Australian Aviation Network Overview

January 2026

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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

The Australian aviation network entered 2026 with strong growth in domestic (+4.7%) and international (+7.3%) passenger flights through the summer holiday and sports season. 22 January marked the busiest January day in the last seven years. This was offset by a decrease (10.0%) in regional flights.

Despite significant weather challenges, including ex-Tropical Cyclone Koji and periods of extreme heat, all key air traffic flow management (ATFM) indicators strengthened compared with the 12-month average. This reflects the capacity of our sector to manage surge volumes while continuing to collaborate closely on network planning and disruption management.

The rollout of Airport Collaborative Decision Making (A-CDM) across the four busiest airports is improving operational predictability and transparency. Industry partners are working closely to share lessons, address remaining barriers, and align on benefits realisation.

Air traffic service variations were 65% lower than this time last year. ARFFS maintained full service availability at 25 of the 27 sites while responding to a 22% increase in emergency response call-outs nationally. This month, Airservices managed 77,120 passenger flights, an increase of 867 flights year-on-year, and contributed 0.2% of total network delays.

Notwithstanding this notable improvement trend, it was disappointing to see inconsistency in service delivery, including four days at Sydney Airport where we had service disruptions that significantly impacted industry and the travelling public.

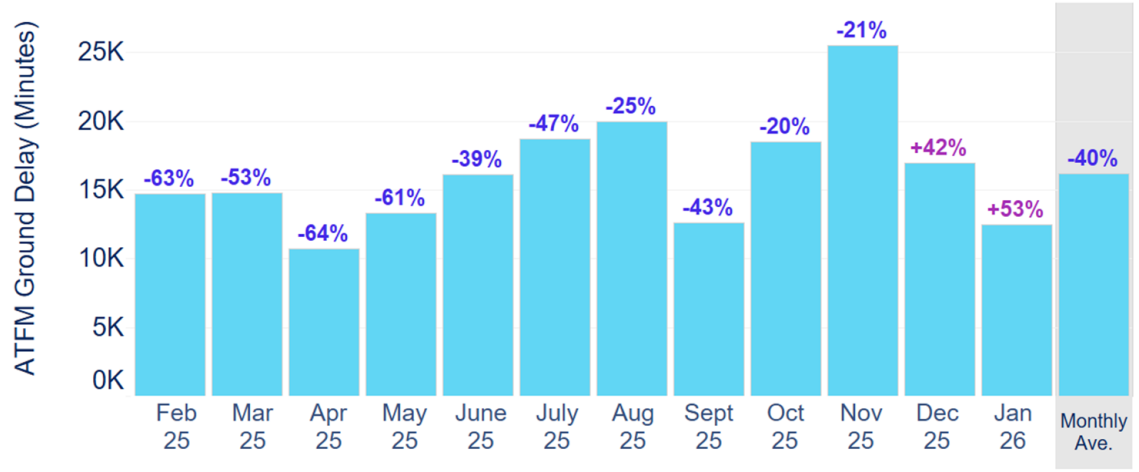
We are implementing a number of additional measures to strengthen resilience in Sydney as a priority which has Executive and CEO oversight, including priority targeted actions improving rostering, strengthening management processes and continual training and recruitment.

Noise complainant numbers decreased 25% nationally in January 2026 compared to January 2025, continuing a downward trend in complainant numbers.

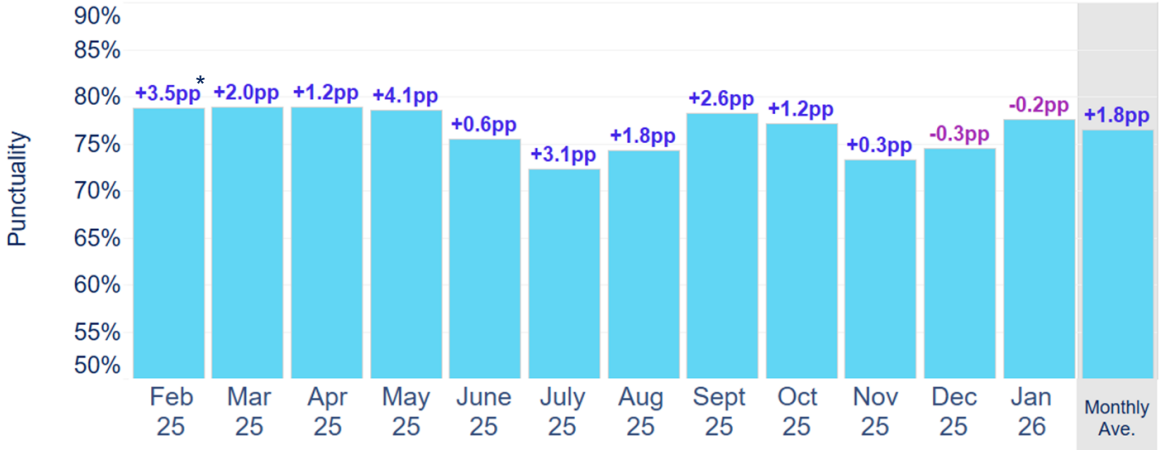
Network performance snapshot (year-on-year comparisons)

Total Air Traffic Flow Management (ATFM) Delays

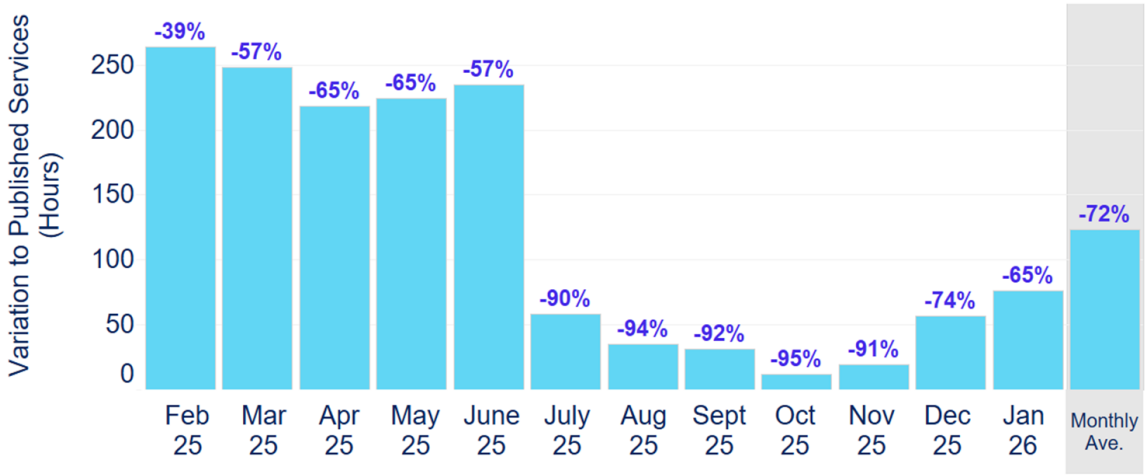
(Due to all causes such as weather, airport works, strategic overdemand, Airservices, etc.)



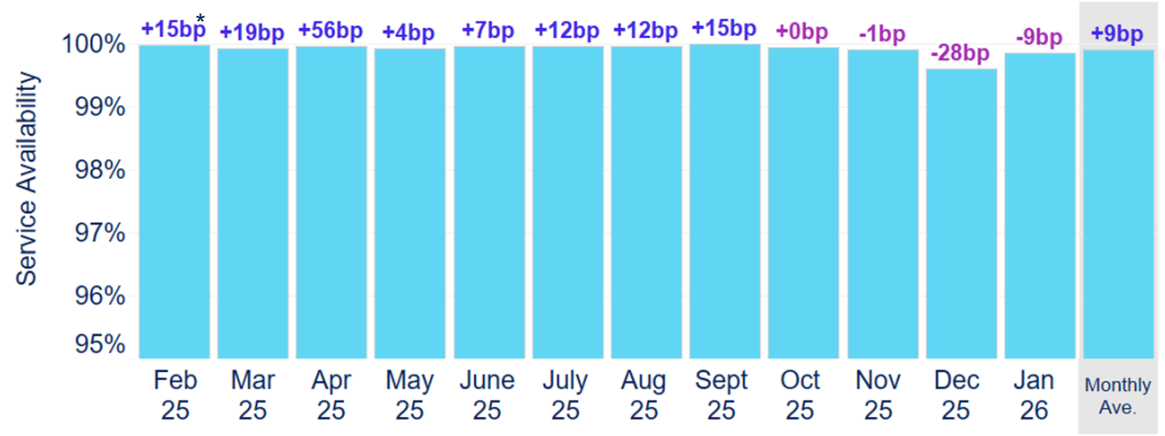
Departure Punctuality (First Flight Out)



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

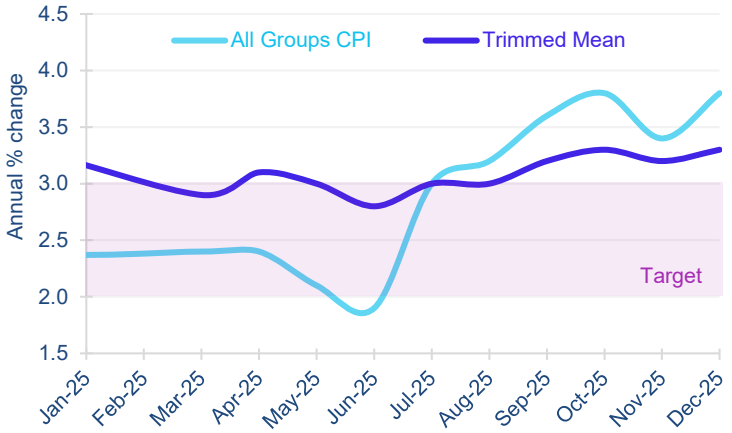
Economic factors

As 2026 begins, key economic indicators are shifting, including an increased cash rate, ongoing fuel price volatility and the Australian dollar reaching a three-year high. In this dynamic environment, the outlook for tourism spending and international travel demand remains positive, underscoring the sustained appeal of travel.

