



# Australian Aviation Network Overview

April 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

The Australian aviation network continues to demonstrate resilience despite geopolitical and economic volatility. Notably, 2 April 2026 marked the busiest April day since 2019, driven by Easter holiday leisure travel. However, growth has recently pulled back markedly reflecting the impact of ongoing Middle East disruption on the Australian aviation industry.

International growth moderated to 3% year-on-year as global uncertainty persists. Australia-Middle East traffic is 30% of pre-conflict levels. Encouragingly, displaced long-haul demand, particularly for the European market, has largely been absorbed via alternative hubs driving solid growth in Asia-Pacific markets.

Demand outlook however remains uncertain. In response to fuel supply risks and operating cost pressures, major airlines implemented forward capacity reductions, followed by targeted ticket sales to stimulate demand in key domestic and short-haul international leisure markets. This reflects dynamic adjustment in capacity, yield and cost management across the sector.

Airservices has been working closely with airlines and industry stakeholders to jointly develop a Network Fuel Conservation Framework, focusing on effective strategic use of Ground Delay Programs (GDP) to minimise airborne delay and fuel burn. This positions the network to respond coherently and in alignment with the National Fuel Security Plan should any movement in levels be triggered. We also continued to focus on balancing flight efficiency and community outcomes by maximising the use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) at Brisbane when weather and traffic conditions permit.

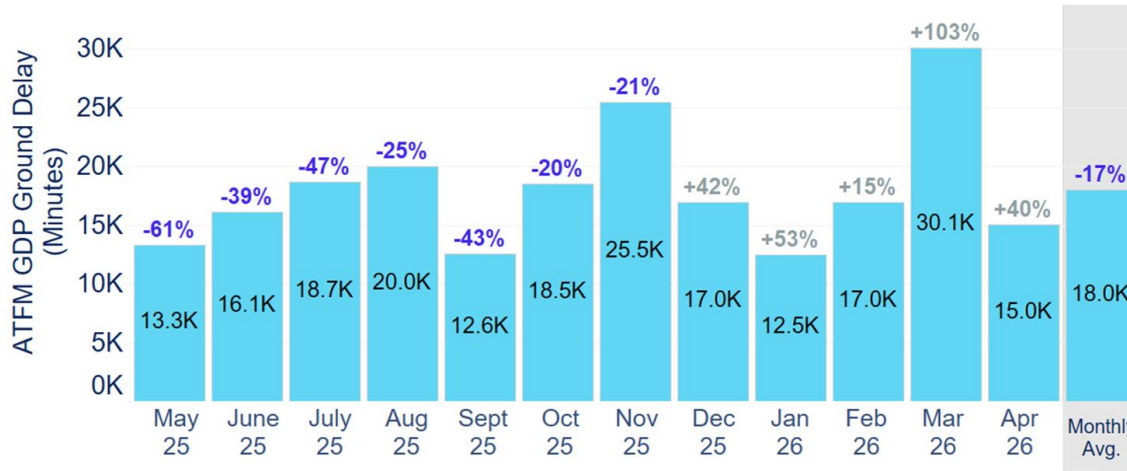
Industry on-time performance (OTP) has been steady, with weather disruption being the dominant constraint. This was evident on 12 April when prolonged single runway operations due to strong crosswinds in Sydney resulted in network disruptions. Post-event reviews with industry stakeholders reinforced the importance of earlier activation of demand management, flight plan data integrity and schedule compliance for operational predictability, and effective use of Airport Collaborative Decision Making (A-CDM). Air Traffic Flow Management (ATFM) outcomes have since improved, tracking above the 12-month average. All four major airports recorded the highest compliance to A-CDM Target Off-Block Times (TOBTs) since go-live, well ahead of global benchmarks.

Air traffic service consistency also strengthened, with 92% year-on-year reduction in tower service variations. Airspace service variations were confined to non-peak periods in three locations, and there were no Airservices-attributable ATFM delays at the four busiest airports. This progress reflects heightened holiday resilience measures and sustained focus on increasing resourcing and strengthening processes to improve service outcomes.

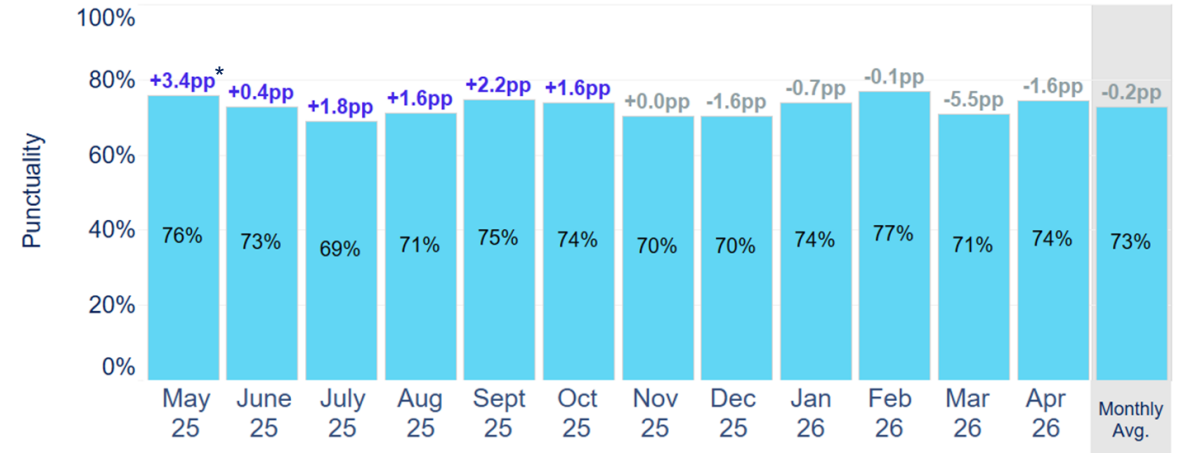
# Network performance snapshot (year-on-year comparisons)

## Total Air Traffic Flow Management (ATFM) Delays

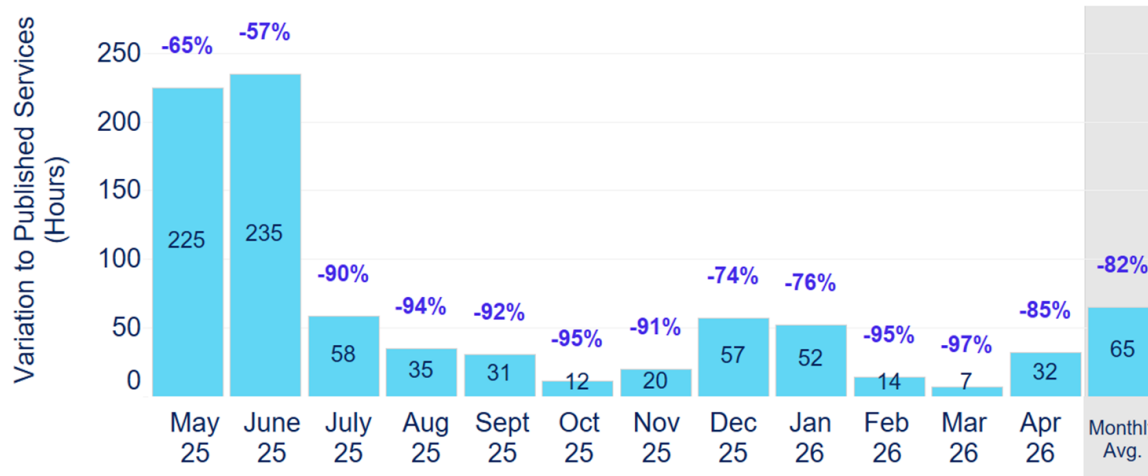
(Due to all causes such as weather, airport works, strategic overdemand, Airservices, etc.)



