Australian Aviation Network Overview

March 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

Short-term volatility remained the defining theme for aviation in March 2026, however against a backdrop of Middle East conflict and uncertainties in fuel and energy supply, the Australian aviation network demonstrated strong resilience. Overall activity levels broadly aligned with the trend over the last two years. Australia-Middle East traffic is down 77% year-on-year and direct Australia-Europe traffic has fallen by 31% as some services are re-routed via other hubs. In contrast, Asian gateways such as Singapore, Kuala Lumpur, Hong Kong, Tokyo, and Seoul are capturing much of this displaced demand and may emerge as alternative hubs and travel destinations. Growth in international markets is mixed, with media reporting that some Chinese airlines are reducing flights to Australia to focus on higher yield routes while outbound demand to Southeast Asia remains resilient.

Domestic leisure and mining demand, together with solid international travel across Asia Pacific markets, largely offset the reduction in Middle East and European traffic in March 2026. Operators have responded with a cautious and disciplined approach to the evolving environment, underpinned by regular risk assessment and cross-sector coordination. Notwithstanding, forecast domestic schedules for May and June show current schedule forecast have decreased to pre-conflict schedules, with domestic capacity reductions of up to -1.5% and recent industry announcements of up to 5% reductions in domestic capacity.

Industry operational performance continued to improve, although adverse weather at Melbourne and Sydney drove air traffic flow management (ATFM) ground delays to around double last year's level. The 2025-26 summer season was the wettest in nearly a decade, with rainfall 32% higher than average. Industry focus remains firmly on coordinated disruption preparation, recovery capability and operational process refinement in response to increasing cost pressures and volatile external factors.

Industry collaboration progressed further through agreement to share data and jointly develop consistent methodologies to track Airport Collaborative Decision Making (A-CDM) benefits. Continued engagement will occur with industry partners on A-CDM ways of working and increased data transparency to drive network-wide outcomes.

In March, Airservices managed 75,301 passenger flights. Air Traffic Service variations decreased by 97% year-on-year and Airservices attributable ATFM ground delay were limited to Sydney operations on 6 March due to thunderstorm activity combined with rostering, staffing, and recovery constraints. Although departure spacing was applied at times in Brisbane and Sydney without impacting arrival throughput, these events still highlight the need to improve consistency in service provision. In the lead-up to Easter, heightened resilience measures were implemented, including daily roundtable oversight of network decisions and a strong focus on maximising all available resources to service the travelling public.

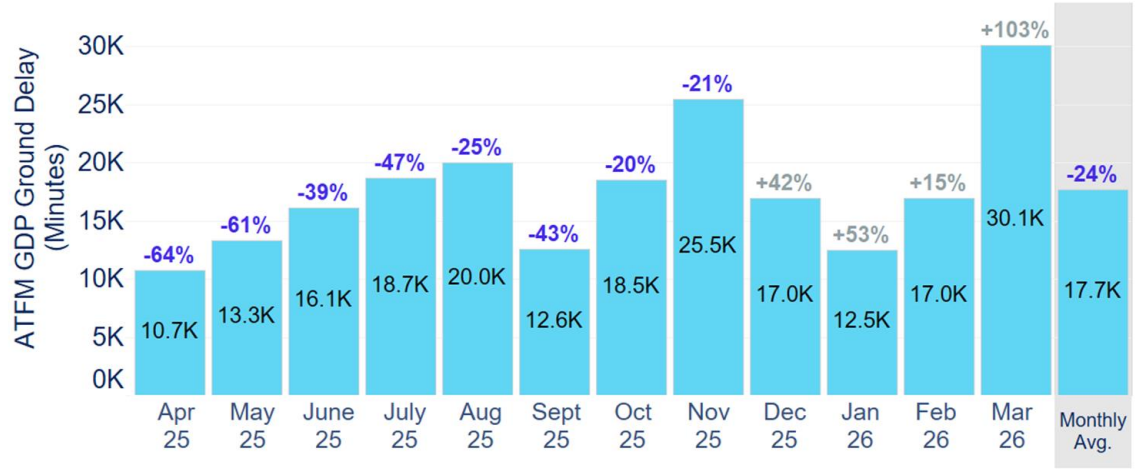
Aviation Rescue Fire Fighting (ARFF) delivered 99.96% service availability, while responding to a 10% year-on-year increase in annual call-outs, particularly at major airports. Despite the impacts of ex-cyclone Narelle, ARFF supported timely recovery and safe resumption of essential aviation services.

Despite a long-term decline in suitable weather conditions since 2020 in Brisbane, Airservices has focussed on enabling Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS), with usage doubling between 2024 and 2025. However, SODPROPS remains highly weather dependent, and in March the required conditions were available for only 14% of priority hours. Airservices recognises the benefits of SODPROPS for the Brisbane community and will continue to maximise use of this mode when conditions are favourable.

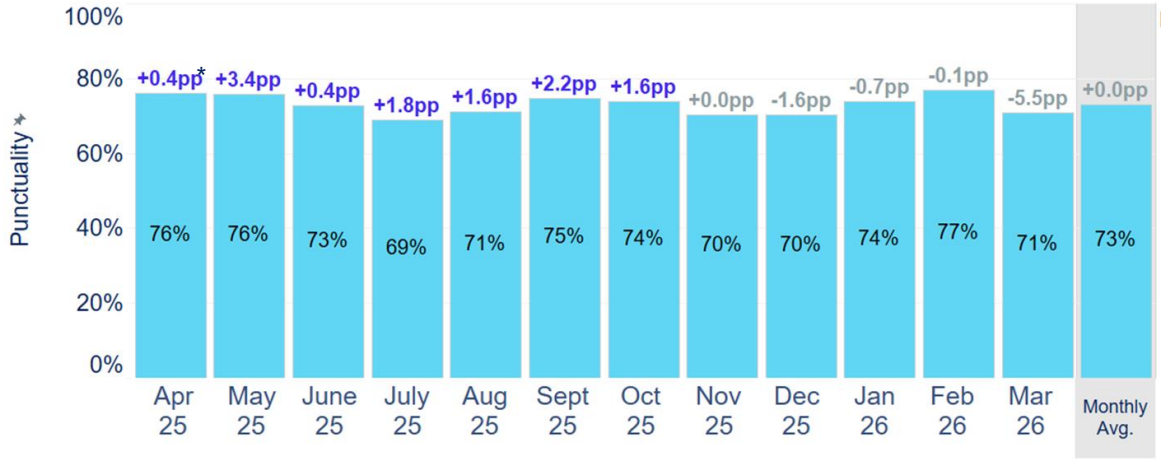
Network performance snapshot (year-on-year comparisons)

Total Air Traffic Flow Management (ATFM) Delays

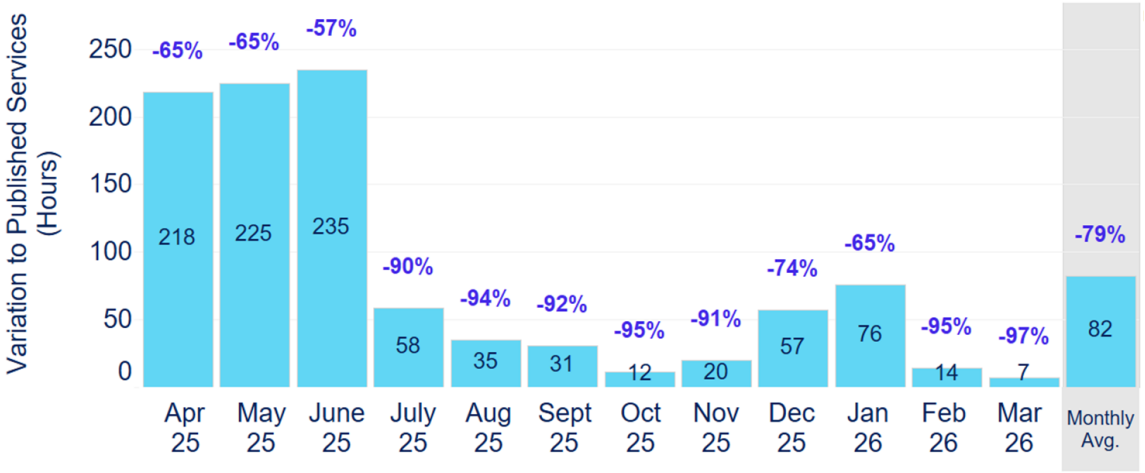
(Due to all causes such as weather, airport works, strategic overdemand, Airservices, etc.)



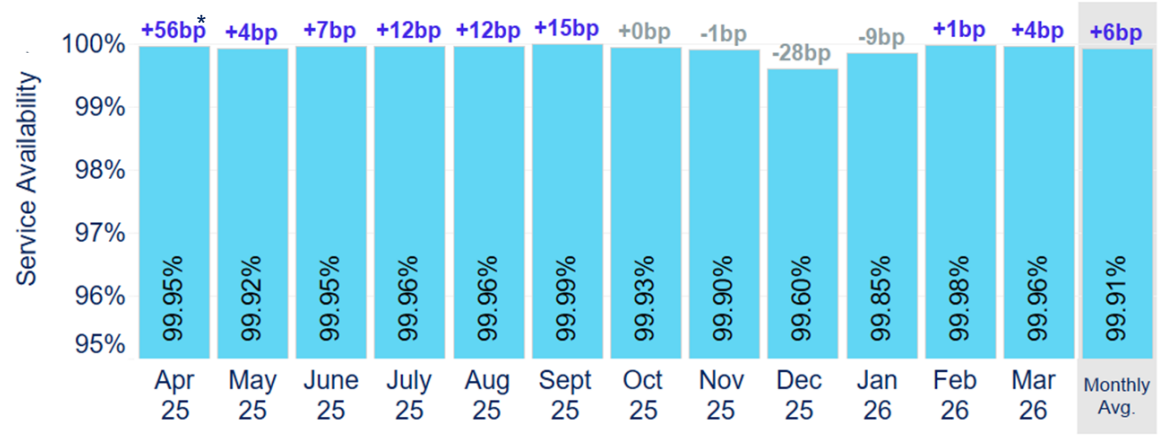
Departure Punctuality (First Flight Out)



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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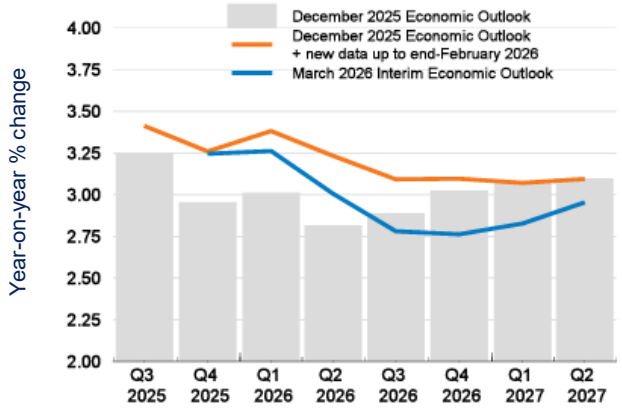
Economic and social trends

