

Australian Aviation Network Overview

May 2026



Contents



We acknowledge and embrace a culture that celebrates diversity, inclusion, and equality for all. In making this statement we acknowledge Aboriginal and Torres Strait Islander peoples as the Traditional Owners and Custodians of the country on which we operate, now called Australia.

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Executive Summary

The Australian aviation sector continues to display ongoing resilience and flexibility while navigating continued volatility. However, as the Middle East conflict extended beyond 100 days during this period, there was real pressure on the sector beginning to constrain its ability to manage this challenging environment over the medium-term.

In May 2026, the Australian aviation network recorded its first contraction in 10 months in terms of daily passenger flights, although projected weekly demand capacity is still tracking just above 2025 levels. Domestic demand softened, with capacity adjustments concentrated on major capital-city corridors and targeted lower-yield routes. This reflects a near-term recalibration to maintain core connectivity while optimising capacity, fleet utilisation and yield.

International growth moderated to 1.3%, well below the 12-month average of 7% with clear divergence across markets. Middle East traffic is still over 40% below last year, constrained by ongoing disruption to key transit routes. In contrast, Asia Pacific markets continue to grow steadily, supported by short to medium-haul demand and capturing displaced European traffic. North American demand is building, underpinned by a strengthening Australian dollar during this reporting period and increased transpacific capacity.

The Middle East conflict is further disrupting already constrained aircraft supply chains, contributing to record backlogs of over 16,600 aircraft on order globally. At the same time, continued deployment of next-generation aircraft into the Australian network, albeit at a slower pace, is supporting improved efficiency and environmental outcomes.

Against these challenges, it is pleasing to note overall industry operational performance has strengthened. Some airlines reported their highest on-time performance results in nearly a decade. Close cross-industry coordination delivered improvements across key air traffic flow management (ATFM) metrics. Airport Collaborative Decision Making (A-CDM) implementation continues to mature, with high compliance. Benefits were evident in improved predictability and real-time insights enabled effective management of demand and capacity during adverse weather events.

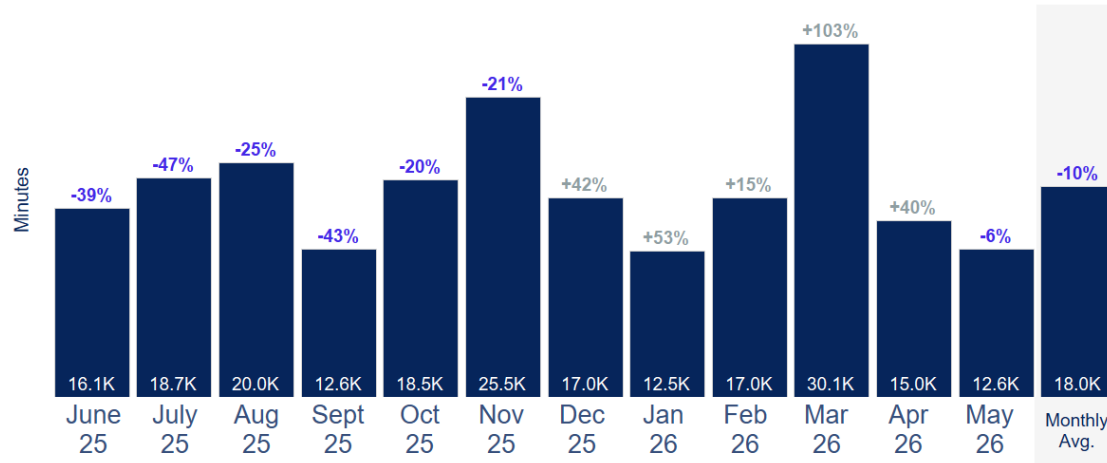
Airservices service performance improved, with no attributable ATFM ground delays at major airports, minimal tower service variation, and year-on-year reductions in airspace service variations. Our core focus remains on strengthening operational resilience and sustaining consistent performance across the network.

Aviation Rescue Fire Fighting (ARFF) services maintained full service availability at 26 of 27 locations, with the value of ARFF demonstrated in ongoing multi-agency exercises to strengthen emergency preparedness.

Network performance snapshot (year-on-year comparisons)

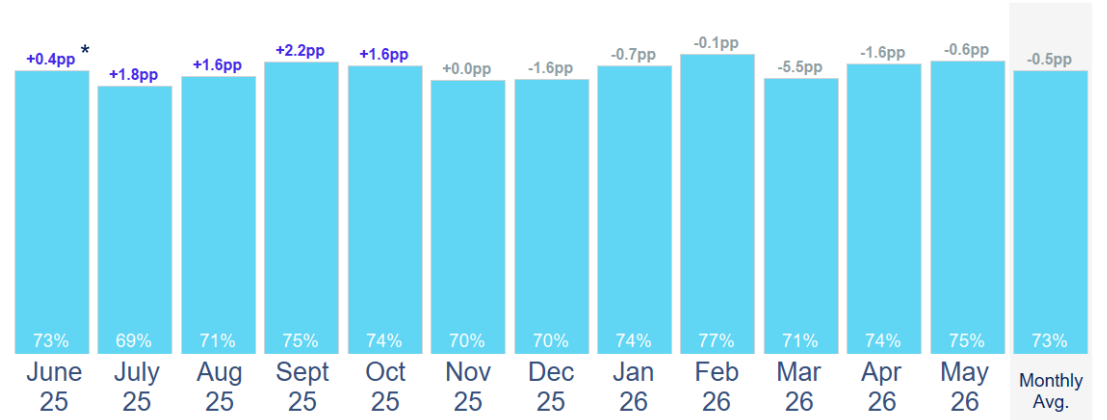
Total Air Traffic Flow Management (ATFM) Delays

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

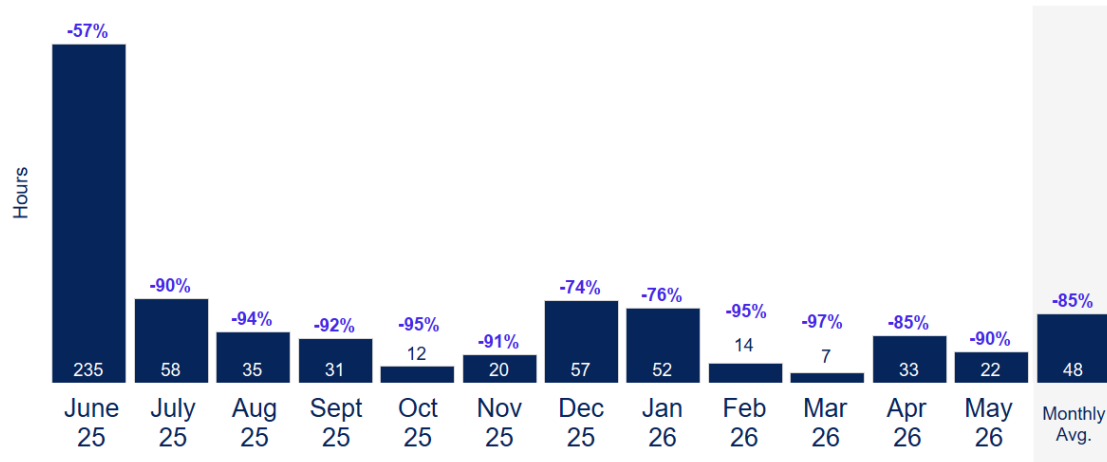


First Wave Departure Punctuality

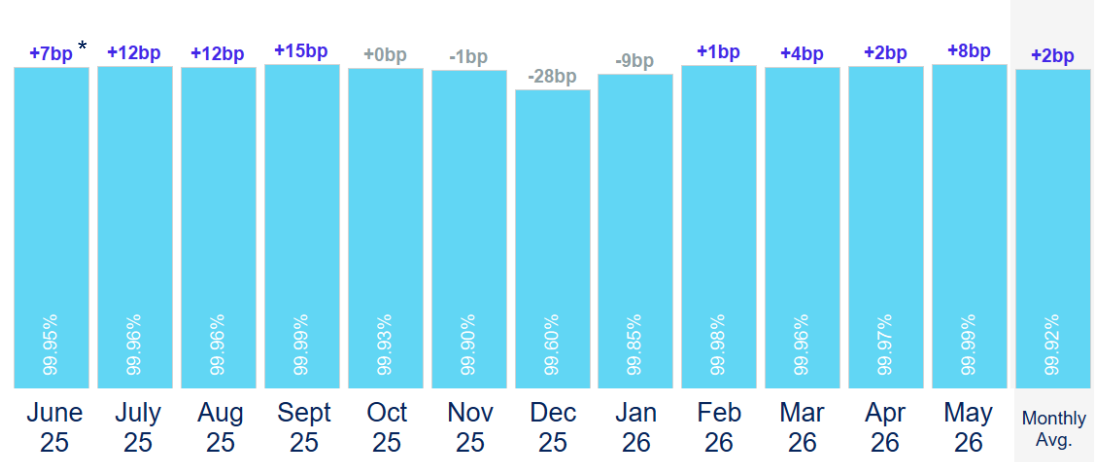
(First flight out)



Service Variations (Airspace & Tower)



Aviation Rescue and Fire Fighting (ARFF) 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.