Figure 1. Australian exchange rate.

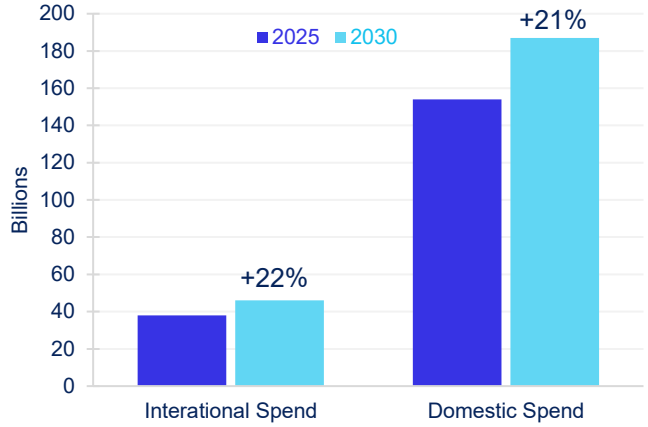
Source: Trading Economics (website) – latest data as at 5/2/2026.

Figure 2. Consumer Price Index (CPI) Indicator.



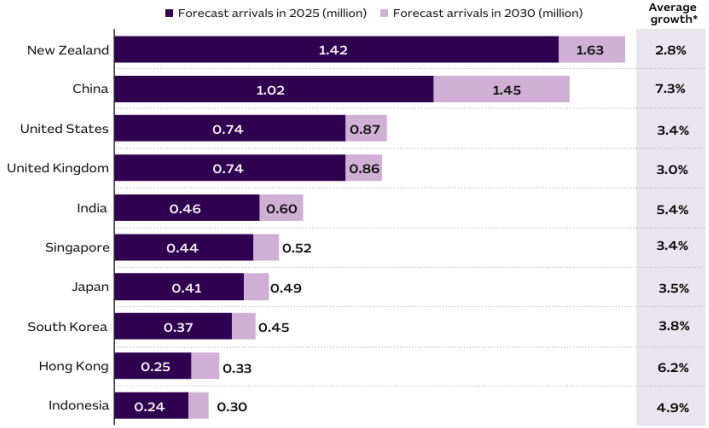
Source: ABS (website) – latest data to December 2025 as at 28/01/2026

Figure 3. Tourism spend forecast.



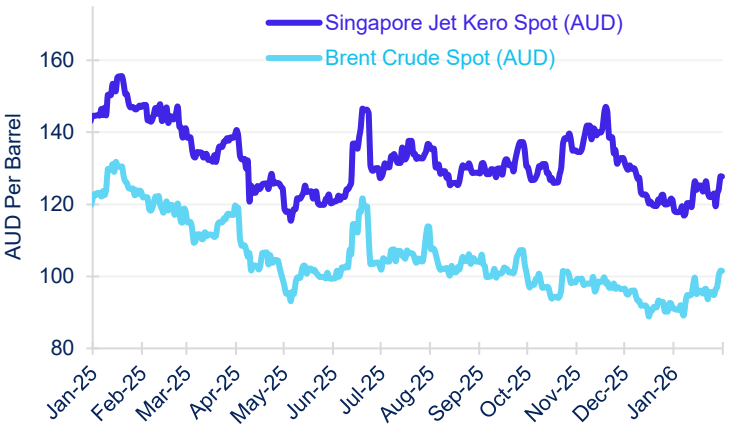
Source: TRA (website) – latest data as as at 4/2/2025

Figure 4. Forecast growth of Australia's top 10 markets.



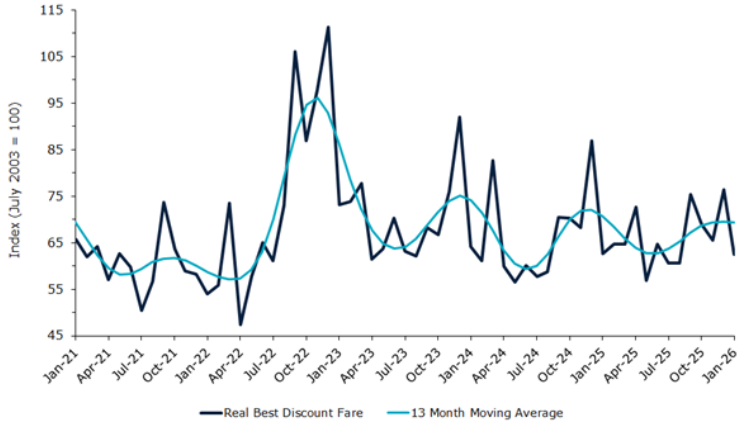
Source: TRA (website) – latest data as at 4/2/2025

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



Source: Bloomberg – latest data as at 4/2/2026

Figure 6. Domestic airfares (real best discount).



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

Social factors: aircraft noise

Noise complainant numbers decreased 25% nationally in January 2026 compared to January 2025. We continue to observe an uptick in aircraft noise complaints during periods of heightened community engagement activity, such as the recent Sunshine Coast consultation on the post-implementation review (PIR) recommendations. This trend suggests engagement efforts raise community awareness of flight paths and operating changes, reinforcing the importance of building understanding while maintaining a balanced approach between industry development and mitigating noise impacts on local communities.

Figure 7. National aircraft noise complaints (top) and complainants (middle) with year-on-year change, and key dates for community and industry engagement (bottom).

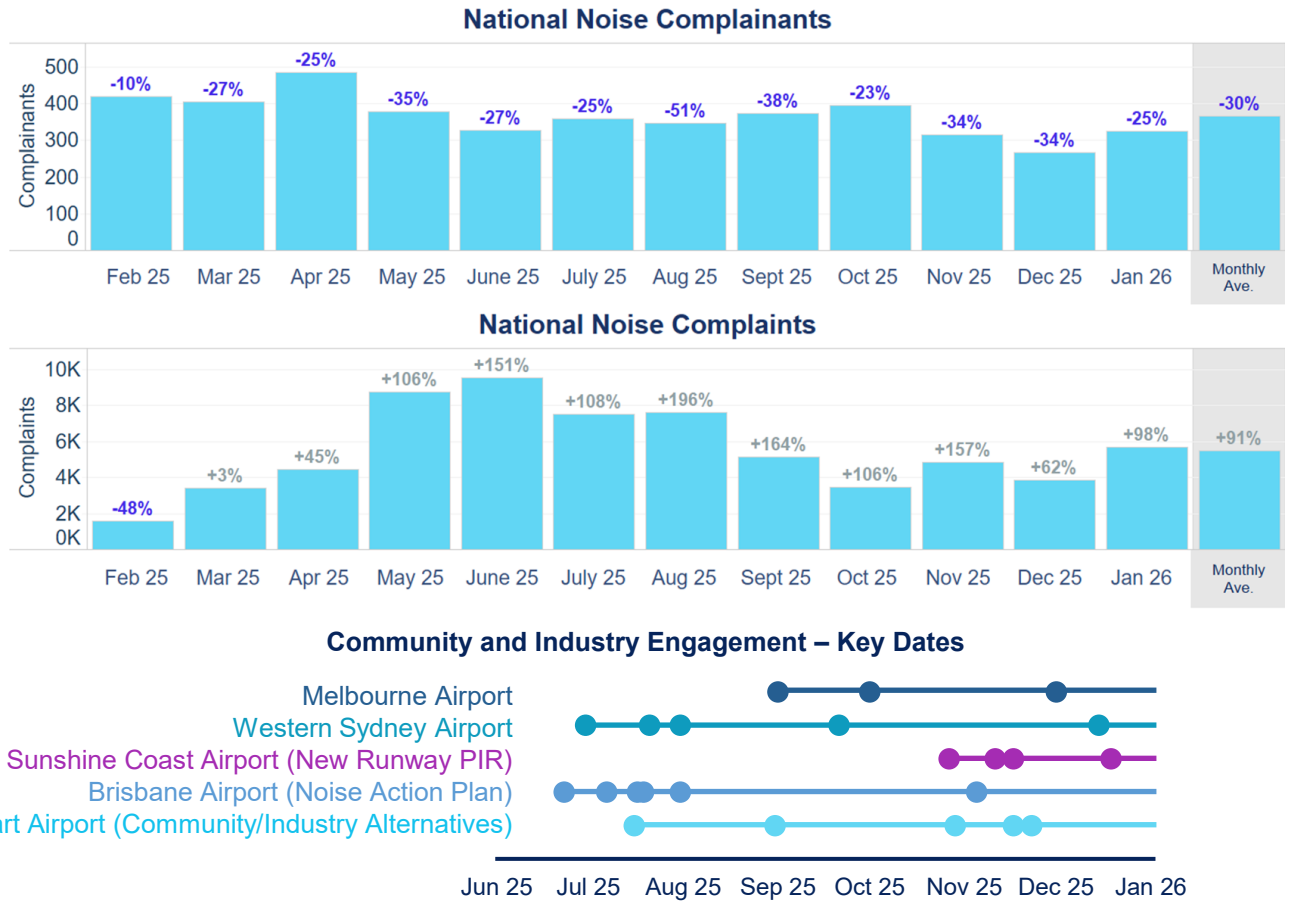


Figure 8. Aircraft noise complainants by key airports for January 2026 with year-on-year change.

