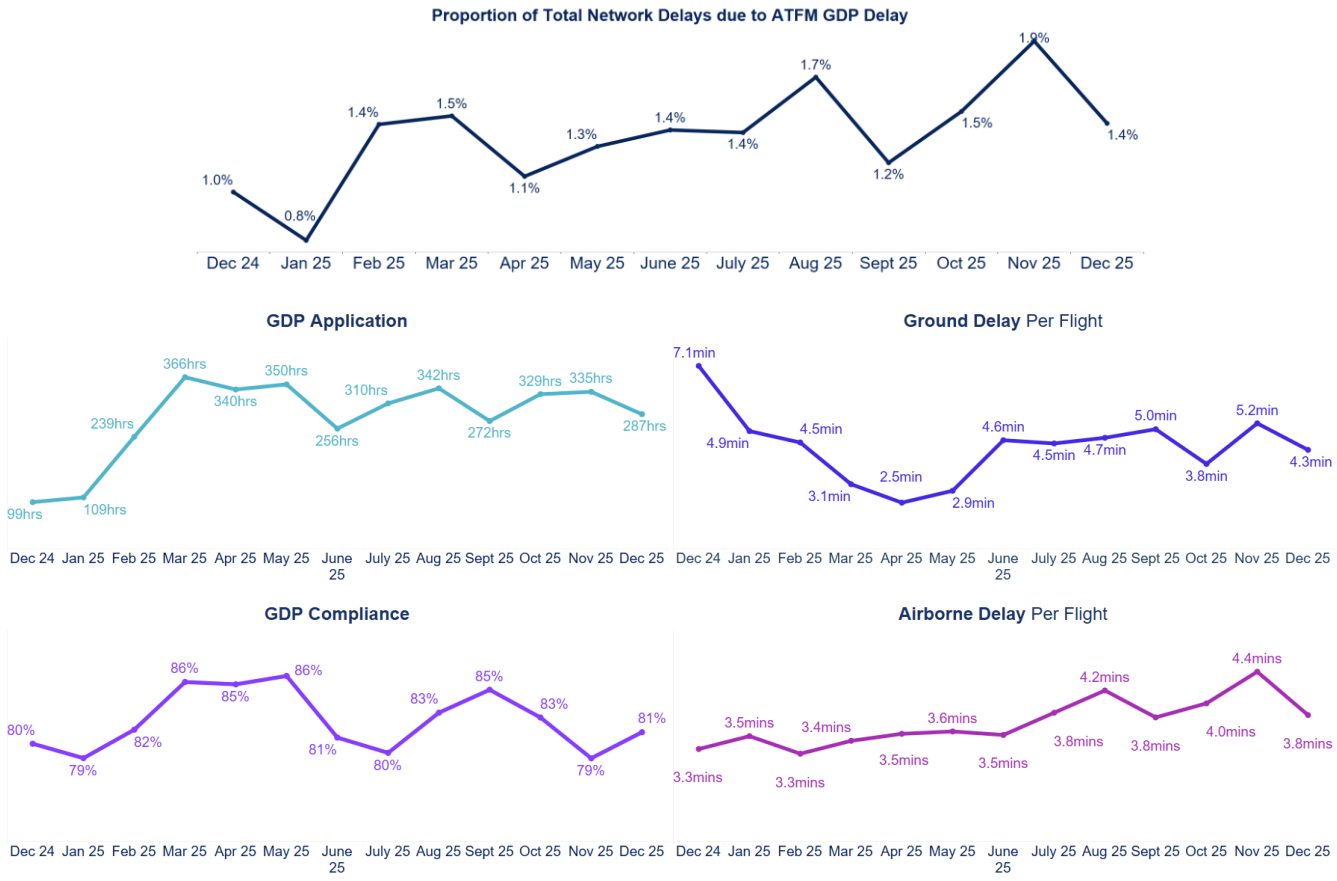
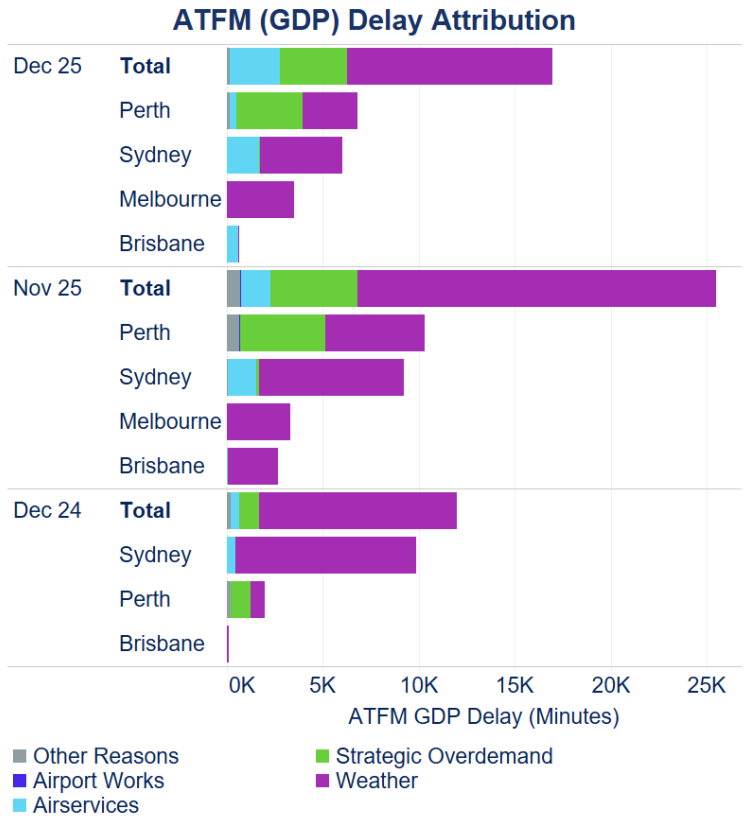