Economic factors

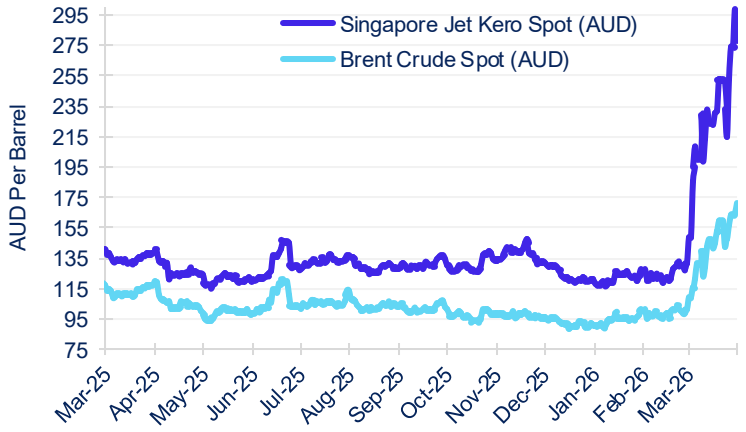
Aviation continues to face a volatile economic environment, with heightened energy supply uncertainty, logistics risks and renewed inflationary pressures. Jet fuel prices, which typically represent around 30% of airline operating costs, increased around 80% over the previous month, driving higher airfares and reduction in forward seat capacity by approximately 3% over the next three months. Combined with weaker consumer confidence, these factors are weighing on industry operating costs and near-term demand outlook.

Figure 1. Global GDP outlook.



Source: OECD (website) – latest data as at 26/3/2026.

Figure 2. Jet fuel and Brent crude oil prices daily.

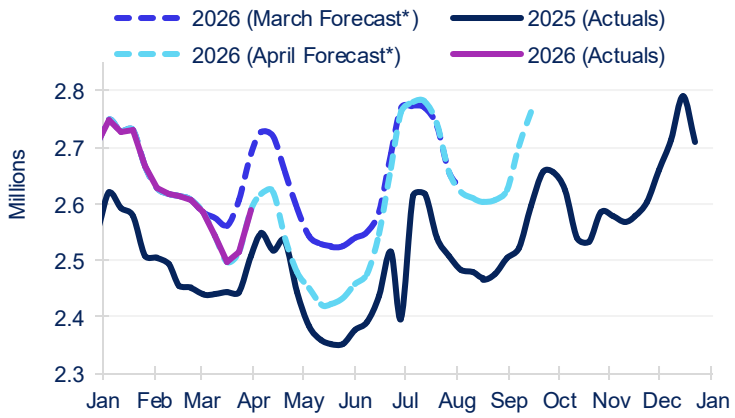


Source: Bloomberg – latest data as at 1/4/2026.

Figure 3. Australian Consumer Confidence (ANZ-Roy Morgan).

Source: ANZ – Roy Morgan (website) – latest data as at 7/4/2026.

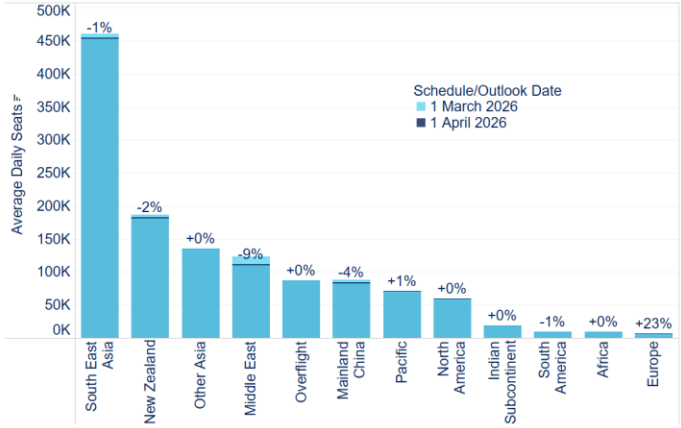
Figure 4. Australia weekly seat capacity.



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

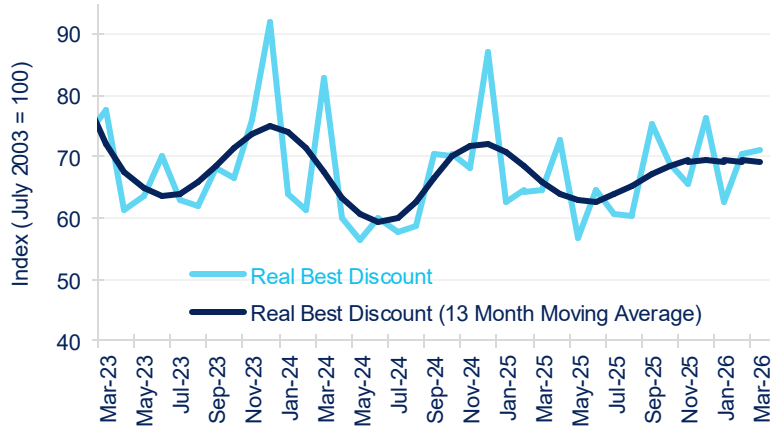
Source: CAPA (website) – latest data as at 7/4/2026.

Figure 5. Seat capacity outlook for international markets (April-June 2026).



Source: Airservices ODAS and OAG.

Figure 6. Domestic airfares (real best discount).

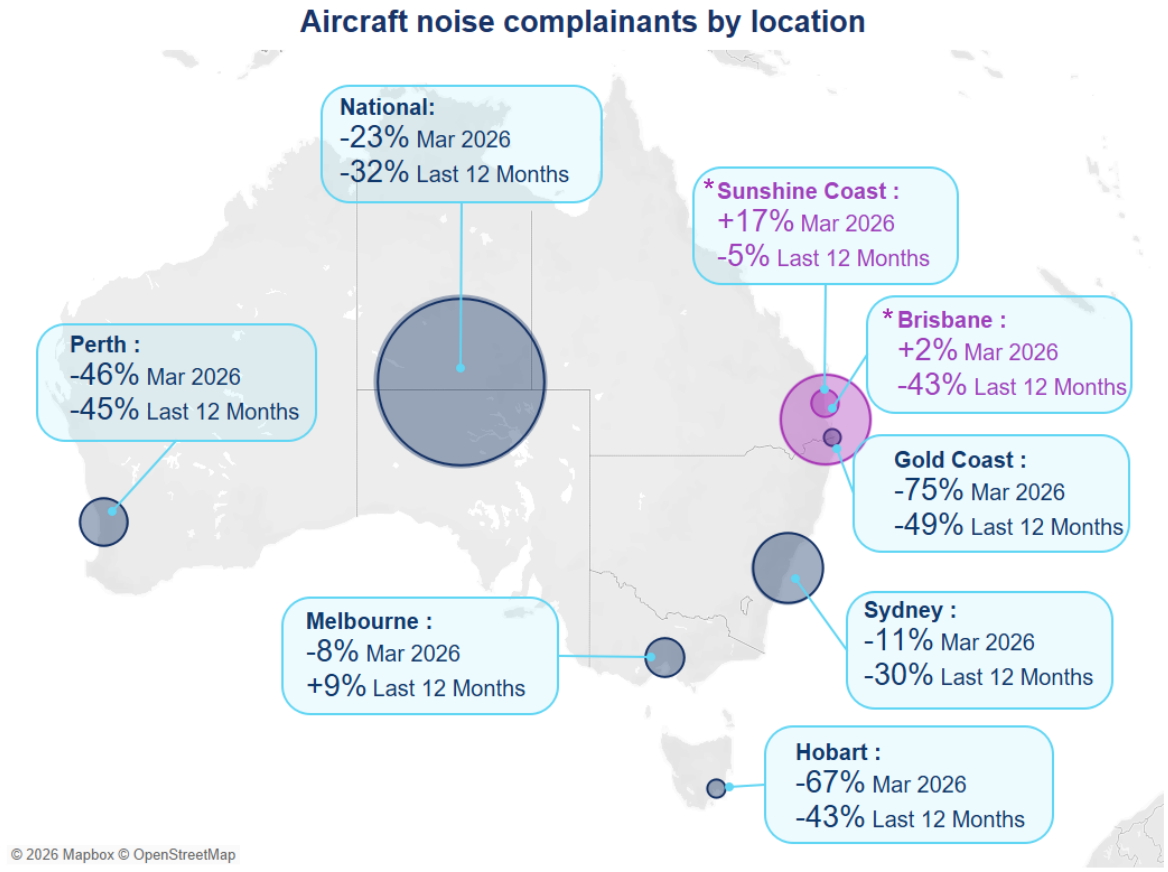


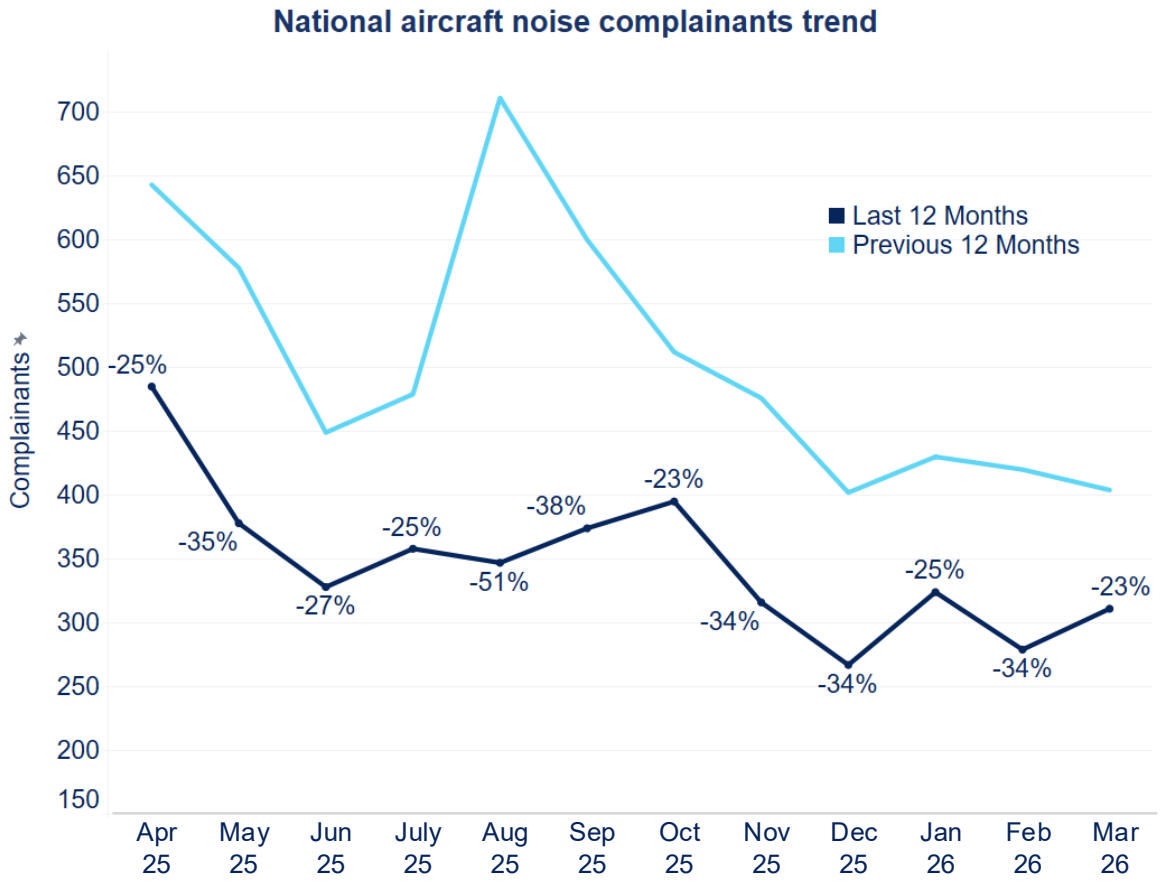
Source: BITRE (website) – latest data as at 7/4/2026.