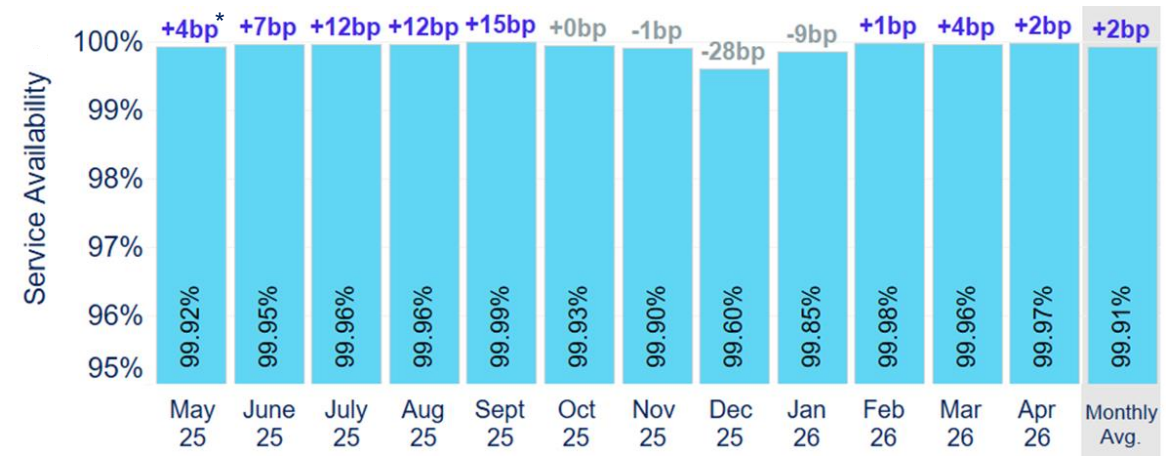
## Departure Punctuality (First Flight Out)



## 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.



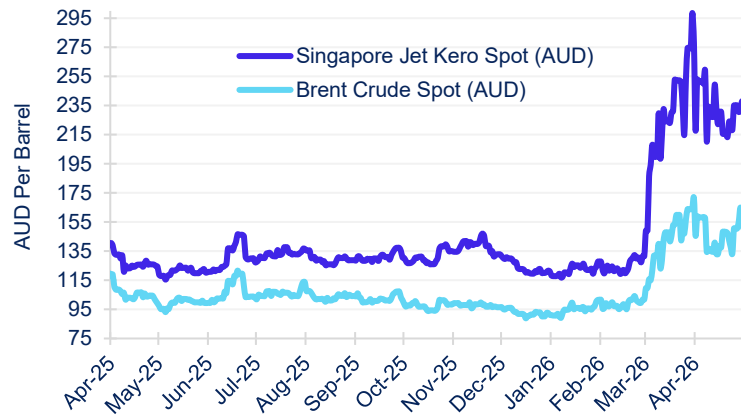
# Economic and social trends



# Economic factors

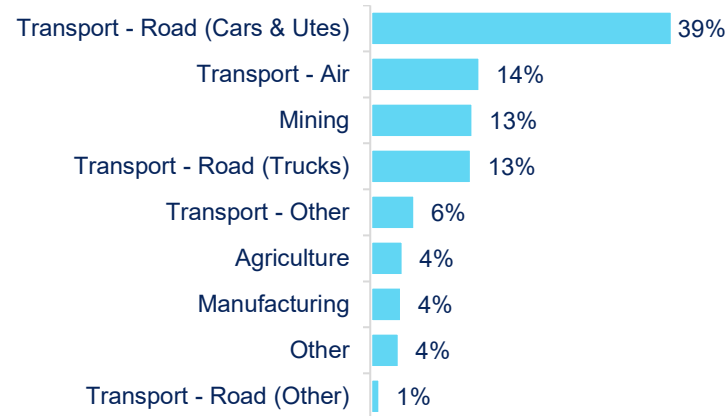
Despite the Middle East ceasefire in early April, continued disruption in the Strait of Hormuz carrying around 20% of global oil trade and regional tensions have pushed jet fuel prices to more than double the level in February. The energy shock is weighing on consumer confidence and impacting supply chain stability and costs. This is impacting airline capacity and airfare decisions.

Figure 1. Jet fuel and Brent crude oil prices daily.



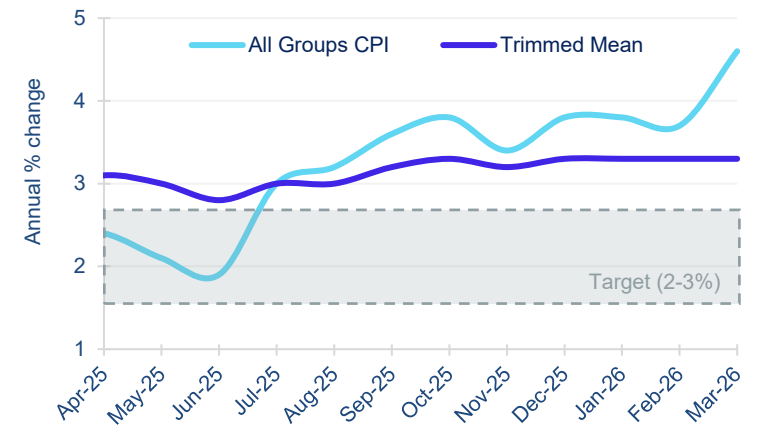
Source: Bloomberg – latest data as at 4/5/2026.

Figure 2. Australia's share of oil consumption by sector.



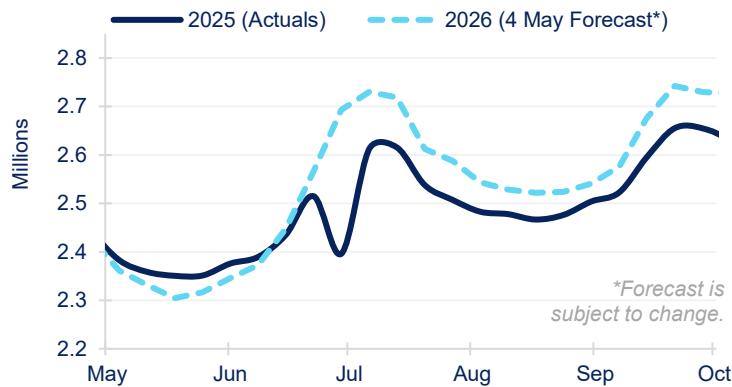
Source: Australian Industry Group from DCCEE and DISR data ([website](#)) – data as at 7/5/2026.

Figure 3. Consumer Price Index (CPI) Australia.



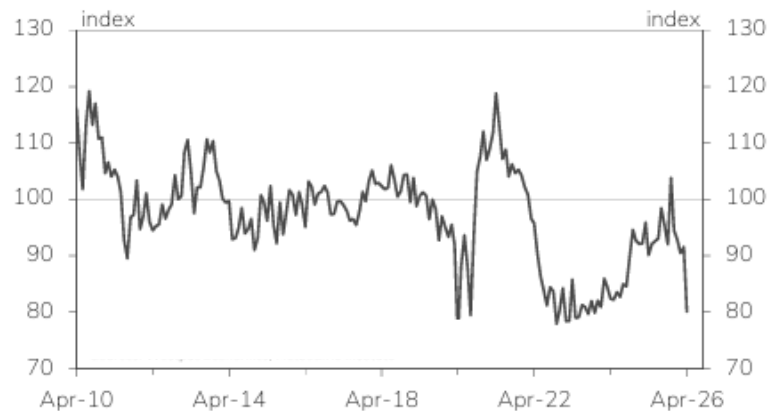
Source: ABS ([website](#)) – latest data as at 29/4/2026.

Figure 4. Australia weekly seat capacity (5-month outlook from May 2026 compared to 2025).



Source: CAPA ([website](#)) – latest data as at 7/5/2026.

Figure 5. Consumer sentiment (Westpac-Melbourne Institute).



Source: Westpac IQ ([website](#)) – as at 8/5/2026.

Figure 6. Domestic airfares (real best discount).