Figure 19. ATFM (GDP) delay by attribution overall and by airport.



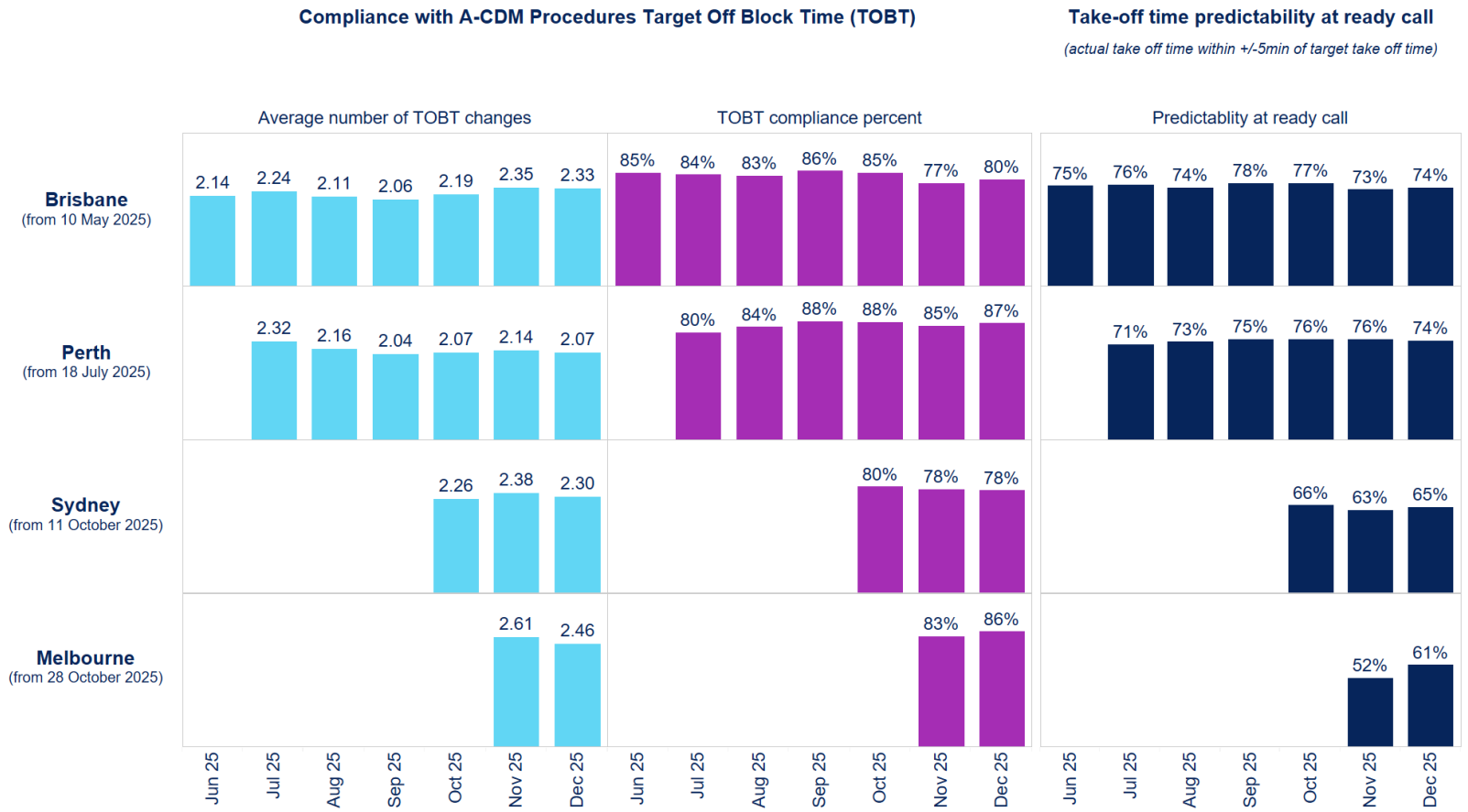
Airports with nil ATFM delay are not shown.