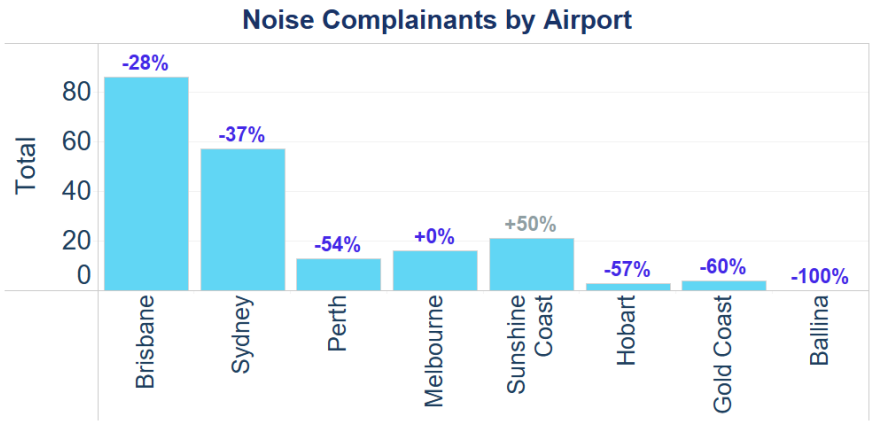
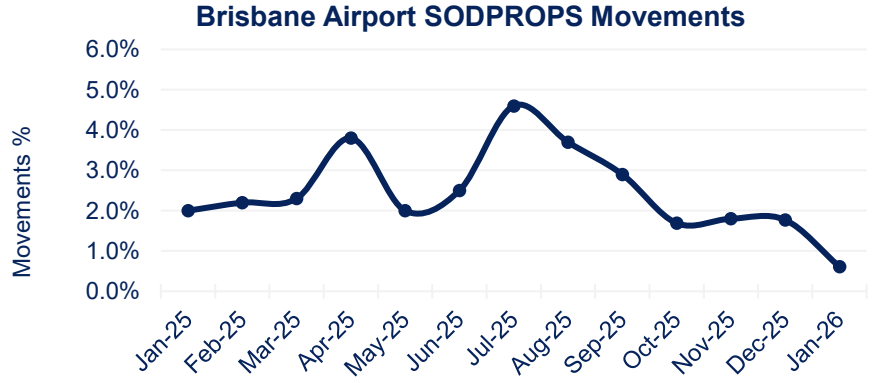


Figure 9. Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) usage* by movements at Brisbane.



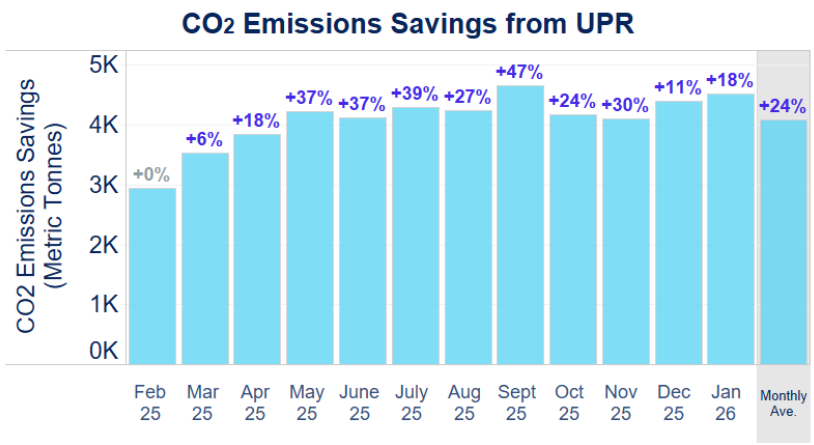
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool (website).

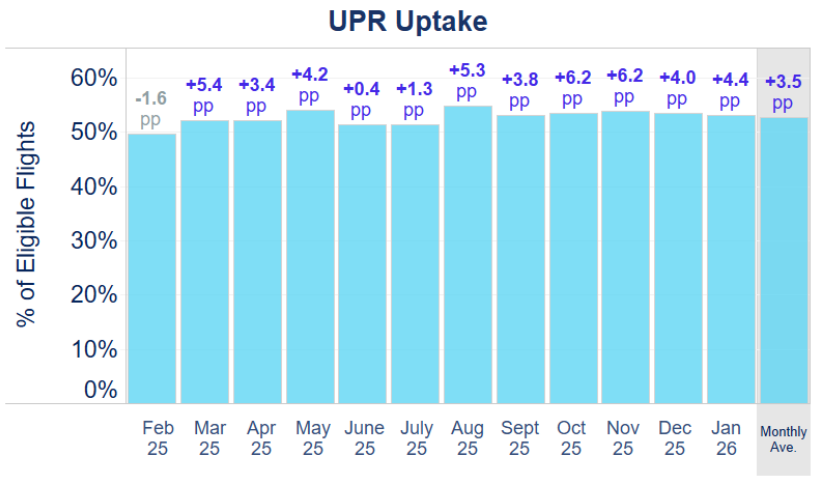
* The decrease in SODPROPS usage at Brisbane Airport between July to January 2026 was primarily due to variable weather conditions limiting opportunities for implementation.

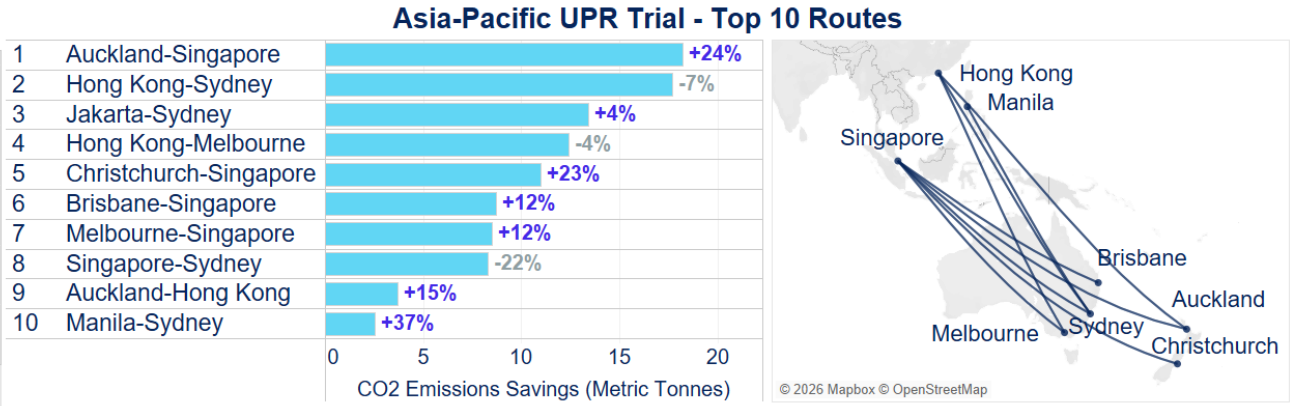
Social factors: aircraft emissions

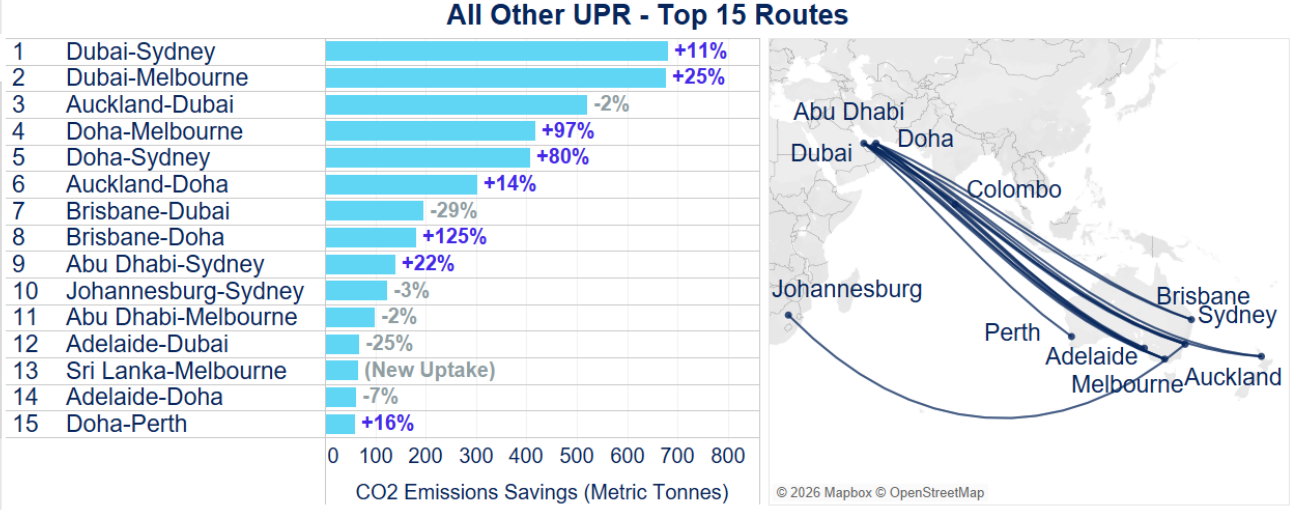
The expansion of User Preferred Routes in upper airspace continues to deliver significant fuel and emissions savings. Notably, Middle Eastern routes contributed 12 of the 15 top UPR routes, delivering a total of 3,869 tons of CO_2 emission this month.