Social factors: aircraft noise

The overall number of aircraft noise complainants has been trending downwards. However, seasonal changes affecting runway use at Brisbane and Sunshine Coast has resulted in heightened sensitivity to aircraft noise reflected in a slight increase in complaints at these locations. This reinforces the need for continued cross-industry commitment to transparent reporting, proactive community engagement and embedding “community-by-design” principles into airport and airline growth initiatives.

Figure 7. Aircraft noise complainants with year-on-year change by location (left) and national aircraft noise complainants trend (right).





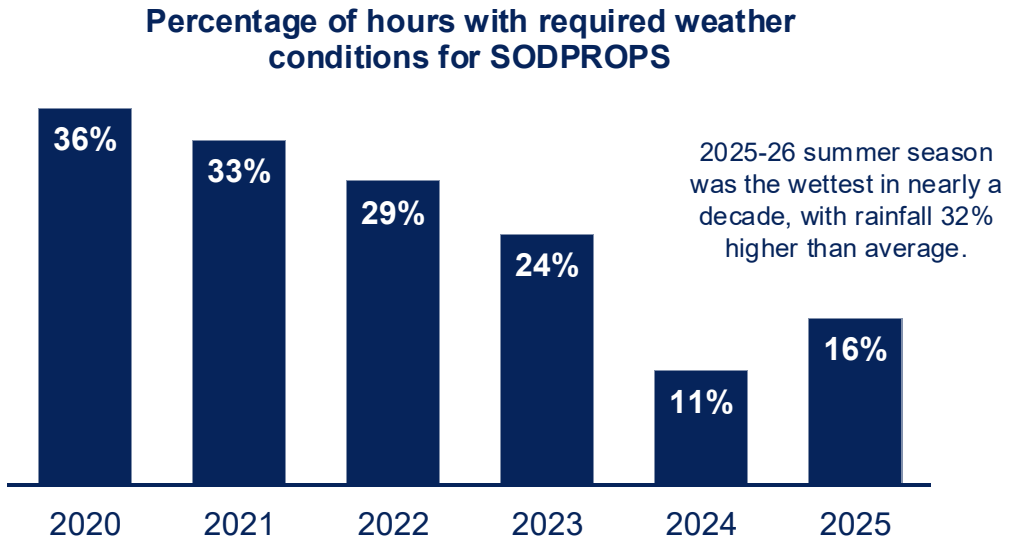
Source: Airservices’ Noise Complaints and Information Service (NCIS).

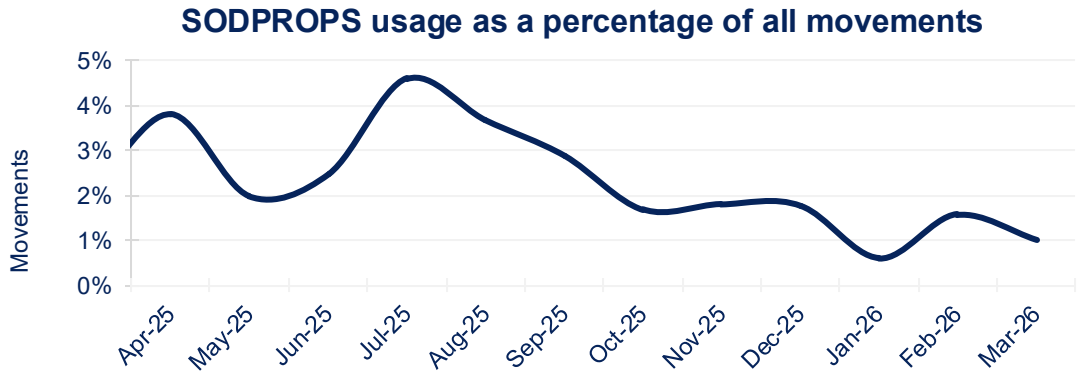
* The March 2026 year-on-year increase at Sunshine Coast (+17%) was driven by one additional complainant, while Brisbane’s increase (+2%) was driven by two additional complainants.

Social factors: Brisbane SODPROPS usage

Despite a long-term decline in suitable weather conditions since 2020 in Brisbane, Airservices has focussed on enabling Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS), with usage doubling between 2024 and 2025. However, SODPROPS remains highly weather dependent, and in March the required conditions were available for only 14% of priority hours. Airservices recognises the benefits of SODPROPS for the Brisbane community and will continue to maximise use of this mode when conditions are favourable.

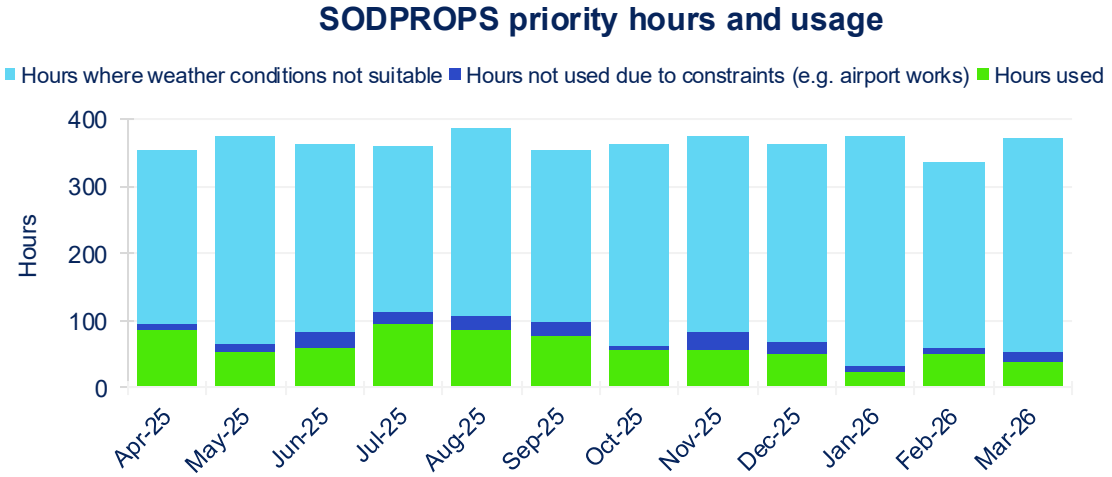
Figure 8. Yearly SODPROPS availability and movements (left) and monthly trend of SODPROPS movements and availability (right) at Brisbane Airport.





SODPROPS movements between 2024 and 2025

Year	SODPROPS movements	Percentage of all movements
2024	2926	1.4%
2025	5683	2.6%