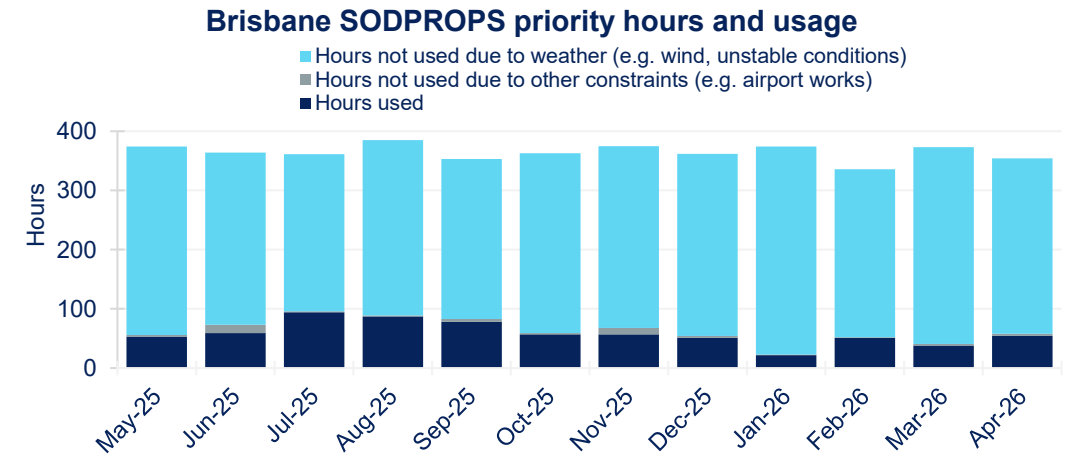
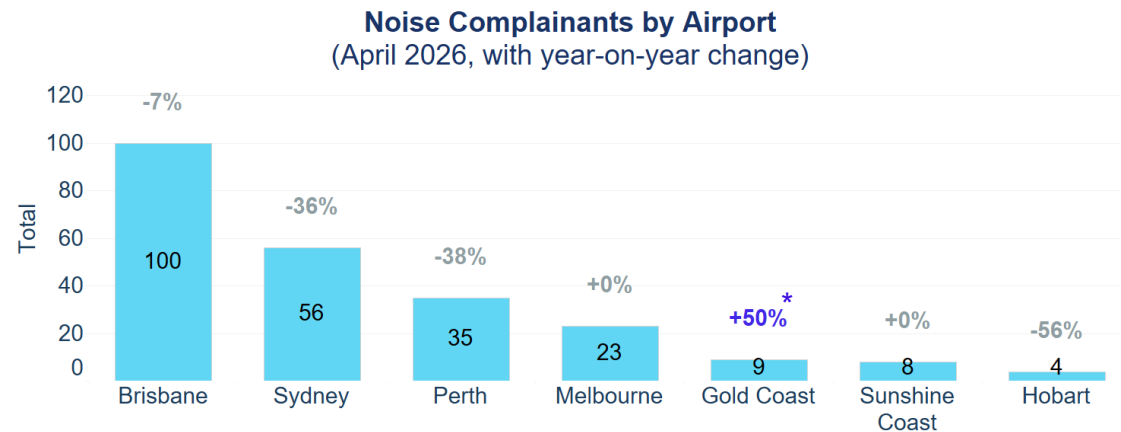
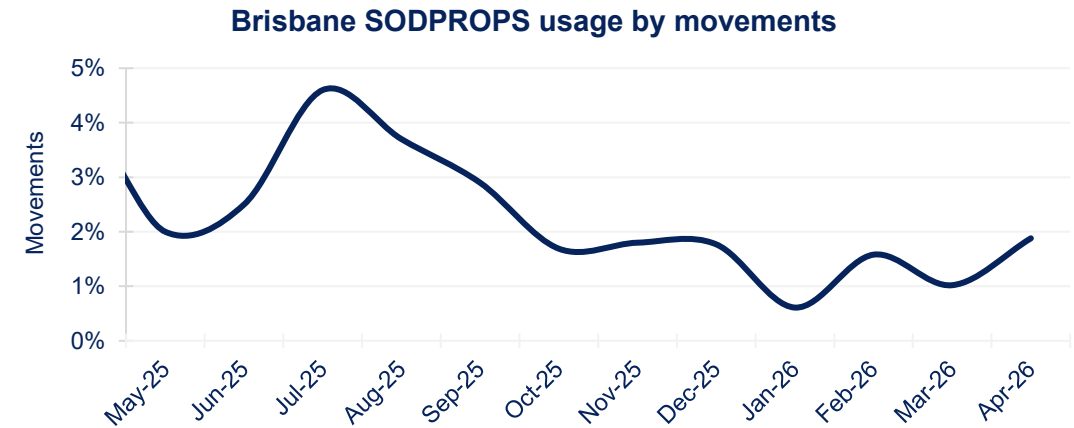
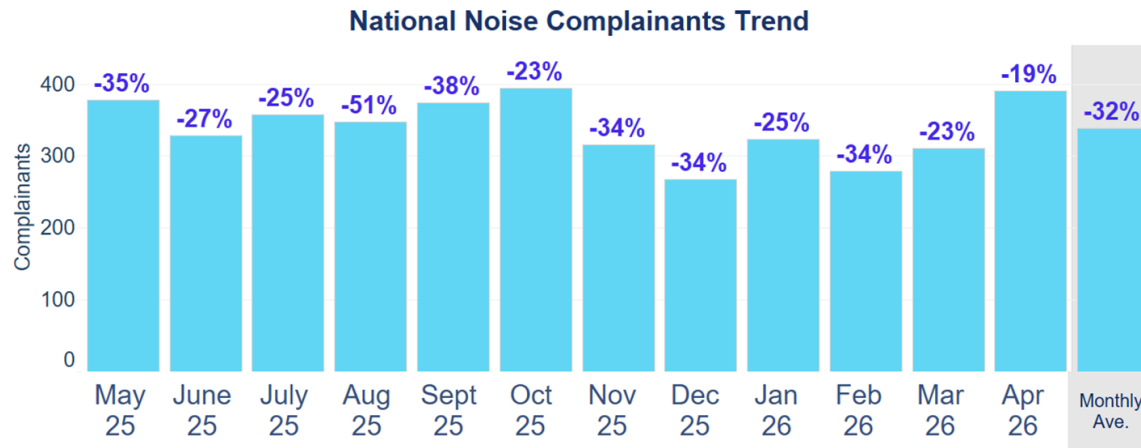


Source: BITRE ([website](#)) – latest data as at 5/5/2026.

# Social factors: aircraft noise

Aircraft noise complainants continue to decrease year-on-year nationally. In April, the key theme was around weather-related shifts in flight operations at airports, highlighting the need to continually build public understanding of operational changes. Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) usage increased in April under more favourable operating conditions, as efforts continued to maximise its use whenever weather and traffic conditions permitted.

Figure 7. Aircraft noise complainants by month (top left) and by location for April 2026 (bottom left) with year-on-year change, and Brisbane SODPROPS usage metrics (right).



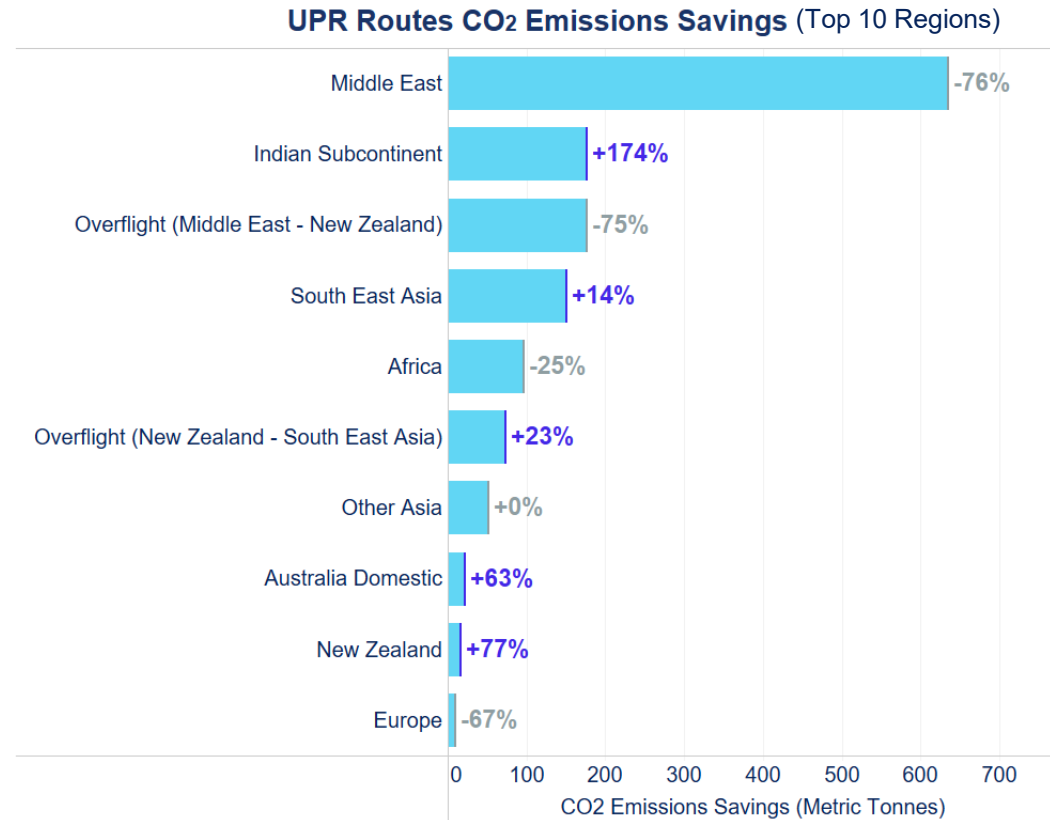
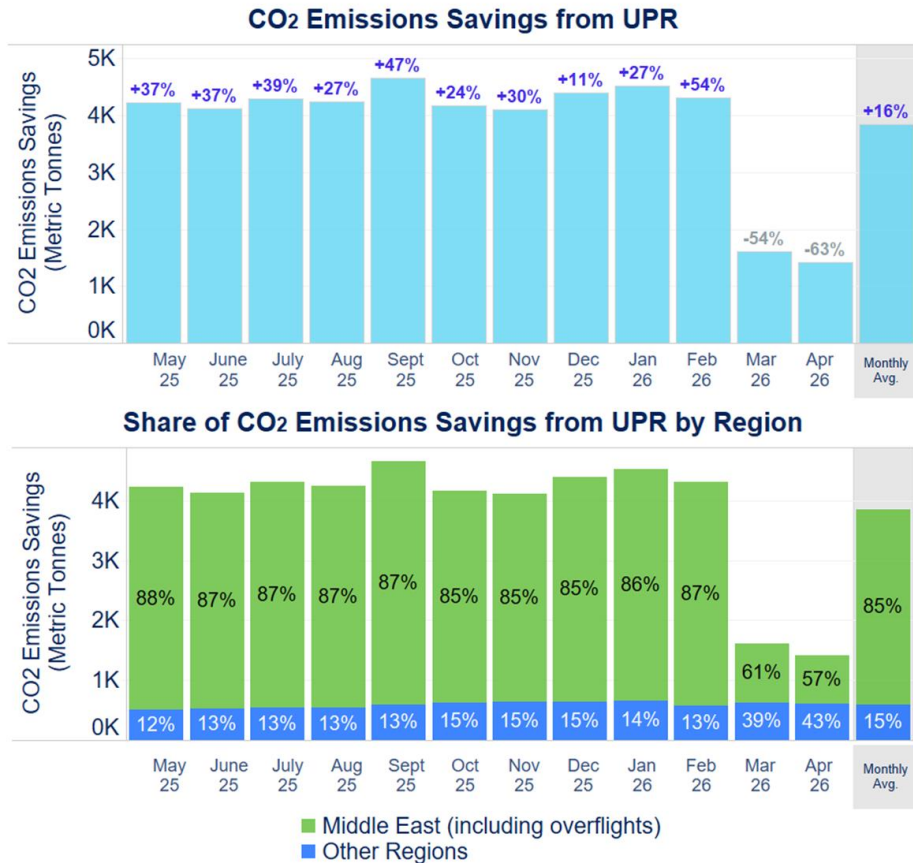
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool ([website](#)).