Figure 10. Left figure shows User Preferred Routes (UPR) total CO_2 emissions savings (top) and share of eligible flights using UPRs (bottom). Right figure shows CO_2 emissions savings by top 10 routes for the Asia-Pacific UPR trial (top) and by top 15 other UPR routes (bottom right) for January 2026, with year-on-year change.









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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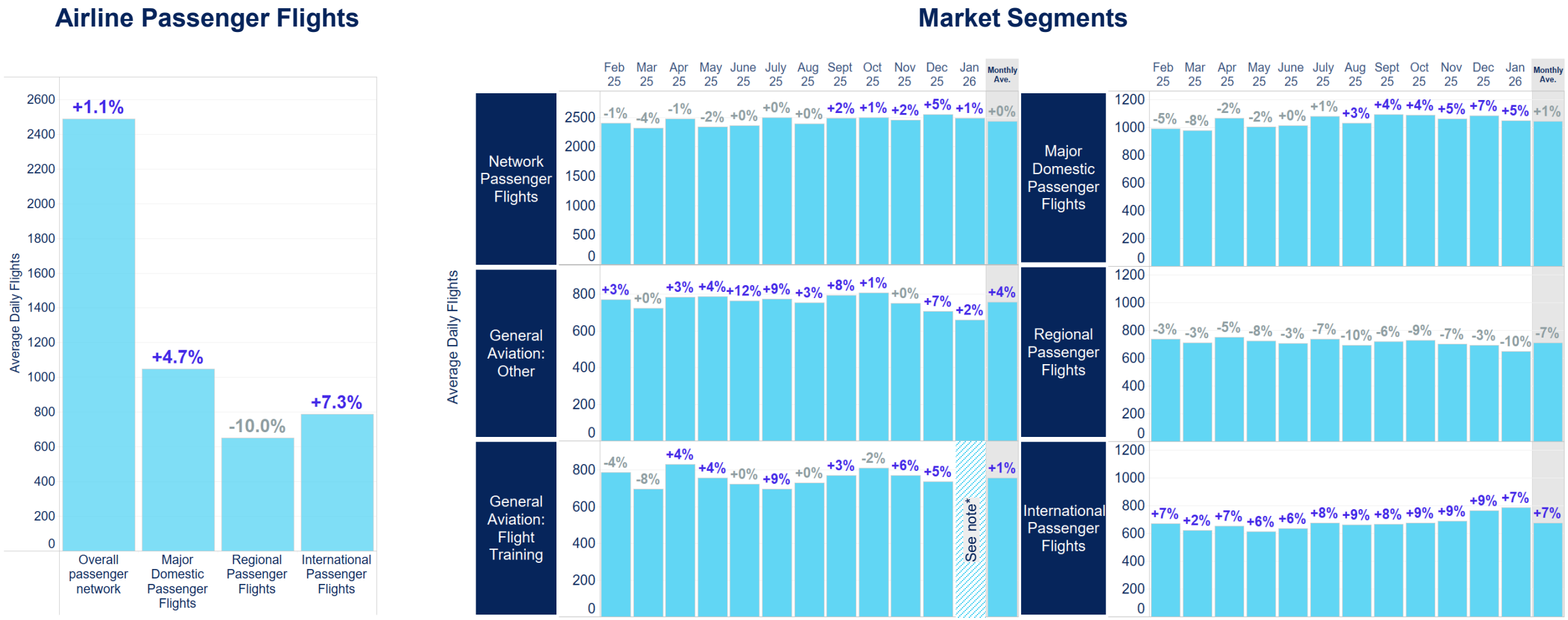
Australian aviation: domestic and international markets

State of Australian aviation growth

The Australian aviation network kicked off 2026 with solid domestic and international growth. January 22 marked the busiest January day in the last seven years.

Figure 11. Airline passenger flights in January 2026 with year-on-year change (left) and monthly by market segments with year-on-year change (right).

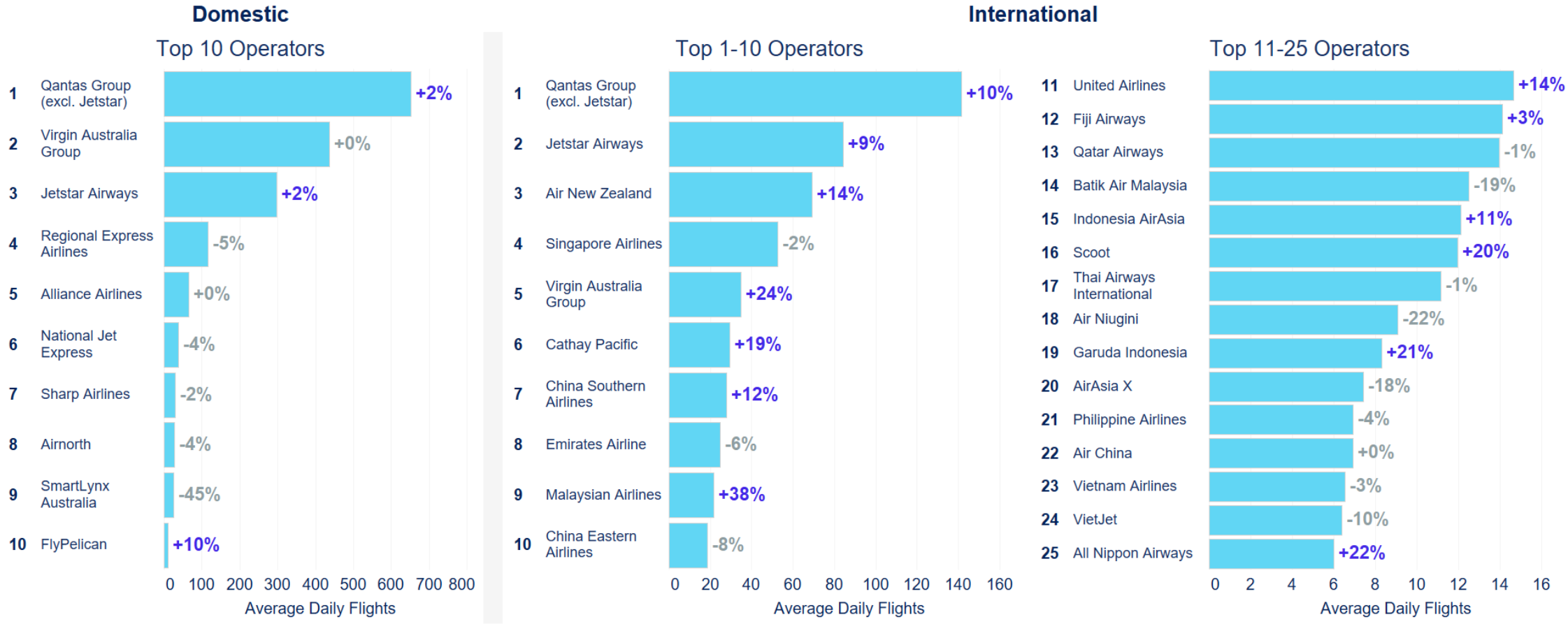


Source: Airservices ODAS (excludes helicopters).
* *General Aviation: Flight Training* data is one month in arrears.

Top aircraft operators

Growth across operators reflects the continued strength of domestic leisure travel and additional summer peak capacity from international carriers, especially on routes to New Zealand, Japan, China and South-East Asia.

Figure 12. Growth of top airlines for the domestic segment (left) and international segment (right) in January 2026, with year-on-year percentage change.