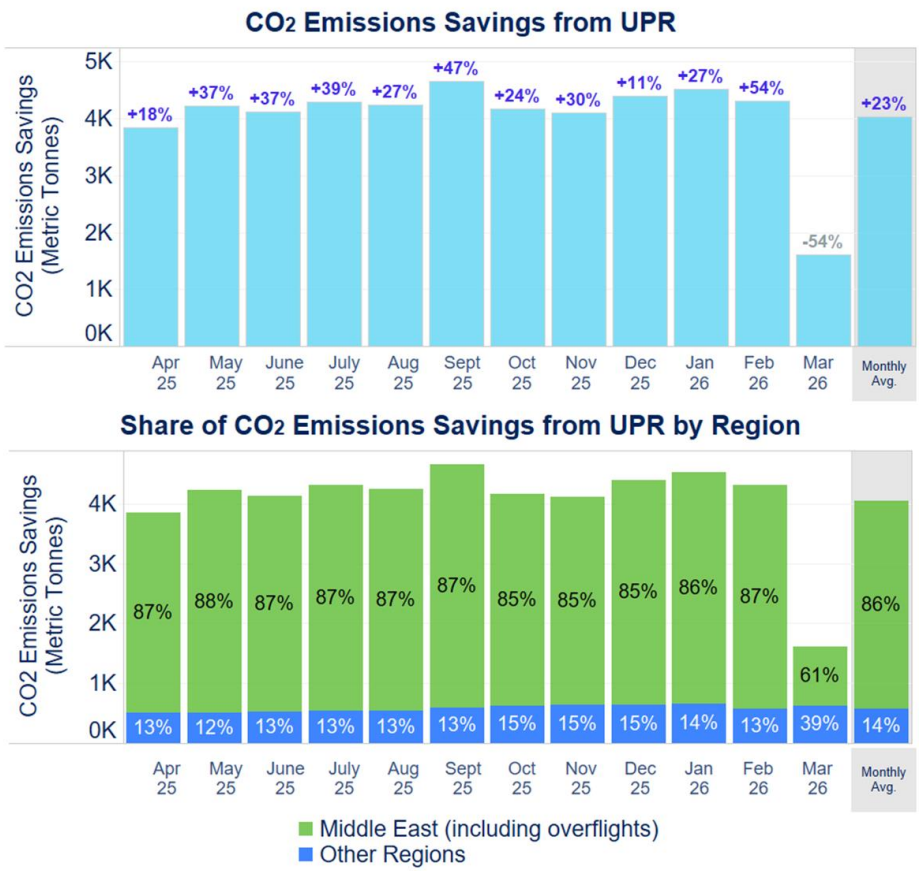


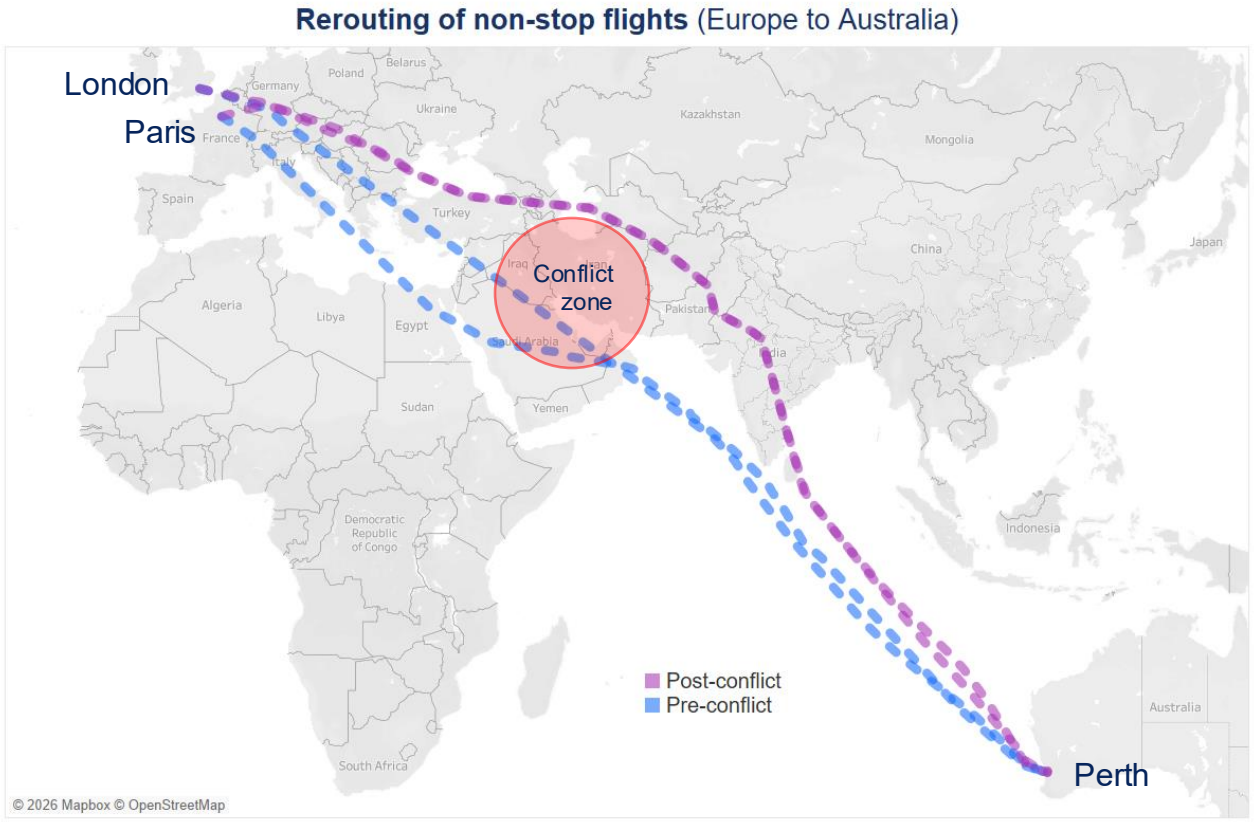
Source: Airservices' Aircraft in Your Neighbourhood tool (website).

Social factors: aircraft emissions

Around 86% of the monthly fuel burn and emissions savings achieved through User Preferred Routes are attributable to long-haul flights by Middle East carriers. However, the Middle East conflict has moderated near-term benefits realisation. Some flights that have been re-routed to avoid the affected airspace increased fuel burn by around 10% per flight. Volatile fuel costs are likely to sharpen industry's focus on operational efficiency and sustainability initiatives.

Figure 9. User Preferred Routes (UPR) total CO_2 emissions savings (top left) and share by region (bottom left). Re-routing of Europe to Australia flights (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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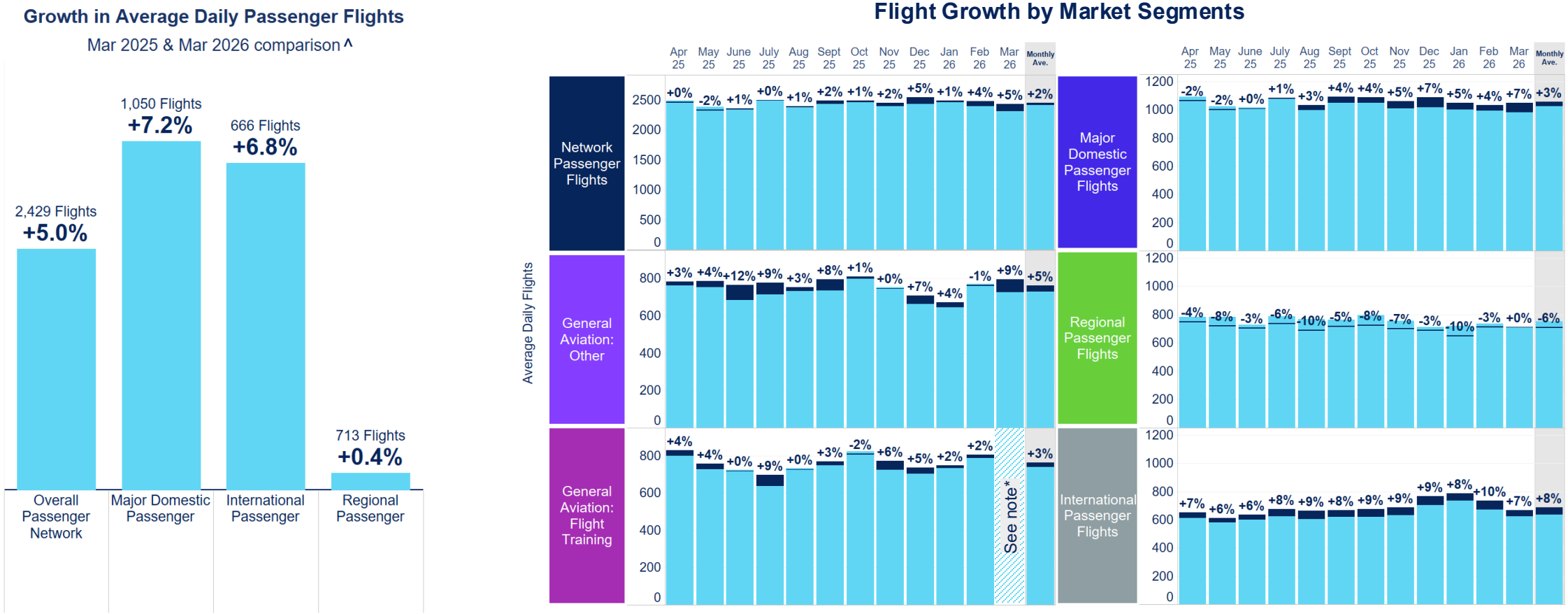
Australian aviation: domestic and international markets

State of Australian aviation growth

The Australian aviation network recorded 2,429 daily average passenger flights in March, broadly in line with the rolling 12-month average. While around 6% of the network associated with Middle East carriers have been impacted, this has been largely offset by continued growth in domestic passenger flights and international travel across Asia Pacific.

Figure 10. Average daily passenger flights in March 2026 with year-on-year change (left) and monthly year-on-year traffic growth trend by market segments (right).



Source: Airservices ODAS (excludes helicopters).
^ March 2025 traffic was impacted by ex-tropical cyclone Alfred.
* *General Aviation: Flight Training* data is one month in arrears.

Top aircraft operators

Most Middle East carriers' flights to/from Australia have been suspended. In contrast, the activities among the major operators driving the network have been relatively stable, reflecting resilient travel demand and a cautious and disciplined industry approach to the evolving operating environment. This also underscores the value of cross-sector coordination in sustaining network resilience and collectively mitigating the impacts of external shocks.

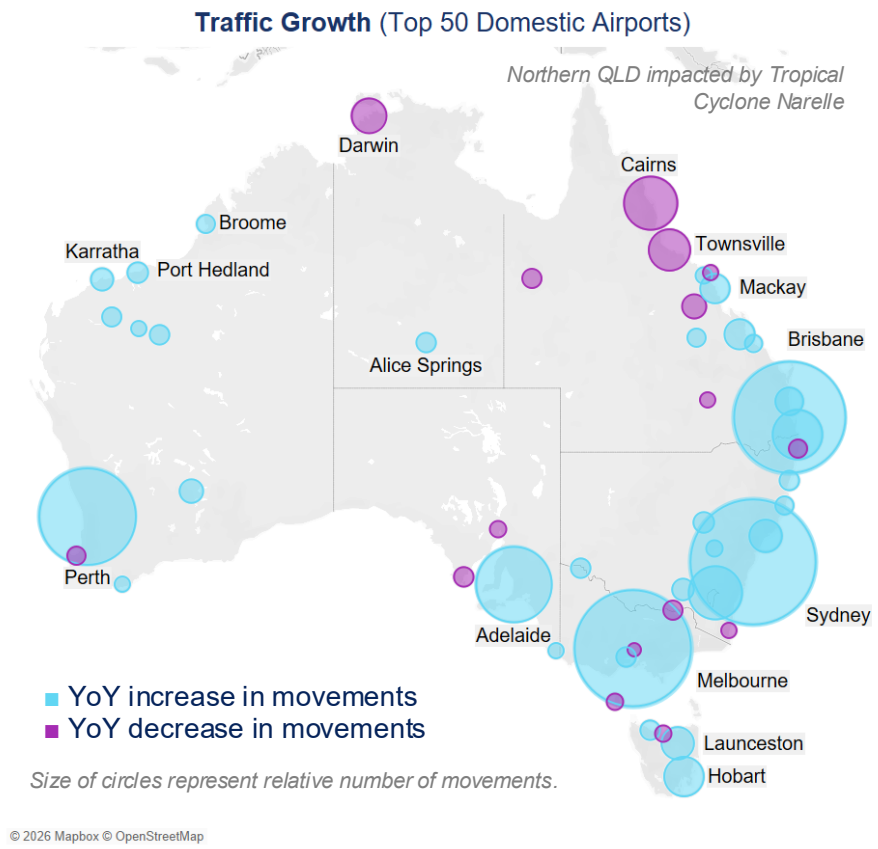
Figure 11. Growth of top airlines for the domestic segment (left) and international segment (middle, right) in March 2026, with year-on-year percentage change*.