\* Percentage increase is from a low base of 6 complainants for Gold Coast.

# Social factors: aircraft emissions

Emissions savings from User Preferred Routes (UPRs) have increased over the last 12 months across India, South-East Asia, New Zealand, and transcontinental routes in Australia. As airlines up-gauge to meet demand, the use of larger aircraft such as the A380 can double emissions savings on some UPR routes. In the current fuel environment, industry stakeholders are collaborating on a Network Fuel Conservation Framework to reduce airborne holding, aligned with the Government's National Fuel Security Plan levels.

Figure 8. User Preferred Routes (UPR) total CO<sub>2</sub> emissions savings (top left), share by region (bottom left), and by route region in April 2026 with year-on-year change (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<sub>2</sub> emissions savings are measured across the entire flight segment within Australian airspace.



# Australian aviation: domestic and international markets



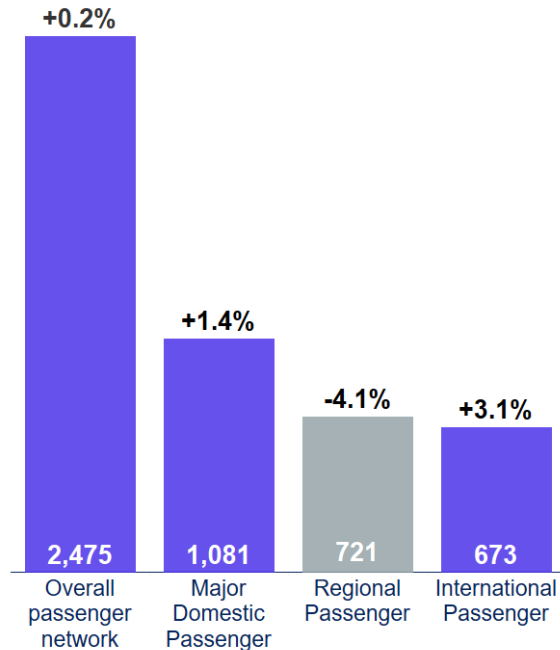
# State of Australian aviation growth

The Australian aviation network recorded 2,475 daily average passenger flights in April, broadly in line with last year's levels. Growth has moderated markedly compared to recent months, reflecting the impact of ongoing Middle East uncertainty on capacity deployment and demand across Australian aviation. The domestic regional sector declined by approximately 4% year-on-year, extending a contracting trend since 2025.

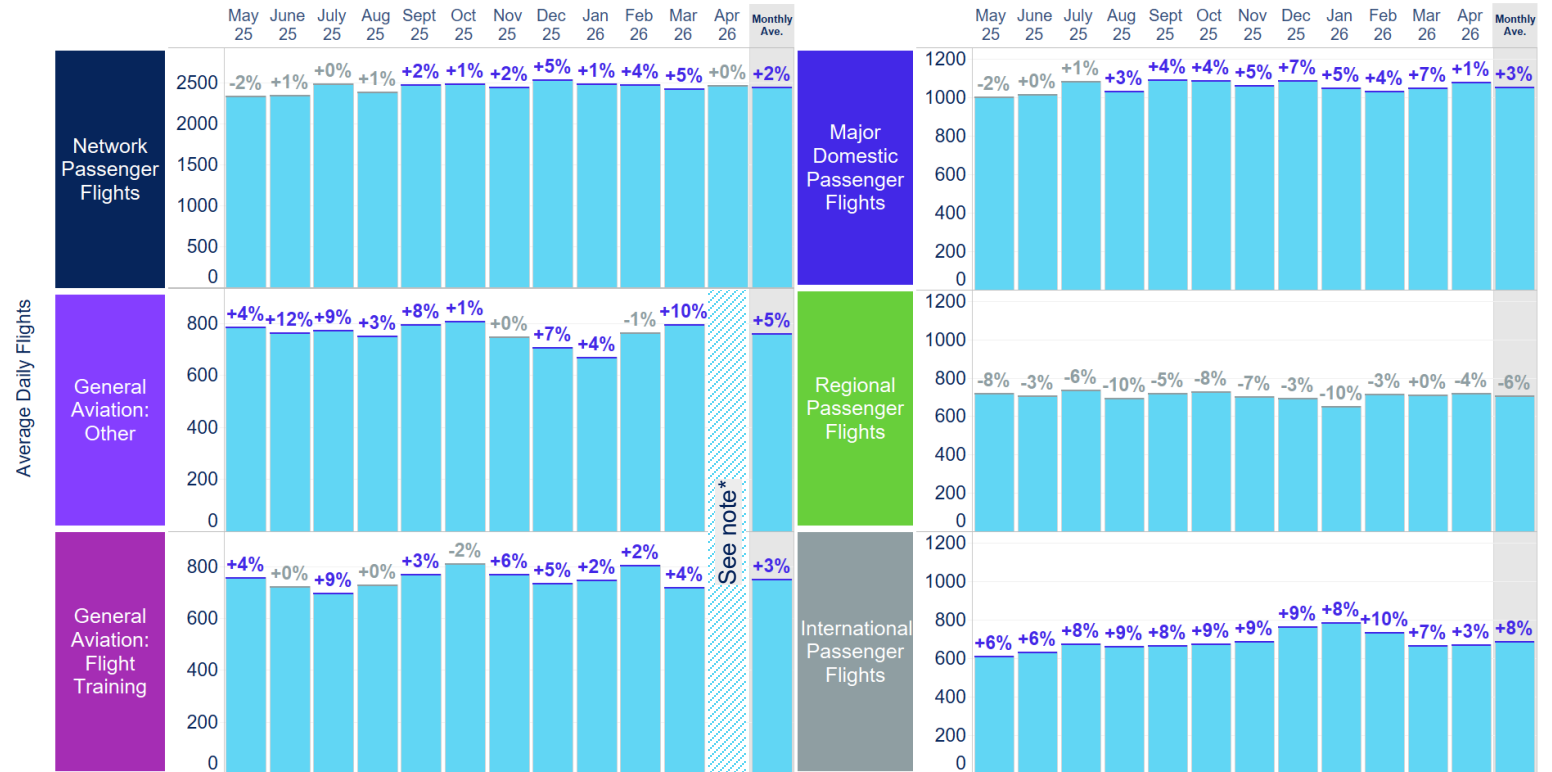
Figure 9. Average daily passenger flights in April 2026 with year-on-year change by market segments (left) and year-on-year growth rate (right).