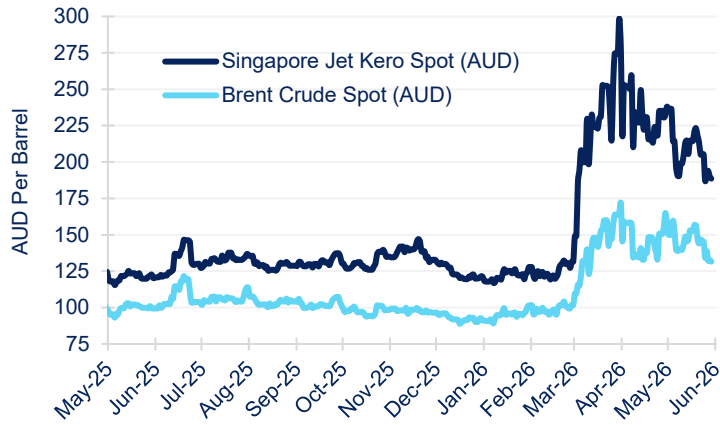
Economic and social trends



Economic factors

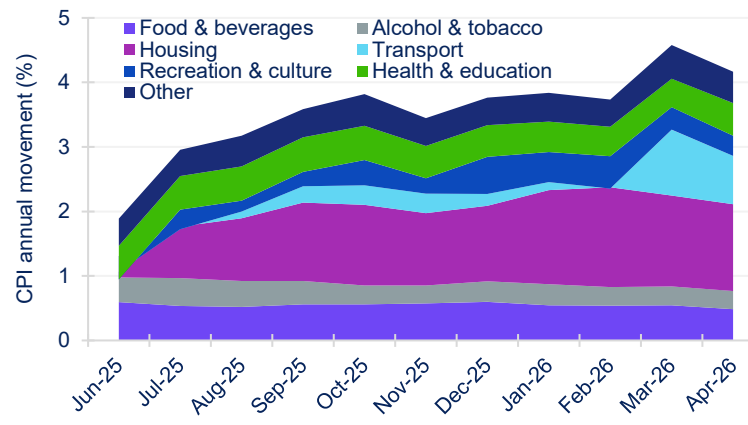
The global and Australian economies have been relatively resilient amid the Middle East conflict. However, as the conflict extends beyond 100 days, disruption risks to the aviation sector remain elevated. This volatility is driving a shift toward shorter, more price-sensitive travel and increasing pressure on operating costs and supply chains shaping network decisions and near-term efficiency priorities.

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



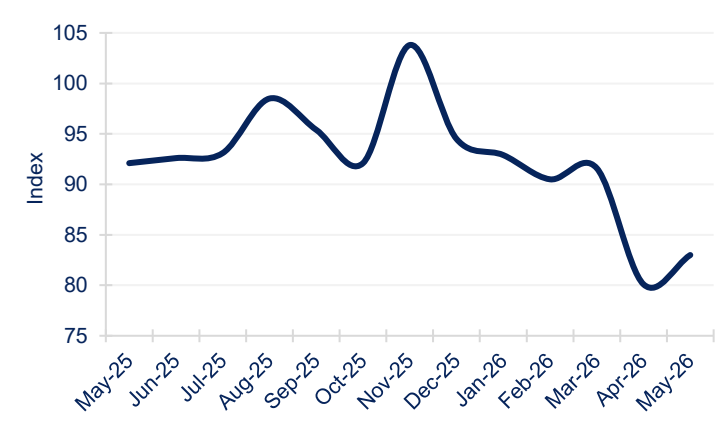
Source: Bloomberg – latest data as at 29/5/2026.

Figure 2. Consumer Price Index (CPI) Australia.



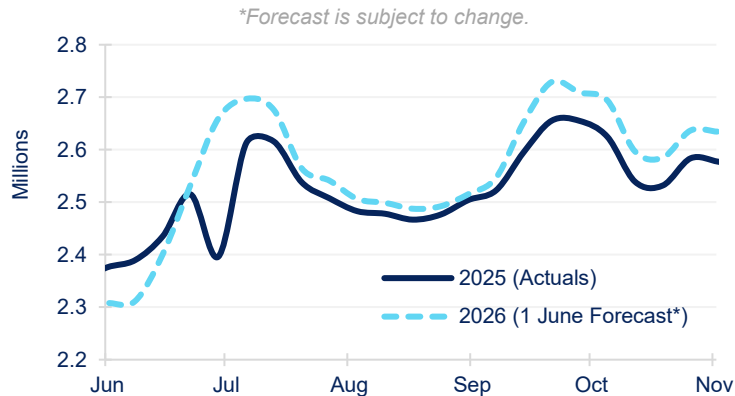
Source: ABS ([website](#)) – latest data as at 3/6/2026.

Figure 3. Australian consumer sentiment.



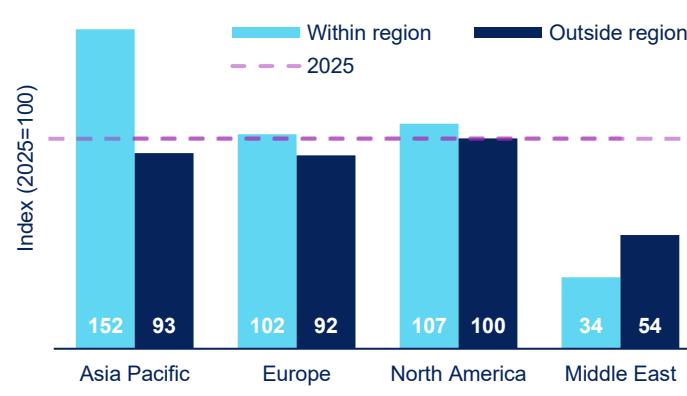
Source: Trading Economics ([website](#)) – as at 3/6/2026.

Figure 4. Australia weekly seat capacity (6-month outlook from June 2026 compared to 2025).



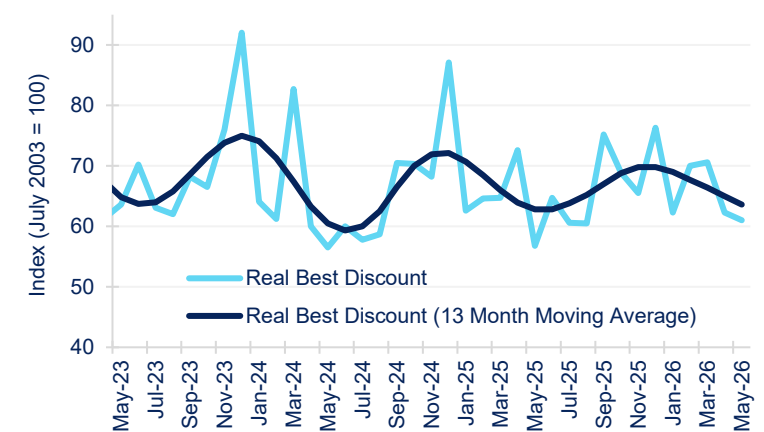
Source: CAPA ([website](#)) – latest data as at 3/6/2026.

Figure 5. Change in travel patterns compared to 2025 (March-April 2026).



Source: IATA ([website](#)) – data as at 26/5/2026.

Figure 6. Domestic airfares (real best discount).