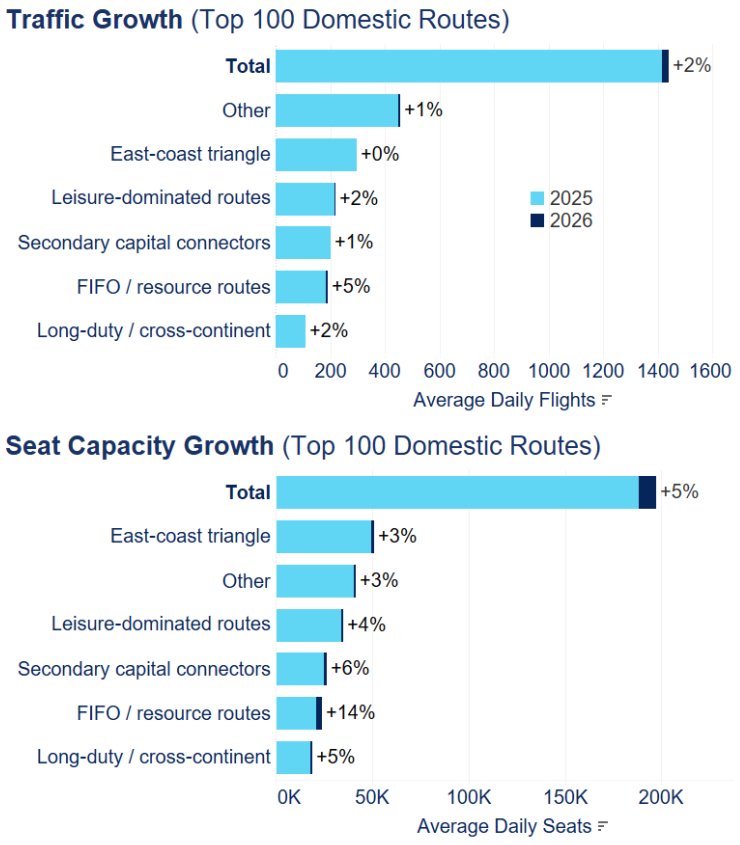
Source: Airservices ODAS (includes airline flights only). Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.
* The first week in March 2025 was severely impacted by ex-Cyclone Alfred, and therefore year-on-year comparisons between March 2025 and March 2026 are not fully representative of underlying or broader growth trends.

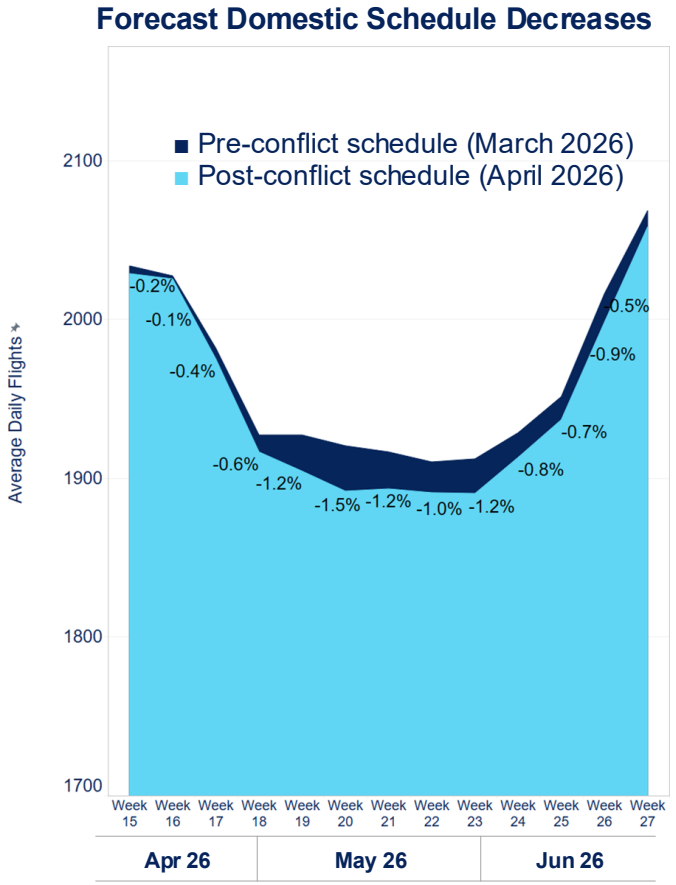
Domestic network

Growth in the domestic network continues to be driven by mining, cross-continental and leisure travel. The direct capacity impact from the Middle East conflict in March was limited as the traffic levels were broadly in line with comparable periods in the last two years. However, we are starting to see announcements on domestic capacity reductions of up to 5% by some carriers due to increasing fuel costs.

Figure 12. Year-on-year growth* for top 50 domestic airports by movements (left) for top 100 domestic routes by movements (middle top) and for top 100 domestic routes by seat capacity (middle bottom) in March 2026. Domestic traffic outlook for April, May, June 2026 pre- and post-conflict (right).





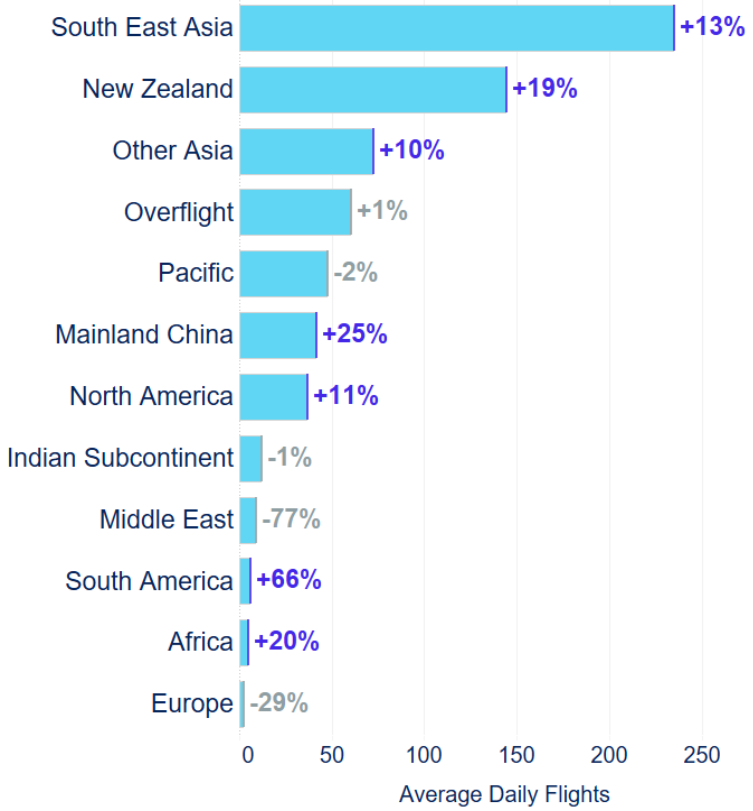


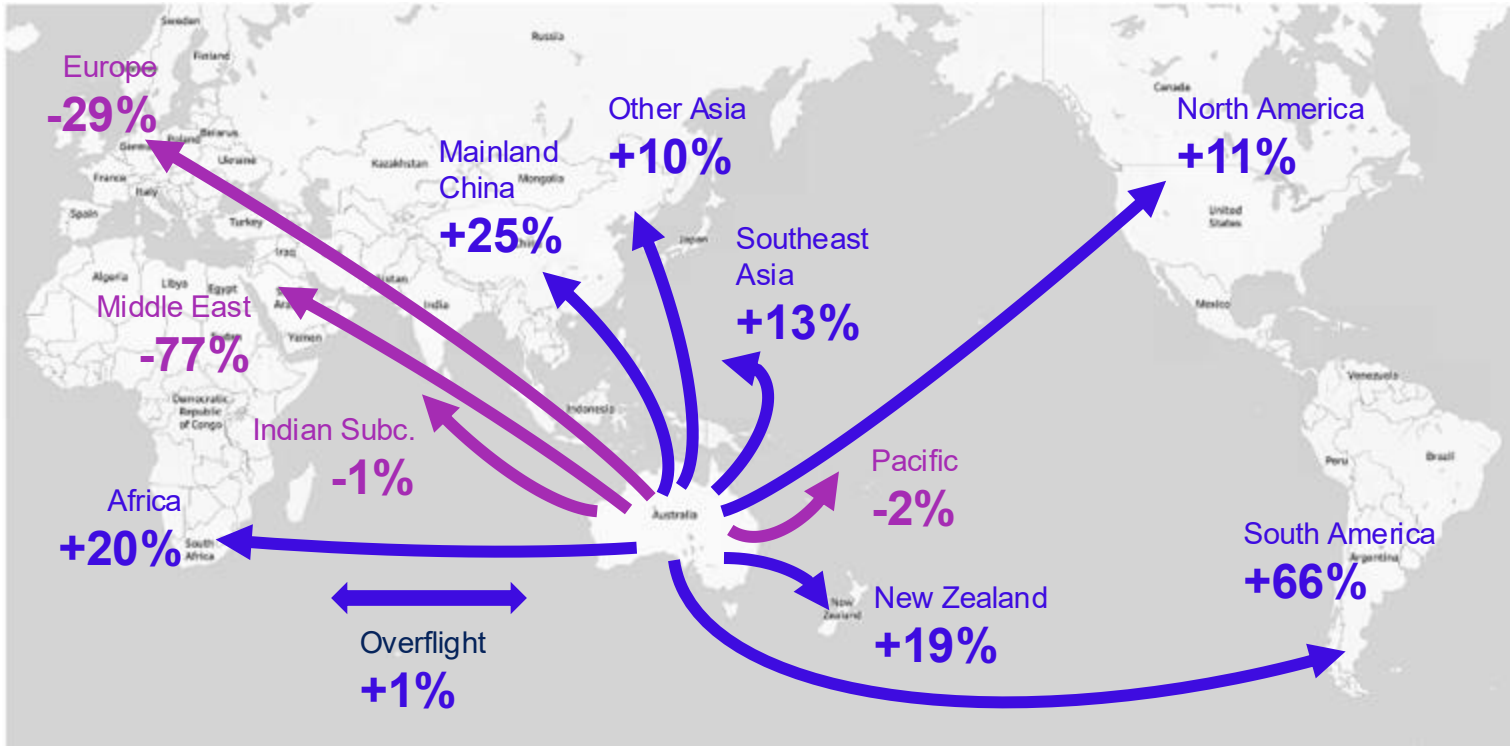
Source: Airservices ODAS and OAG (includes airline flights only). * Excludes first week of March due to impacts of ex-tropical cyclone Alfred in 2025.

