



Australian Aviation Network Overview

Financial Year 2025-2026

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

This June 2026 edition provides a snapshot of the key performance outcomes for the Australian aviation network in Financial Year 2025-2026 (FY26).

Our industry demonstrated strong resilience and adaptability this year. Despite significant disruptions to global aviation from the Middle East conflict, passenger volumes grew by 3% compared to FY25, driven by robust leisure travel, continued resource sector activities and 7% growth in international flights. 18 December 2025 was the busiest day since 2019. General aviation, particularly flight training, experienced steady 3% year-on-year growth.

While growth softened in the final quarter as airlines responded to fuel price volatility, supply chain constraints and market uncertainty, it was pleasing to see the industry continuing to adapt. With 117 new aircraft entering into the network, airlines are able to meet demand through higher aircraft utilisation and consistently strong load factors.

Industry adaptability and greater resilience paid dividends despite the volatile environment. On-time performance and cancellation rates outperformed long-term averages for the second consecutive month, with Australian airlines placing among the world's leading performers. All key Air Traffic Flow Management (ATFM) metrics improved despite increasingly challenging weather conditions that accounted for over two thirds of ground delays. These results reflect closer industry coordination to anticipate disruption, apply lessons learnt and align network settings to optimise operations.

The industry also made meaningful progress in community and sustainability outcomes. User Preferred Routes delivered more than 42,700 tonnes of CO₂ emissions savings, with 53% of international flights benefiting from optimised flight profiles. The number of aircraft noise complainants fell to a six-year low. Maximising flights over water continues to be a priority focus in Brisbane, with Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) being delivered 89% of the time when weather conditions permitted.

FY26 marked a significant milestone with Airport Collaborative Decision Making (A-CDM) now operating at Australia's four busiest airports. Through real-time information sharing and common operating picture, A-CDM is enabling enhanced departure on-time performance, unlocking peak-period capacity at constrained airport and data-informed approach to gate and bay management. Ongoing programs and workshops to further enhance this decision-making tool will continue to drive benefits over the long term.

Air traffic service outcomes reached their highest level in the last five years, with service variations reduced by 86% year-on-year and Airservices-attributable ground delays fell by 13% year-on-year to less than 0.1% of total network delays. While this improving trend is pleasing to see, strengthening resilience across the network remains a key priority, particularly at Sydney. This effort is underpinned by an enhanced workforce capability, with a record number of air traffic controllers now in service following the introduction of 109 new controllers during FY26, additional staff progressing through the training pipeline, and ongoing efforts in strengthening all aspects of service resilience.

The Aviation Rescue Fire Fighting service also maintained a high-standard of reliability, achieving 99.9% availability across the network while responding to increasing emergency call-outs. Together, these outcomes reflect Airservices' ongoing commitment to delivering safe, reliable and efficient services that support the sustainable growth of Australia's aviation industry.