## Growth in Average Daily Passenger Flights

Apr 2026, with year-on-year change



## Flight Growth Trend by Market Segments



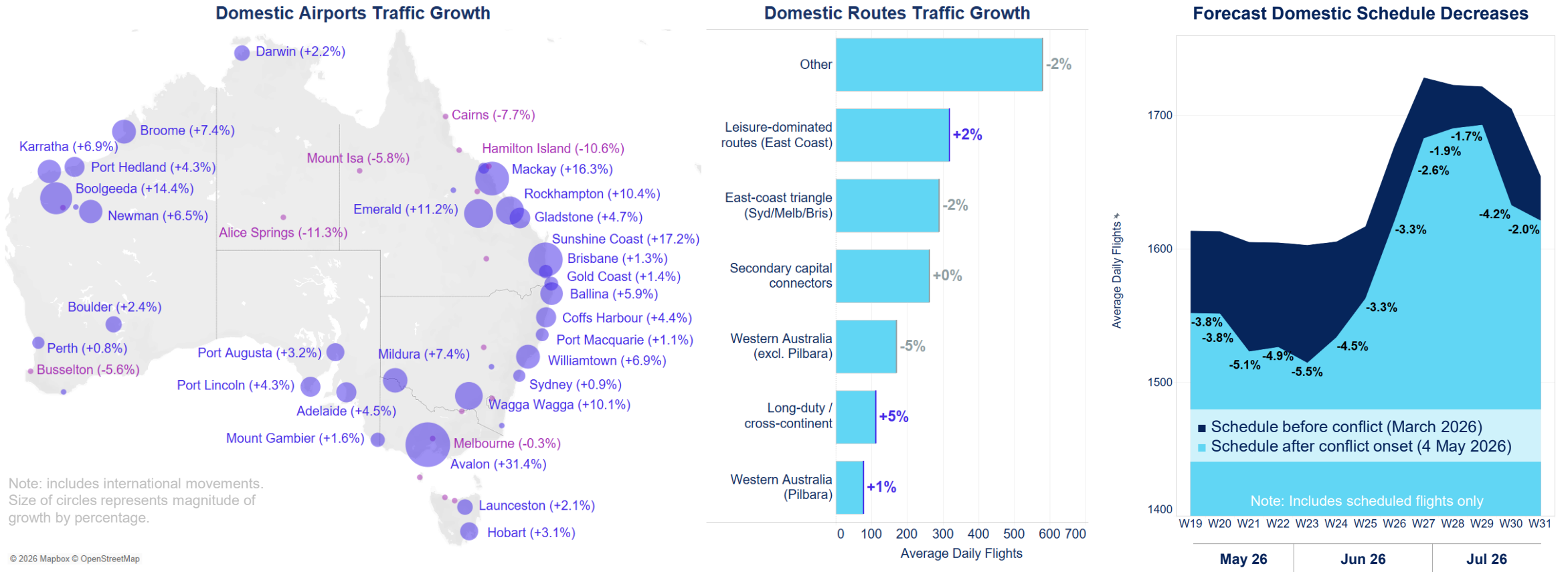
Source: Airservices ODAS (includes airline flights only).  
 \* General aviation data is one month in arrears.



# Domestic network

Domestic travel demand proved resilient in April driven by holiday leisure travel, and double-digit year-on-year growth in mining traffic at key ports in Queensland and the Pilbara region. In response to fuel and operating cost pressures, major airlines implemented forward capacity reductions over the next three to six months, while sales launched in the second half of the month targeted demand stimulation in key leisure markets. These dynamics are reshaping the domestic network, underpinned by disciplined capacity, yield and cost management.

Figure 11. Domestic growth at airports by movements (left) and for domestic routes by flights (middle) in April 2026 by year-on-year change. Domestic traffic outlook for May-July 2026 (right) before and after conflict onset.

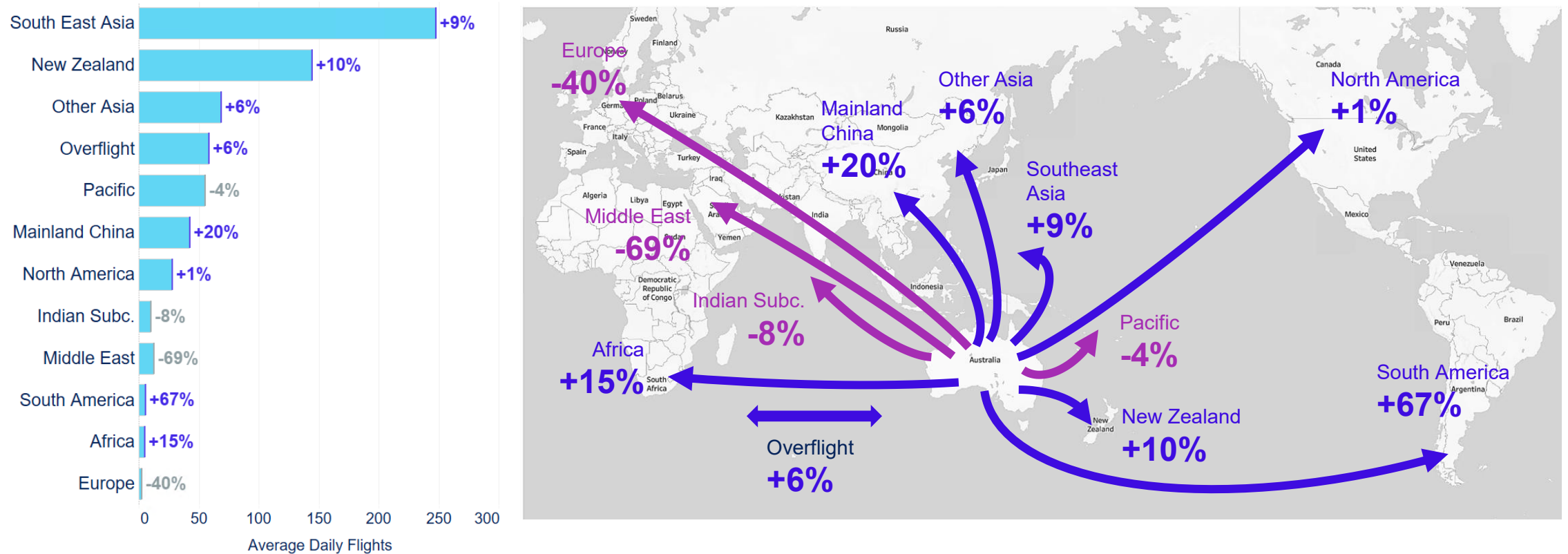


Source: Airservices ODAS and OAG (includes airline flights only).

# International markets

Australia-Middle East traffic in April was 69% below last year's levels. Direct Australia-Europe traffic declined by 40% and US market growth remained subdued amid geopolitical uncertainty. In contrast, Asia Pacific markets continue to grow strongly, benefitting from demand for lower-cost, short-haul tourism and the role of the region as a stable alternative connection to Europe where the underlying demand continues to be resilient. These factors are reshaping airline network structures, with greater reliance on Asian hubs and capacity redeployment towards popular European destinations such as Paris and Rome.

Figure 12. Average daily flights growth of international markets by region in April 2026 by year-on-year change.



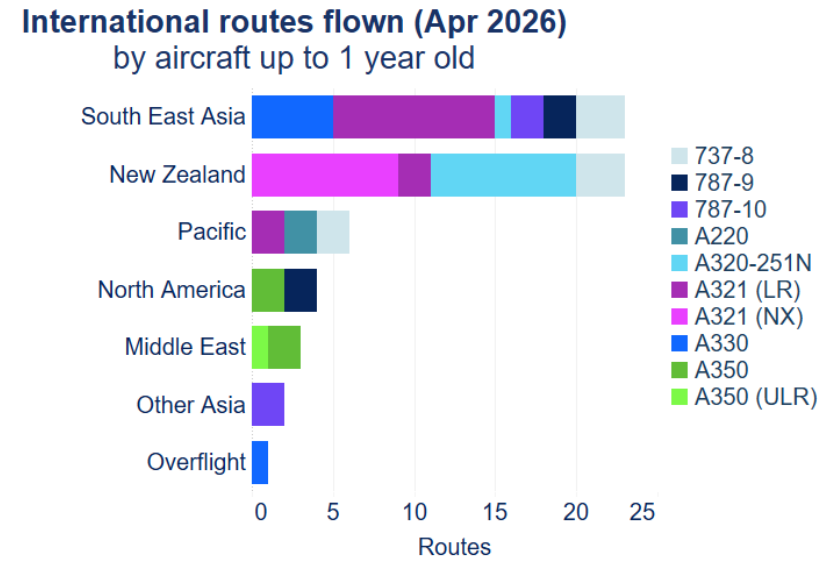
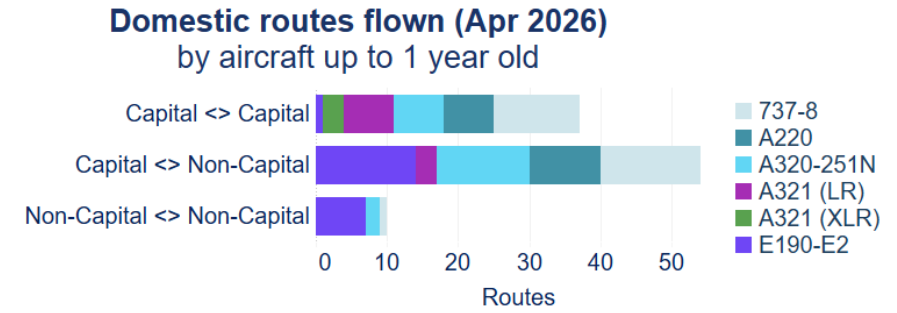
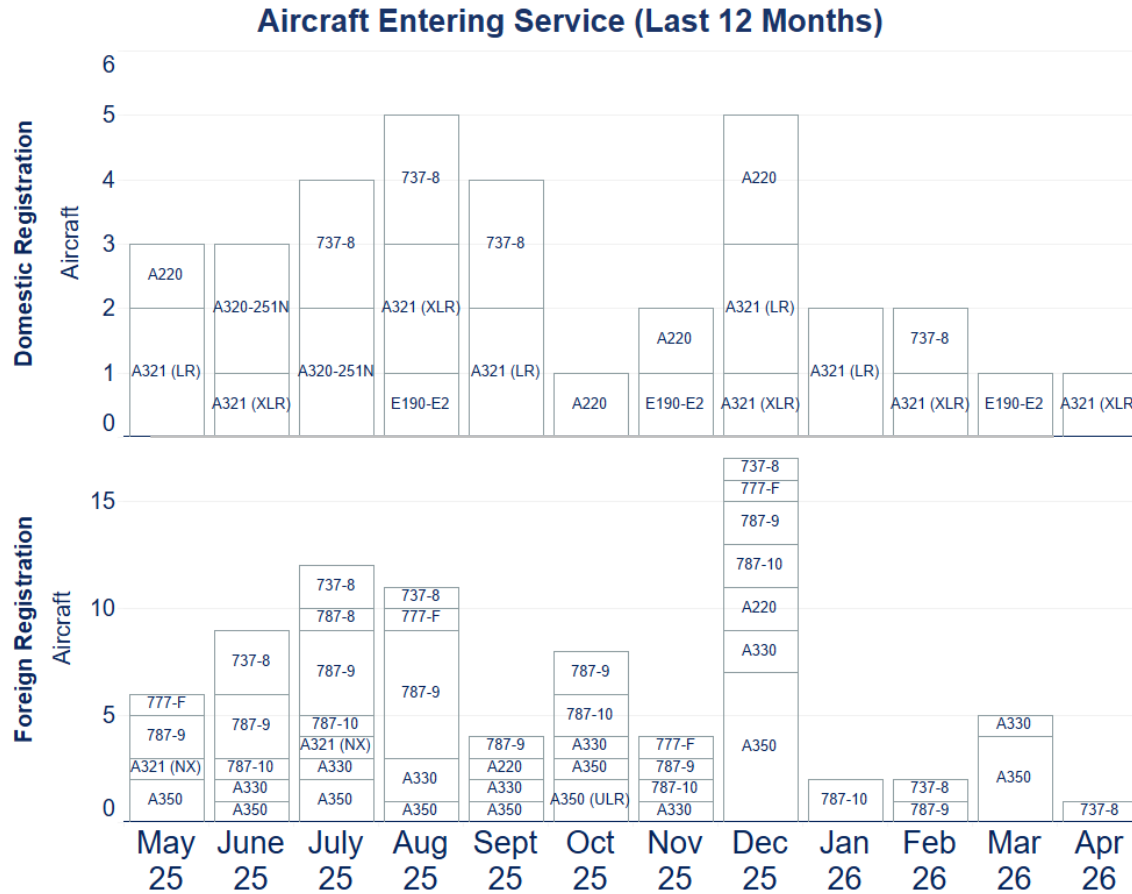
Source: Aircservices ODAS (includes airline flights only).