International markets

Australia-Middle East traffic is down 77% year-on-year and direct Australia-Europe traffic has fallen by 31% as some services are re-routed via other hubs. In contrast, Asian gateways such as Singapore, Kuala Lumpur, Hong Kong, Tokyo, and Seoul are capturing much of this displaced demand and may emerge as alternative hubs and travel destinations. Growth in international markets is mixed, with media reporting that some Chinese airlines are reducing flights to Australia to focus on higher yield routes while outbound demand to Southeast Asia remains resilient.

Figure 13. Growth of international markets by region for March 2026 with year-on-year change.



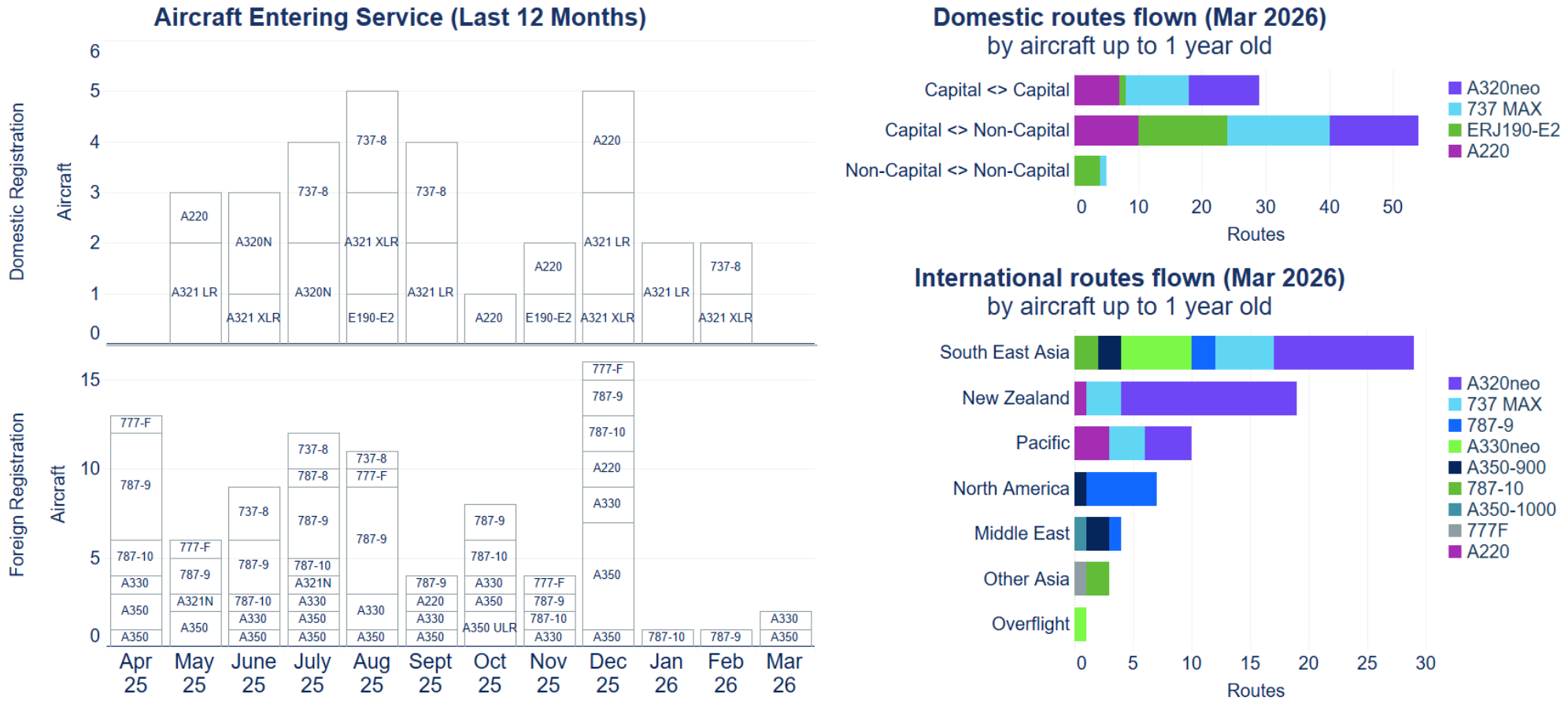


Source: Airservices ODAS (includes airline flights only).
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

The Middle East conflict has introduced additional uncertainty into global aircraft supply chains, particularly for wide-body aircraft and some Middle Eastern operators. Australian carriers are maintaining cautious flexibility, and closely monitoring jet fuel and diesel supplies, logistics complexity and financial conditions. Fuel price volatility and supply constraints are reinforcing the long-term case for fleet renewal towards fuel-efficient aircraft.

Figure 14. Aircraft newly entering service in the Australian network in the last 12 months (left) and routes flown in March 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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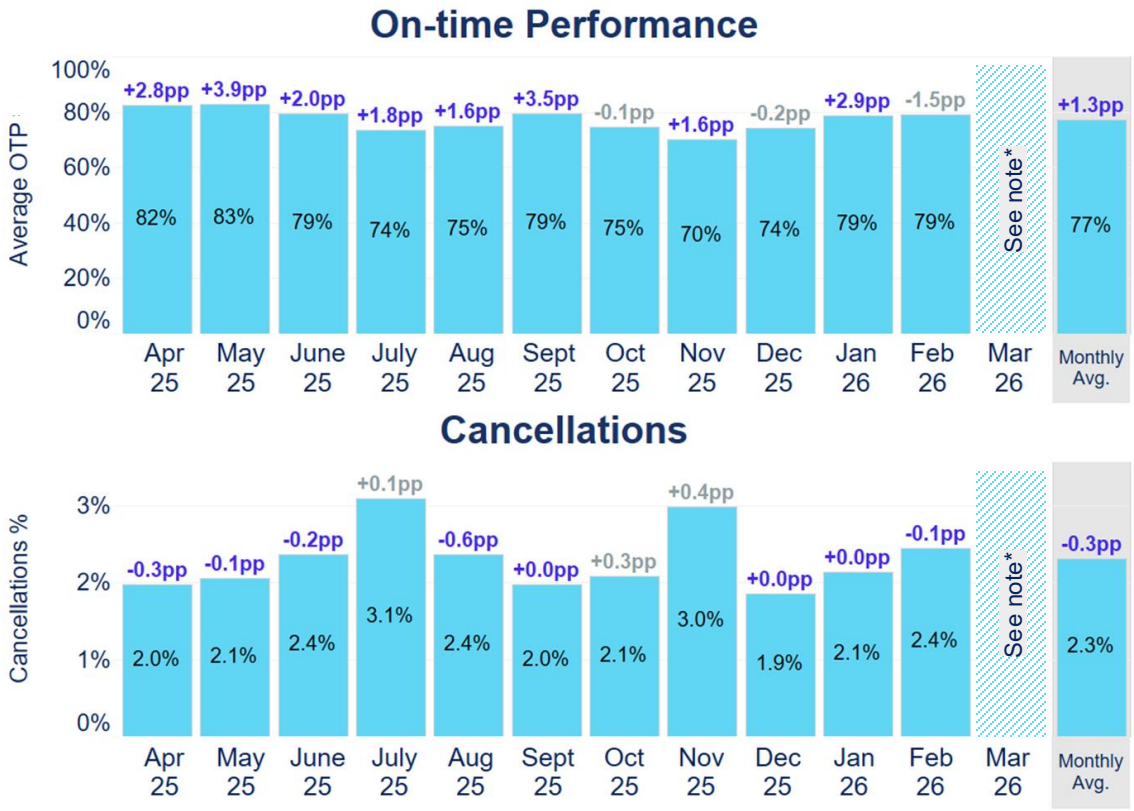
Australian aviation: network performance

Industry performance

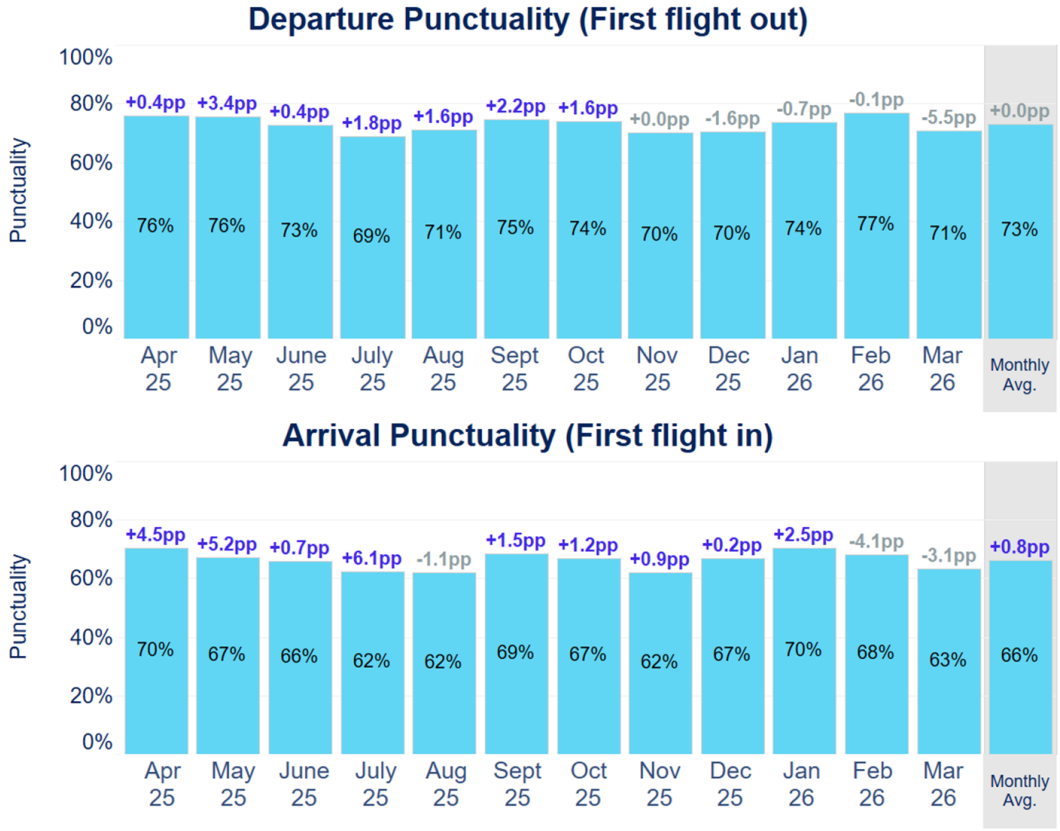
While flight completion rates have been trending upwards, industry on-time performance is highly sensitive to weather disruptions. These challenges are more amplified in the short term as airlines respond to cost pressures through capacity reductions and tighter schedule buffers. As a result, strengthening disruption management and network recovery capabilities remains a key cross-industry focus.