Year in review: FY26 vs FY25

1. Network activity & capacity

Traffic growth and fleet renewal across the network



+1.5%

Network passenger flights
Increase vs FY25

+2.7%

Domestic passengers
Increase vs FY25

117

New aircraft in service
Capacity and fleet renewal

3. Airservices service performance

Reduced Airservices-attributable delay and increased service consistency



-13%

Ground delay minutes
Attributable to Airservices

-86%

Service variations
Across airspace and towers

99.92%

ARFF availability
High operational continuity

2. Industry operational performance

Punctuality, cancellations and airport coordination



77%

On-time performance
Up from 76%

2.3%

Cancellation rate
Down from 2.5%

84%

A-CDM TOBT compliance
Improved predictability

4. Sustainability & community

Environmental savings and community noise outcomes



-29%

Aircraft noise complainants
Reduced vs FY25

42,752 t

CO₂ emissions savings
From User Preferred Routes



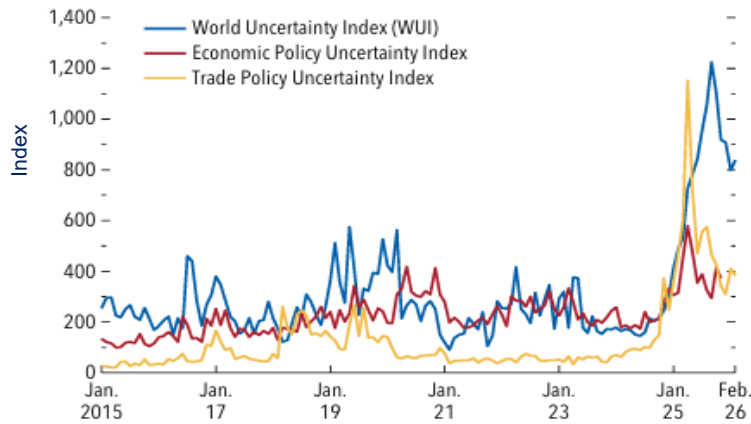
Economic and social trends



Economic factors

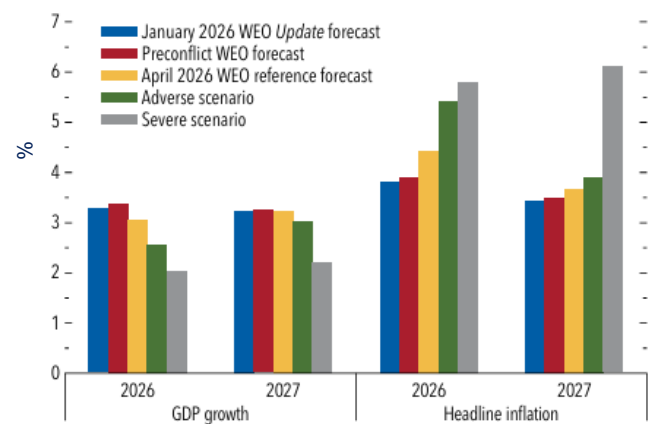
Australia’s aviation sector continued to demonstrate resilience in FY26, despite geostrategic uncertainty, softened economic growth outlook, volatile fuel prices and persistent inflationary pressures. Robust consumer demand for travel enabled the industry to sustain growth while adapting to a rapidly evolving operating environment.

Figure 1. Global uncertainty index.



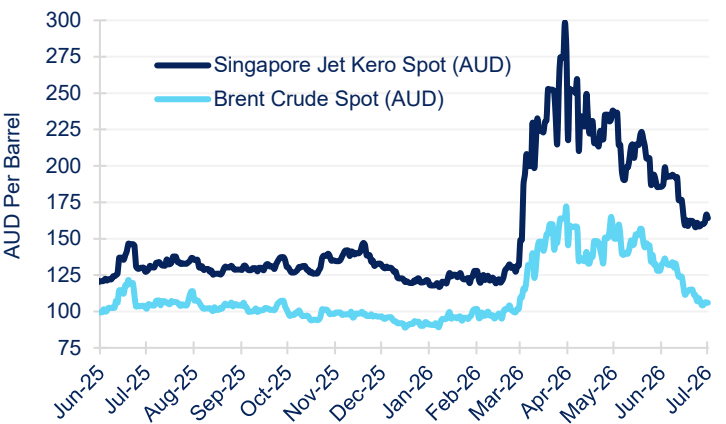
Source: IMF ([website](#)) – latest data as at 6/7/2026.

Figure 2. Global growth and inflation outlook.



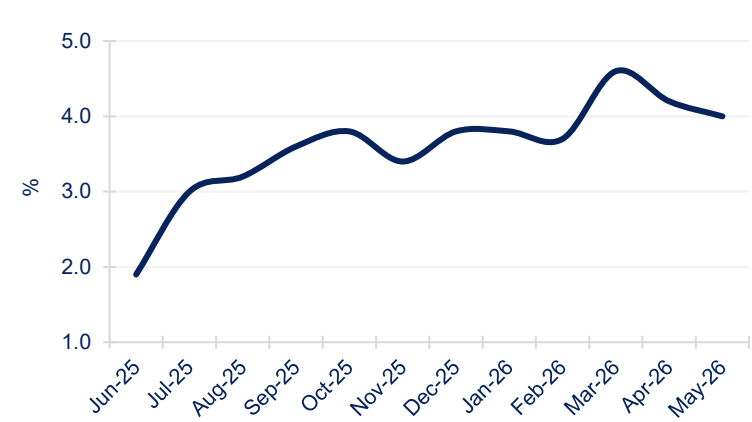
Source: IMF ([website](#)) – latest data as at 6/7/2026.

Figure 3. Jet fuel and Brent crude oil prices daily.



