Australian Aviation Network Overview

February 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.

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Executive Summary

February 2026 delivered another strong month for Australia's aviation network, supported by Lunar New Year travel, Winter Olympics and a strong Australian dollar. Total passenger flights increased 3.4% year-on-year, with international demand at its highest growth rate in the last 12 months.

Industry on-time performance continued to improve. Load factors, after peaking last August, are beginning to ease with ongoing fleet renewal. Balanced with industry growth, the commitment to improving aircraft noise outcomes is reflected in measures such as the Brisbane Airport tailwind trial which supported 10% of night-time departures to operate over water in February.

The ongoing conflict in the Middle East is seeing significant impacts on the aviation sector with airspace closures and network disruptions. This is particularly significant for our network, as around 6% of Australia's international flights rely on connectivity through the region. The long-term economic and geopolitical impacts of the conflict are likely to be significant and the extent of these effects will take some time to emerge.

Airservices facilitated 69,482 passenger flights in February, an increase of 81 flights per day from this time last year, while Ground Delay Programs (GDP) accounted for 2% of network delays. Severe weather, including tropical lows, thunderstorms and lightning affected multiple airports late in the month, reinforcing the importance of industry collaboration on climate resilience and opportunity for investing in advanced weather forecasting and warning capabilities.

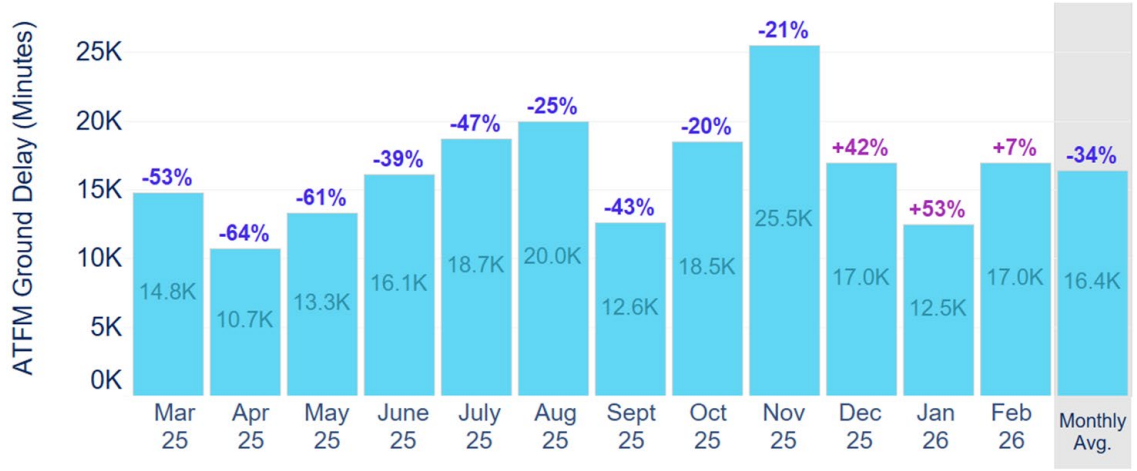
Industry partners also reviewed A-CDM progress, noting gains at capacity-constrained airports which included increased runway slot availability during peak periods, reduced delays and gate conflictions, and greater operational transparency. We now focus on harnessing insights with partners to improve operational outcomes.

Air traffic service variations decreased by 95% and Airservices attributable GDP ground delays fell by 63% compared to the same period last year. Tower service consistency reached a four-year high, with 2.2 hours of service variation. However rostering, staffing, and recovery constraints led to 15 hours of GDP ground delays in Brisbane attributable to Airservices, and application of traffic management measures in Sydney. We are progressing a set of measures to consistently provide the capacity needed to meet traffic demand. Our focus remains on building workforce capacity and planning to enhance service resilience.

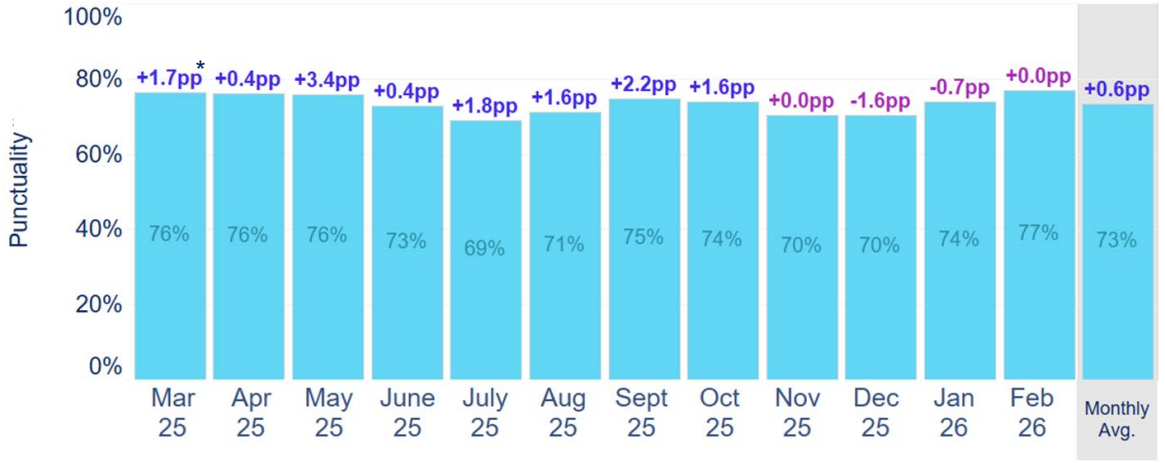
Network performance snapshot (year-on-year comparisons)

Total Air Traffic Flow Management (ATFM) Delays

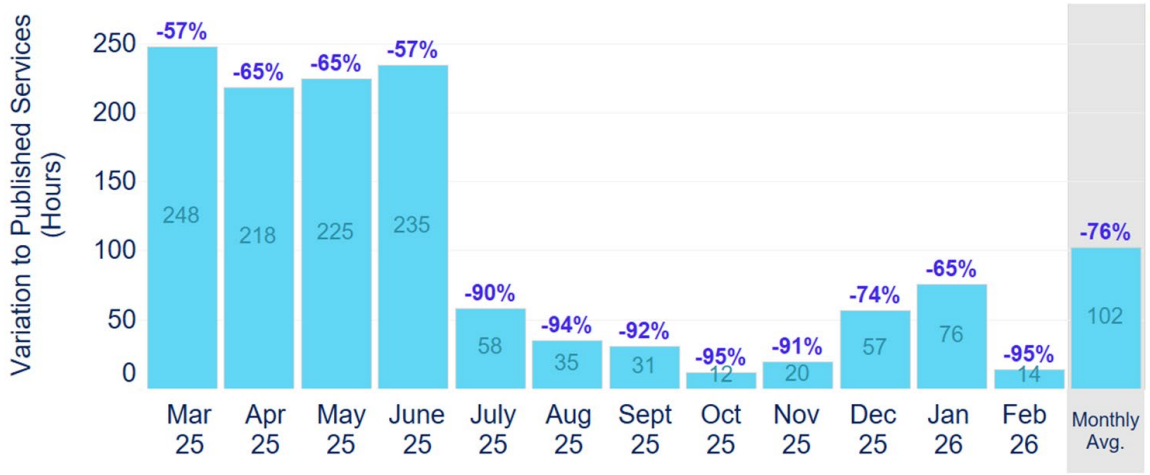
(Due to all causes such as weather, airport works, strategic overdemand, Airservices, etc.)



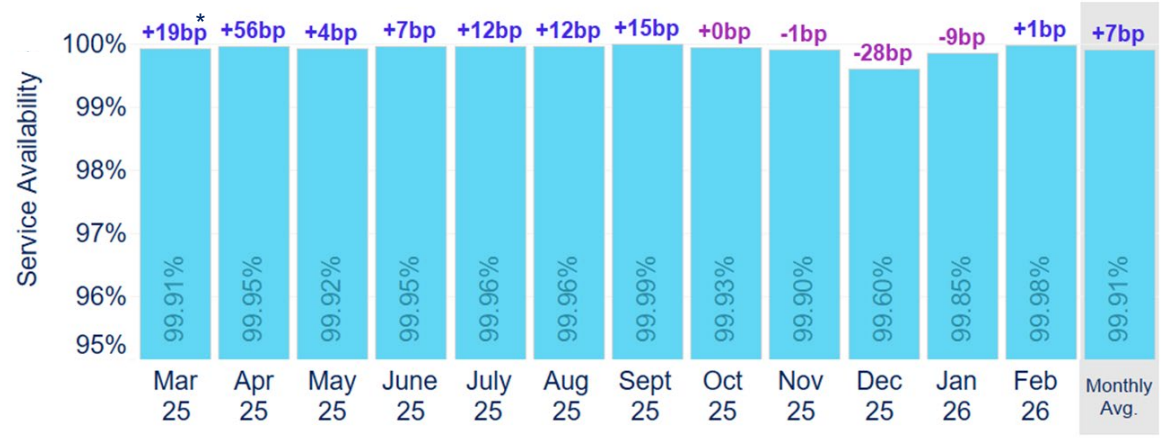
Departure Punctuality (First Flight Out)



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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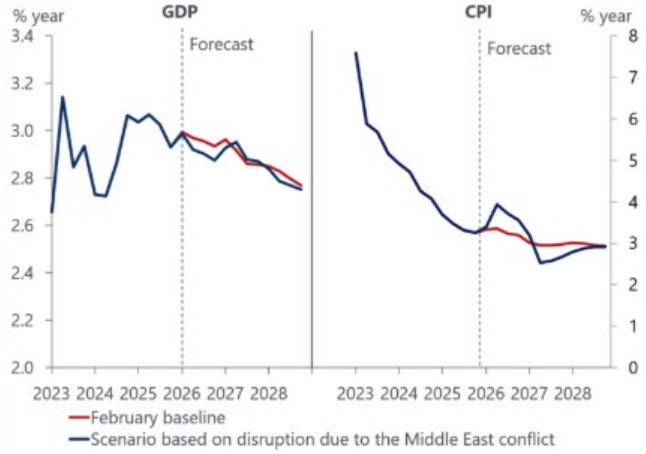
Economic and social trends