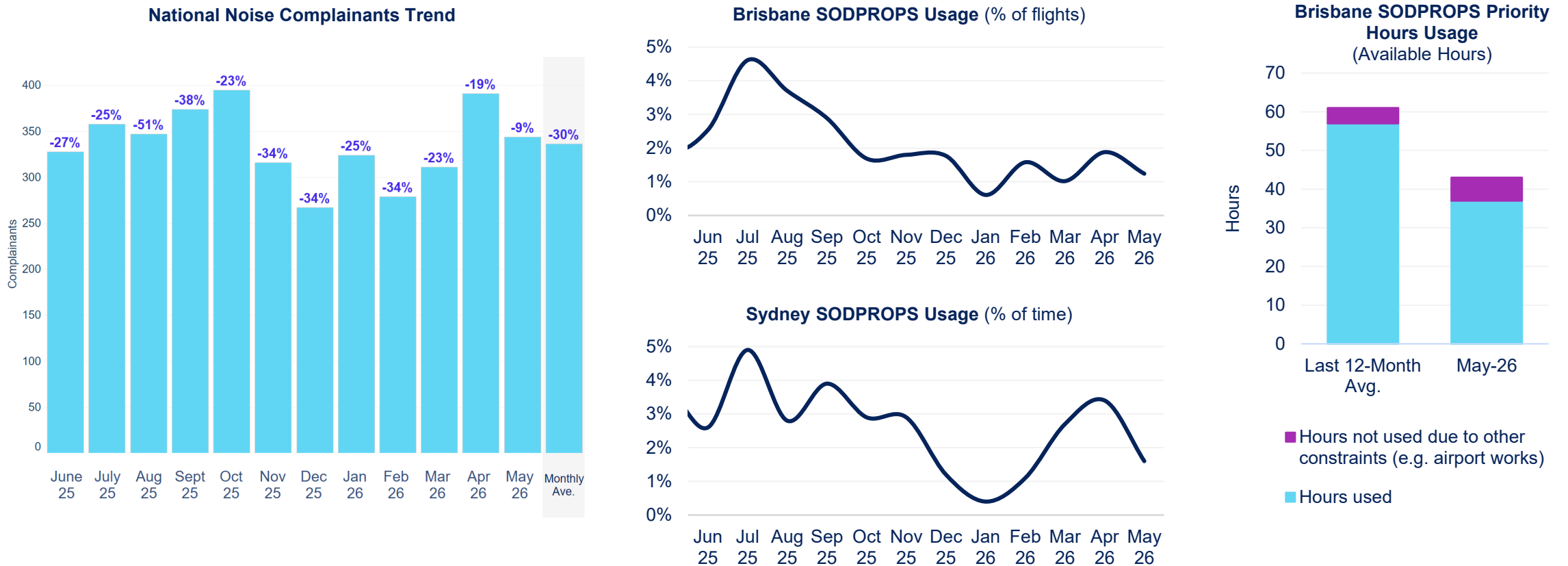


Source: BITRE ([website](#)) – latest data as at 4/6/2026.

Social factors: aircraft noise

Nationally, aircraft noise complainants are trending downwards with an average monthly reduction of 30% over the past year, reflecting incremental improvements in noise management at locations across Australia. Complainant activity remains highly event-driven, increasing during flight path changes, runway works, weather variation, or community engagements. This reinforces an industry-wide focus on building community trust through transparency on the operational drivers of aircraft noise, and continued engagement with impacted communities. Additionally, while usage of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) at Brisbane and Sydney was lower in May due to higher-than-average rainfall, it continues to be maximised whenever conditions allow, with usage averaging 93%[^] of available hours over the past year.

Figure 7. Aircraft noise complainants trend (left), SODPROPS usage* trend at Brisbane and Sydney (middle) and SODPROPS priority hours usage at Brisbane (right).



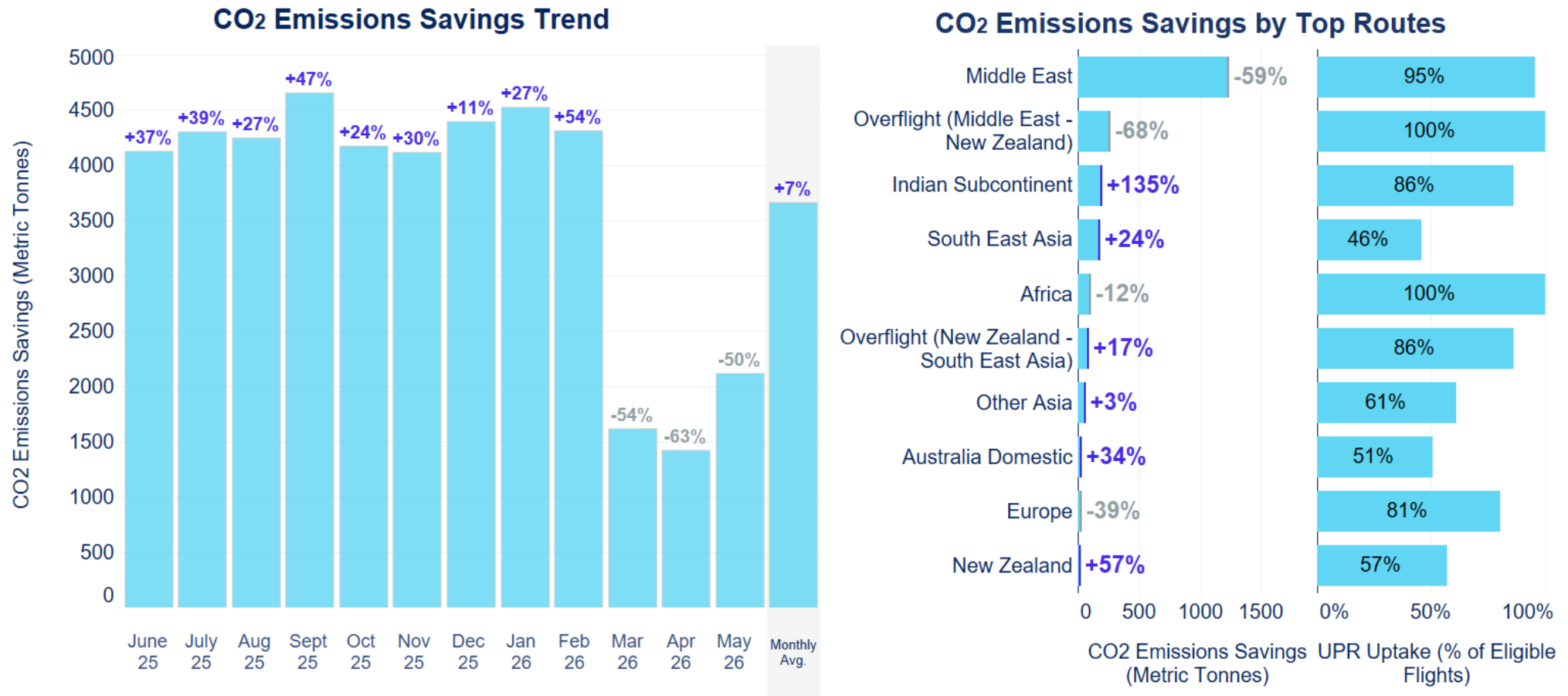
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool ([website](#)).

* SODPROPS usage at Brisbane and Sydney has decreased in May due to adverse weather, with persistent rainfall exceeding the long-term average. ^ Excludes hours not used due to weather (e.g. wind, unstable conditions).

Social factors: aircraft emissions

In the 12 months to May, User Preferred Routes (UPRs) contributed 44,000 metric tonnes of CO₂ emissions savings. Long-haul routes across the Middle East, Africa, and Europe maintain strong uptake and adoption across short- to medium-haul flights is increasing, supporting broader progress toward sustainability targets.

Figure 8. User Preferred Routes (UPR) total CO₂ emissions savings trend (left) and by top routes with UPR percentage uptake in May 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. CO₂ emissions savings are measured across the entire flight segment within Australian airspace.



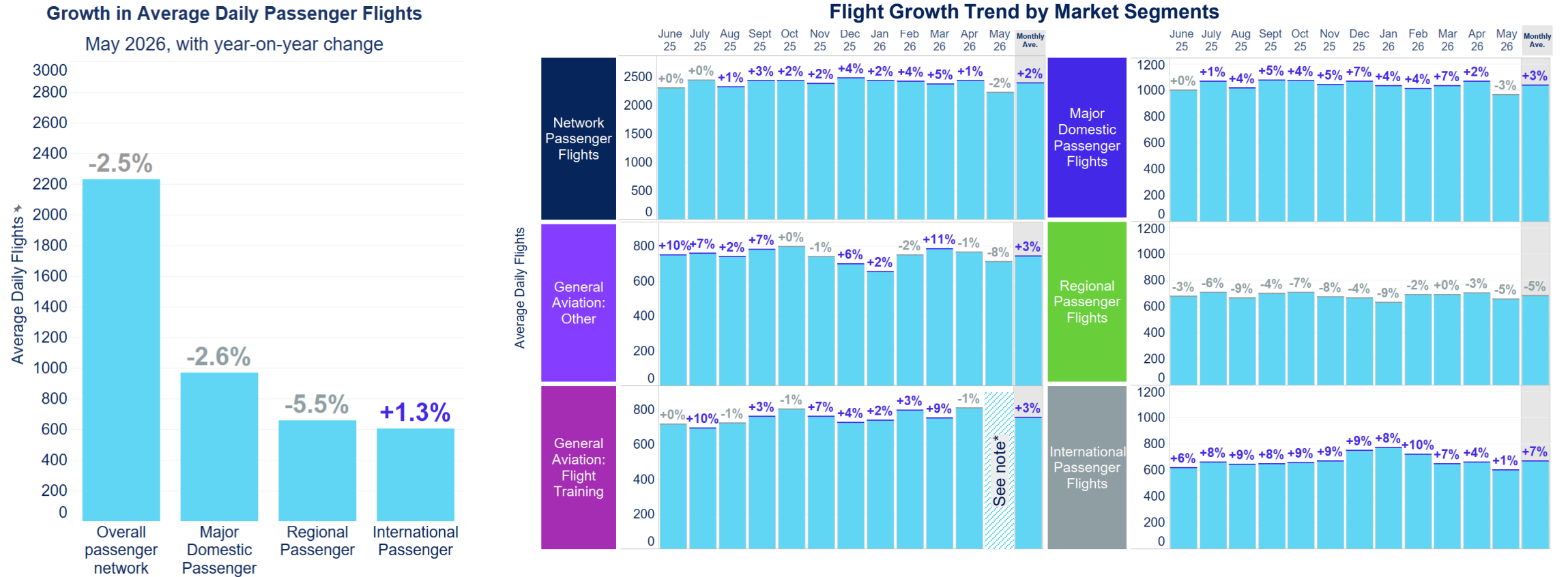
Australian aviation: domestic and international markets