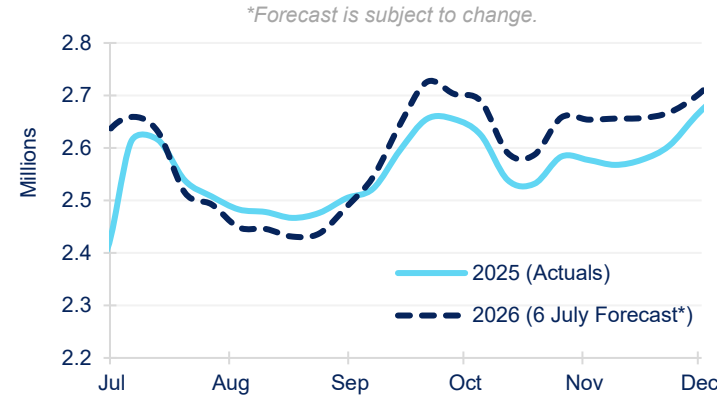
Source: Bloomberg – latest data as at 14/7/2026.

Figure 4. Consumer Price Index (CPI) Australia.



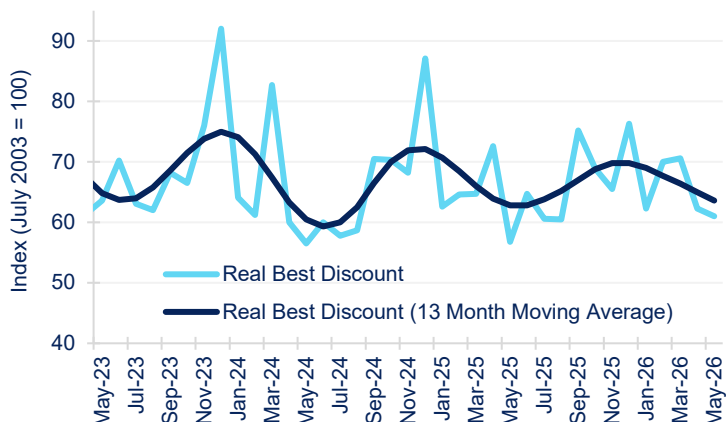
Source: ABS ([website](#)) – latest data as at 24/6/2026.

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



Source: CAPA ([website](#)) – latest data as at 10/7/2026.

Figure 6. Domestic airfares (real best discount).

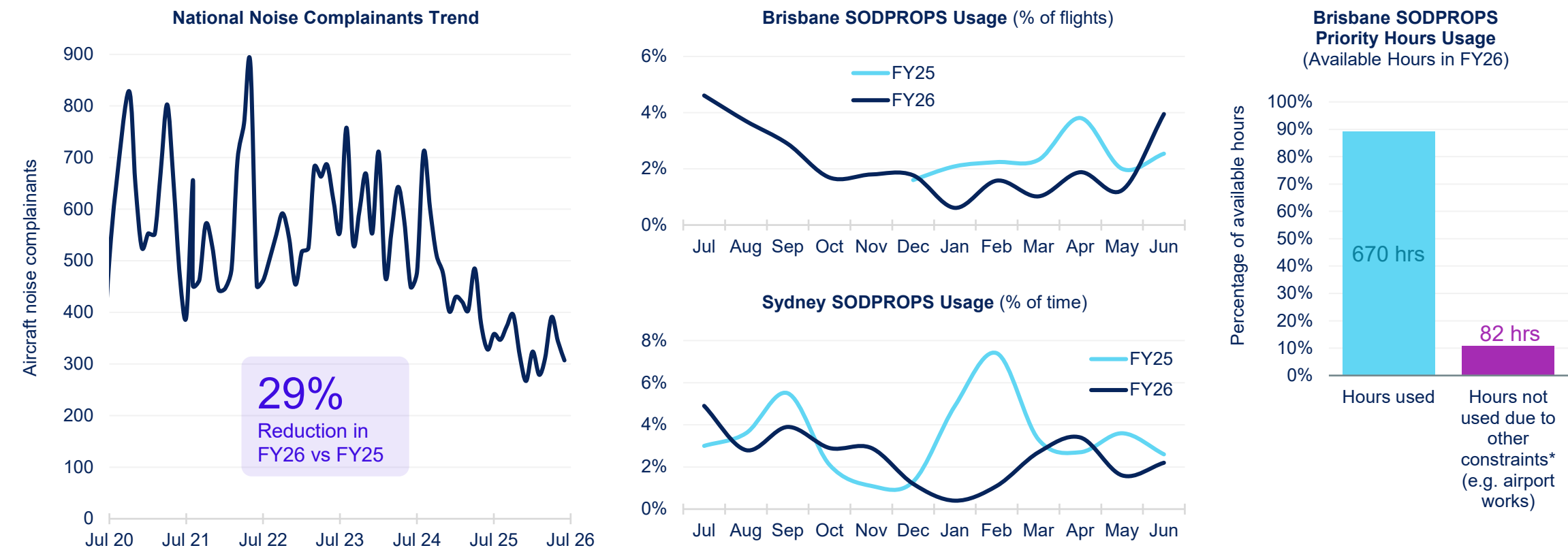


Source: BITRE ([website](#)) – latest data as at 4/6/2026.