Economic factors

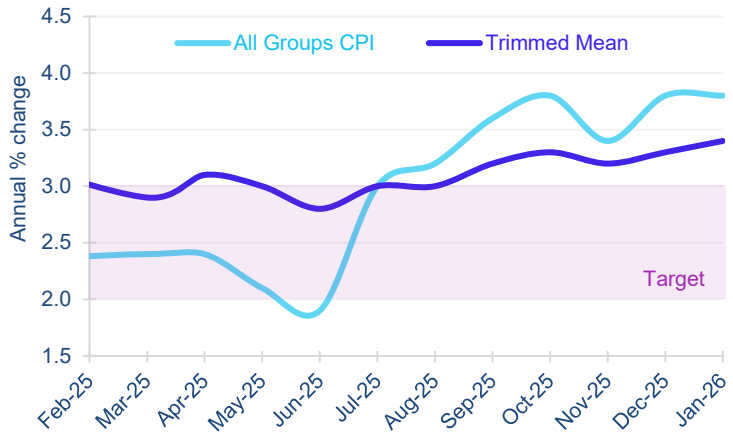
The aviation sector continues to operate in a highly volatile global environment. Fuel price, critical materials, supply chain pressures, long-haul flight disruptions and broader economic uncertainty in the face of the Middle East conflict are again testing the resilience of our industry, and the extent of long-term effects will take some time to emerge.

Figure 1. Global GDP and CPI outlook.



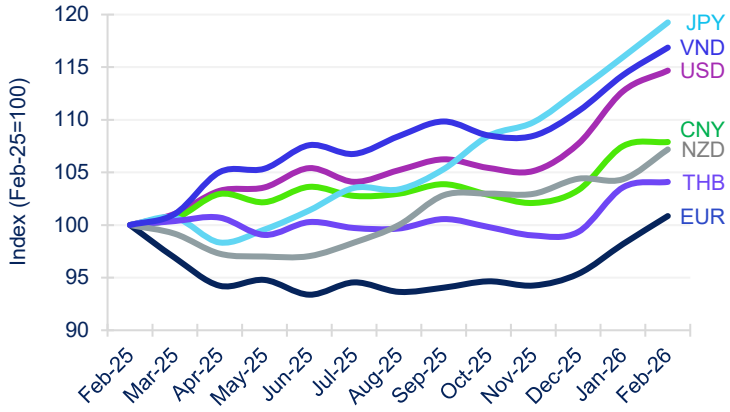
Source: Oxford Economics (website) – latest data as at 3/3/2026.

Figure 2. Consumer Price Index (CPI) Indicator.



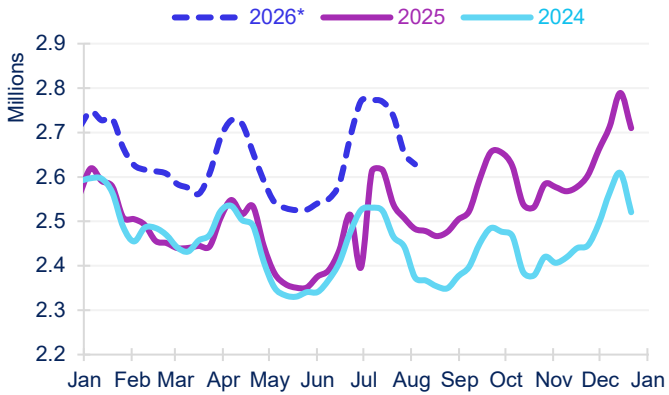
Source: ABS (website) – latest data to January 2026 as at 25/02/2026

Figure 3. AUD exchange rates for key currencies.



Source: RBA (website) – latest data as at 5/3/2026

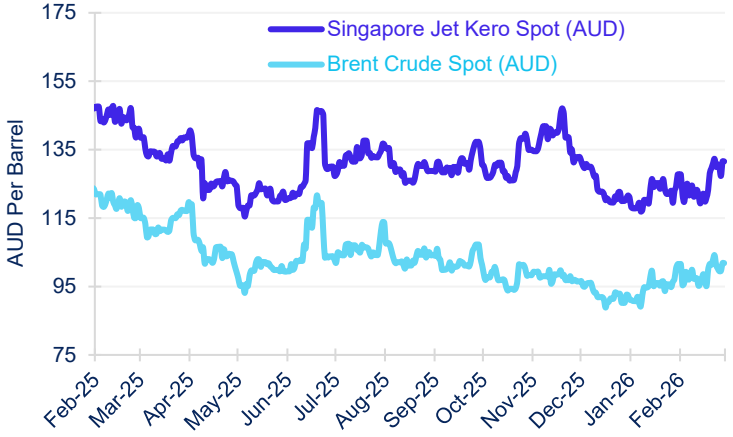
Figure 4. Australia weekly seat capacity.



** Values include forecast from March 2026 and subject to change.*

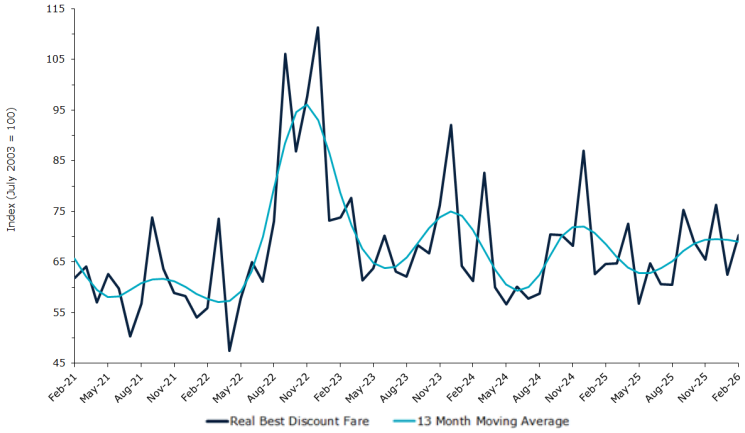
Source: CAPA (website) – latest data as at 4/3/2026

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 3/3/2026

Social factors: aircraft noise

Overall aircraft noise complainants decreased by 34% year-on-year, reflecting ongoing community engagement and noise-mitigation efforts. In February, the Brisbane Airport tailwind trial supported 10% of night-time departures to operate over water, providing noise relief during sensitive periods. However, with runway works underway across airports, sustained and proactive engagement remains essential to help communities prepare for temporary flight path changes.

Figure 7. National and airport aircraft noise complainants with year-on-year change.

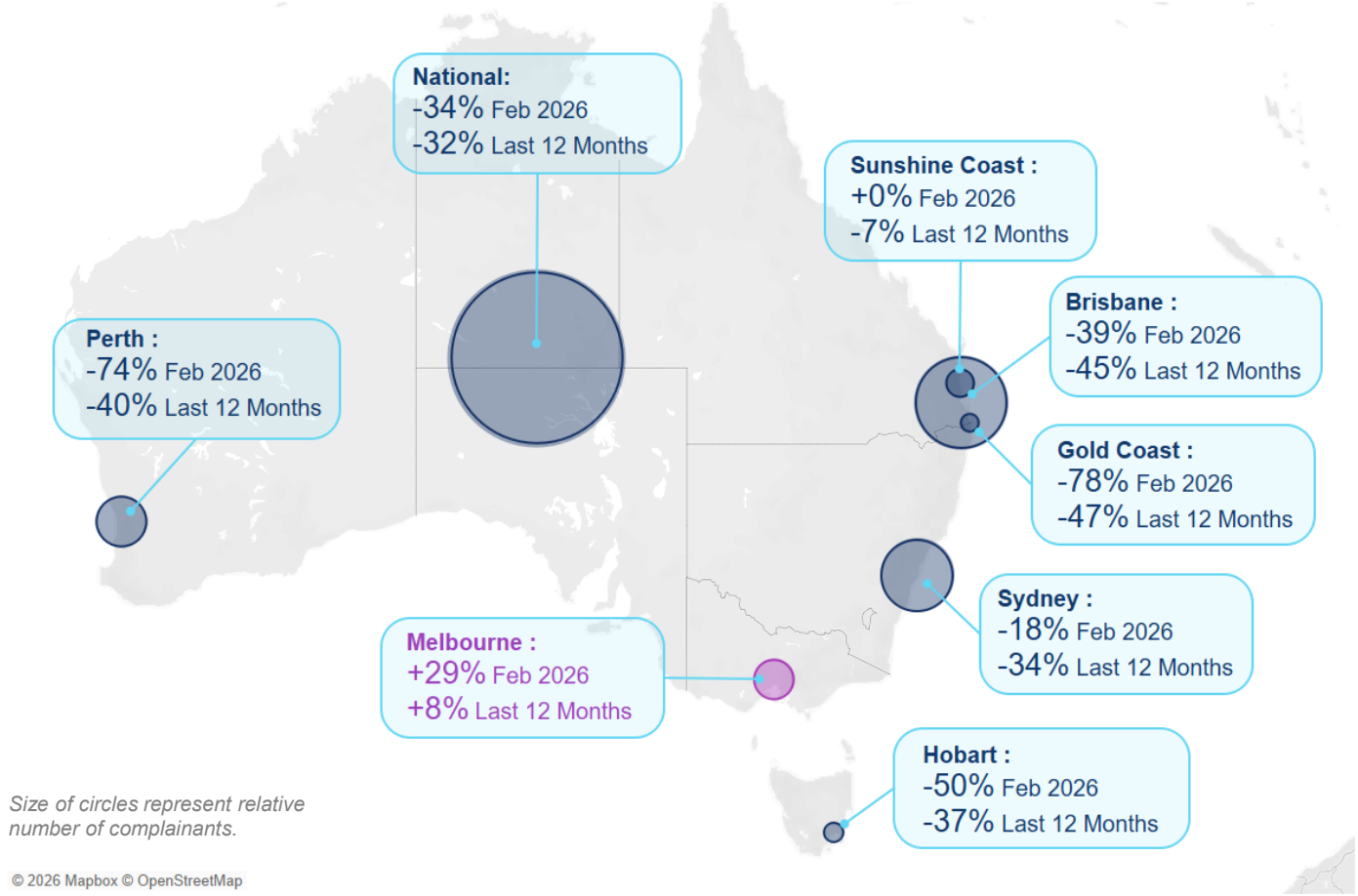


Figure 8. Use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) and constraints during priority hours in 2025 at Brisbane Airport.