State of Australian aviation growth

In May 2026, passenger flights across the Australian network marked the first contraction in 10 months, declining 2.5% year-on-year. Domestic activity softened, while international growth slowed to 1.3% compared to the 12-month average of 7% as airlines adjusted capacity and fleets in response to ongoing cost and fuel supply pressures.

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).

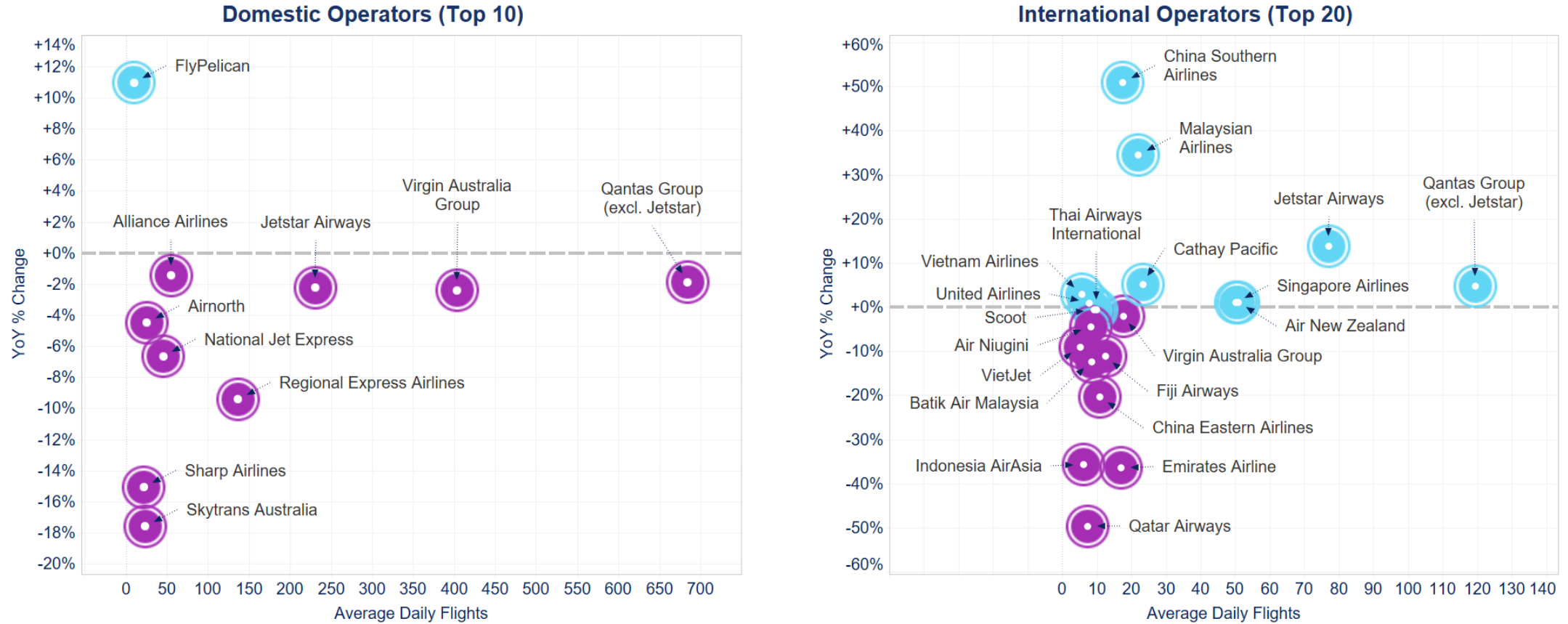


Source: Airservices ODAS (includes airline flights only).
* General aviation data is one month in arrears.

Top aircraft operators

Domestic flight activity is broadly softening. Internationally, growth is concentrated among larger Asia-Pacific airlines able to redeploy capacity to capture displaced and intra-regional demand. In contrast, several low-cost carriers have implemented double-digit capacity cuts for May-June. Middle East carriers have largely restored their global networks, albeit with ongoing schedule and capacity constraints due to continued airspace disruptions in the face of ongoing volatility.

Figure 10. Average daily flights growth for top airlines in the domestic segment (left) and international segment (right) in May 2026, with year-on-year percentage change.

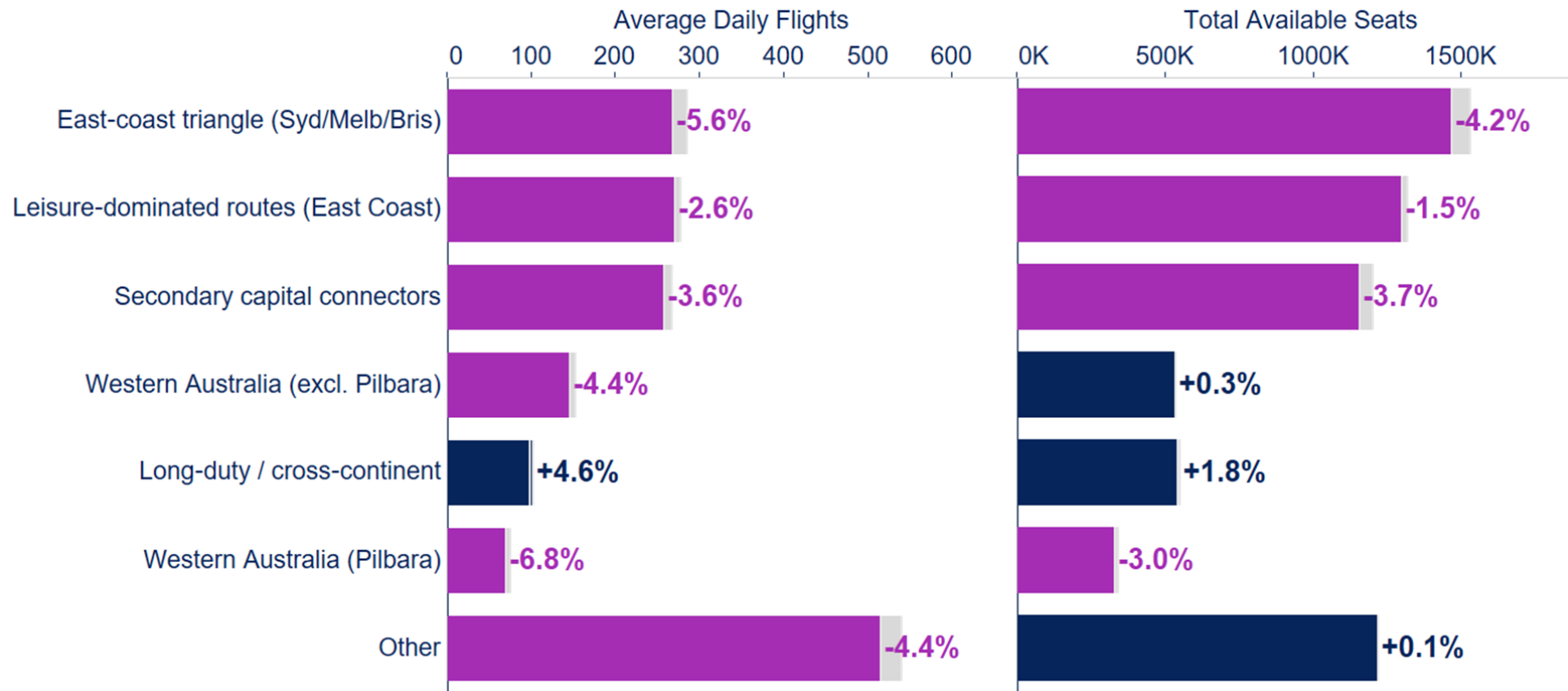


Source: Aircservices ODAS (includes airline flights only). Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

In May, around 180,000 Australian domestic seats were removed year-on-year, representing a 3.8% reduction in flights. These adjustments were concentrated on high-volume capital-city corridors, alongside targeted reduction in lower-demand regional and leisure services and optimisation of longer, fuel-intensive sectors. This reflects measures to maintain core network coverage while moderating lower-yield capacity. Domestic flight volumes at major East Coast capital-city airports are tracking approximately 3-5% below last year's levels.