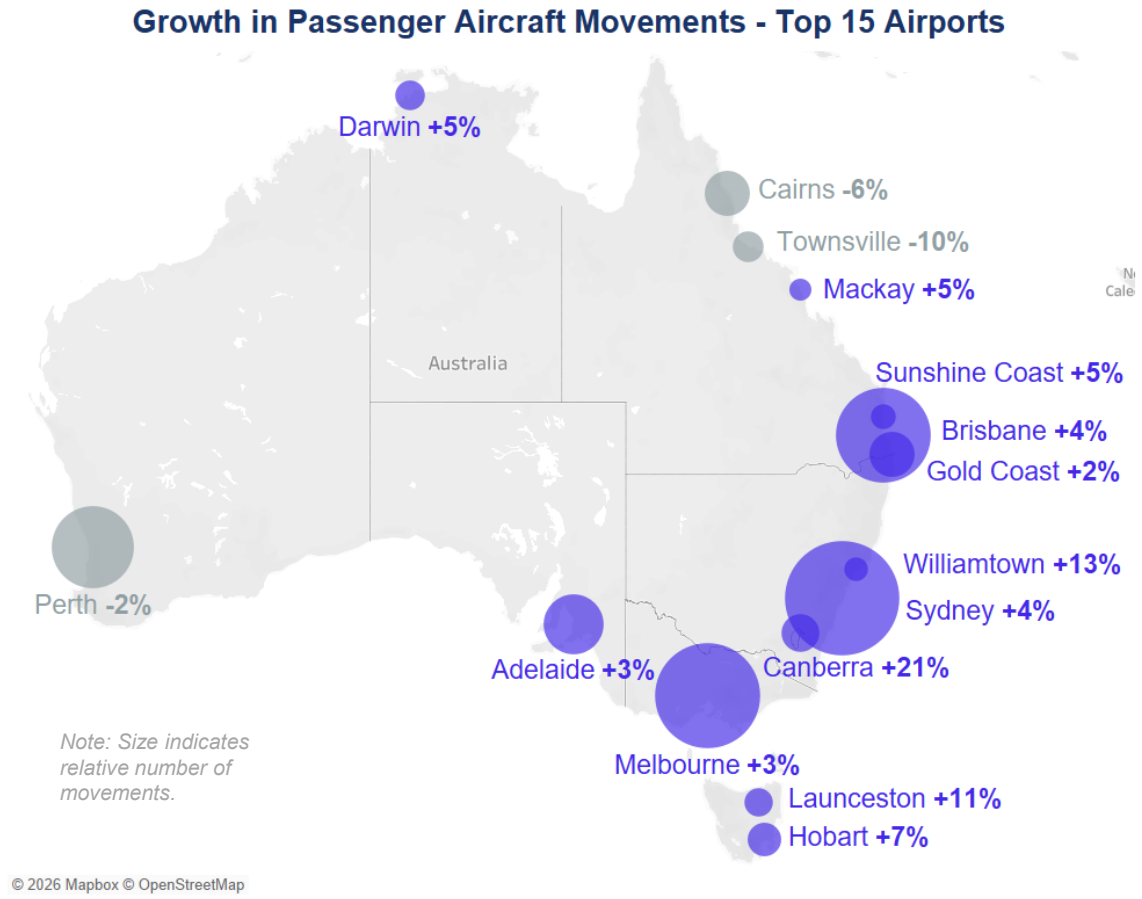


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

Most airports that drive the domestic network recorded year-on year growth in January 2026. As demand and load factors remain strong, balancing efficient aircraft rotation with contingency buffers in schedules is key for network resilience. Cross-industry sharing of insights and coordination through quarterly senior-level Aviation Network Performance Roundtable and weekly/quarterly operational network meetings are critical to mitigate knock-on effects of disruptions particularly at the major airports. Systems investments such as A-CDM are also delivering improved predictability.

Figure 13. Growth in passenger aircraft movements at the top 15 airports for January 2026 with year-on-year change.

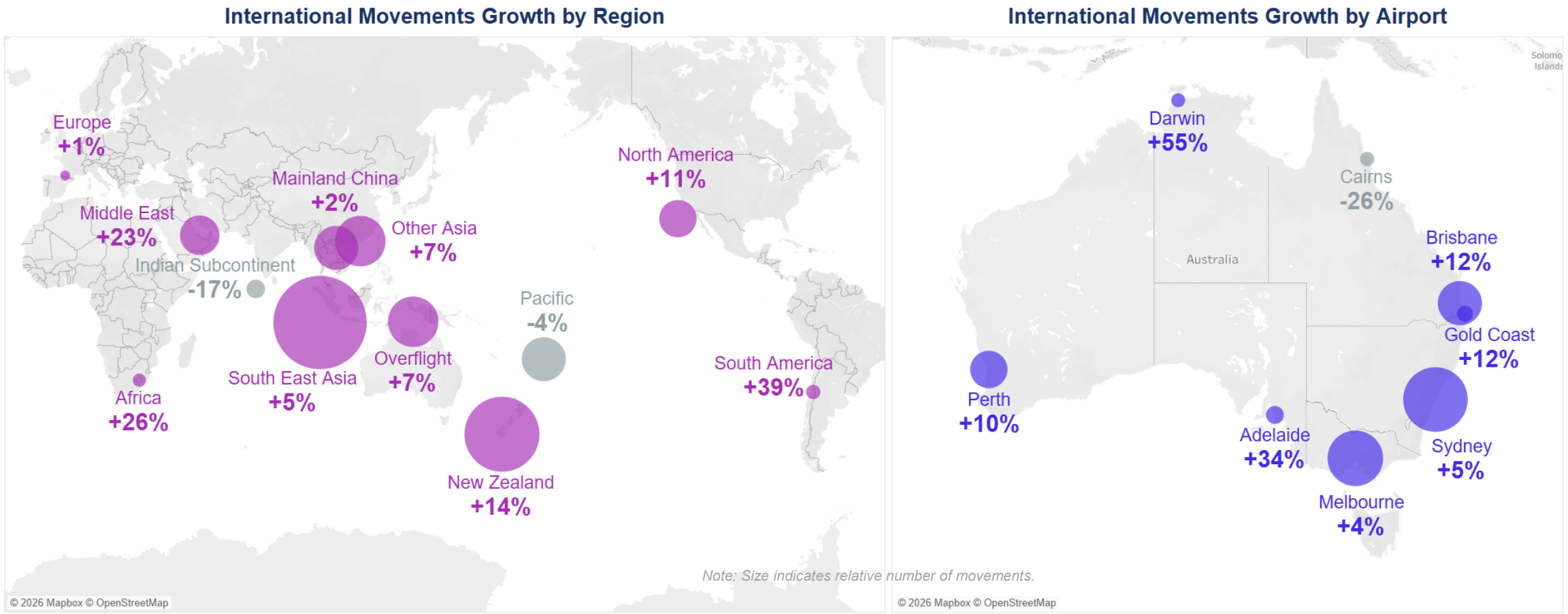


Source: Airservices ODAS (includes airline flights only).

International markets

The summer holiday uplift in international travel continued this month, with broad-based growth across major gateways and secondary airports. Outbound travel is expected to remain robust, supported by the stronger Australian dollar.

Figure 14. Growth of international markets by region (left) and international movements at airports (right) for January 2026 with year-on-year change.

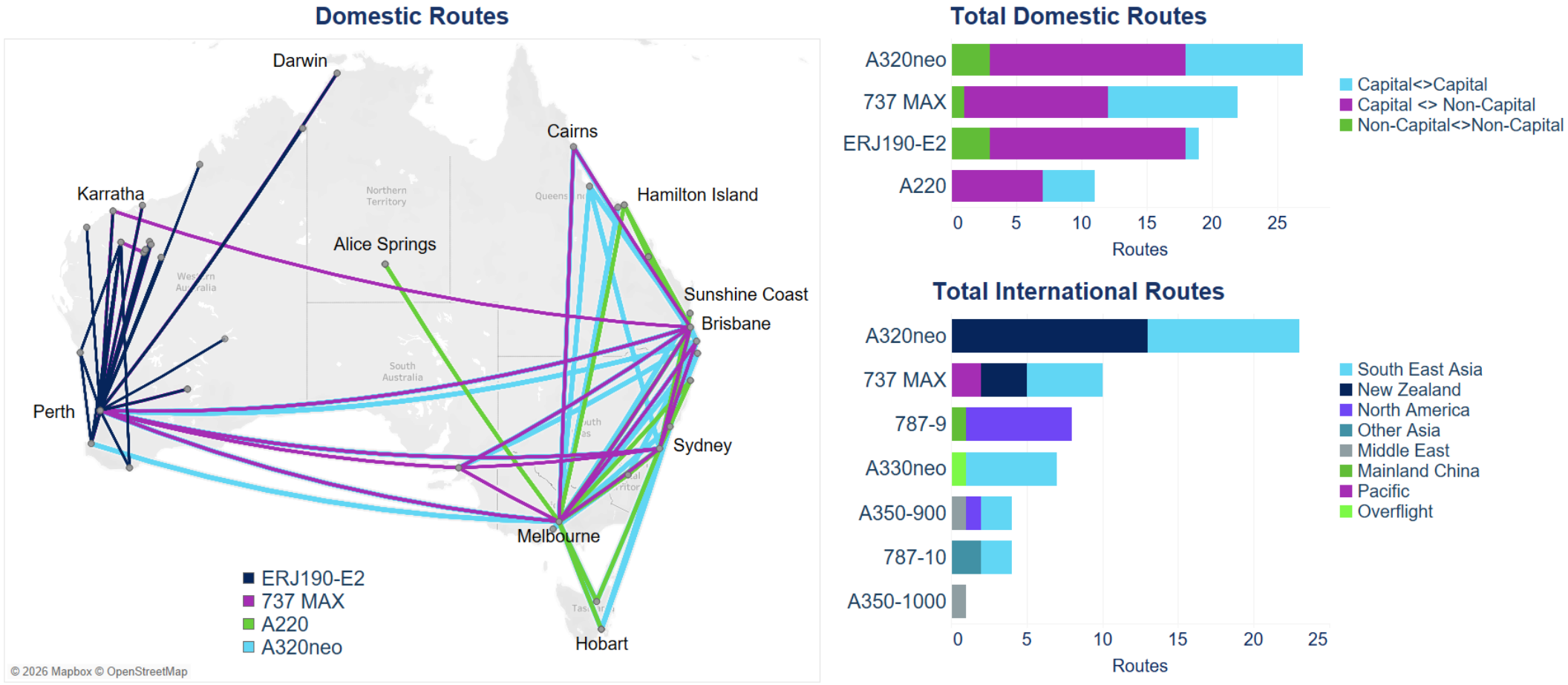


Source: Airservices ODAS (includes airline flights only). Only airports with at least 60 movements per month are shown on right.
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

The addition of another A321LR over the peak holiday season boosted capacity on key busy routes. Meanwhile, the ongoing expansion of the E190 fleet is improving operational resilience in Western Australia's resources region. New aircraft are also supporting international growth, particularly in the top outbound markets in South-East Asia and New Zealand.