Social factors: aircraft noise

In FY26, the number of aircraft noise complainants decreased to a six-year low. Complainant activity remains highly event-driven, typically associated with flight path changes, runway works, weather variation, and community engagement activities. Following periods of above-average rainfall, SODPROPS utilisation improved at both Brisbane and Sydney. At Brisbane, flights using SODPROPS increased year-on-year by 1.4 percentage points to 4.0% in June 2026. Sydney also recorded higher utilisation compared with the previous month, with a total utilisation of 2.2%. Although SODPROPS availability is heavily dependent on favourable weather conditions, the mode was utilised for 89% of available hours in FY26, with the remainder of hours unavailable due to airport works and other non weather-related* constraints.

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



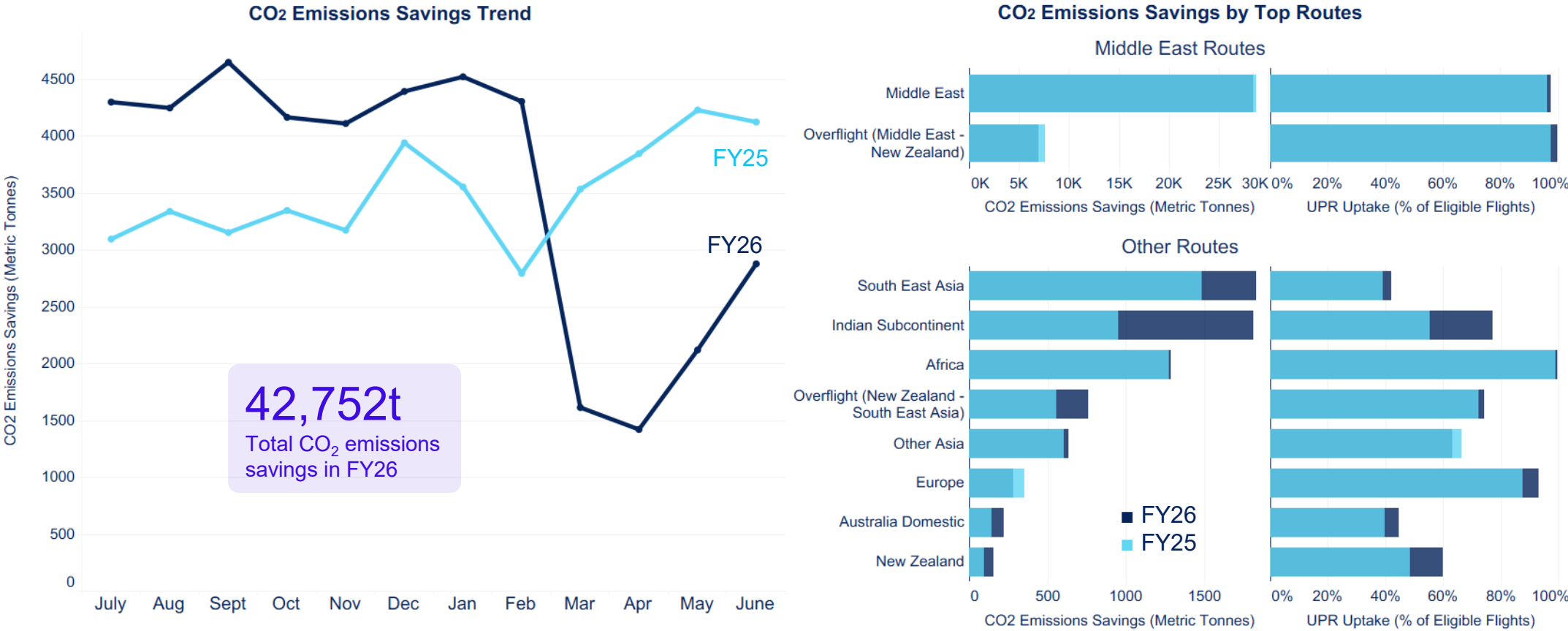
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool ([website](#)).

* All non weather-related constraints include airport maintenance, military operations, Airservices staffing, conflicting airfield operations, operational reasons, and periods with no aircraft movements. These exclude any operational constraints that are attributable to weather-related factors (e.g. unstable conditions).