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

Fleet renewal and the utilisation of larger, more efficient aircraft remain central to airline operations. This is reflected in milestones such as the Airbus A350-1000ULR entering the flight-test phase, regional fleet modernisation and international airlines' measured seat growth using higher-capability aircraft. This has translated into over 70 additional average daily movements operated by larger aircraft, including A350s, 787s, and A321LR/XLR variants, compared to the same time last year.

Figure 13. Aircraft newly entering service in the Australian network in the last 12 months (left) and routes flown in April 2026 by aircraft up to 1 year old for domestic and international segments (right).



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



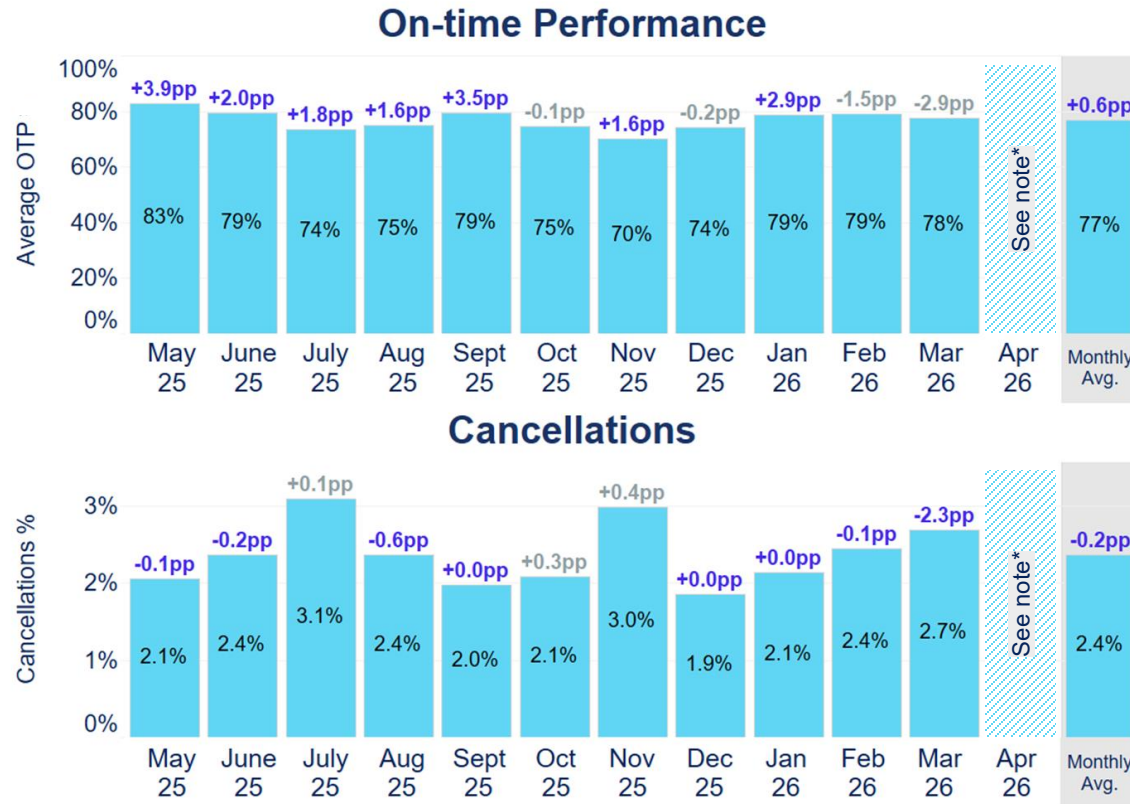
# Australian aviation: network performance



# Industry performance

Industry on-time performance (OTP) has been steady in 2026 to date and cancellation rates edged up slightly. Low OTP performance correlated with the days of most significant weather disruption. Consistent application of established cross-industry meteorological collaborative decision-making process (MET-CDM) remains key to network predictability and resilience.

Figure 14. Total industry OTP<sup>^</sup> and cancellations, up to March 2026\* with year-on-year change.

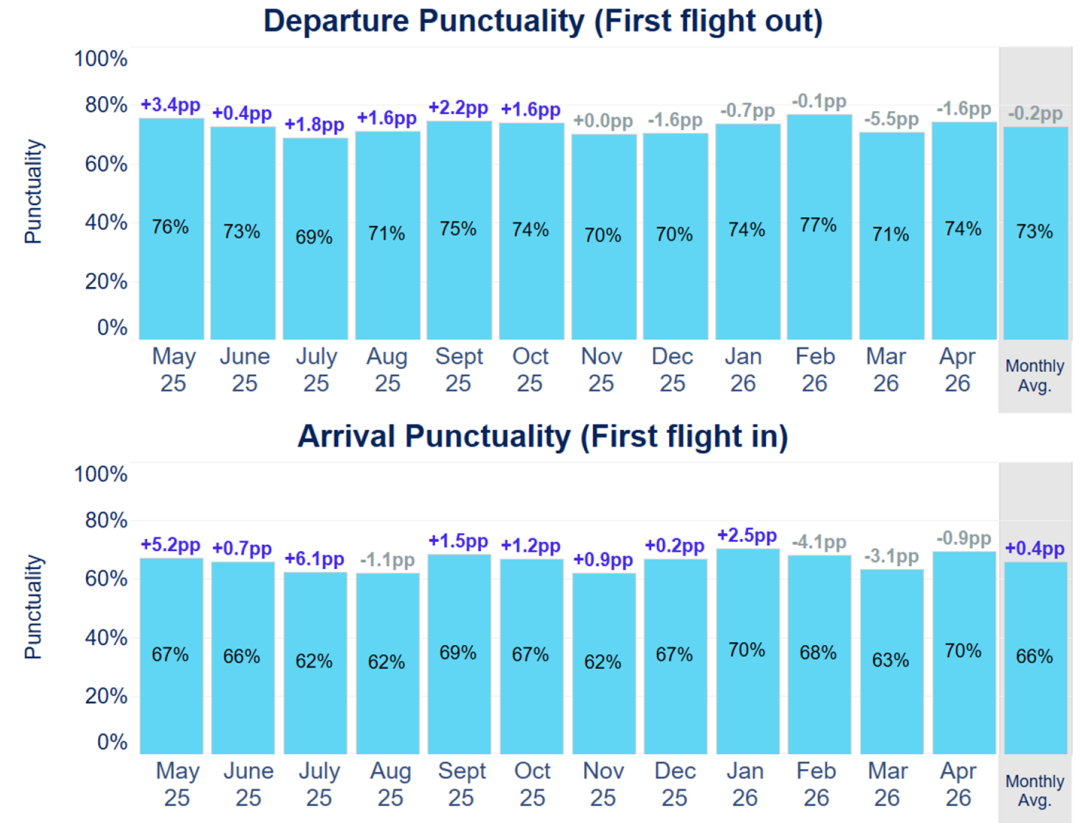


Source: BITRE ([website](#)). March 2025 performance was impacted by ex-tropical cyclone Alfred.