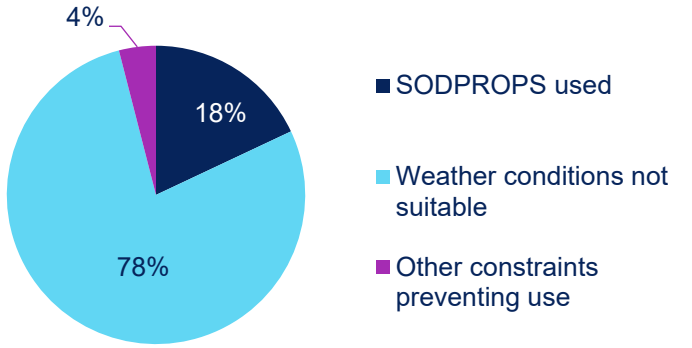
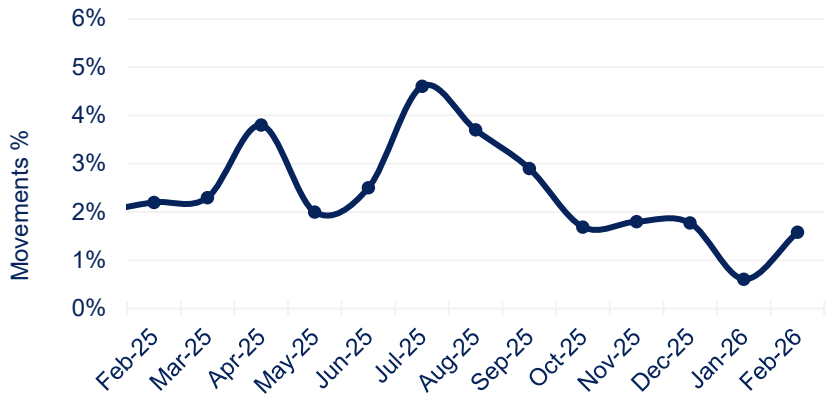


Figure 9. Use of SODPROPS by percentage of movements* at Brisbane Airport.

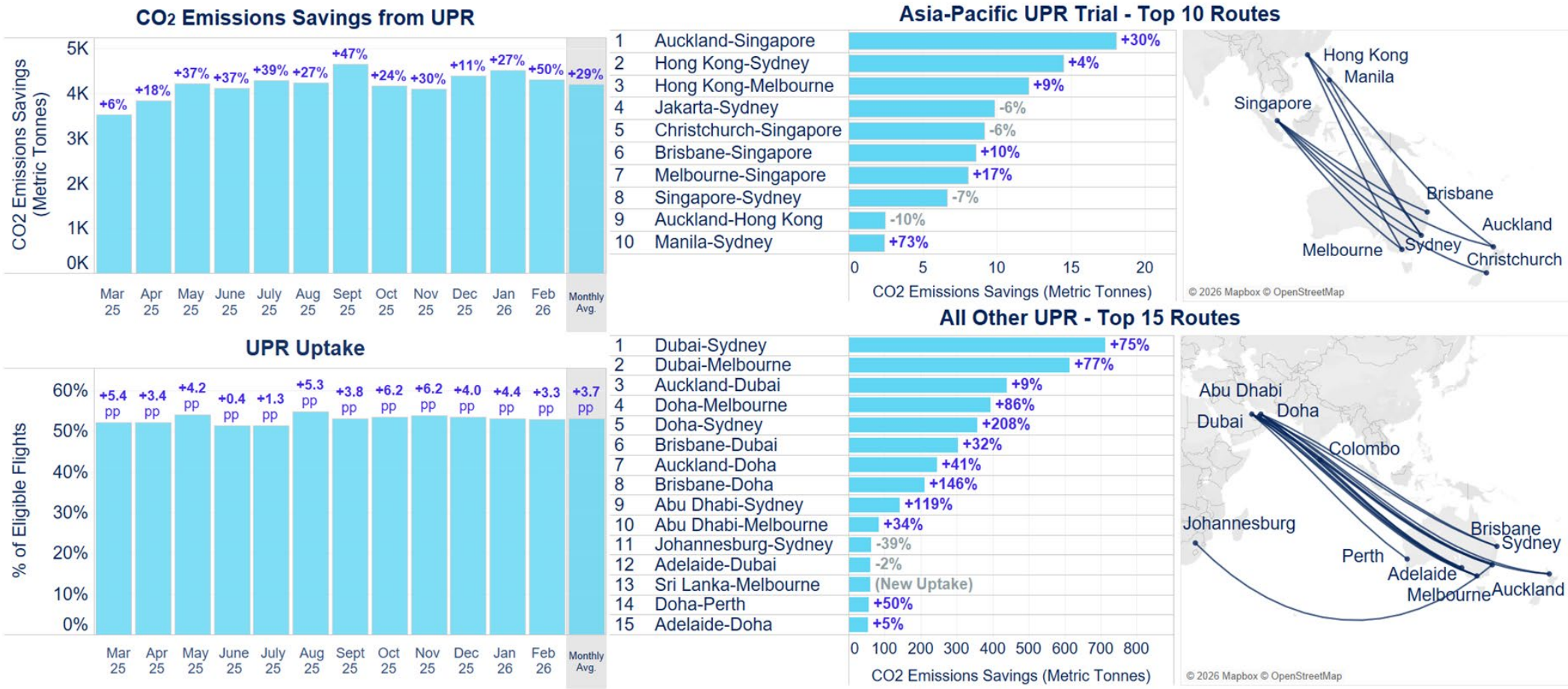


Source: Airservices' Noise Complaints and Information Service (NCIS), Airservices' Aircraft in Your Neighbourhood tool (website), Brisbane Noise Action Plan March 2026 update (website), and Brisbane Airport tailwind trial (website).
* The decrease in SODPROPS usage at Brisbane Airport between July to January 2026 was primarily due to variable weather conditions limiting opportunities for implementation.

Social factors: aircraft emissions

The integration of User Preferred Routes in upper airspace continues to deliver fuel and emissions savings, reducing CO_2 emissions by 4,308 tons this month - double the savings achieved last year and the highest year-on-year increase in the past 12 months.

Figure 10. User Preferred Routes (UPR) total CO_2 emissions savings (top left) and share of eligible flights using UPRs (bottom left). CO_2 emissions savings by top 10 routes for the Asia-Pacific UPR trial (top right) and by top 15 other UPR routes (bottom right) for February 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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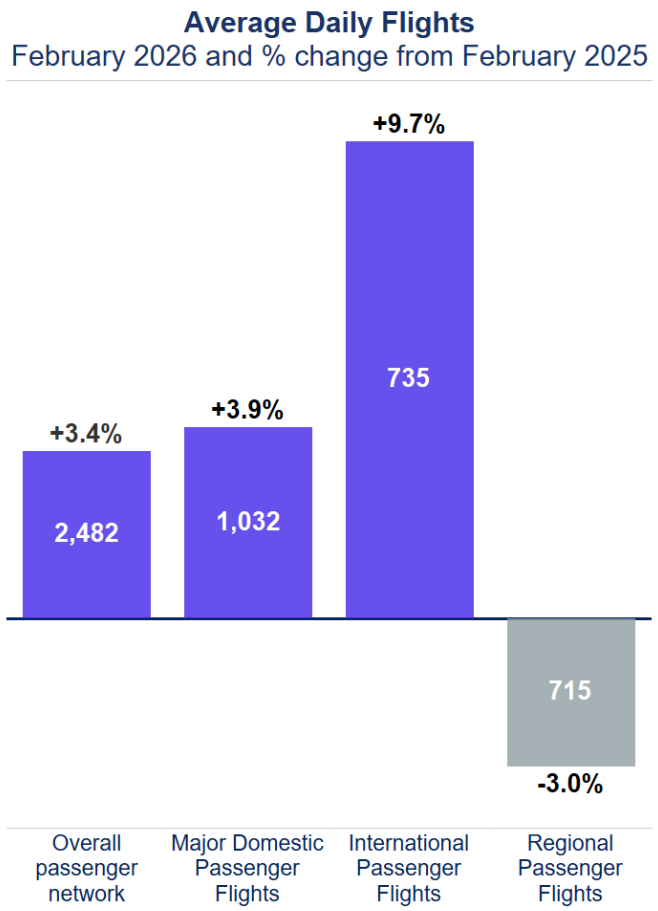
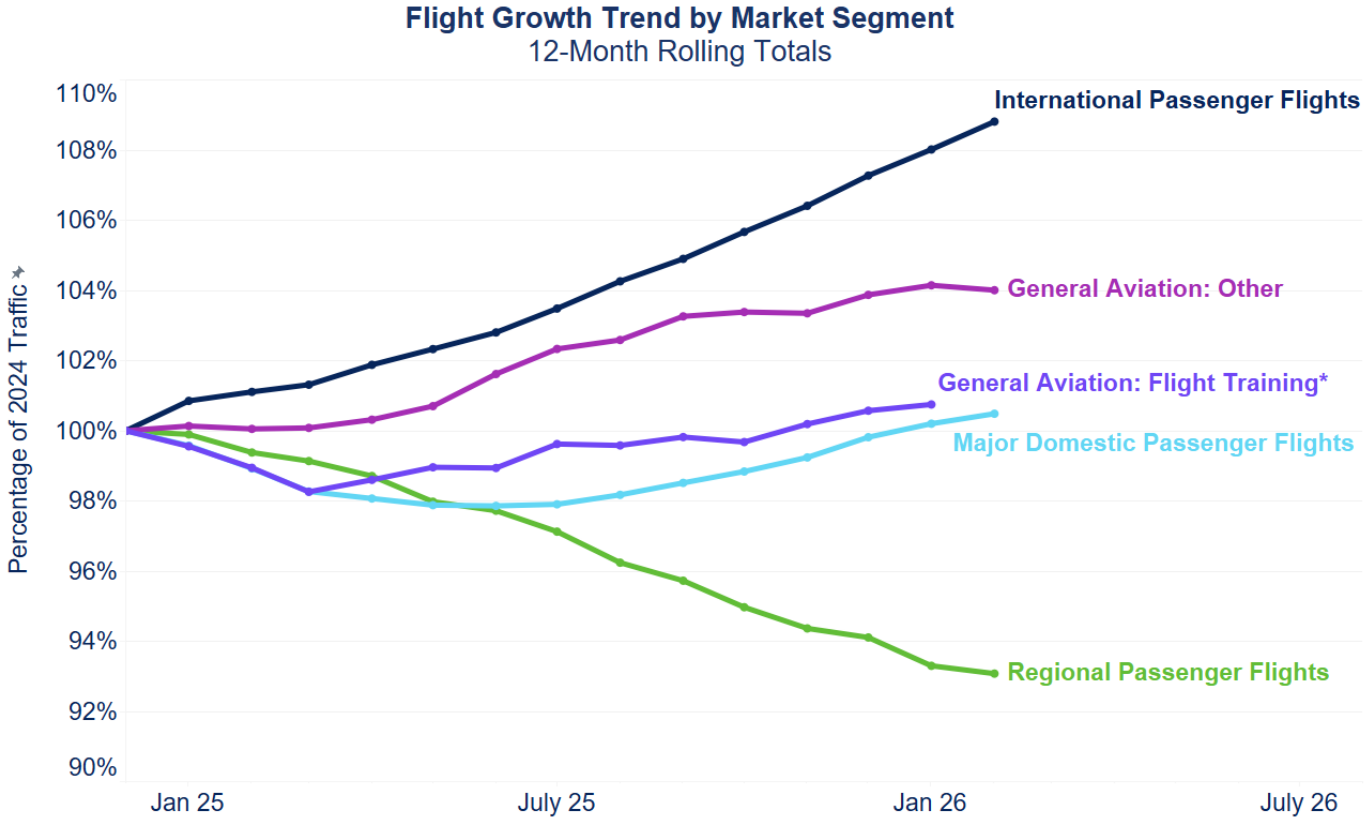
Australian aviation: domestic and international markets