Social factors: aircraft emissions

User Preferred Routes (UPRs) contributed to over 42,700 metric tonnes of CO₂ emissions savings in FY26. Lower flight activity associated with the Middle East conflict was a major contributor to a reduction in CO₂ emissions savings in the last three months compared to 2025. Continued growth in UPR adoption, with over half of international flights now utilising UPRs, highlights the benefit of industry collaborative efforts in working towards greener skies.

Figure 8. Total CO₂ emissions savings from User Preferred Routes (UPR), including the overall trend (left), FY26 top routes with year-on-year changes, with UPR percentage uptake (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.



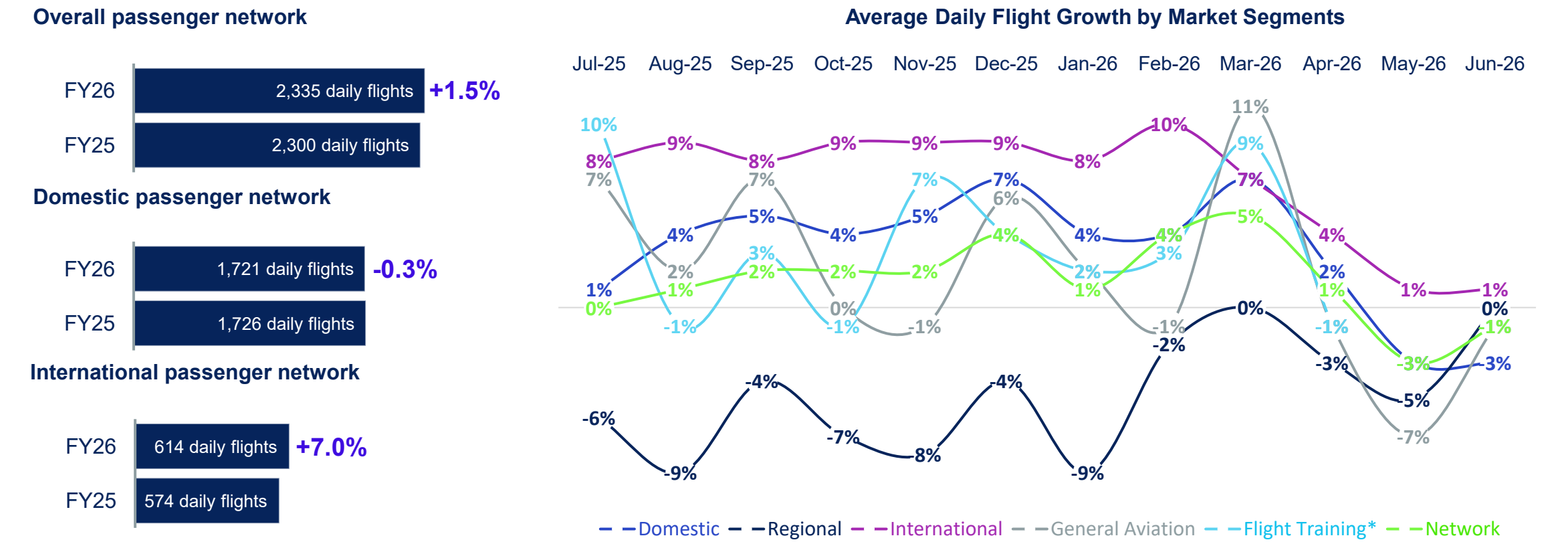
Australian aviation: domestic and international markets



State of Australian aviation growth

After nearly eight months of strong growth, the Middle East conflict contributed to a notable decrease in flight volumes in the remainder of FY26 as aircraft operators adjusted capacity, routes and fleet to manage fuel and supply chain uncertainties and cost pressures. The outlook remains positive, with scheduled capacity across the Australian network expected to remain above last year's levels over the next six months, reflecting resilient passenger demand and consistent with global aviation forecasts. However, this should be caveated by the ongoing uncertainty in the Middle East, with periodic military operations likely to manifest as acute pressures on fuel prices and global supply chains.