Figure 15. Total industry OTP^ and cancellations, up to February 2026 with year-on-year change.



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

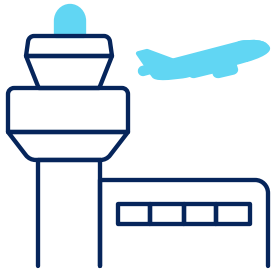
Figure 16. First wave punctuality to March 2026 as a lead indicator for OTP with year-on-year change.

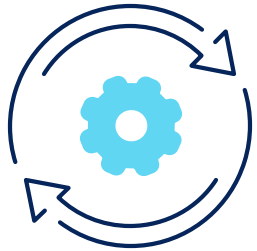


Source: Airservices ODAS (includes Sydney, Perth, Brisbane, Melbourne). The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the Air Traffic Flow Management 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 when 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 operational efficiency by changing the way 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 March, prolonged weather systems including storms, low cloud and strong winds, significantly disrupted Melbourne and Sydney operations resulting in ATFM ground delays almost doubling the levels seen last year this time. Two days alone, 19 and 27 March, accounted for around one-third of total ATFM ground delays for the month. Ground Delay Programs collaboratively developed with industry play an important role in containing airborne delays, which are increasingly critical in the environment of increasing cost pressures.

Figure 17. Key Ground Delay Program (GDP) metrics.

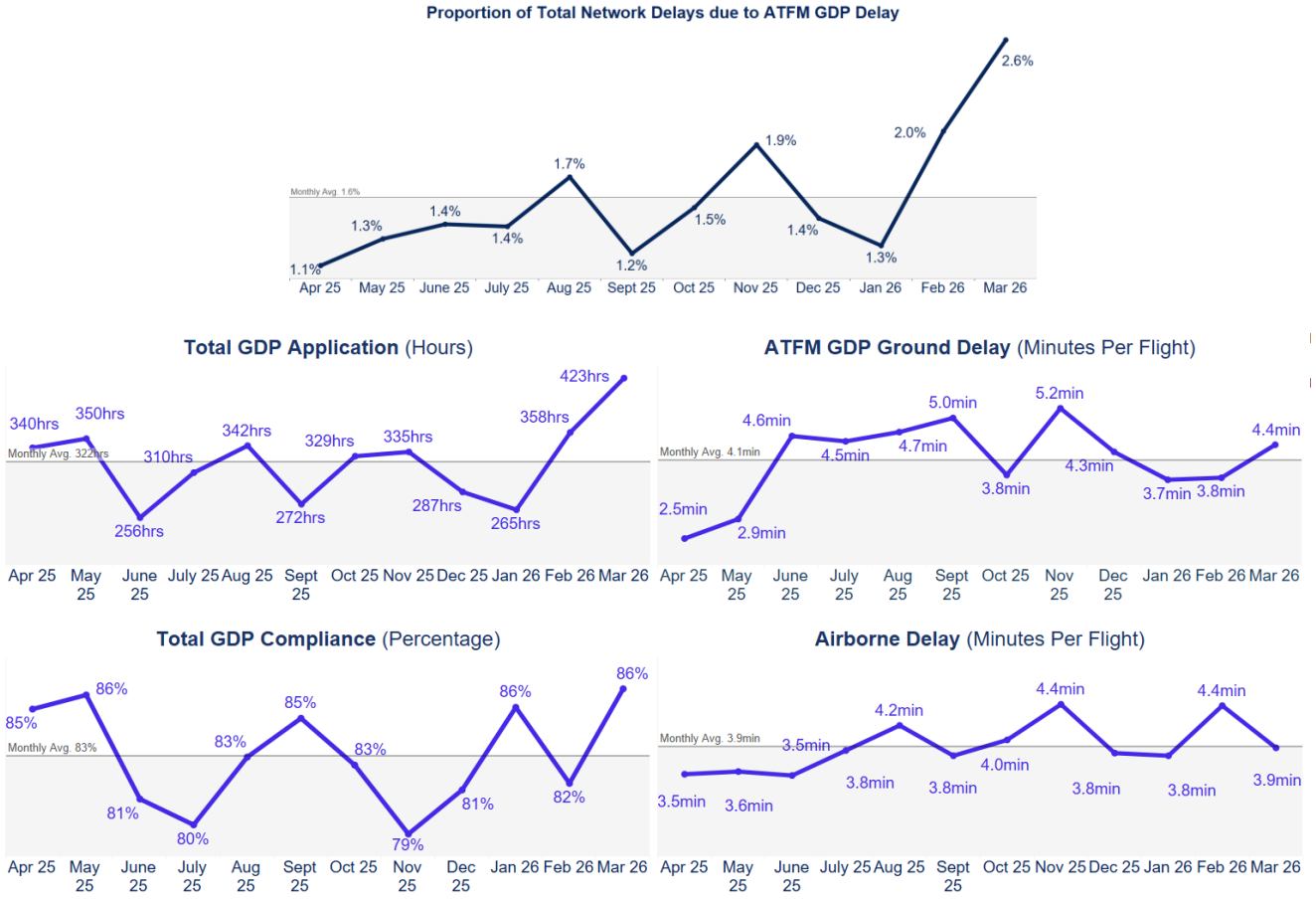
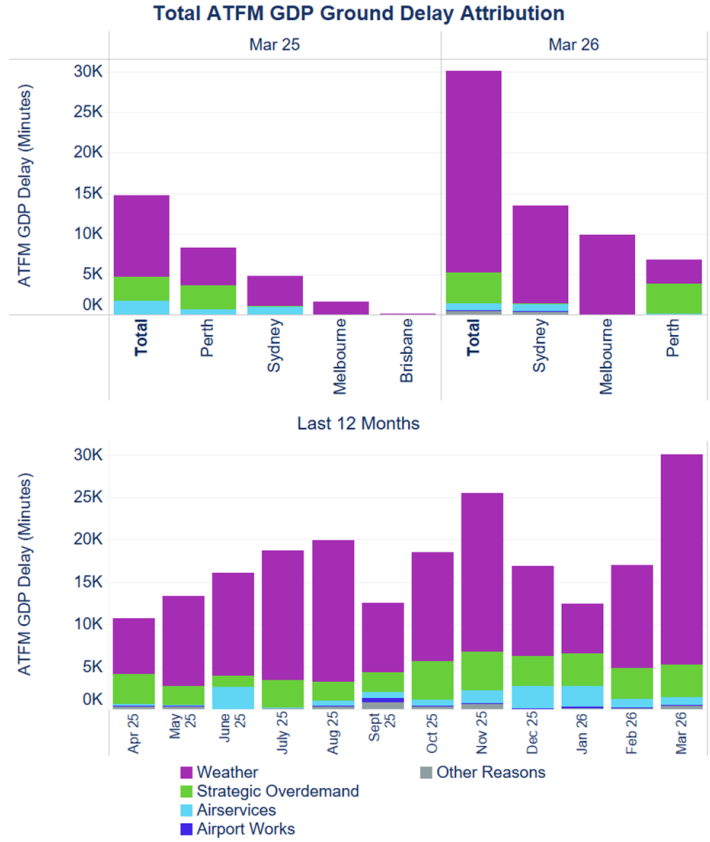


Figure 18. ATFM (GDP) delay by attribution overall and by airport.



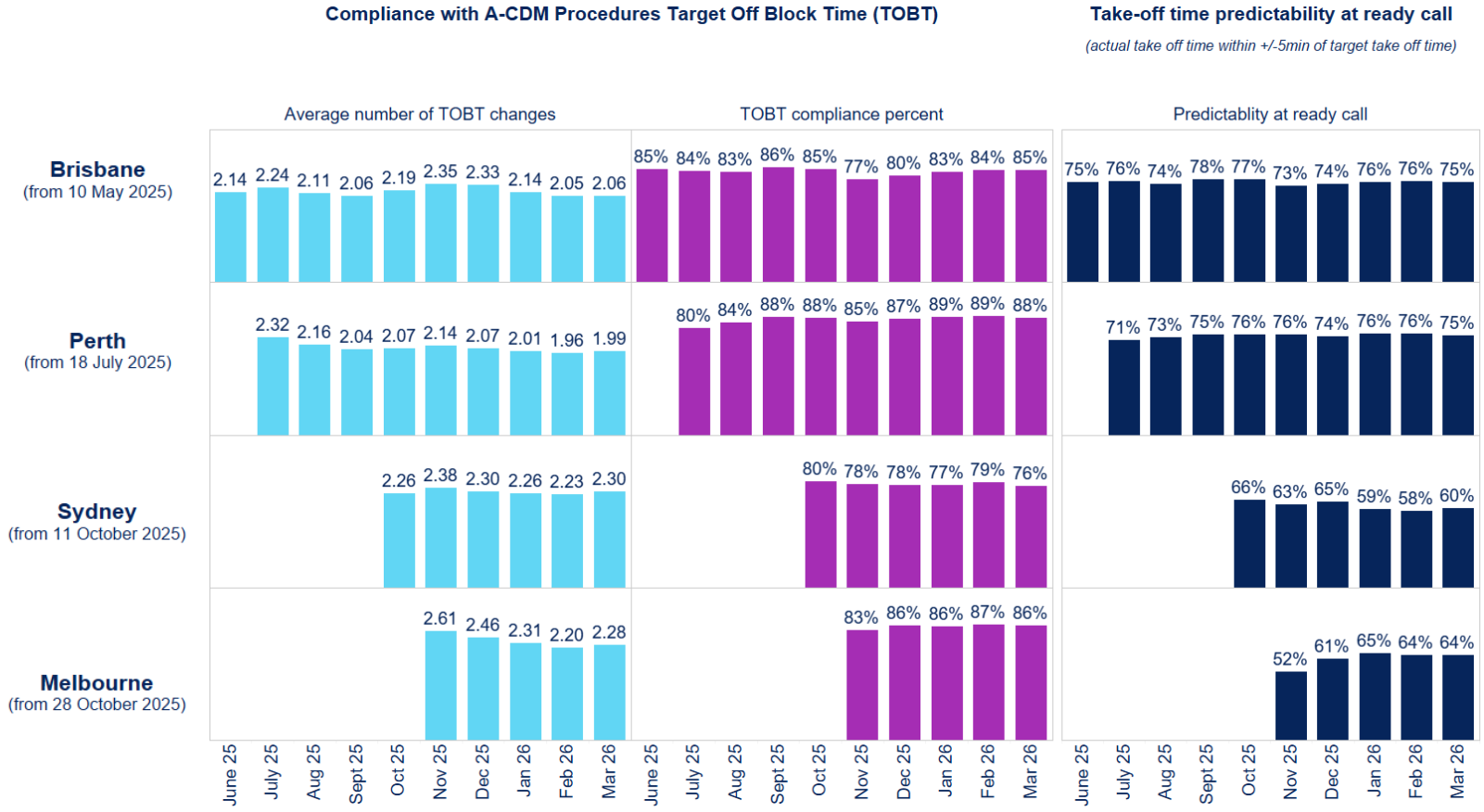
Airports with nil ATFM delay are not shown.