State of Australian aviation growth

This month, the Australian aviation network recorded a 3.4% year-on-year growth in passenger flights. International flights reached their highest growth rate in the past 12 months, supported by the Lunar New Year travel, Winter Olympics and a strong Australian dollar.

Figure 11. Average daily passenger flights in February 2026 with year-on-year change (left) and 12-month rolling totals as a percentage of 2024 by market segments (right).



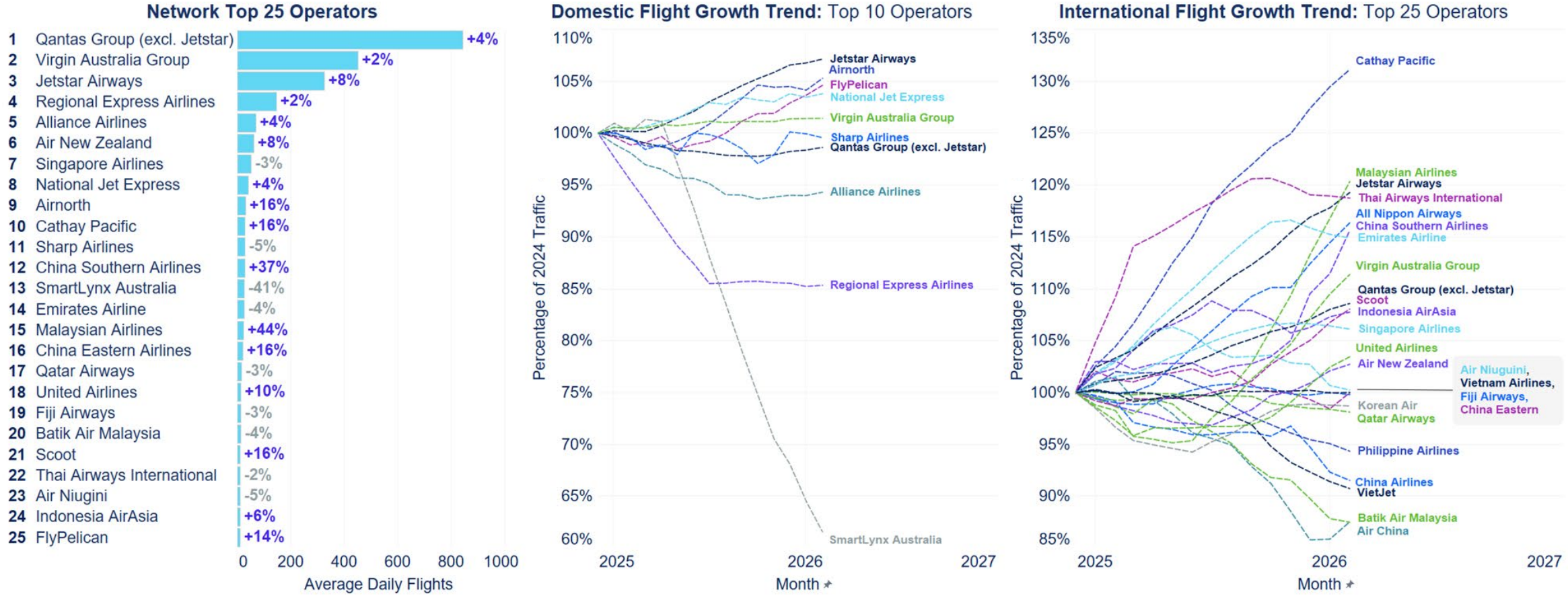


Source: Airservices ODAS (excludes helicopters).
* *General Aviation: Flight Training* data is one month in arrears.

Top aircraft operators

The domestic network continues to be driven by the major airline groups, while international growth is being led by markets benefiting most from the stronger Australian dollar, including Japan, China and South-East Asia.

Figure 12. Overall top 25 airlines growth in February 2026 with year-on-year change (left) and 12-month rolling totals as a percentage of 2024 for domestic and international operators (middle, right).