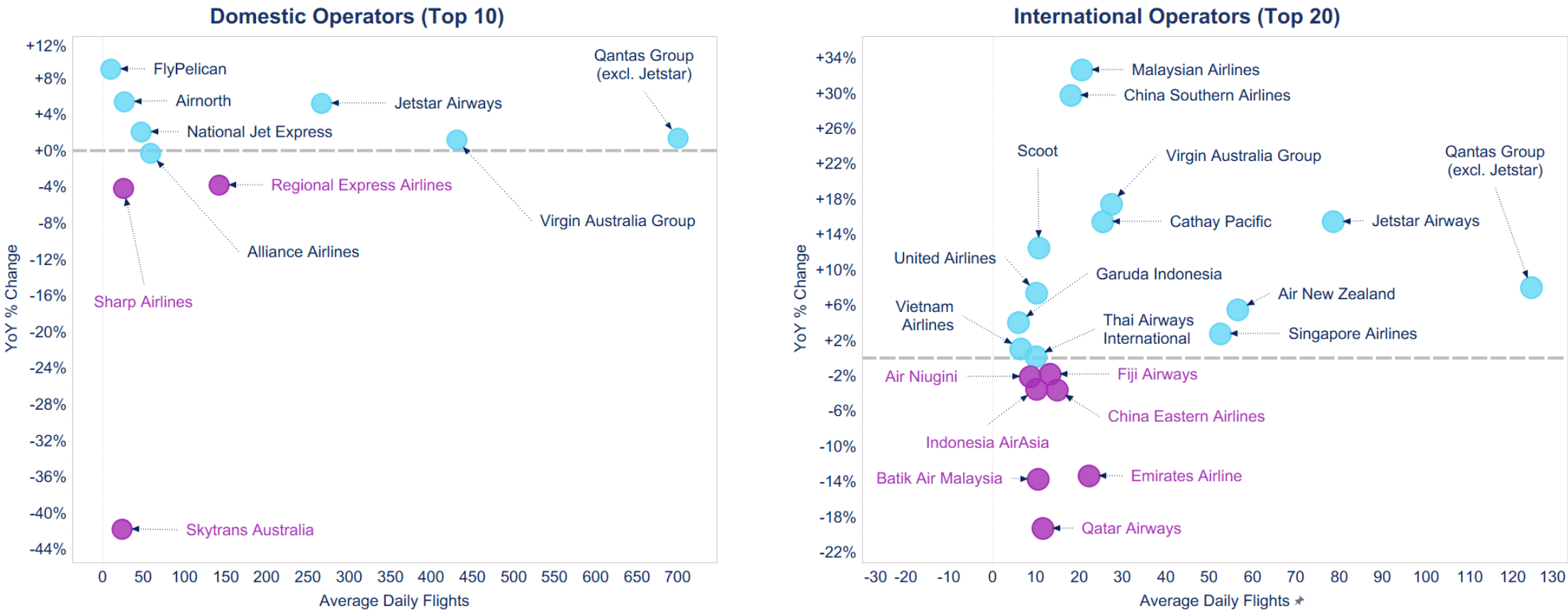
Figure 9. Average daily passenger flights in FY26 vs FY25 with year-on-year change (left) and year-on-year average daily flight growth by market segments* monthly (right).



Top aircraft operators

FY26 saw a notable divergence in operator performance. Middle East airlines experienced a sharp contraction late in the year, reversing earlier growth. In contrast, major Asia Pacific carriers benefitted from capturing re-routed long-haul demand leveraging strategic hubs. Domestically, growth remained broadly consistent with recent years, underpinned by leisure travel, resource sector activity and ongoing fleet and network optimisation.

Figure 10. Average daily flights growth for top airlines in the domestic segment (left) and international segment (right) in FY26, with year-on-year percentage change.