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)

A-CDM is now fully operational at the four busiest airports that underpin national network performance. While the system and supporting procedures are maturing, operational benefits are being realised across the industry. A-CDM is enabling airlines and ground handlers to achieve more predictable turnarounds, improve fleet and crew planning, and reduce delays. Some airport stakeholders are reporting increased flexibility in gate and taxiway utilisation and reduced gate conflicts. For Airservices, A-CDM enables dynamic, data-driven traffic flow management, reducing ground and airspace congestion. A collaborative industry working group is being established to harness complementary information to quantify these benefits and track the industry's return on investment.

Figure 20. A-CDM milestone monitoring at airports.

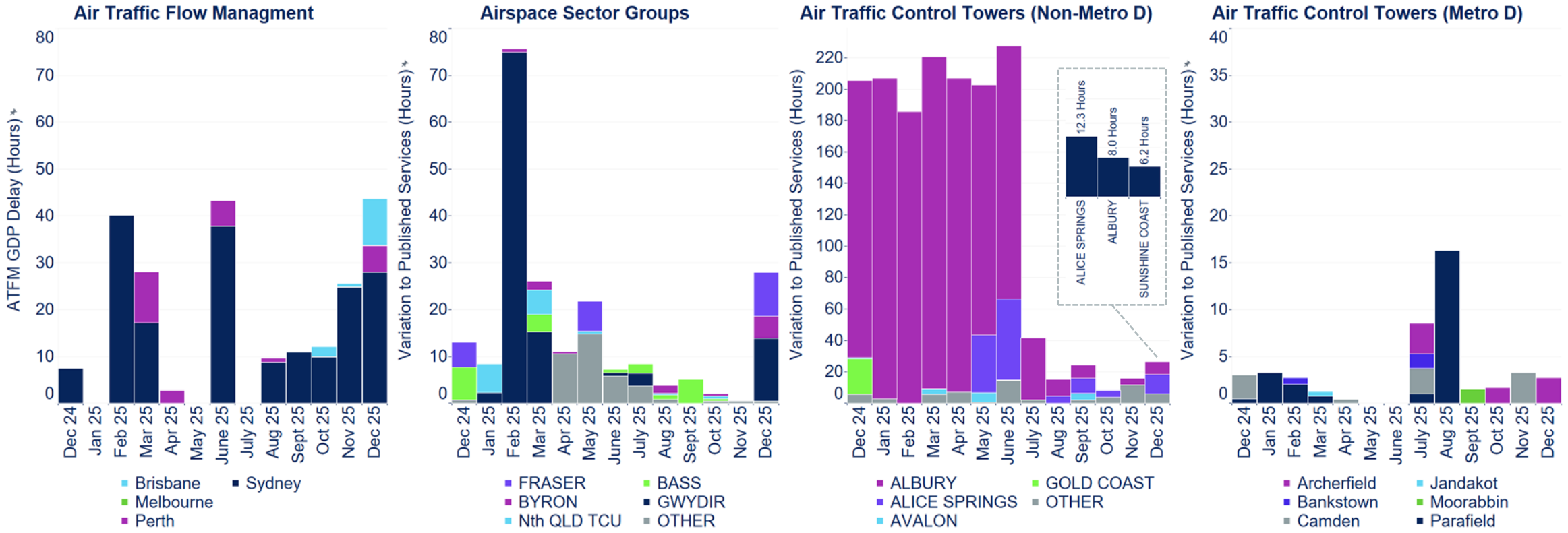


Source: Airservices ODAS and A-CDM.

Air traffic service provision

Air traffic service variation hours in December fell 74% compared with last year, and Airservices ATFM attribution to total network delays remained low at 0.2%. However, unplanned absences led to some adhoc service variations and flow restrictions around Brisbane, Sydney and Perth, despite heightened holiday resilience measures. Lessons are being applied to better align capacity with demand and strengthen workforce management, supported by continued recruitment, training and cross-skilling.

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.

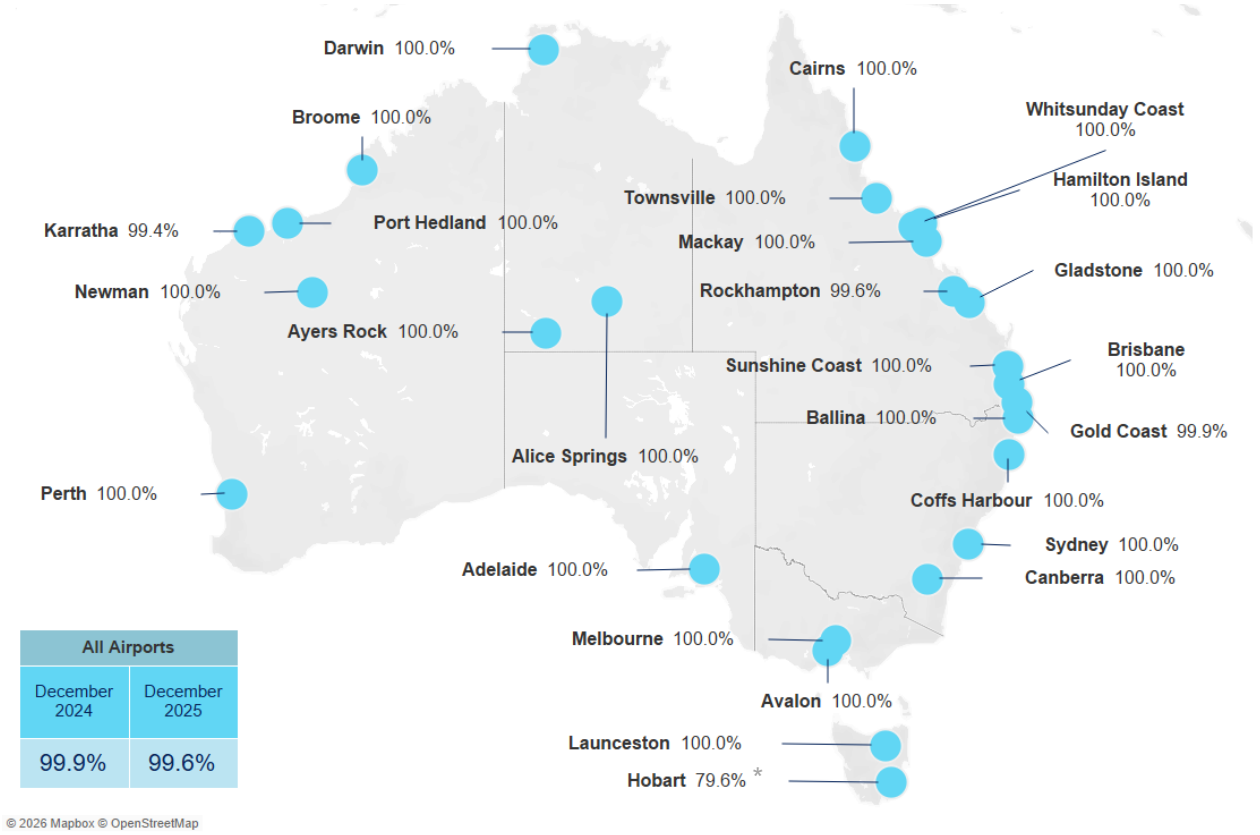
Aviation Rescue Fire Fighting Service (ARFFS)