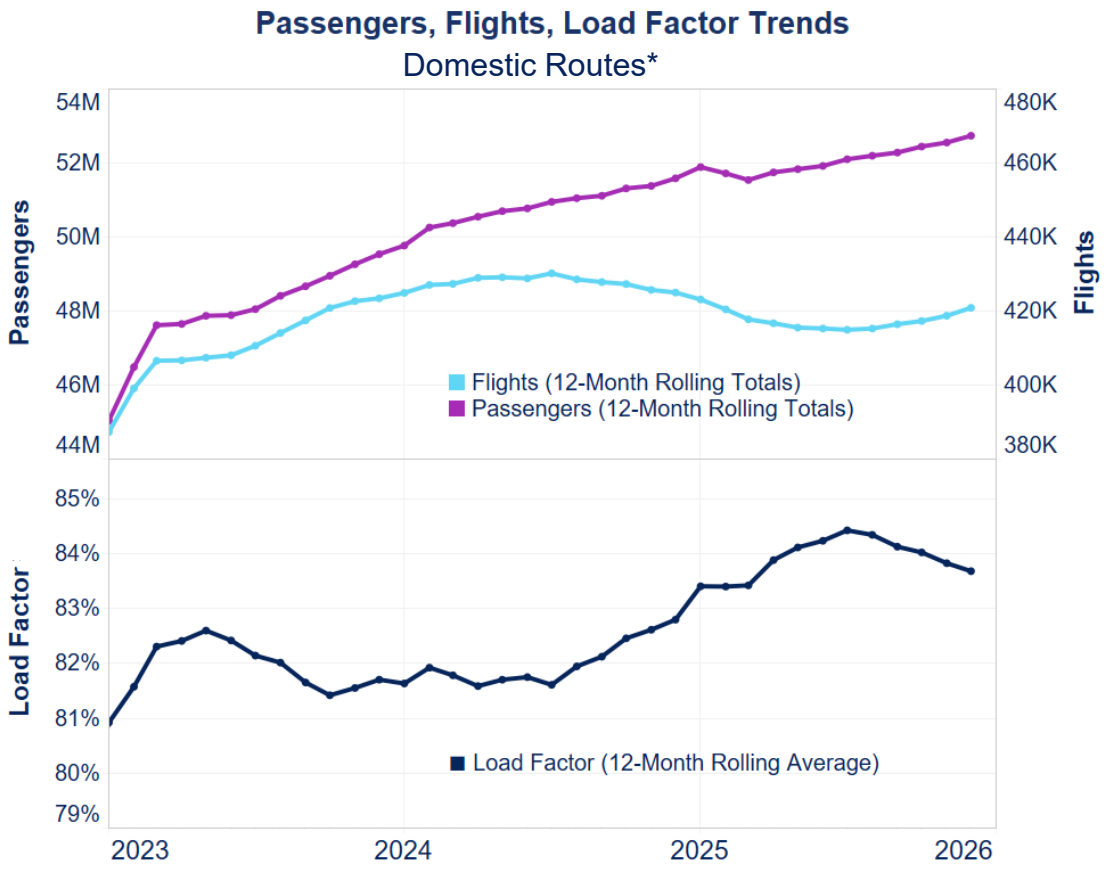


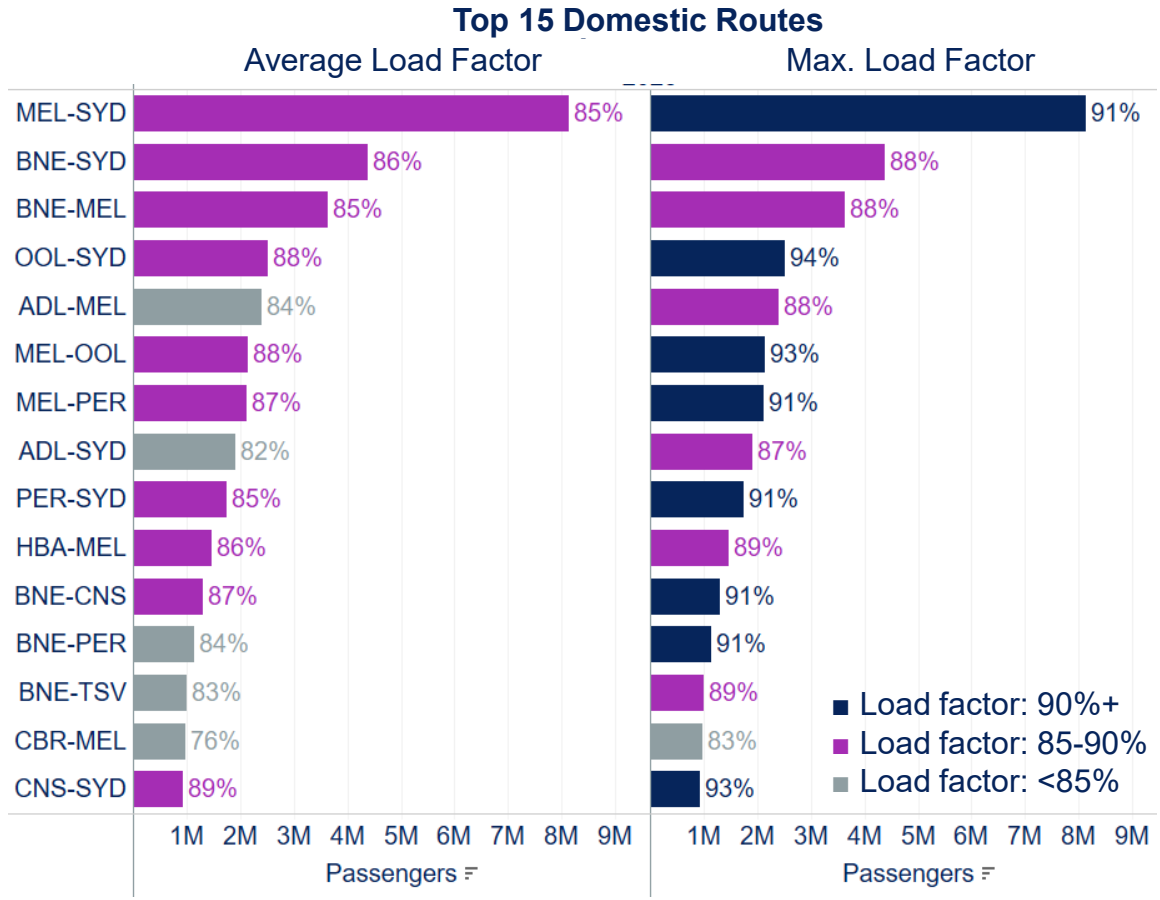
Source: Airservices ODAS (includes airline flights only).
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

Over the past three years, domestic passenger numbers have grown faster than flight volumes, reflecting fleet and resource constraints that shaped the post-pandemic operating environment. Load factors peaked around August last year and have started to ease. 10 of the top 15 busiest routes, all carrying over 900,000 passengers annually, recorded average load factors above 85% in 2025, with some reaching 94% during holiday peaks.

Figure 13. Passenger, flights, and load factor 12-month rolling trends across domestic routes* between 2023 and 2026 (left) and average and peak load factors across top 15 domestic routes by passengers in 2025 (right).





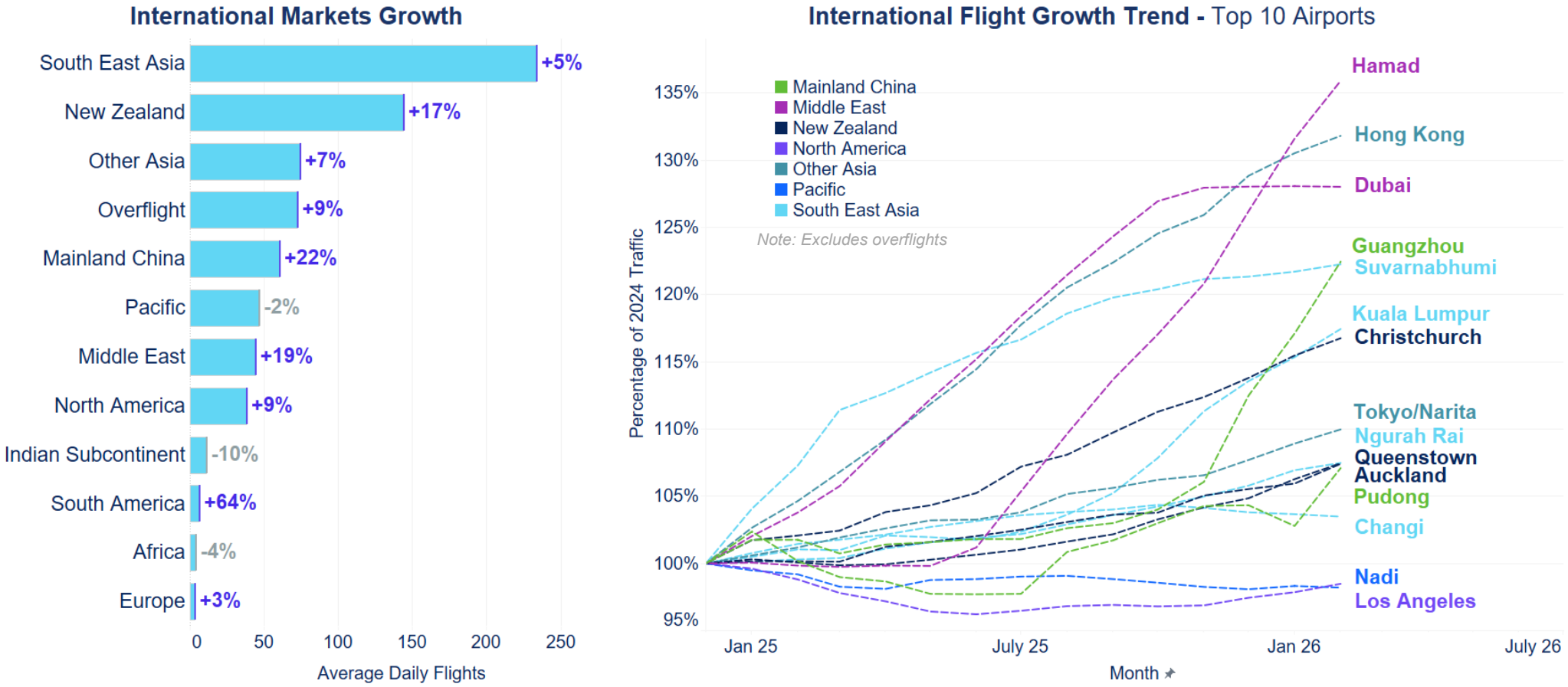
Source: BITRE – latest release to December 2025.

*BITRE only publishes data for routes with an average exceeding 8,000 passengers per month over the previous six months where two or more airline operate – the top 55 routes are shown here where there are regular monthly services.

International markets

In February, the strongest growth rate in international flights was seen in Qatar, Japan, China and Malaysia. However, the Middle East conflict late in the month is expected to soften long-haul demand. About 6% of Australia's international flights (10% of seat capacity) rely on Middle Eastern carriers.

Figure 14. Growth of international markets by region for February 2026 with year-on-year change (left) and 12-month rolling totals as a percentage of 2024 for top 10 international airports (right).