\* Data available up to March 2026 based on latest BITRE data release.

<sup>^</sup> Average of departure and arrival OTP.

Figure 15. First wave punctuality to April 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.

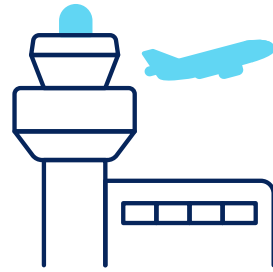
# Network management process

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

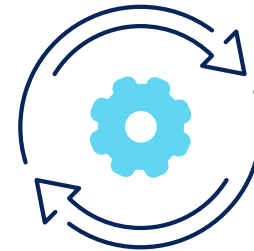
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management 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 April, overall ATFM metrics improved against the 12-month average trend. However, the network remains vulnerable to weather disruptions, as seen on 12 April when prolonged single runway operations at Sydney Airport due to strong crosswinds caused network disruptions. Post-event review with industry identified improvement opportunities, including earlier activation of demand management and balancing arrivals and departures to limit delays. Quality of flight plan data and schedule compliance was also highlighted as a key enabler of improved operational predictability, alongside effective use of A-CDM tools for shared situational awareness.

Figure 16. Key Ground Delay Program (GDP) performance metrics.

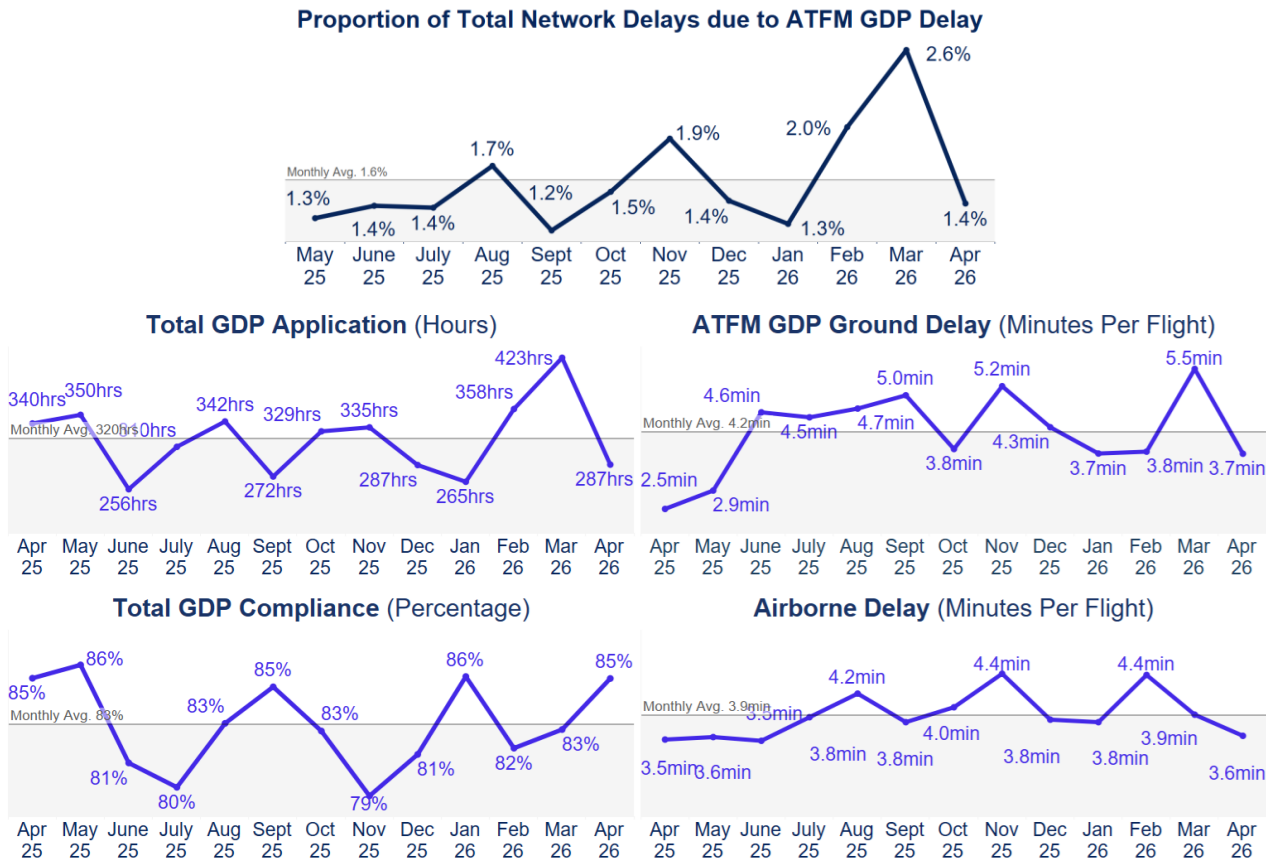
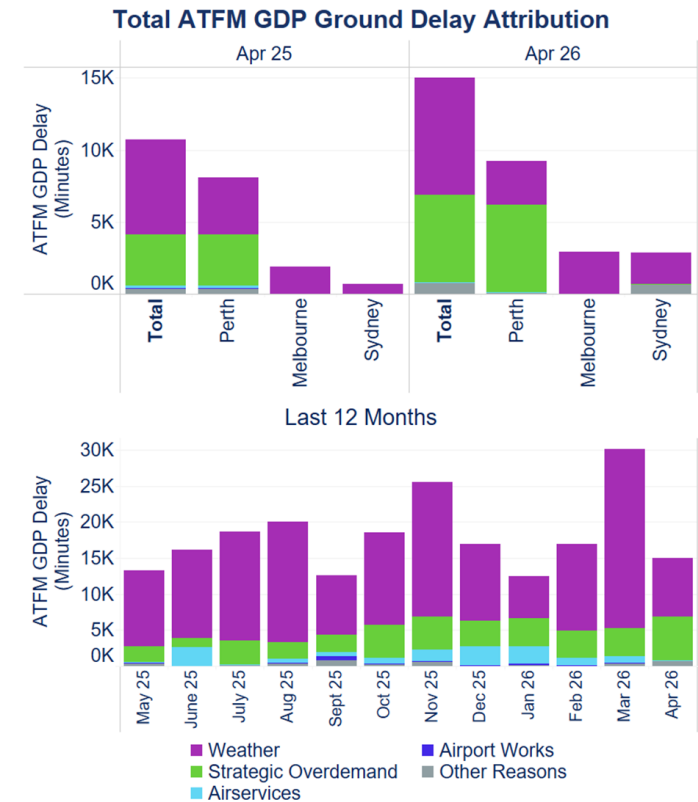


Figure 17. ATFM (GDP) ground delay by attribution at airports and overall.



Airports with nil ATFM delay are not shown.