Figure 11. Domestic route average daily flights and seat capacity in May 2026, with year-on-year change.

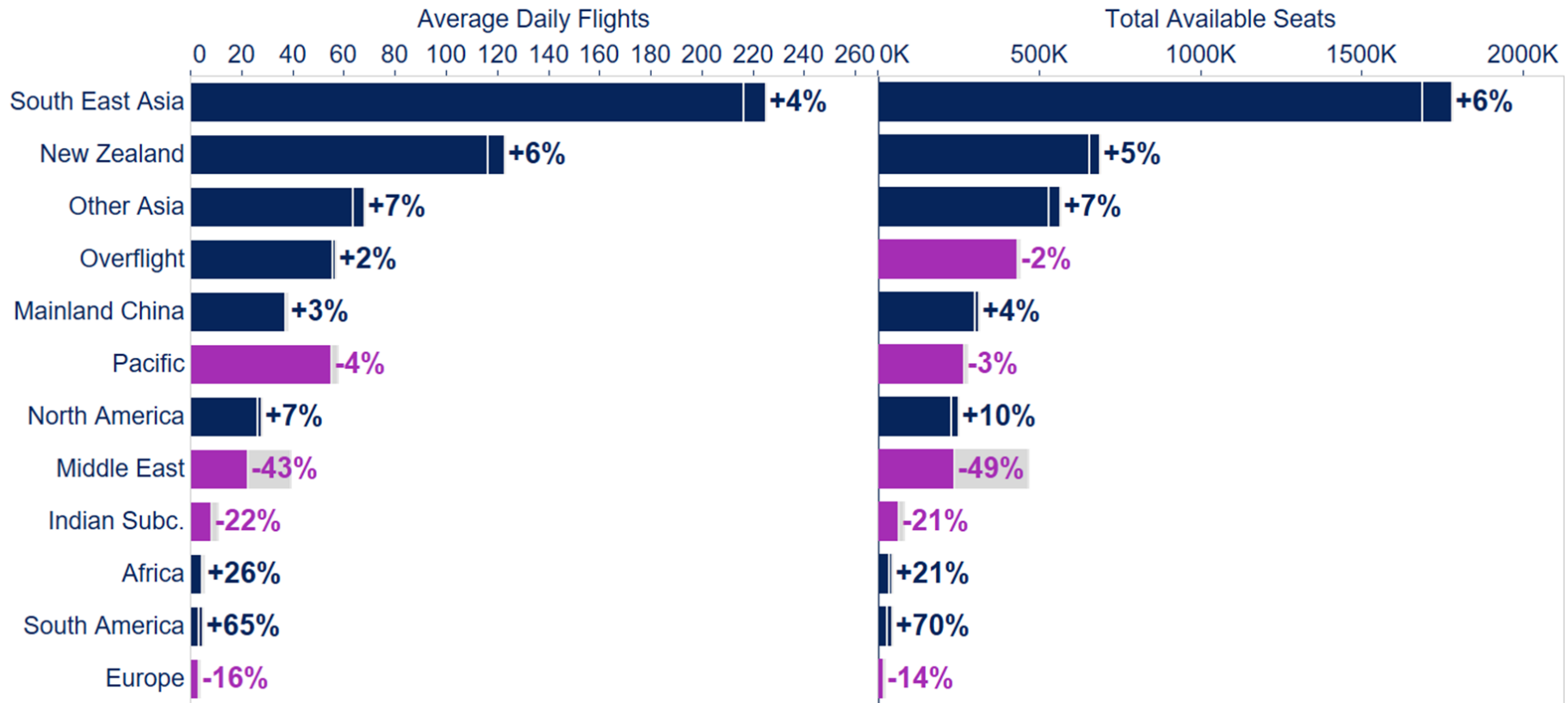


Source: Airservices ODAS and OAG (includes airline flights only).

International markets

International traffic is showing clear divergence across markets. Asia Pacific continues to grow steadily, capturing displaced European traffic and supported by short to medium-haul travel where price sensitivity and security considerations are influencing demand patterns. North America is strengthening, driven by transpacific capacity uplift and a strengthening Australian dollar during this period. In contrast, Middle East activity is still more than 40% below last year, with transit flows to Europe and India constrained.

Figure 12. International markets average daily flights and seat capacity in May 2026, with year-on-year change.



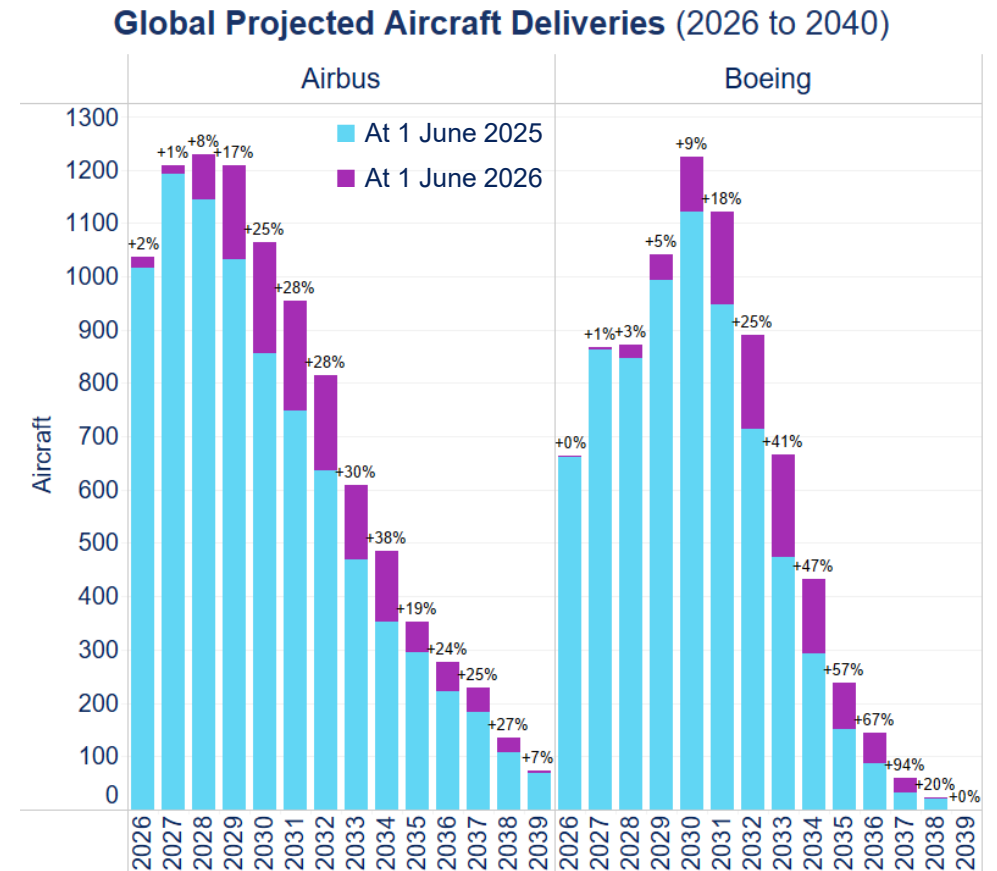
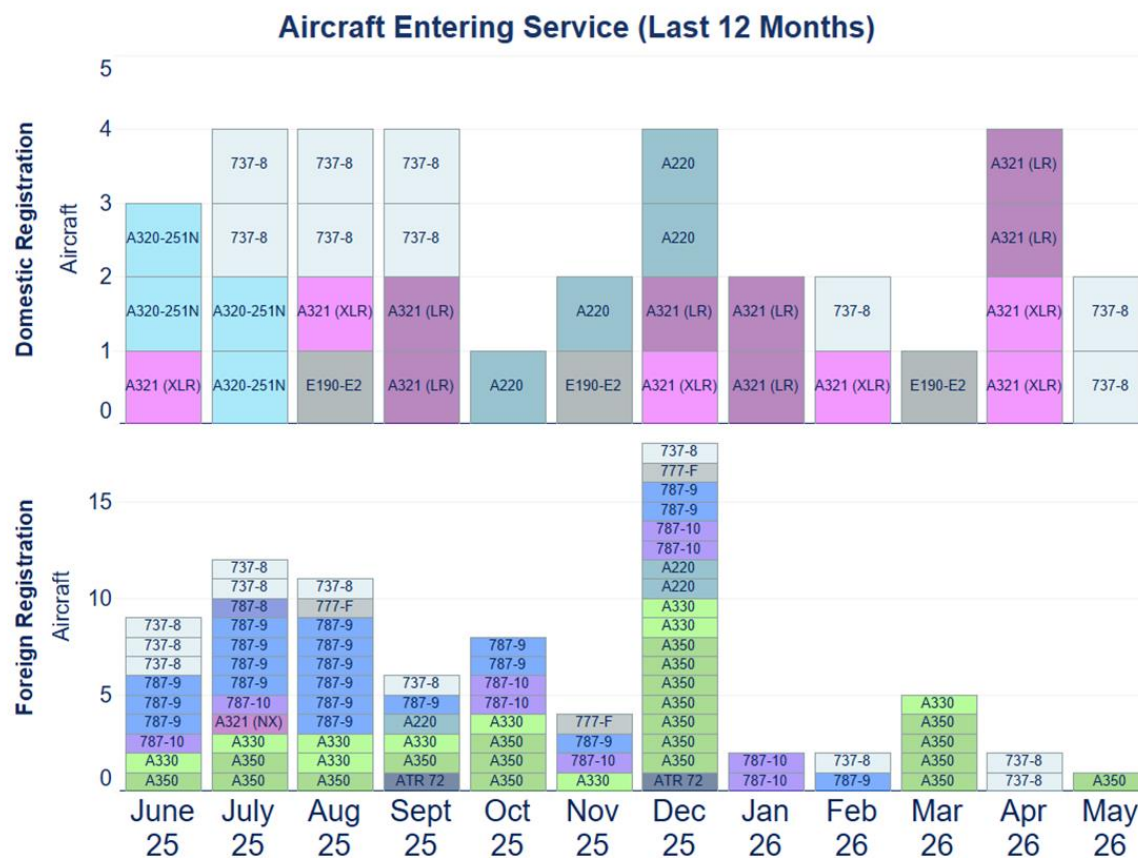
Source: Airservices ODAS (includes airline flights only).