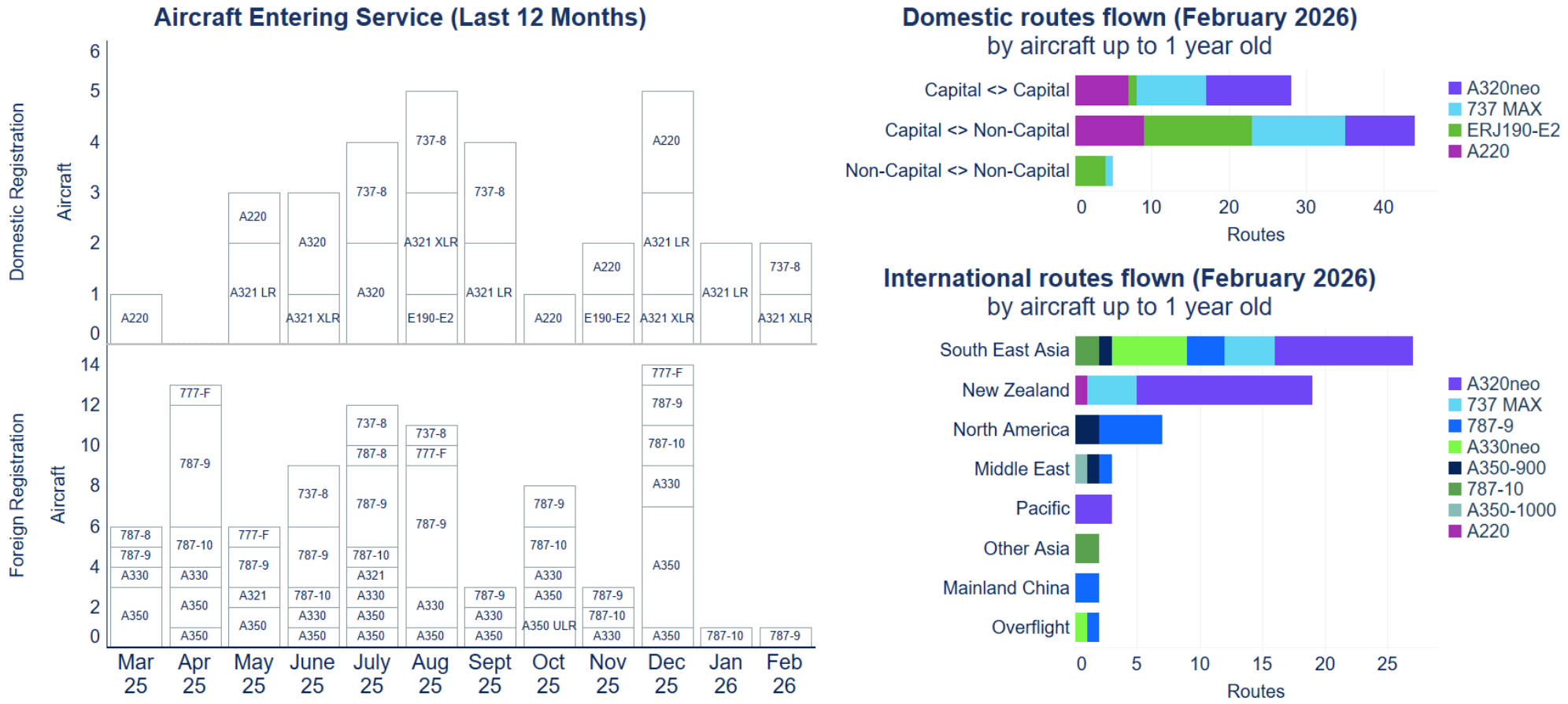


Source: Airservices ODAS (includes airline flights only).
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

On average, around three domestic and seven foreign aircraft are entering the Australian network each month, enhancing domestic and international connectivity. The capacity enhancement is prioritised along key capital-city corridors, coastal leisure destinations, resource and mining markets, as well as short-haul international markets across the Tasman and South-East Asia.

Figure 15. Aircraft newly entering service in the Australian network in the last 12 months (left) and routes flown in February 2026 by aircraft up to 1 year old for domestic and international segments (right).



Source: CAPA and Airservices ODAS (includes airline flights only).

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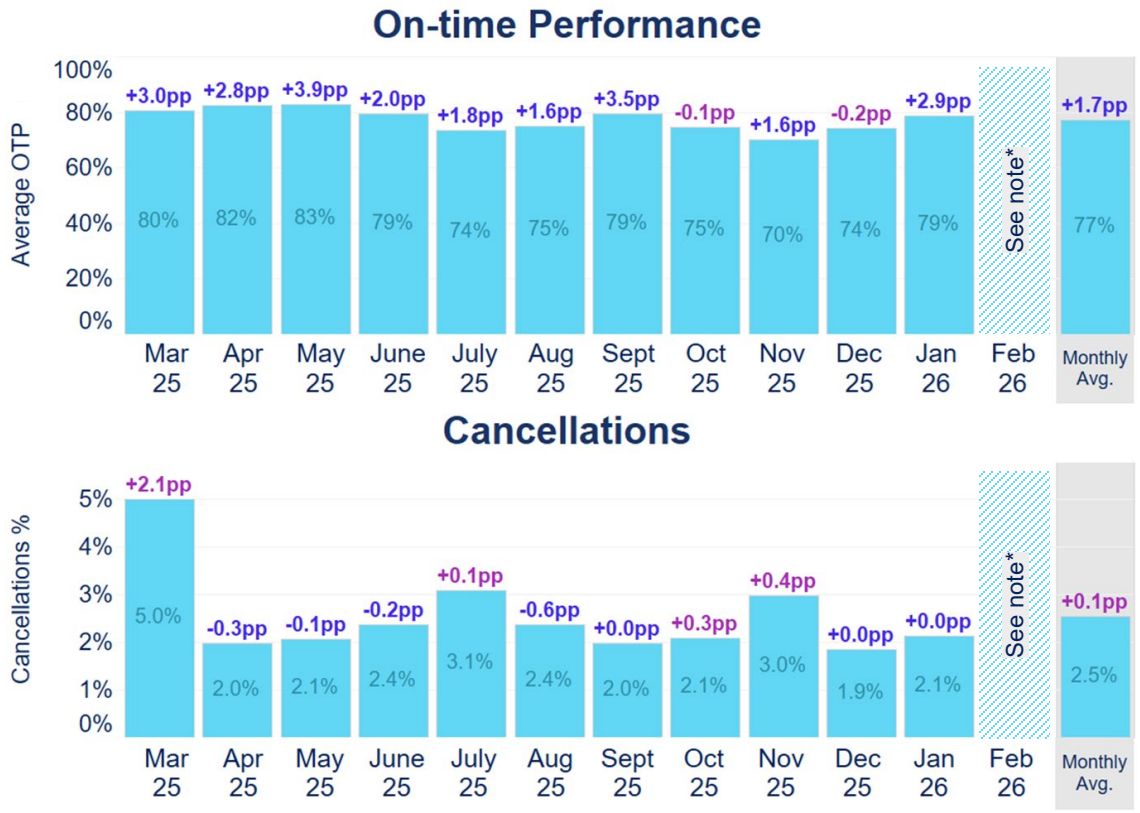
Australian aviation: network performance

Industry performance

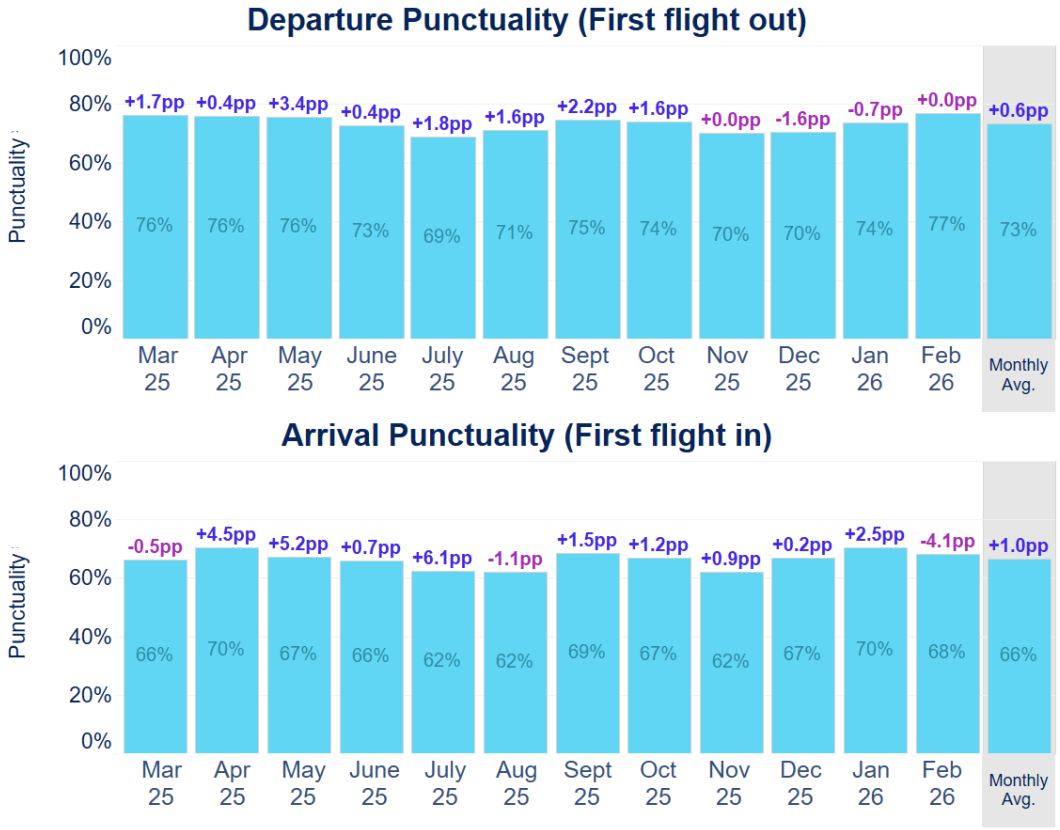
Overall industry on-time performance improved by nearly three percentage points year-on-year in January, while cancellation rate remained low at around 2.0%. Australian carriers now rank among the top 10 most punctual airlines in Asia Pacific, supported by fleet renewal, targeted technology and process improvements addressing key OTP drivers, and investment in workforce capability.

Figure 16. Total industry OTP^ and cancellations, up to January 2026 with year-on-year change.



Source: BITRE (website). March 2025 performance was impacted by Tropical Cyclone Alfred.
* Data available up to January 2026 based on latest BITRE data release.
^ Average of departure and arrival OTP.

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



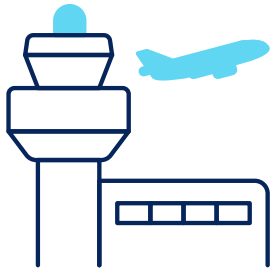
Source: Airservices ODAS (includes Sydney, Perth, Brisbane, Melbourne). The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the Air Traffic Flow Management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

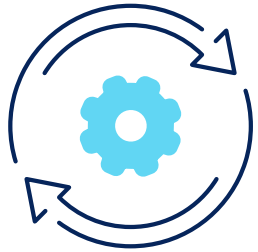
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management 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 February, Airservices facilitated 69,482 passenger flights, an additional 81 flights per day compared with the same month last year. Ground Delay Programs (GDP) accounted for 2.0% of total network delays, mainly due to severe weather such as tropical lows, storms and lightning disrupting throughput and ground operations at multiple airports as seen on 26 February. Climate resilience is an ongoing focus area for industry collaboration, including exploring advanced forecasting and real-time warning capabilities.