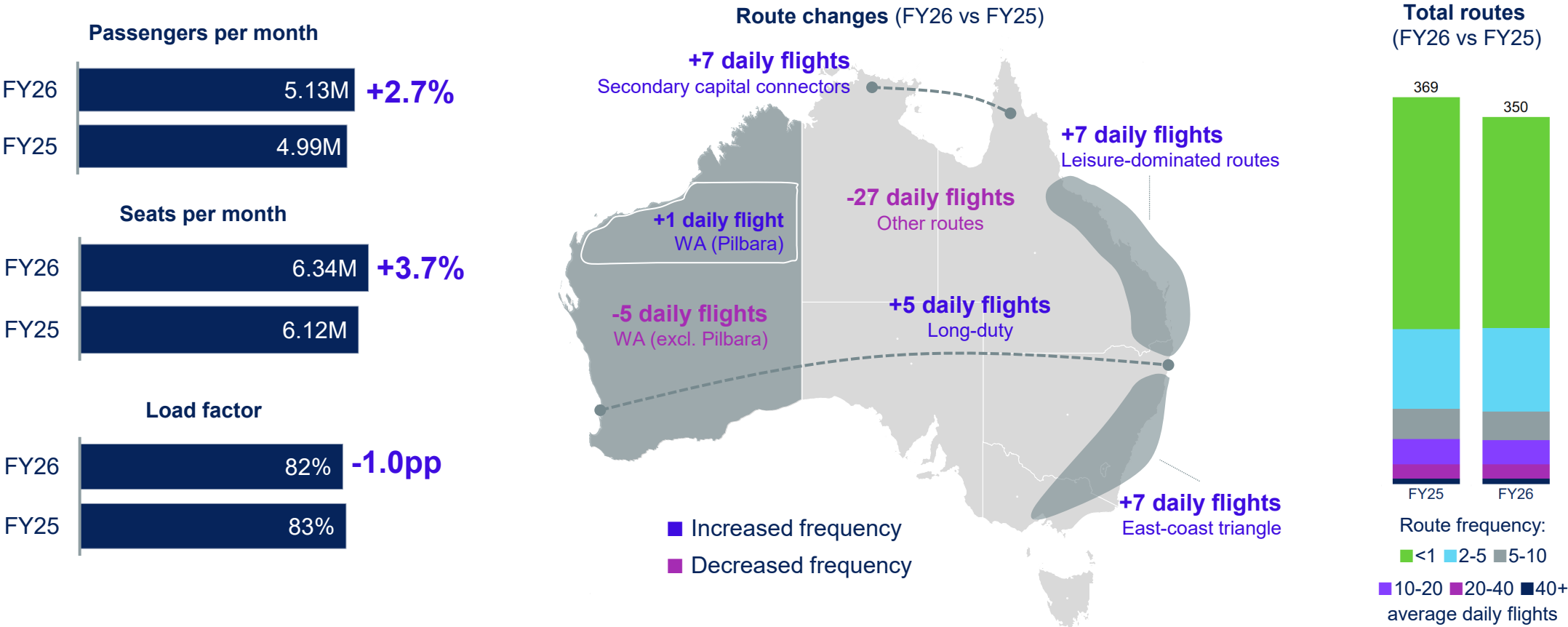


Source: Aircservices ODAS (includes airline flights only). Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

Domestic growth was driven by leisure travel, resource sector activity and greater connectivity via capital-city airports. Annual passenger volumes grew by 3% and load factors remained strong at around 82%. The general aviation sector, particularly flight training, also continued to show resilience. However, much of the growth momentum seen earlier in the year reversed in May and June 2026. Core high-frequency routes were maintained while lower-yield and thin regional connections were scaled back, as aircraft operators responded to fuel price volatility and broader market uncertainty.

Figure 11. Domestic passengers*, seats*, load factors* in FY26 vs FY25 (left) and route changes for FY26, with year-on-year change (right).



Source: Airservices ODAS and BITRE (includes airline flights only).
* Comparison based on partial years due to latest BITRE data up to May 2026.

International markets

International traffic recorded annual growth of 7% in daily average passenger flights during FY26. Growth eased sharply following the Middle East conflict which prompted airlines to reconfigure networks and capacity. As carriers concentrated services on strategic gateways and higher-yield corridors, growth has been increasingly concentrated in key Asia Pacific tourism and medium-haul connection markets such as Guangzhou, Kuala Lumpur, Hong Kong, Singapore and Bangkok.

Figure 12. International markets average daily flights growth in FY26, 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

In FY26, 117 new aircraft entered the Australian aviation network (39 domestic and 78 international), with the majority comprising new-generation narrow-body jets. This reflects a broader fleet renewal trend towards lighter aircraft that provide higher seat capacity, greater range and improved fuel efficiency.

Figure 13. Aircraft newly entering service in the Australian network in FY26 and FY25.