Figure 15. Routes served by new* aircraft in January 2026, including domestic routes (left), total domestic routes (top right), total international routes (bottom right).



Source: Airservices ODAS (includes airline flights only).
* New aircraft less than 1 year old.

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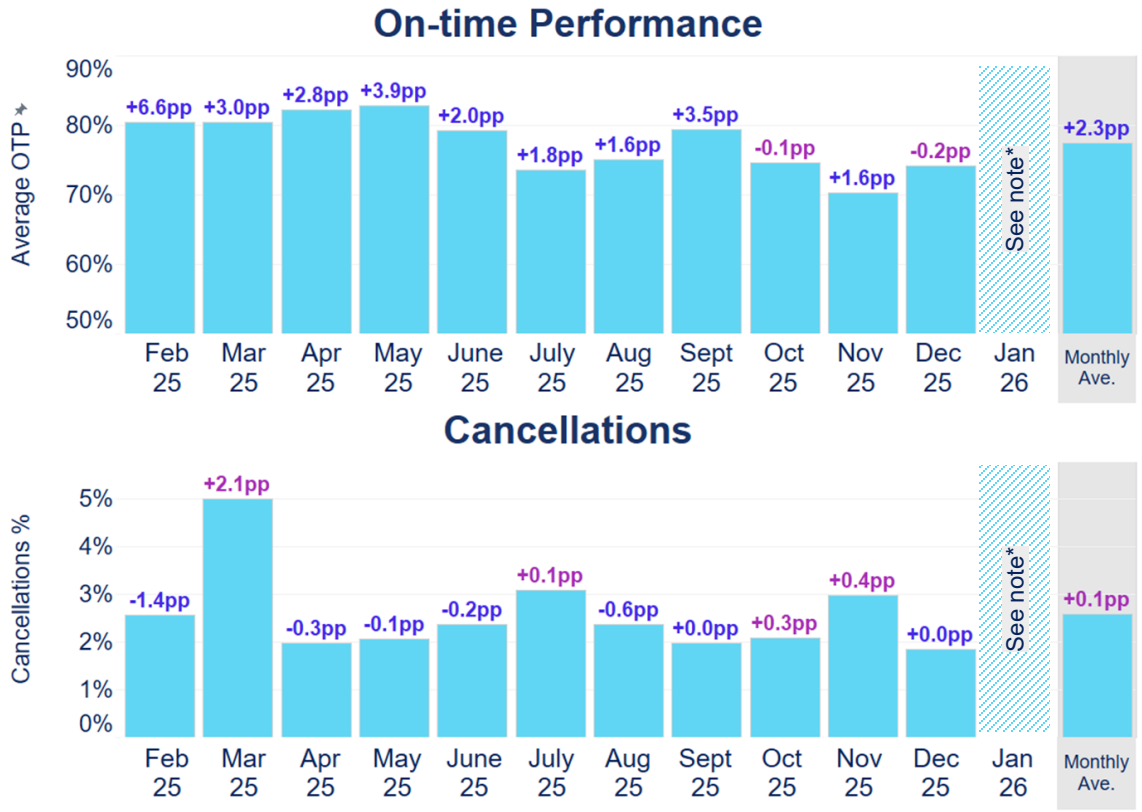
Australian aviation: network performance

Industry performance

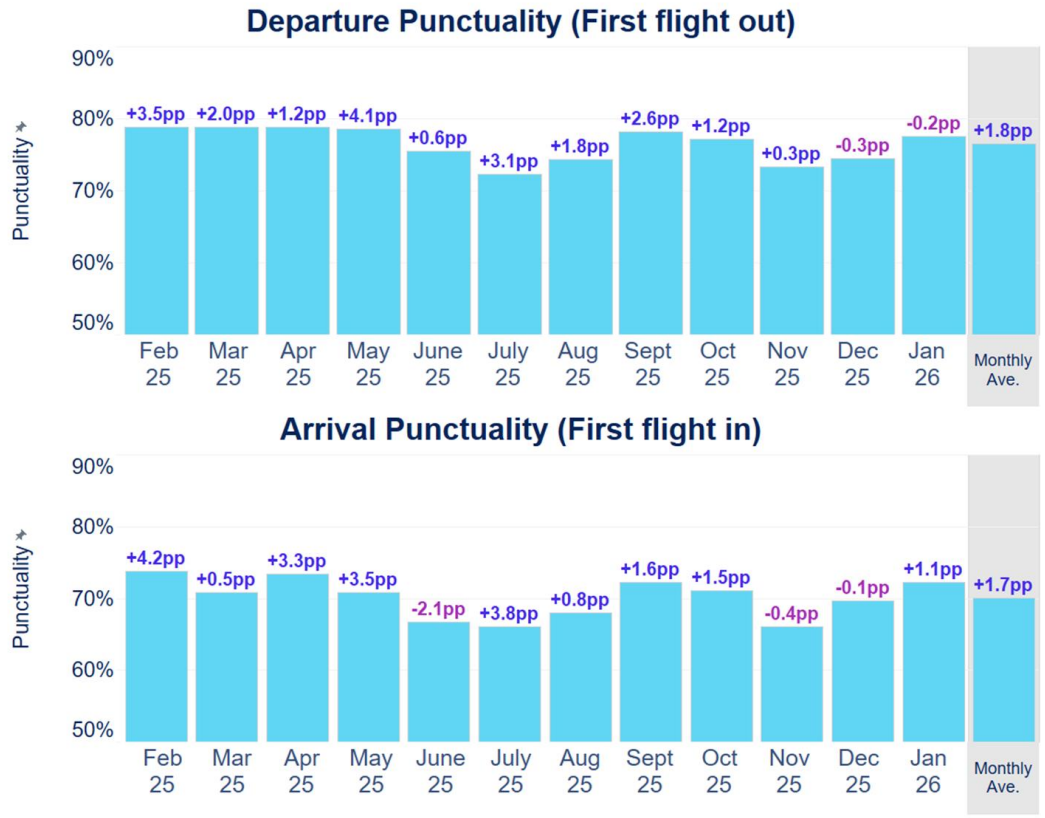
Despite major weather disruptions this summer from ex-Tropical Cyclone Koji to extreme heat, industry on-time performance and first-wave punctuality have held steady. This reflects the whole-of-industry measures, including fleet renewal, improving operational and maintenance processes, and focus on high flight completion rates to ensure passengers reach their destinations reliably.

Figure 16. Total industry OTP^ and cancellations, up to December 2025 with year-on-year change.



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

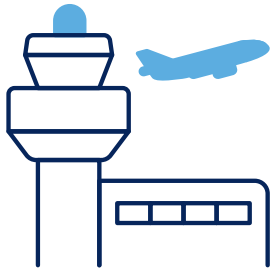
Figure 17. First wave punctuality to January 2026 as a lead indicator for OTP with year-on-year change.

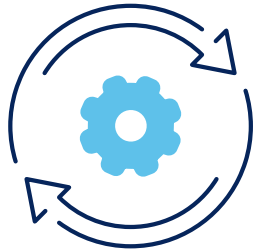


Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the Air Traffic Flow Management process.

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)

Network performance exceeded the 12-month averages across all key ATFM metrics this month. This demonstrates that improved planning, industry coordination and governance of network management is having the desired effect.