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

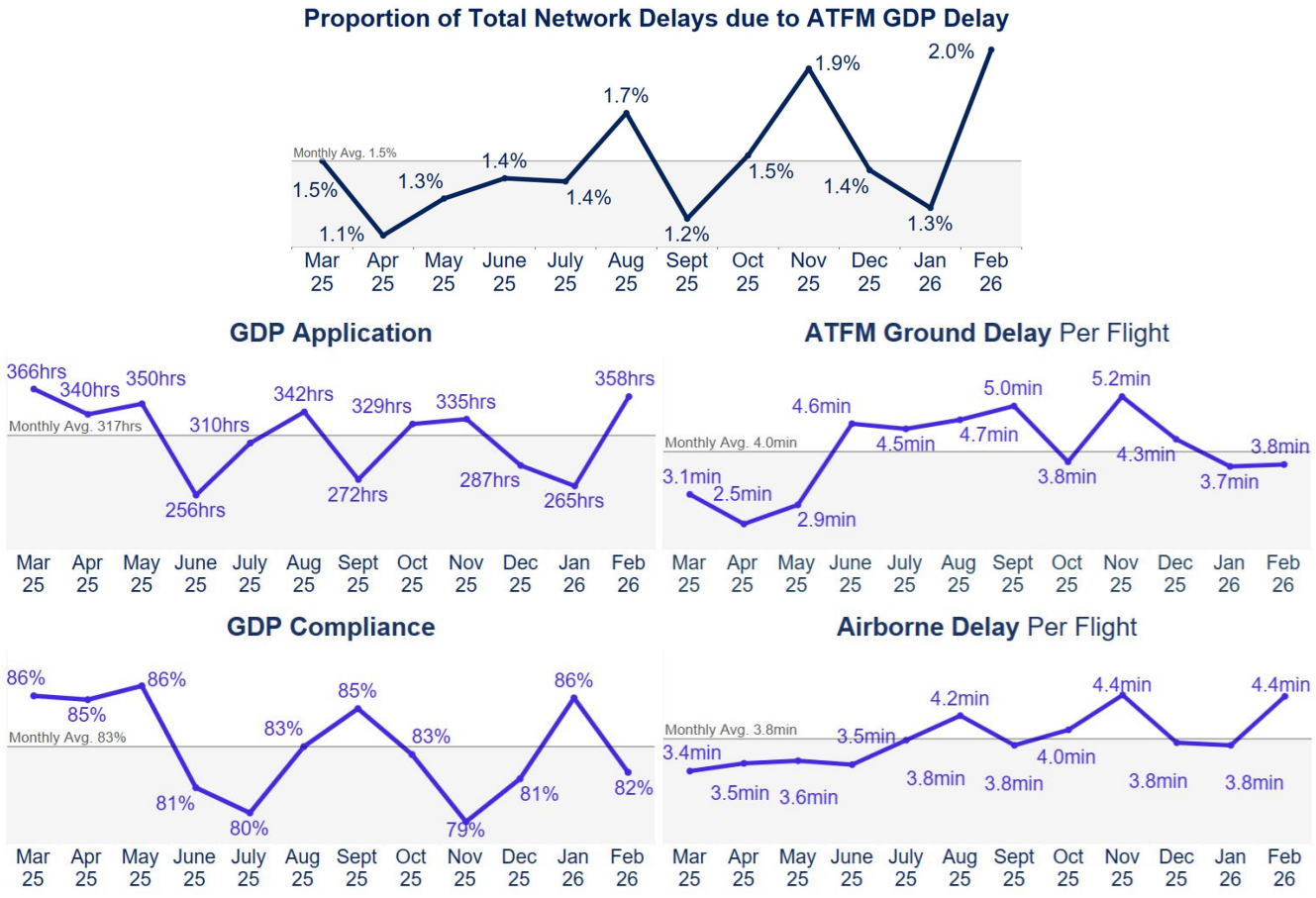
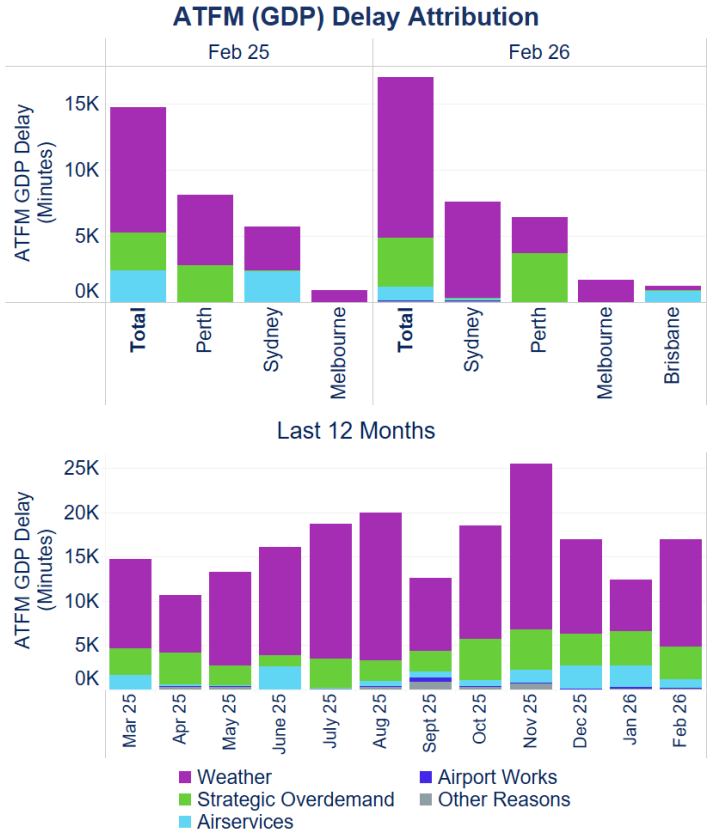


Figure 19. ATFM (GDP) delay by attribution overall and by airport.



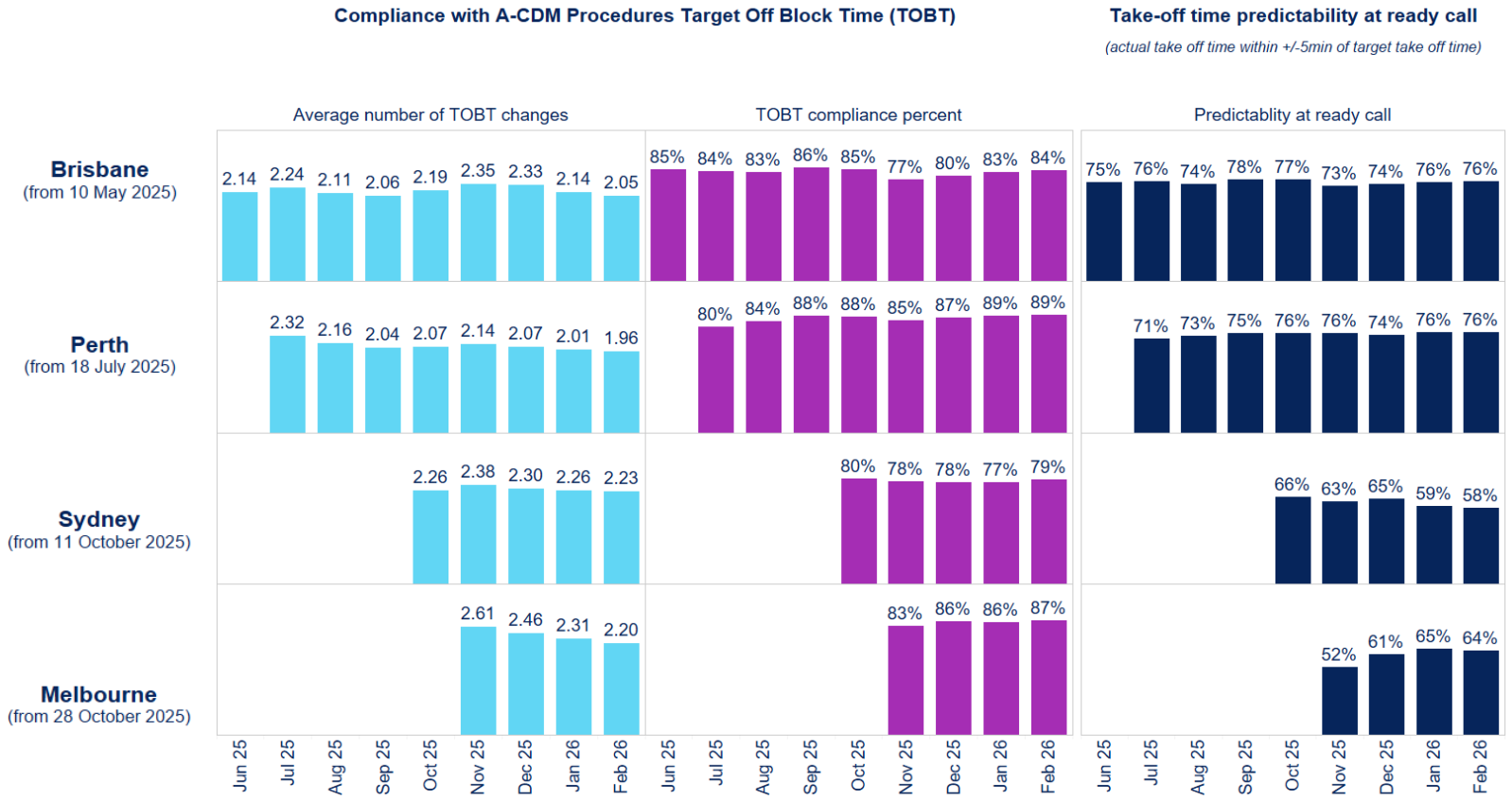
Airports with nil ATFM delay are not shown.

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)

Since A-CDM became operational at the four busiest airports, industry compliance has remained strong at around 85%, exceeding the 80% global benchmark that typically took longer to achieve in overseas implementations. Airports have reported early benefits, including significant delay reductions and increased runway slot availability at Perth Airport, improved gate conflict management at Melbourne Airport, and nationally greater transparency of operational procedures and real-time situation awareness. Partners met this month to confirm post-implementation priorities, focusing on optimising process and system configurations at Sydney Airport and sharing data and analysis insights to improve operational outcomes.