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 – new aircraft deployment and forward deliveries

The Middle East conflict is further disrupting already constrained aircraft supply chains, contributing to record backlogs of over 16,600 aircraft on order globally - equivalent to over a decade of production. Fleet renewal in Australia has slowed in recent months. Notwithstanding, the deployment of next-generation aircraft (e.g. A350) to secondary ports like Adelaide and the use of Boeing 737 MAX aircraft for Perth-Southeast Asia routes is supporting greener, quieter operations.

Figure 13. Aircraft newly entering service in the Australian network in the last 12 months (left) and global passenger aircraft orders for delivery between 2026 and 2040 (right).



Source: CAPA and Aircservices ODAS (includes airline flights only). Only aircraft with at least 4 movements per month are shown on the left.



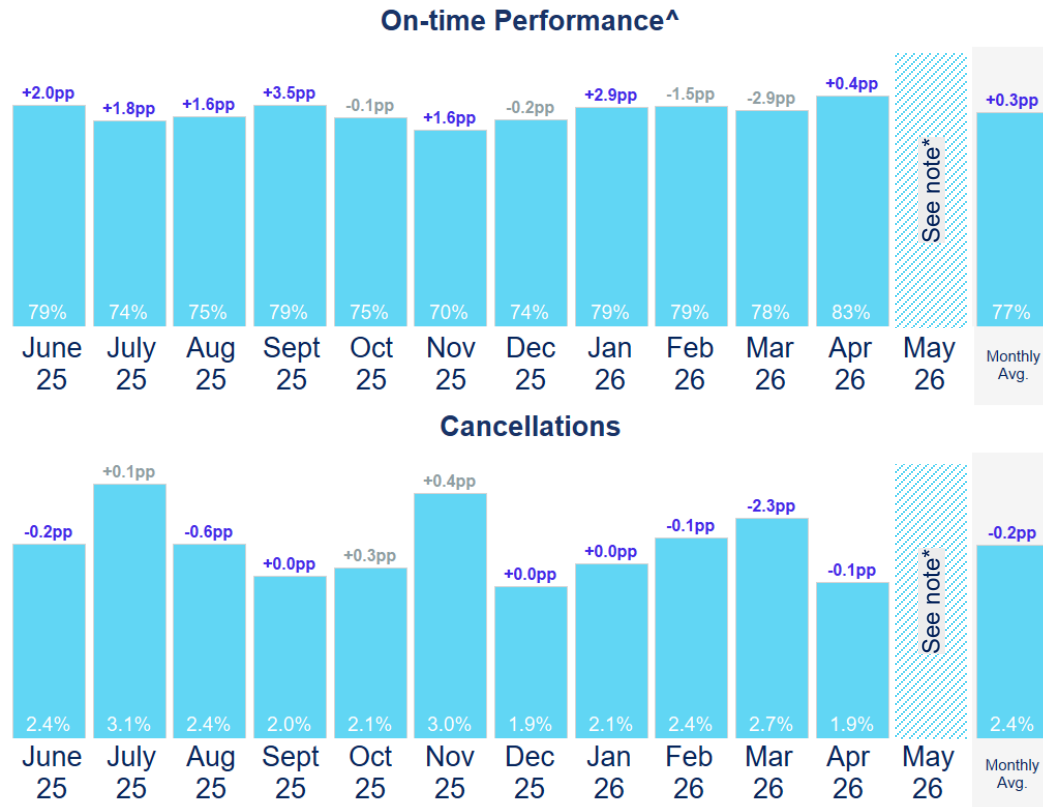
Australian aviation: network performance



Industry performance

Overall industry operating performance improved in April 2026, reflecting a coordinated focus on the peak holiday period. Major airlines recorded their highest April OTP in almost a decade, while some achieved flight completion rates up to 99.2%. Cross-industry efforts to strengthen operational performance, supported by improved resourcing, more robust planning, and stronger coordination across the aviation system is delivering more reliable outcomes for Australian travellers.

Figure 14. Total industry OTP[^] and cancellations, up to April 2026* with year-on-year change.

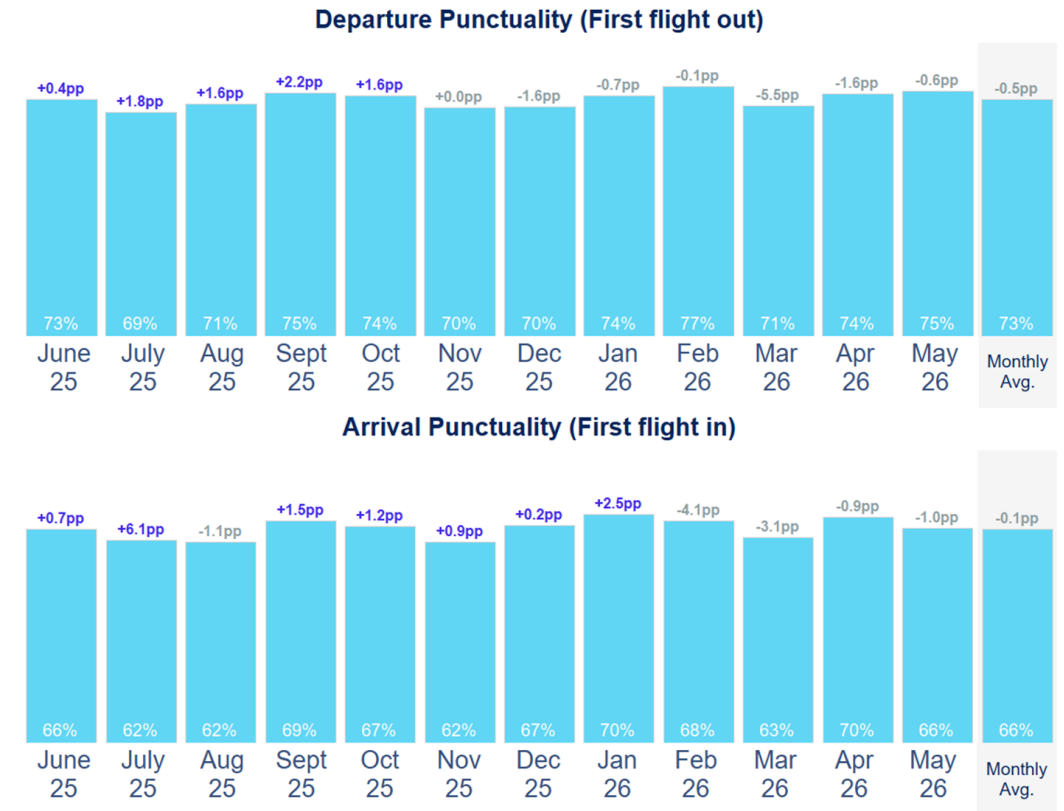


Source: BITRE ([website](#)). March 2025 performance was impacted by ex-tropical cyclone Alfred.