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

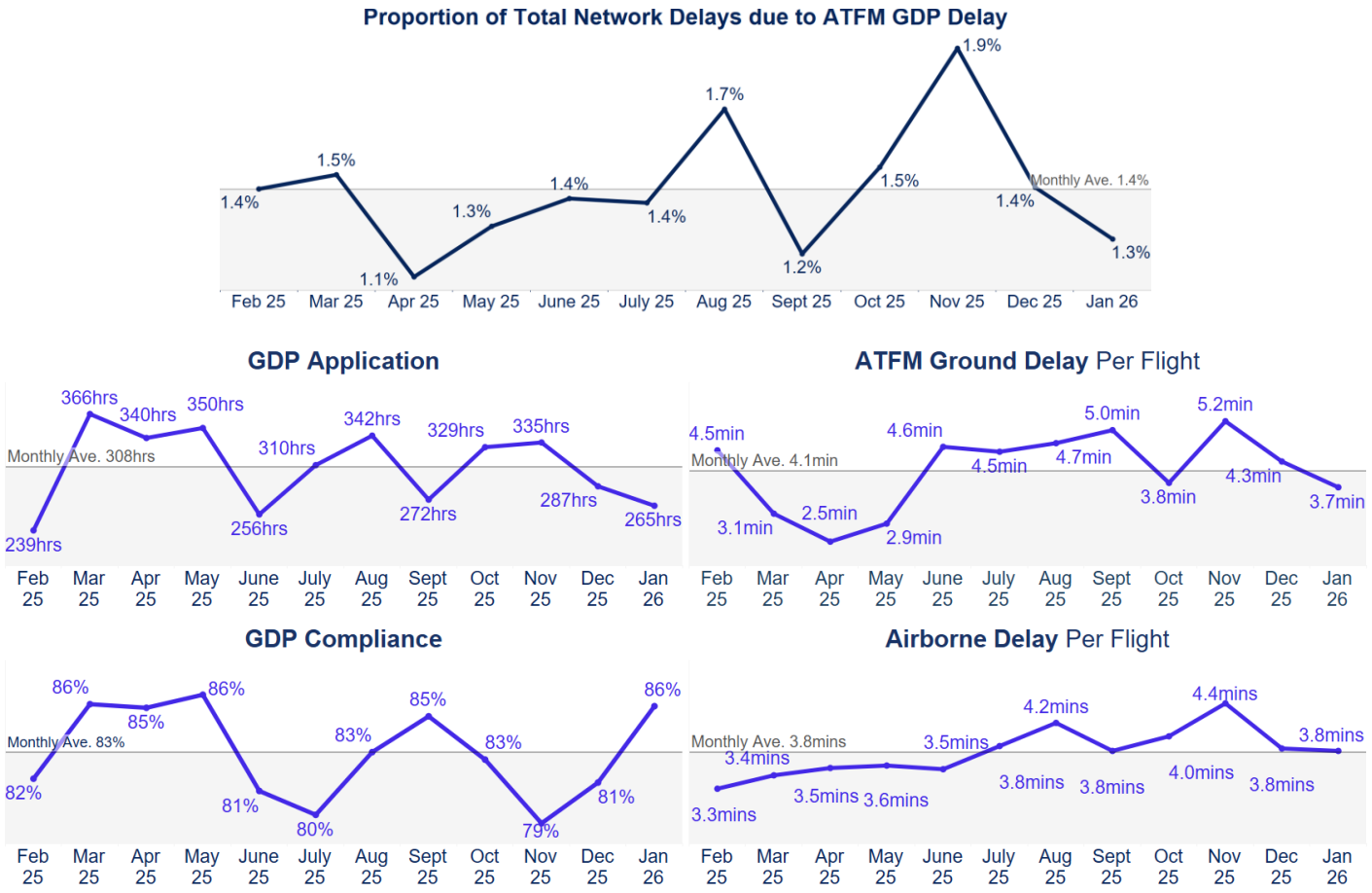
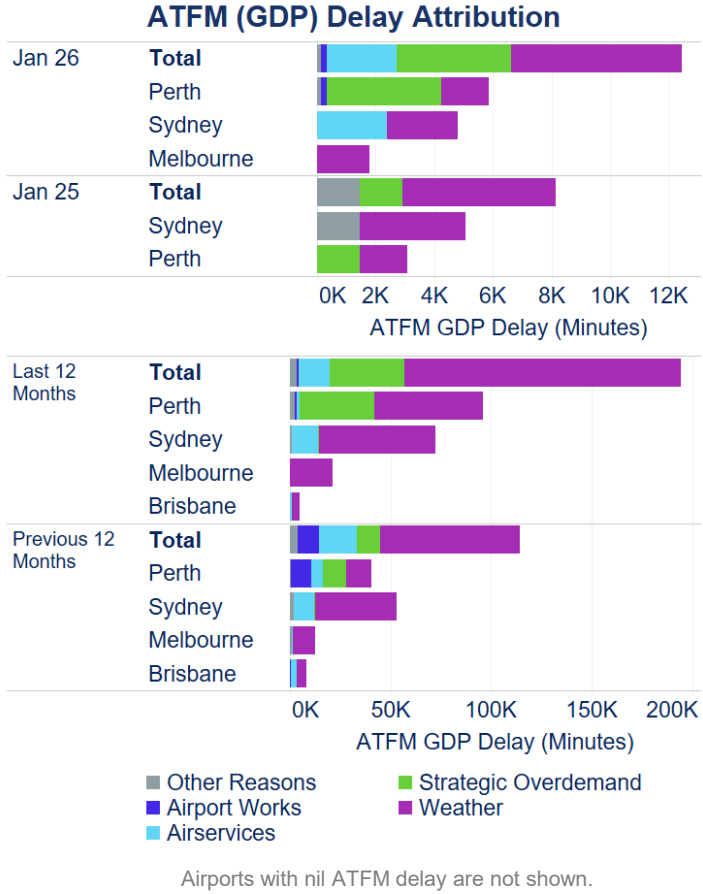


Figure 19. ATFM (GDP) delay by attribution overall and by airport.



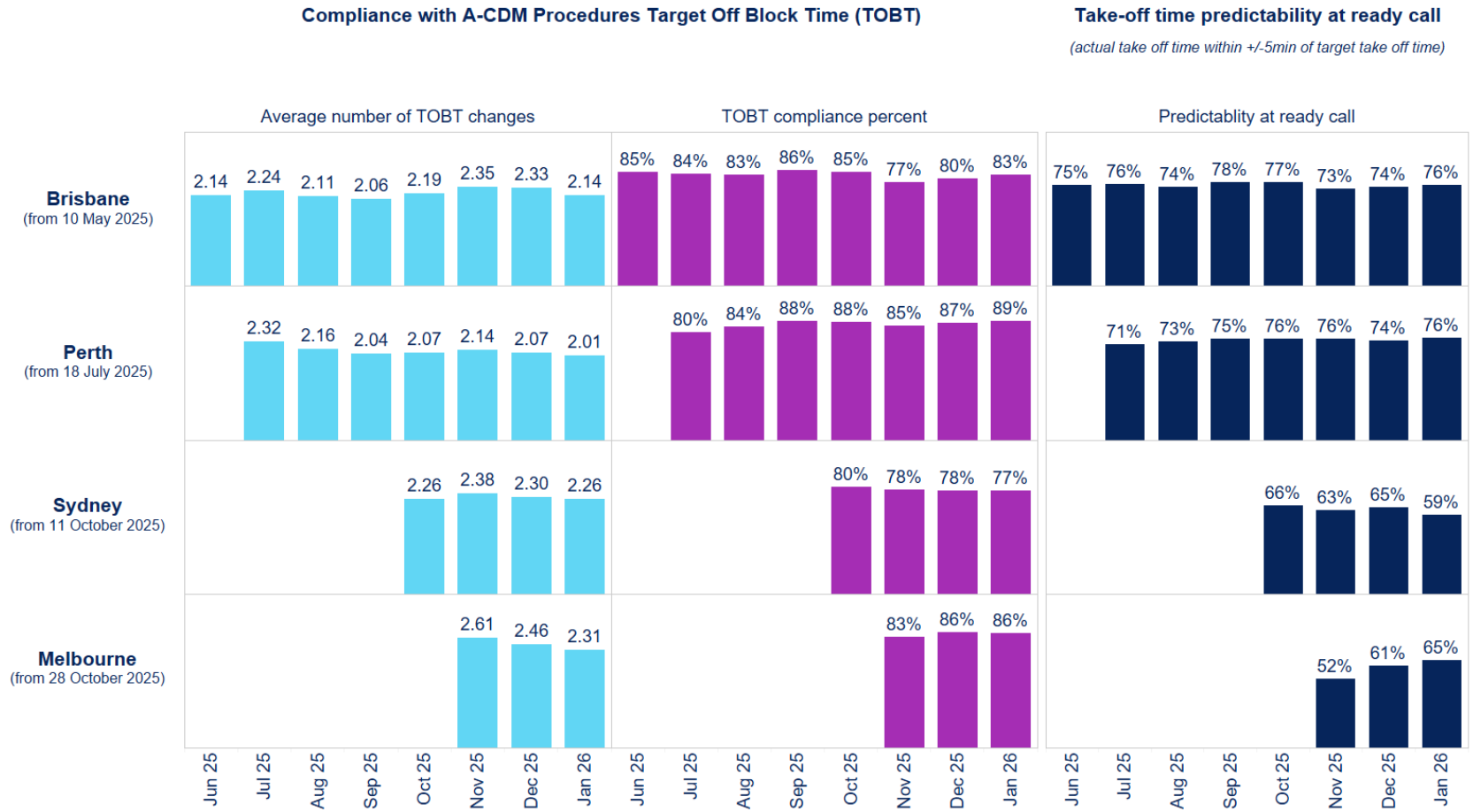
Airports with nil ATFM delay are not shown.

Source: Airservices ODAS (for Sydney, Melbourne, Brisbane, and Perth only). 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 in operation across the four busiest airports. Perth and Melbourne are showing steady month-on-month improvement in key compliance metrics, indicating conditions that support more effective use of ground resources and improved departure flows as maturity increases. At Perth, significant delay reduction and increased runway slots in critical peak periods enabled by A-CDM have been reported. Industry partners are working closely to review insights, set ongoing improvement priorities, and align on expected benefits.

Figure 20. A-CDM milestone monitoring at airports.