Figure 20. A-CDM milestone monitoring at airports.

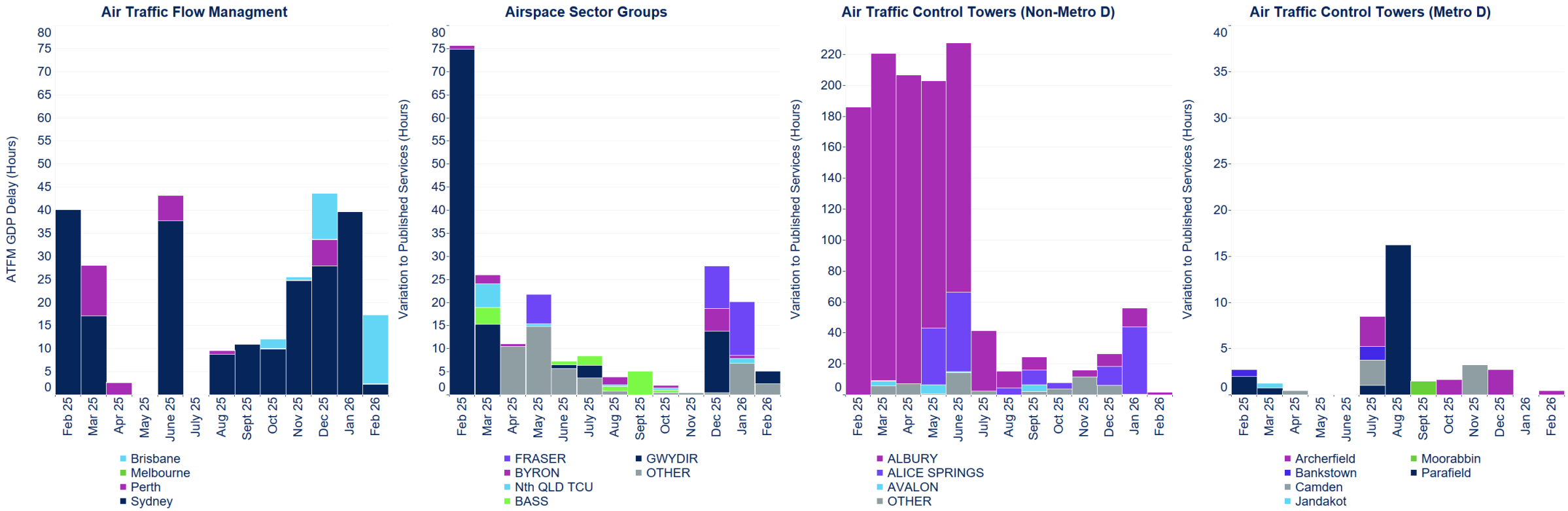


Source: Airservices ODAS and A-CDM.

Air traffic service provision

In February, air traffic service variations decreased by 95% year-on-year and tower service consistency reached a four-year high, with 2.2 hours of service variation. Airservices attributable GDP ground delays fell by 63% year-on-year, representing 0.1% of total network delays. However rostering, staffing, and recovery constraints led to 15 hours of GDP ground delays in Brisbane attributable to Airservices, and application of traffic management measures in Sydney. We are progressing a set of measures to consistently provide the capacity needed to meet traffic demand. Our focus remains on building workforce capacity and planning to enhance service resilience.

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

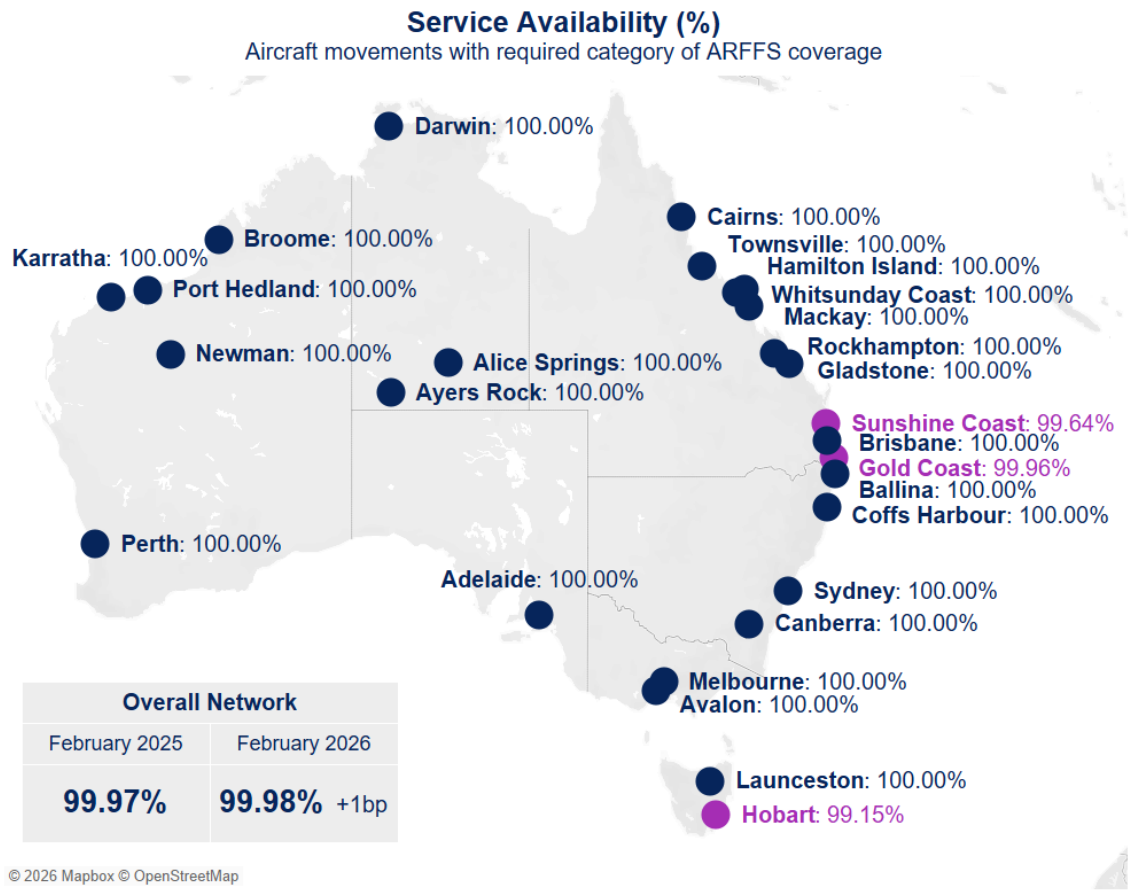


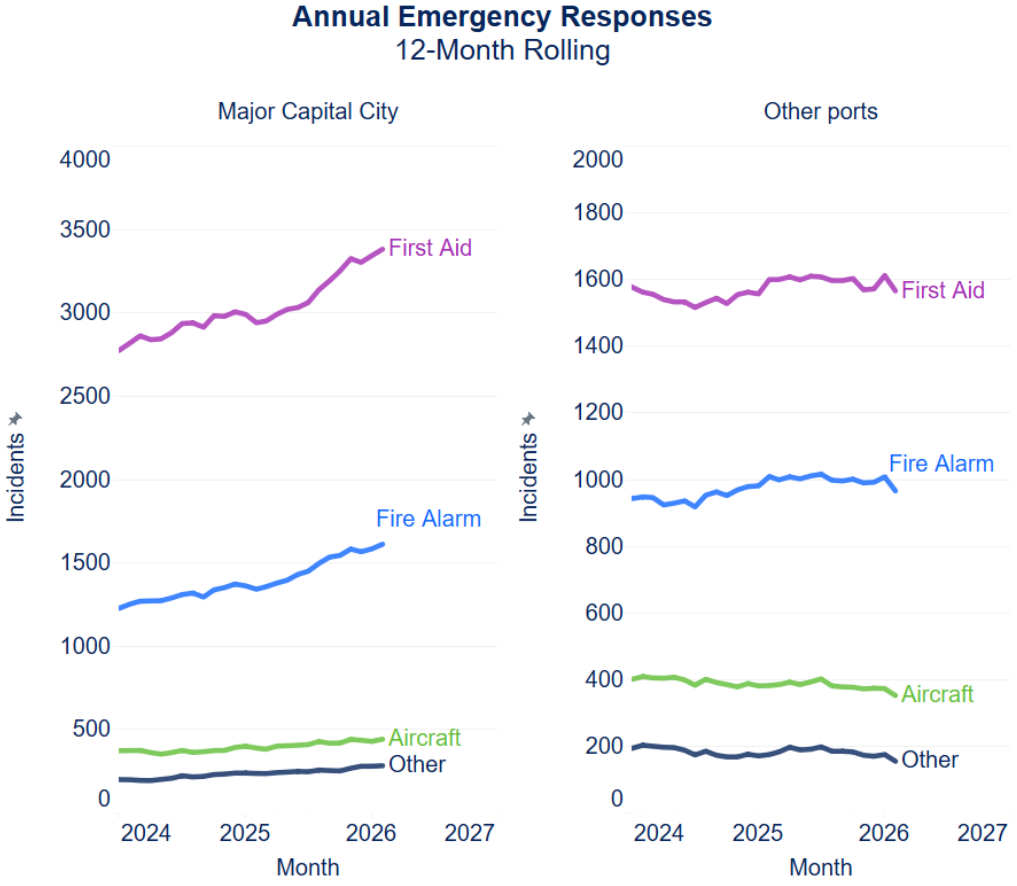
Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information 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 February, ARFFS delivered 99.98% service availability across the network, demonstrating a high standard of emergency response capability to support ongoing industry growth.

Figure 22. ARFFS service availability by airport and overall network in February 2026 with year-on-year change (left) and 12-month rolling number of emergency responses (right).





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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