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

[^] Average of departure and arrival OTP.

Figure 15. First wave punctuality to May 2026 as a lead indicator for OTP with year-on-year change.



Source: Aircservices ODAS (includes Sydney, Perth, Brisbane, Melbourne). The data presented is an estimate based on domestic flight data available to Aircservices, 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.

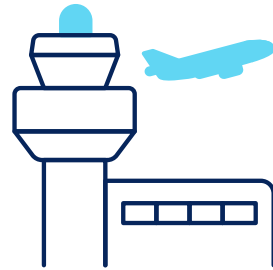
Network management process

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

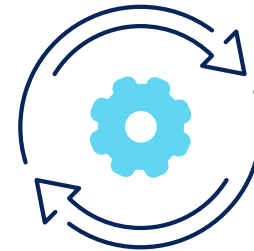
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management 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 May 2026, ATFM ground delays accounted for 1.4% of total network delays driven largely by weather. Key metrics for Ground Delay Program application has trended positively against the 12-month average. At Sydney and Perth, critical east and west coast hubs driving overall network performance, cross-industry coordination on ATFM process helped reduced average airborne delays by 18% and 13% year-on-year. Flights experiencing delays of more than 20 minutes also decreased by 41% and 19%, respectively.

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

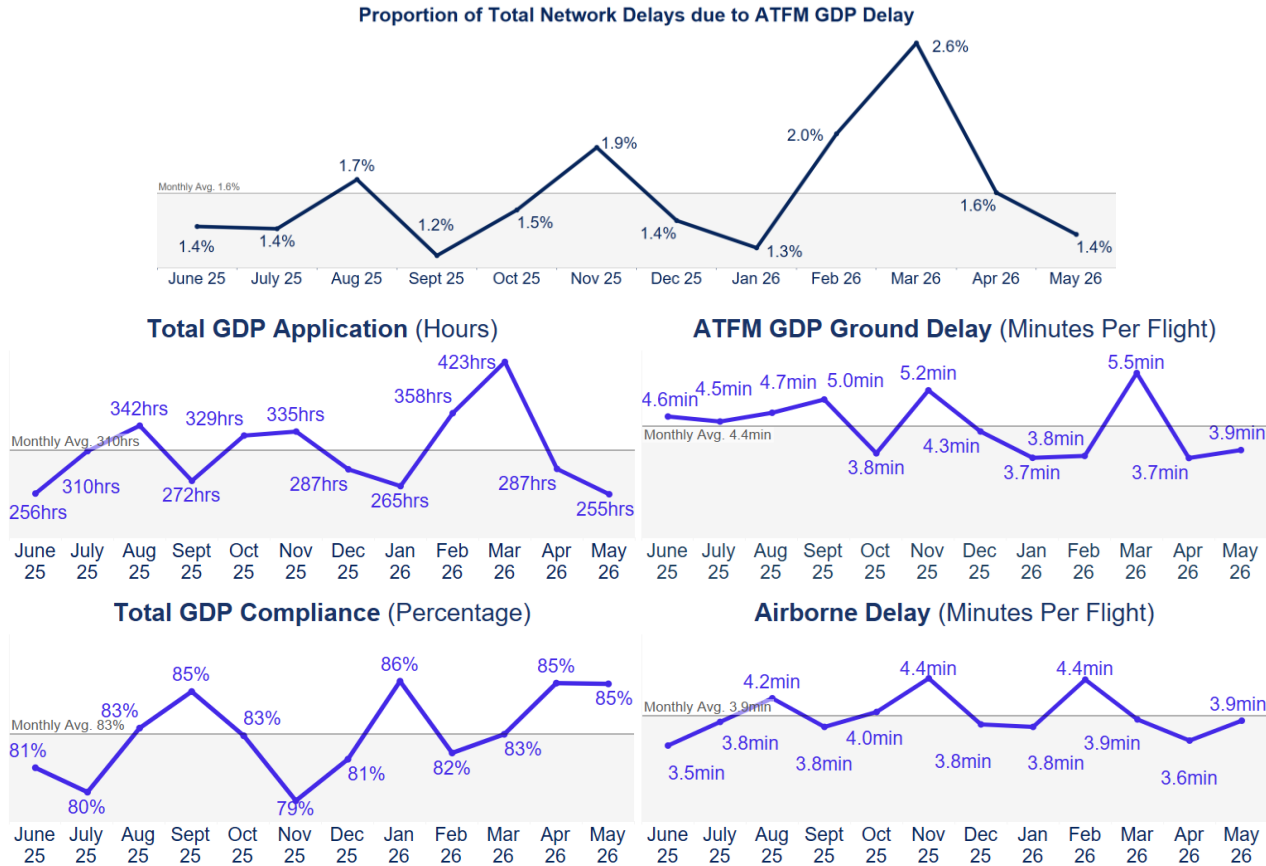
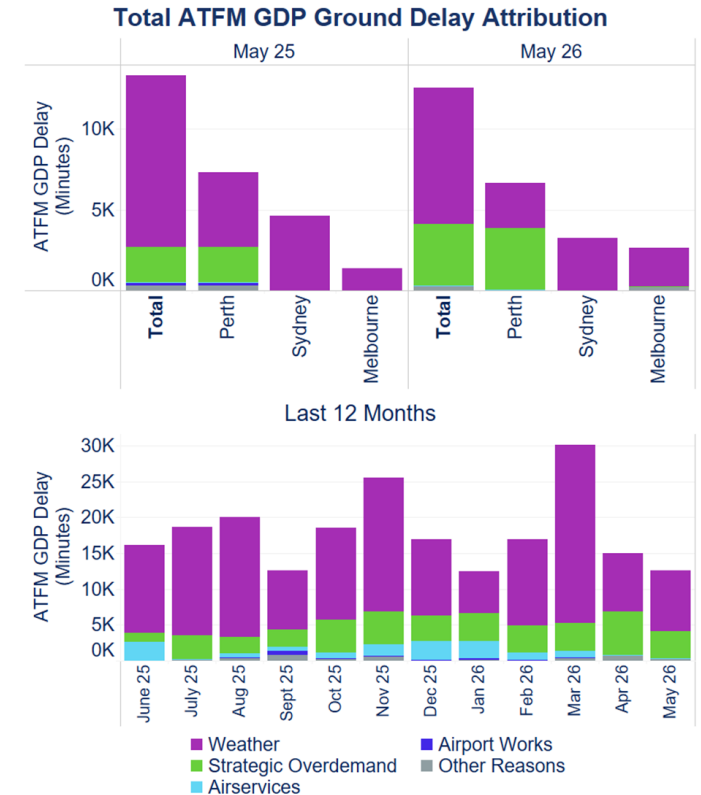


Figure 17. ATFM (GDP) ground delay by attribution at airports and overall.



Airports with nil ATFM delay are not shown.

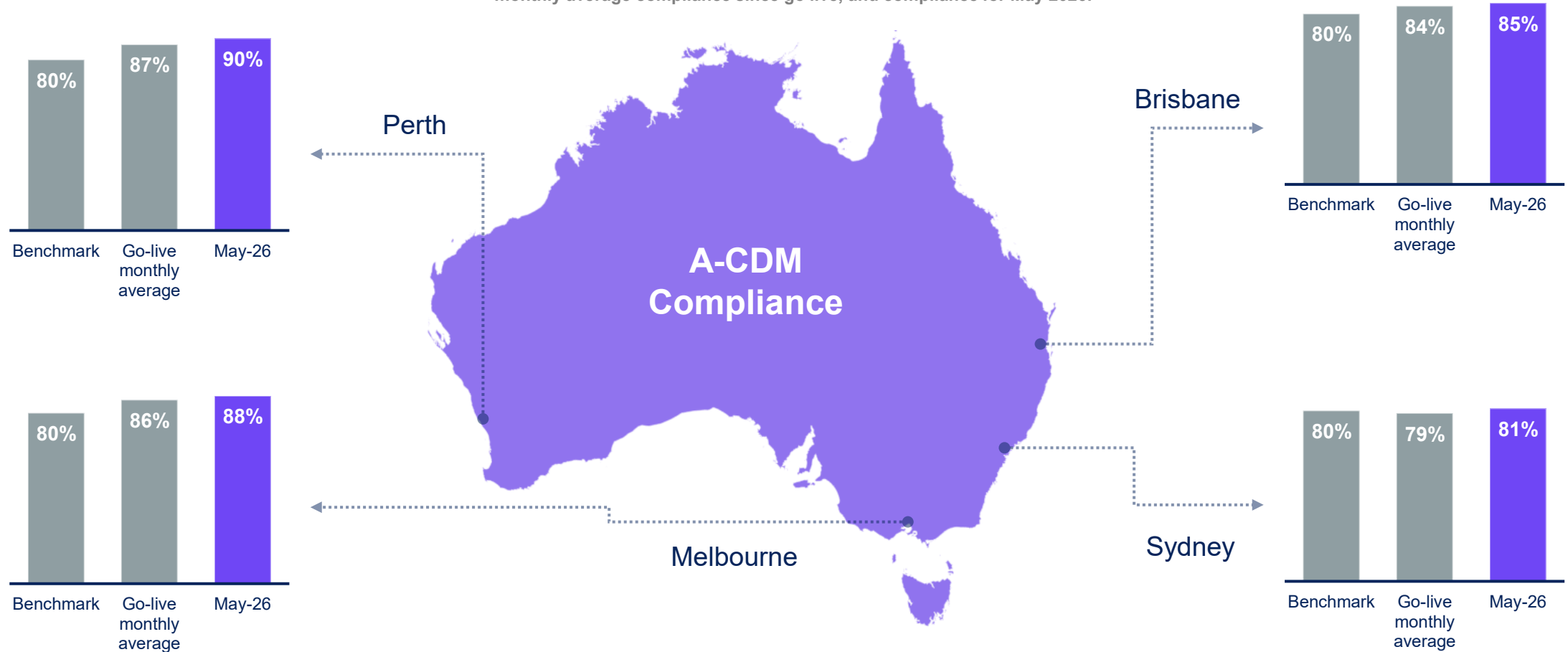
Source: Airservices ODAS (for Sydney, Melbourne, Brisbane, and Perth only). GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.