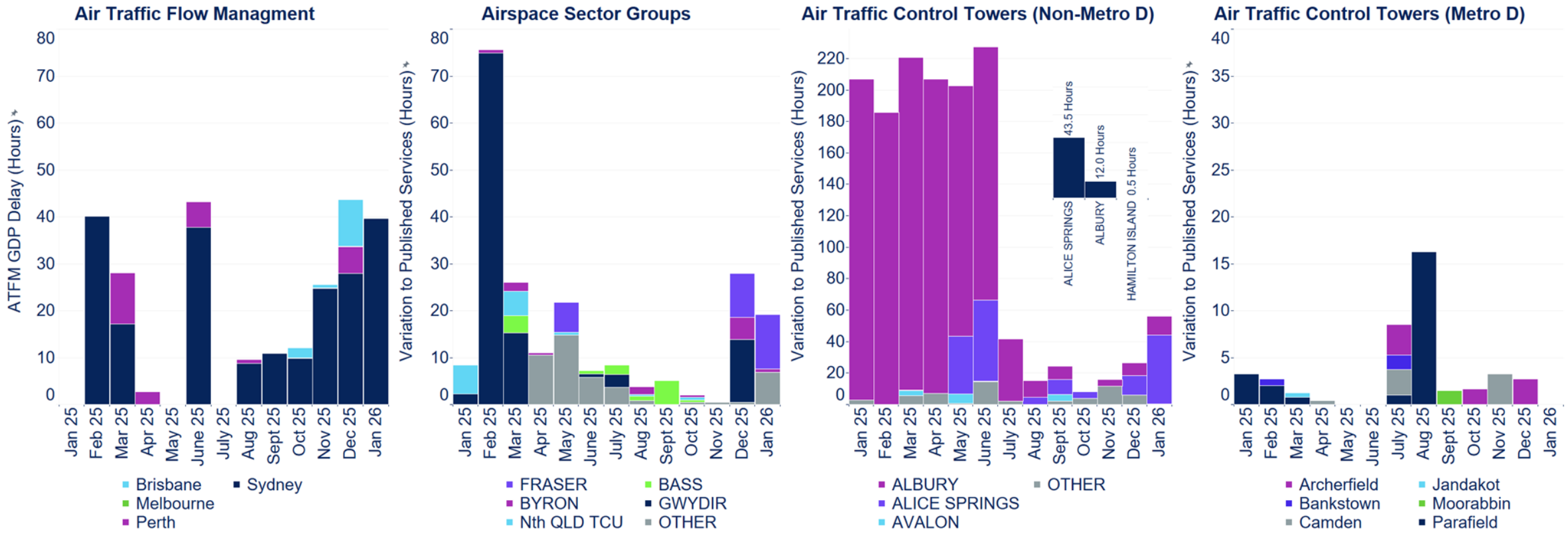


Source: Airservices ODAS and A-CDM.

Air traffic service provision

In January, air traffic service variations were 65% lower than this time last year. However, there were four days at Sydney Airport where we had unacceptably high service disruptions and some service impacts occurred in Brisbane. Targeted actions to improve rostering and strengthen management processes are in place, along with continued training and recruitment efforts to build resilience. We are working closely with airlines and airports, and meeting regularly with industry representatives, keeping them informed of priority targeted actions currently being developed and implemented to address consistency of service delivery.

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

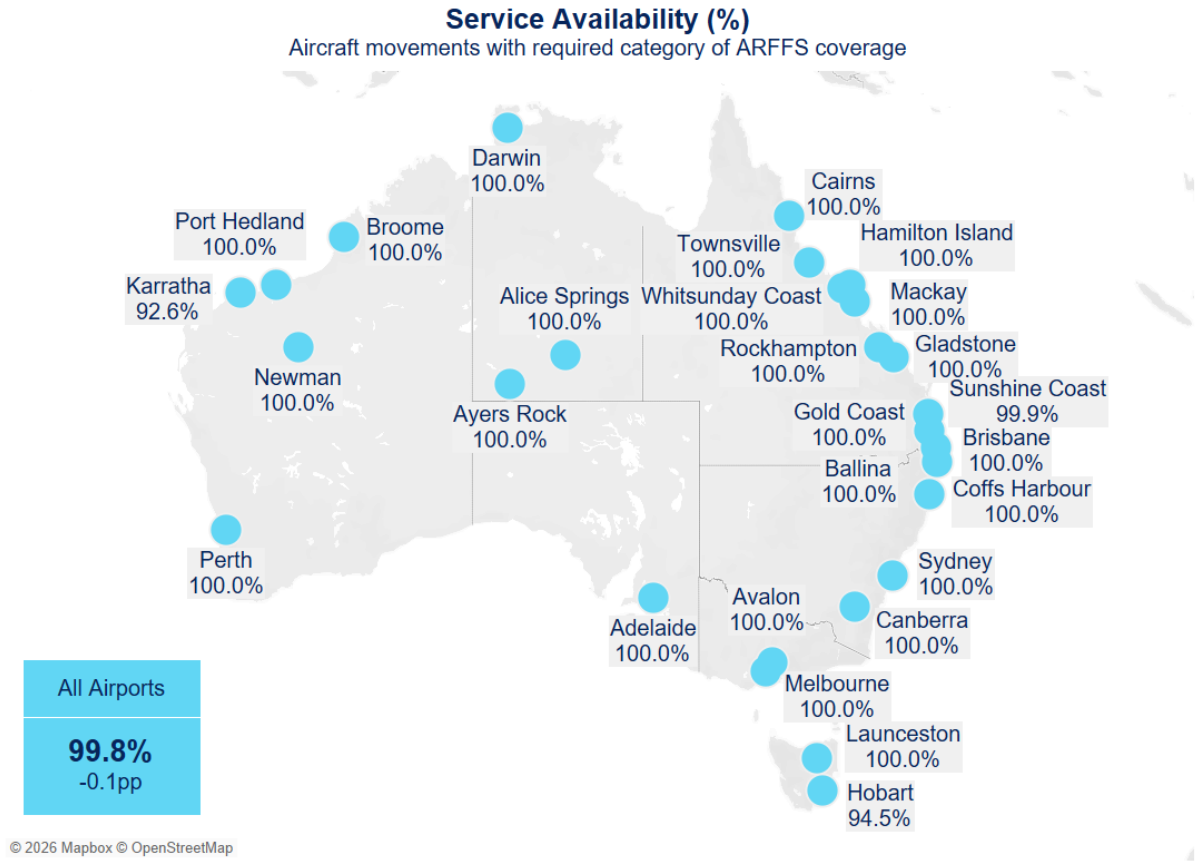


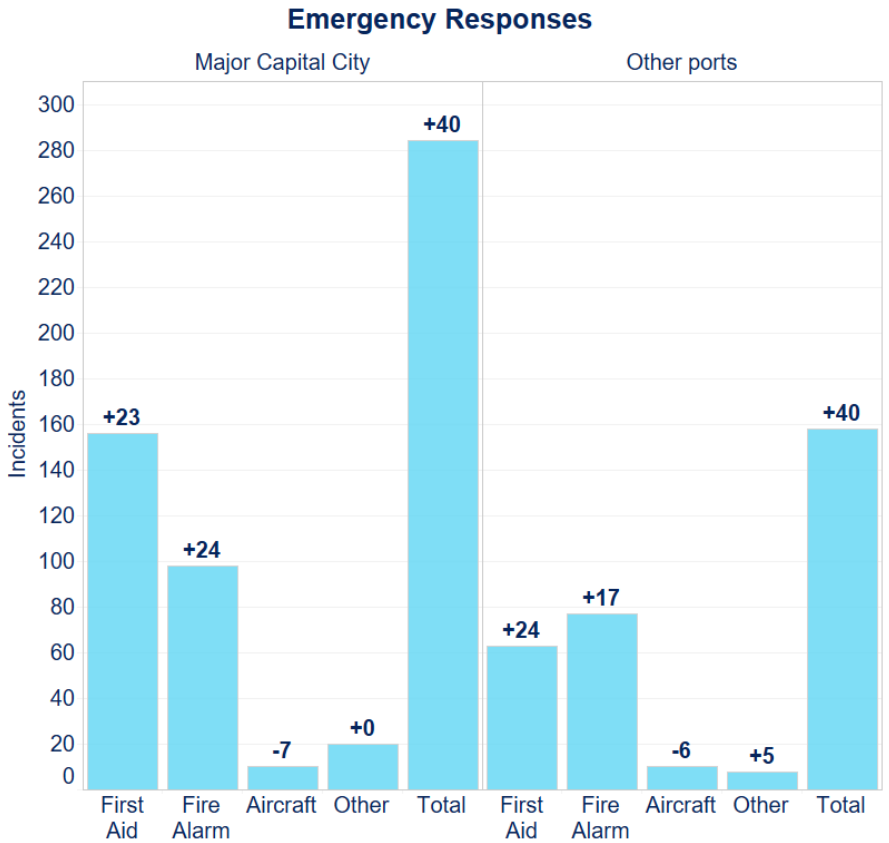
Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic 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 January, ARFFS maintained full service availability at 25 of 27 sites while responding to a 22% increase in call-outs nationally. The operational reliability was further demonstrated during ex-Tropical Cyclone Koji, when ARFFS units at all affected northern Queensland airports sustained required service categories.

Figure 22. ARFFS service availability by airport and overall (left) and number of emergency responses by type (right) for January 2026, with year-on-year change.





Source: Airservices ODAS and ARFFS TRAX. Service availability is based on aircraft movements that received applicable category of ARFFS coverage during published ERSA hours.
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

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