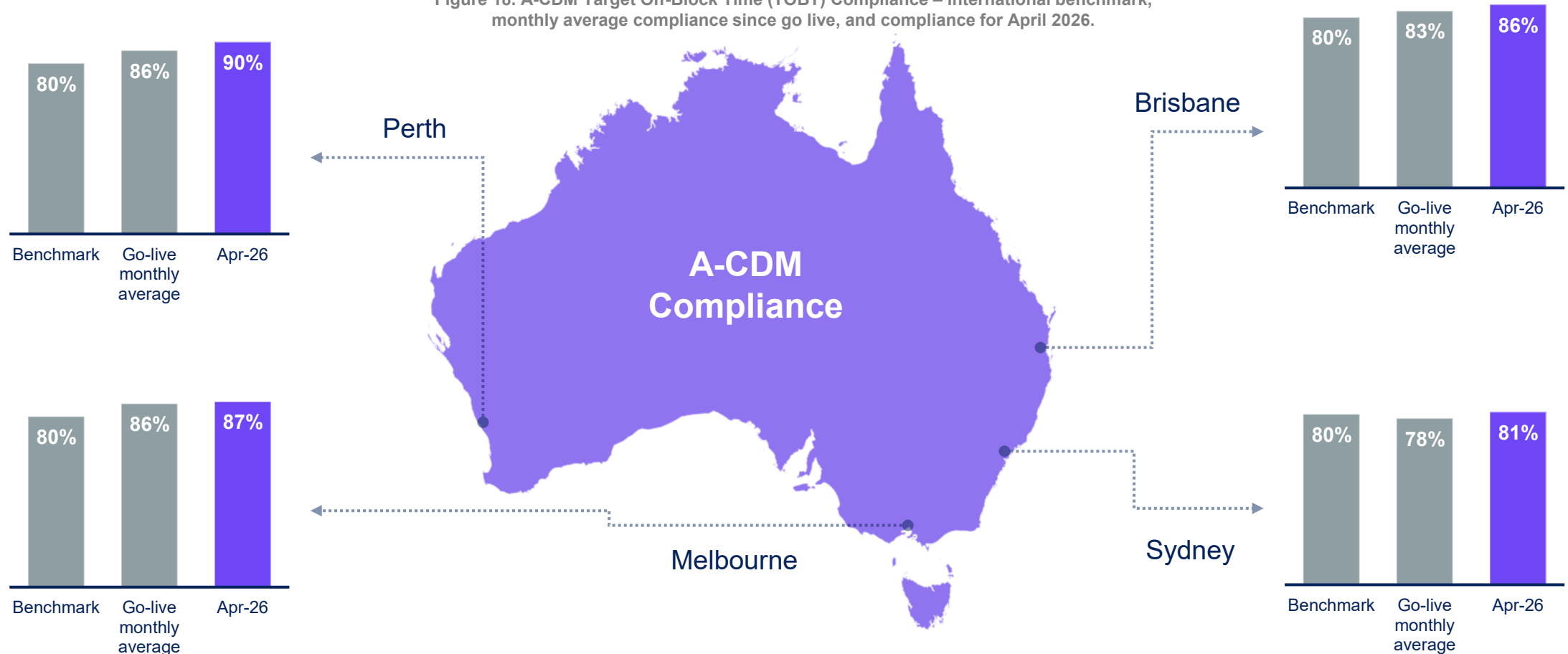
Source: Airservices ODAS (for Sydney, Melbourne, Brisbane, and Perth only). GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.

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)

All four major airports have recorded highest compliance to A-CDM Target Off-Block Times (TOBTs) since go-live, well ahead of global benchmarks. This demonstrates strong industry engagement and close post-implementation performance monitoring and fine-tuning. At capacity-constrained airports with significant airfield works such as Melbourne and Perth, enhanced real-time operational insights from A-CDM is supporting informed airport resource planning and utilisation. Reduced taxi-out delays and more stable departure sequencing is being observed across the East Coast in recent weeks, with industry data sharing underway to consistently measure A-CDM benefits. Opportunities remain to further strengthen consistency in A-CDM compliance across international and non-scheduled operations, supporting continued improvement in overall network predictability.

Figure 18. A-CDM Target Off-Block Time (TOBT) Compliance – international benchmark, monthly average compliance since go live, and compliance for April 2026.

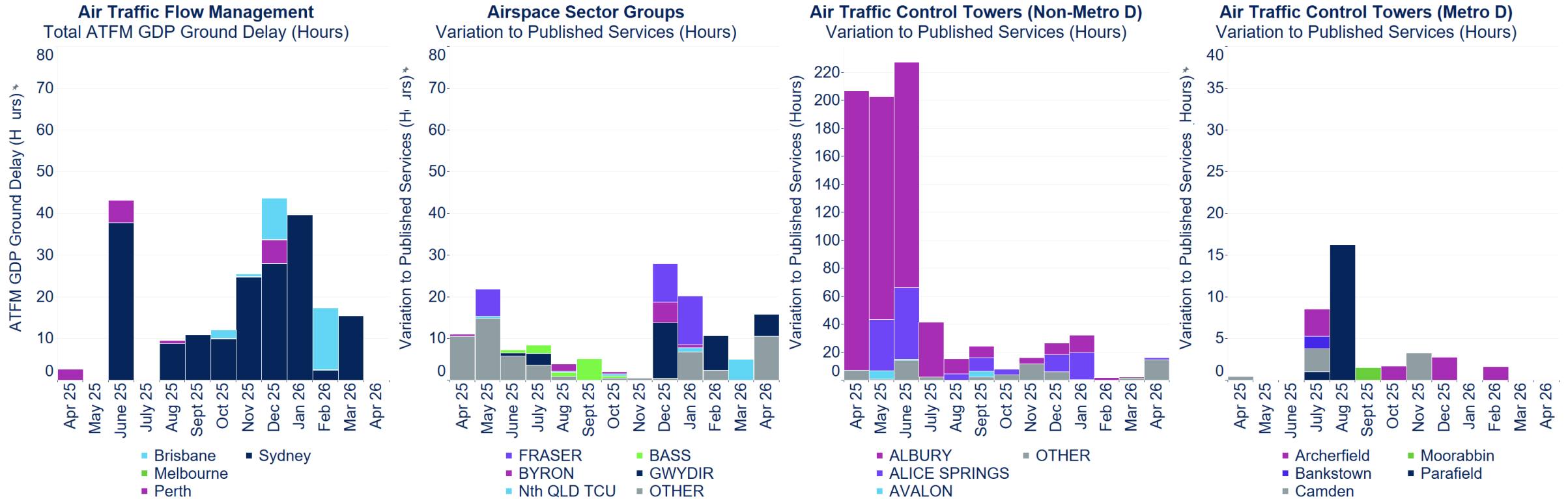


Source: Airservices ODAS and A-CDM.

# Air traffic service provision

Airservices heightened holiday resilience measures and sustained focus on increasing resourcing and strengthening processes underpinned improved service outcomes in April. No Airservices-attributable ATFM ground delays were recorded across the four busiest airports. Airspace service variations were confined to non-peak periods in three locations, and overall aerodrome service variations decreased by 92% year-on-year.

Figure 19. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).

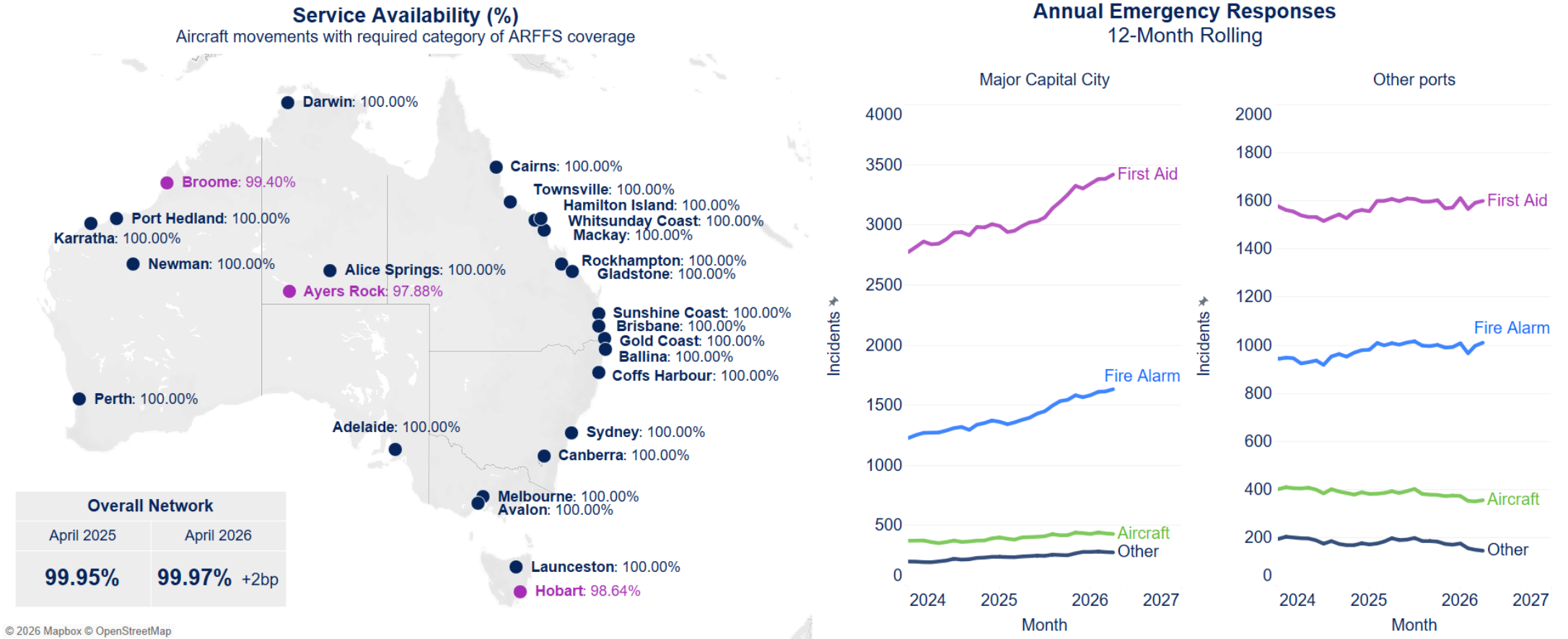


Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information 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) service delivered 99.97% availability across the network in April, maintaining a consistently high standard of service delivery.

Figure 20. ARFFS service availability by airport and overall network in April 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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