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)

A-CDM operations continue to strengthen across major airports, with Target Off-Block Time (TOBT) compliance reaching 90%. Ongoing system updates and industry engagement are strengthening operational confidence. A-CDM is enhancing operational resilience as demonstrated on 7 May during Sydney's single runway operations, where improved predictability and real-time insights enabled effective management of demand and capacity under adverse weather.

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

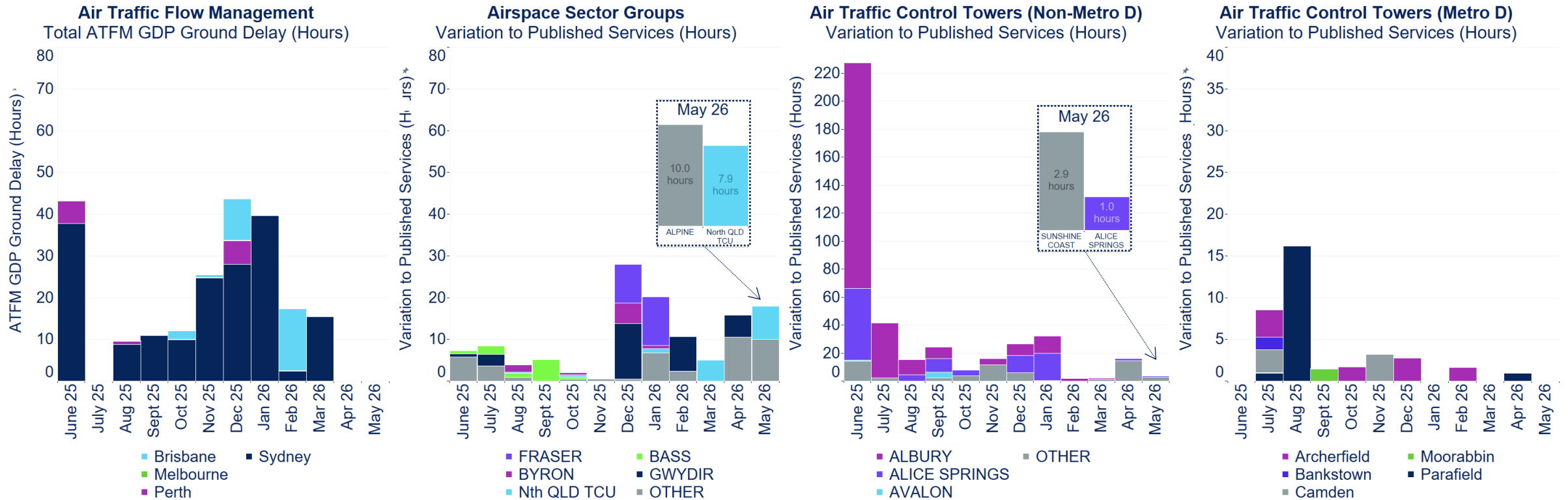


Source: Airservices ODAS and A-CDM.

Air traffic service provision

Air traffic service outcomes continued to improve, with no Airservices-attributable ATFM ground delays at the four major airports, no service variations at Metro D aerodromes and airspace service variations 18% lower than May last year. We remain focused on strengthening operational resilience and sustaining consistent performance across the network.

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

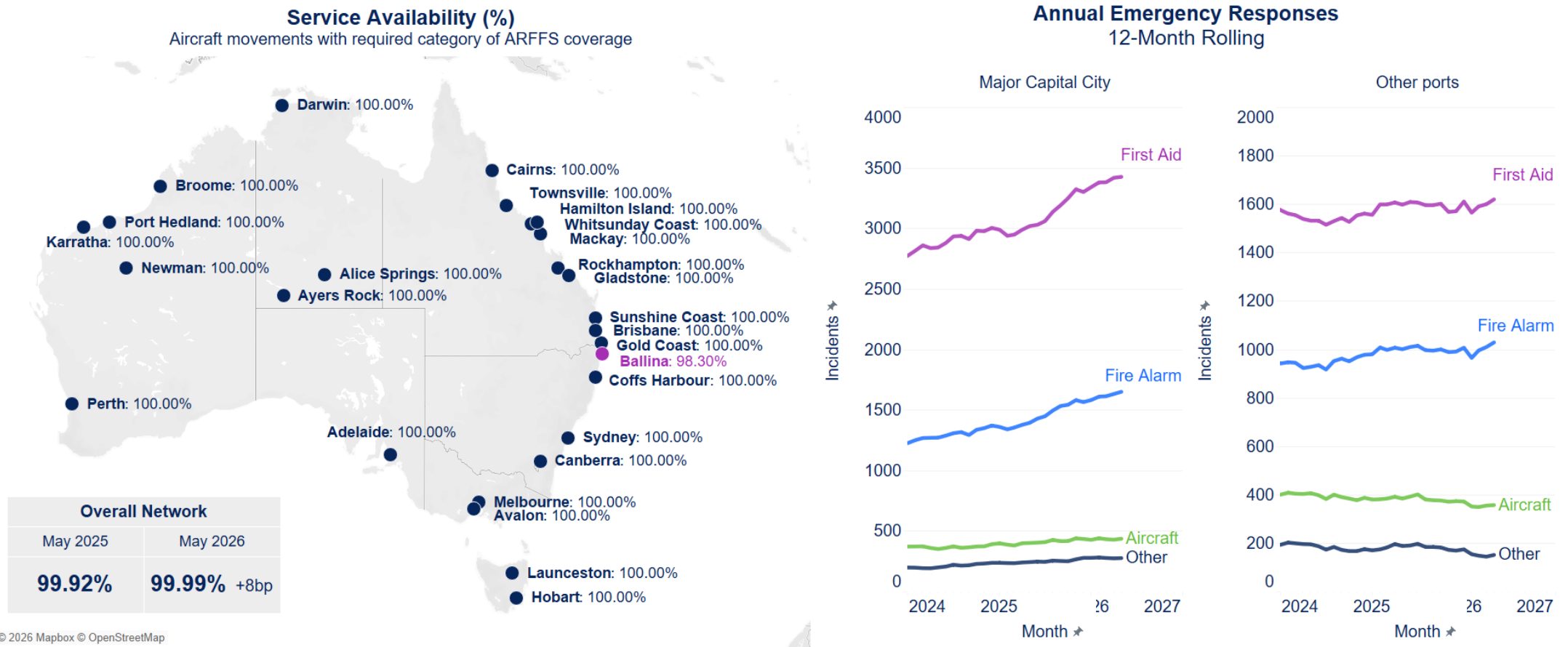


Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information 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 – Sunshine Coast tower currently includes a 90-day variation to operating hours.

Aviation Rescue Fire Fighting Service

Aviation Rescue Fire Fighting (ARFF) services recorded 99.99% availability across the network in May, with full service availability at 26 of 27 locations. Airservices continues to play a critical role in airport emergency capability. On 13 May, ARFF participated in Brisbane Airport Corporation's biannual Aerodrome Emergency Plan exercise, collaborating with partner agencies to support a coordinated response to a simulated aircraft incident and strengthening operational preparedness for emergencies.

Figure 20. ARFFS service availability by airport and overall network in May 2026 with year-on-year change (left) and 12-month rolling number of emergency responses (right).



© 2026 Mapbox © OpenStreetMap

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