In December 2025, ARFF service availability was at 99.6%, with the majority of locations achieving 100%.

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

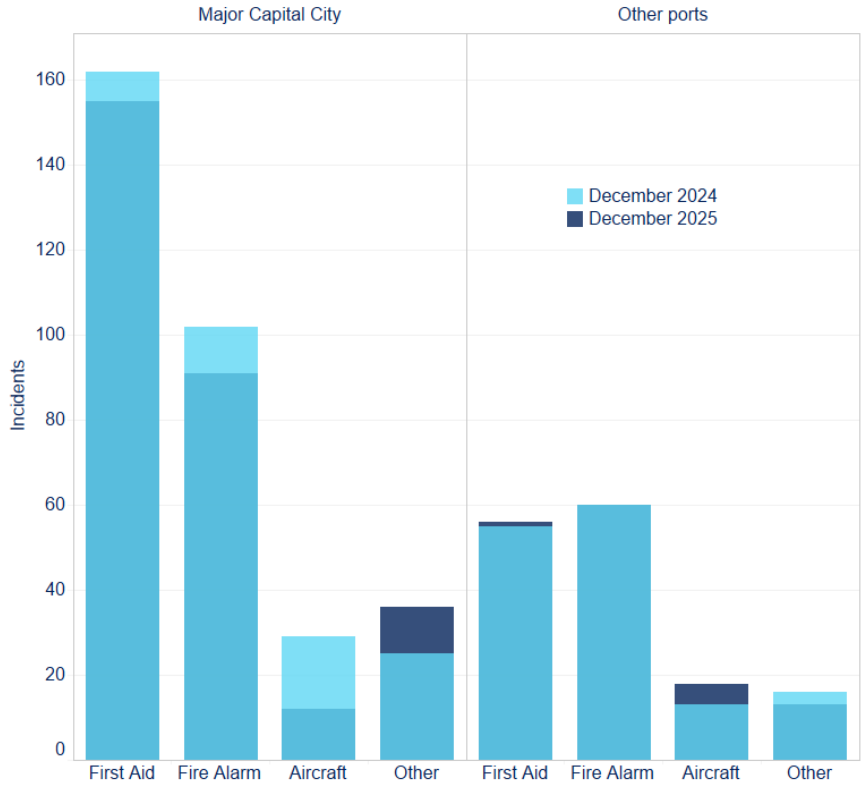
Service Availability (%)

Aircraft movements with required category of ARFFS coverage



All Airports	
December 2024	December 2025
99.9%	99.6%

Emergency Responses



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.
* In close coordination with airline customers, the limited short-term ARFFS category variations at Hobart did not disrupt any passenger flight operations.

For more information

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