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)

This month, A-CDM partners agreed to share data and co-develop a consistent methodology for measuring A-CDM benefits realisation, while jointly prioritising continuous improvement initiatives through established A-CDM governance forums. A key focus is maintaining system stability and operator confidence during significant weather disruptions or capacity constrained periods. Continued engagement will occur with airlines and airports on A-CDM ways of working and increased data transparency.

Figure 19. A-CDM milestone monitoring at airports.

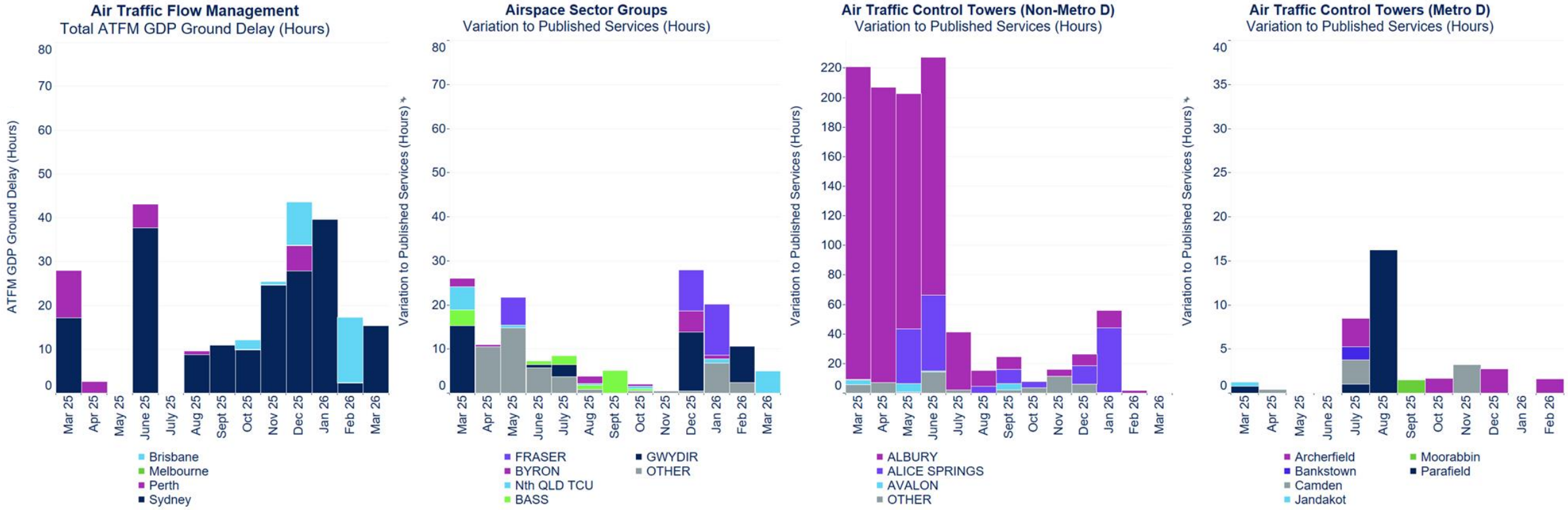


Source: Airservices ODAS and A-CDM.

Air traffic service provision

In March, Air Traffic Service variations decreased by 97% year-on-year and were limited to two locations. Airservices attributable ATFM ground delay of 15 hours were confined to Sydney operations on 6 March due to thunderstorm activity combined with rostering, staffing, and recovery constraints. While departure spacing was applied at times in Brisbane and Sydney without affecting arrival throughput, these events show that consistency of service provision requires sustained focus. In the lead-up to Easter, heightened resilience measures were implemented, including daily roundtable oversight of network decisions and a strong focus on maximising all available resources to minimise disruptions to the travelling public.

Figure 20. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).

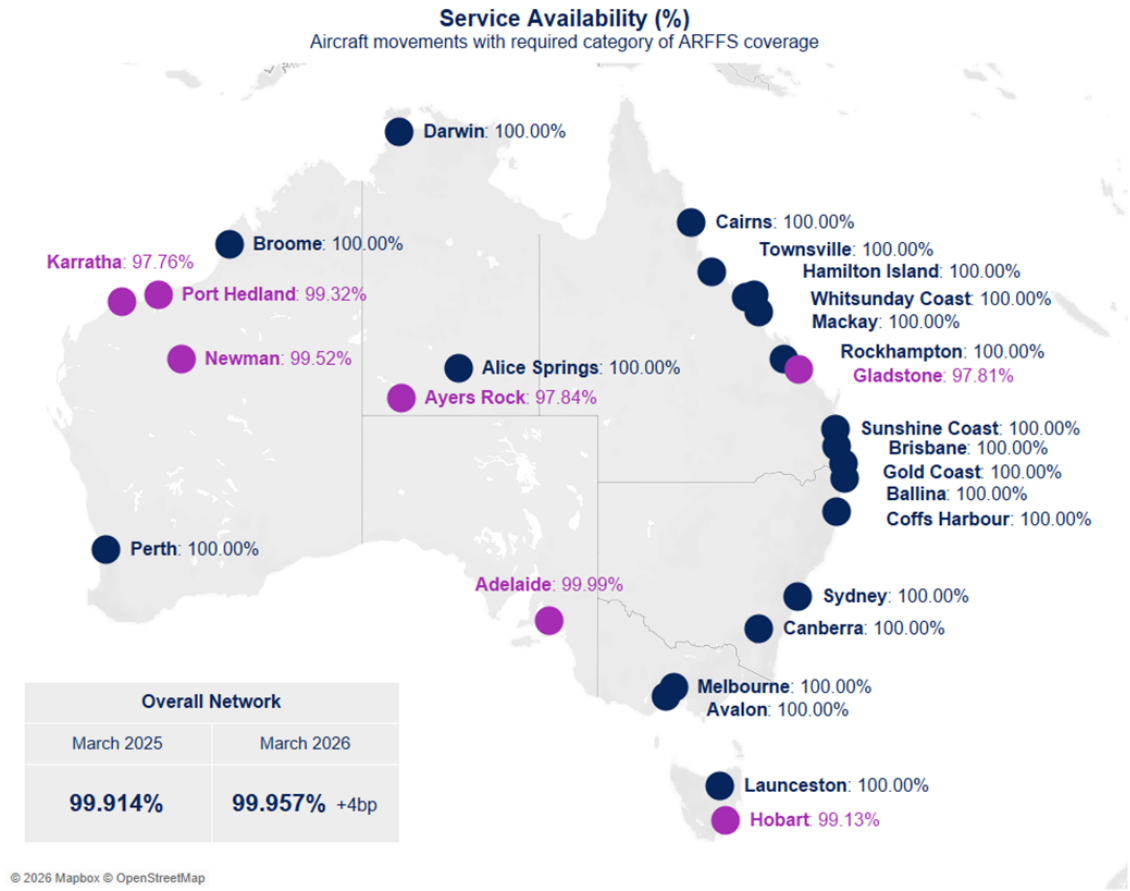


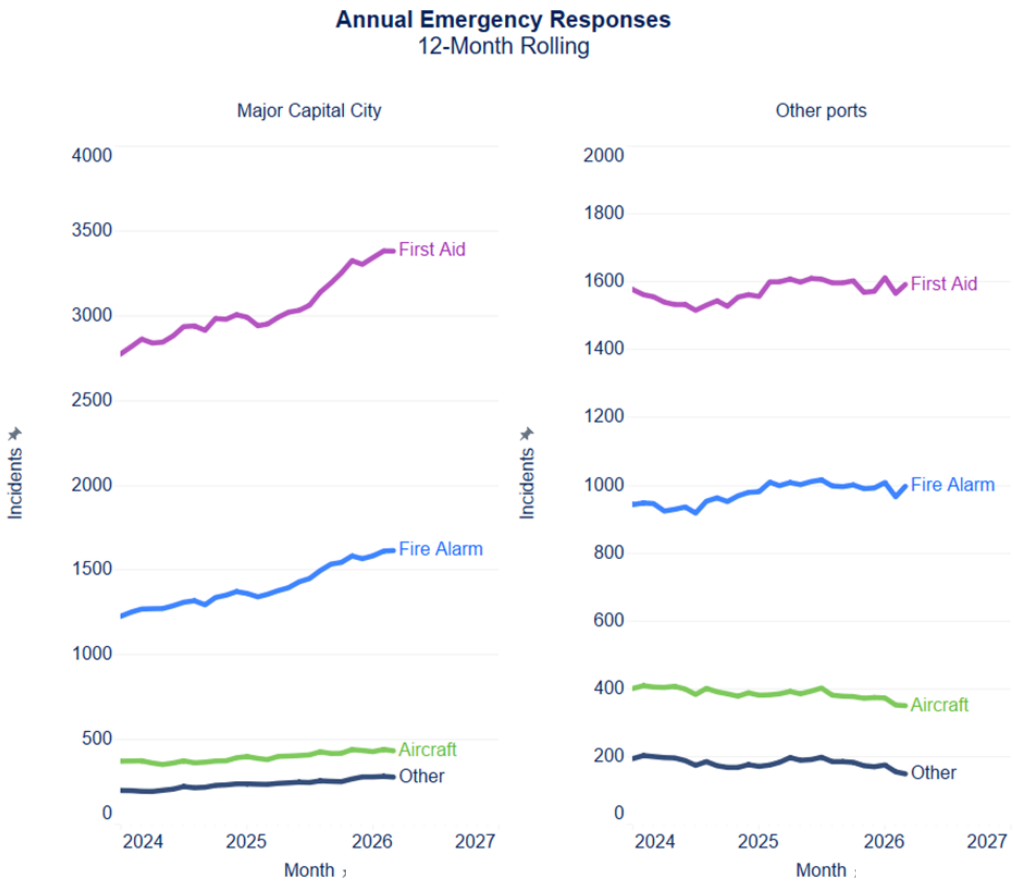
Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information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

Aviation Rescue Fire Fighting (ARFF) delivered 99.96% service availability across the network in March, while responding to a 10% year-on-year increase in annual call-outs, particularly at major airports. Despite the impacts of ex-cyclone Narelle, ARFF supported timely recovery and safe resumption of essential aviation services.

Figure 21. ARFFS service availability by airport and overall network in March 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

stakeholder@airservicesaustralia.com