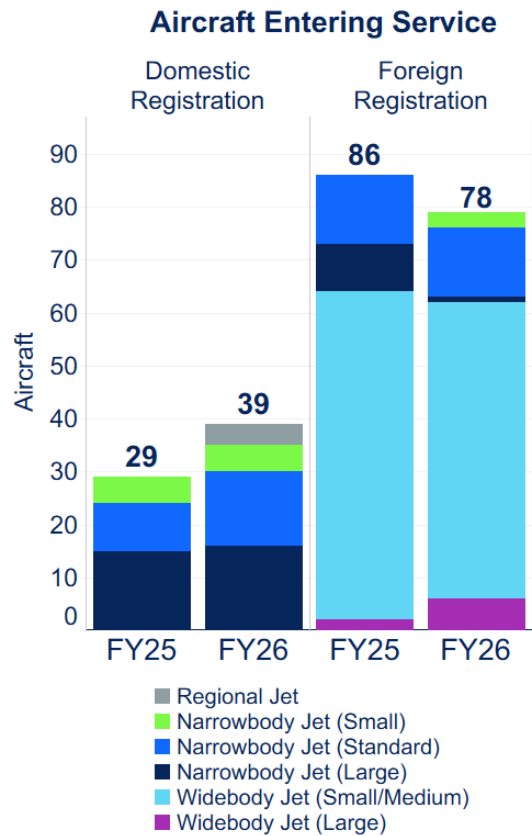
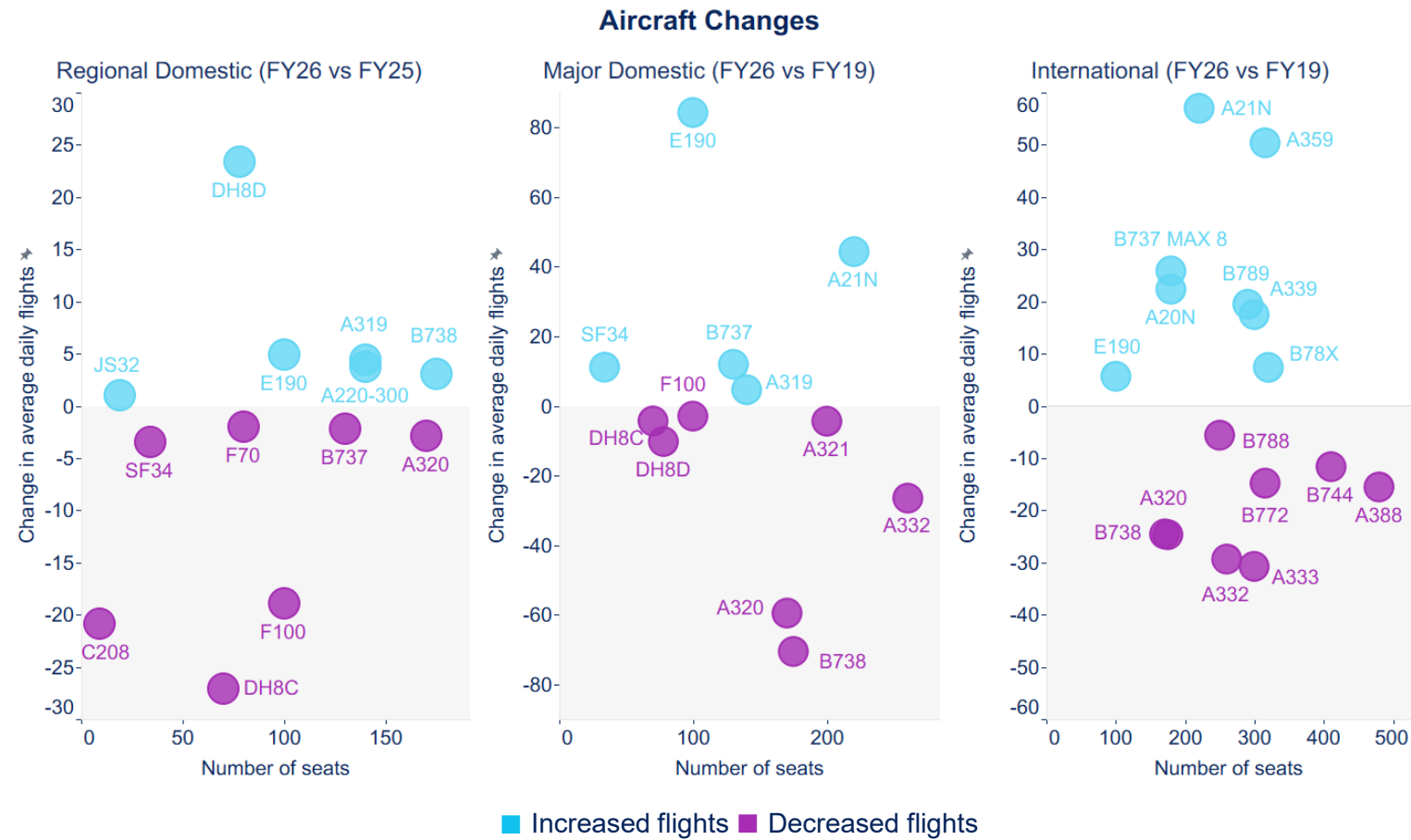


Figure 14. Largest aircraft changes for the domestic, regional, and international segments in FY26. Domestic and international focuses on longer-term changes (vs FY19) and regional focuses on more recent changes (vs FY25).

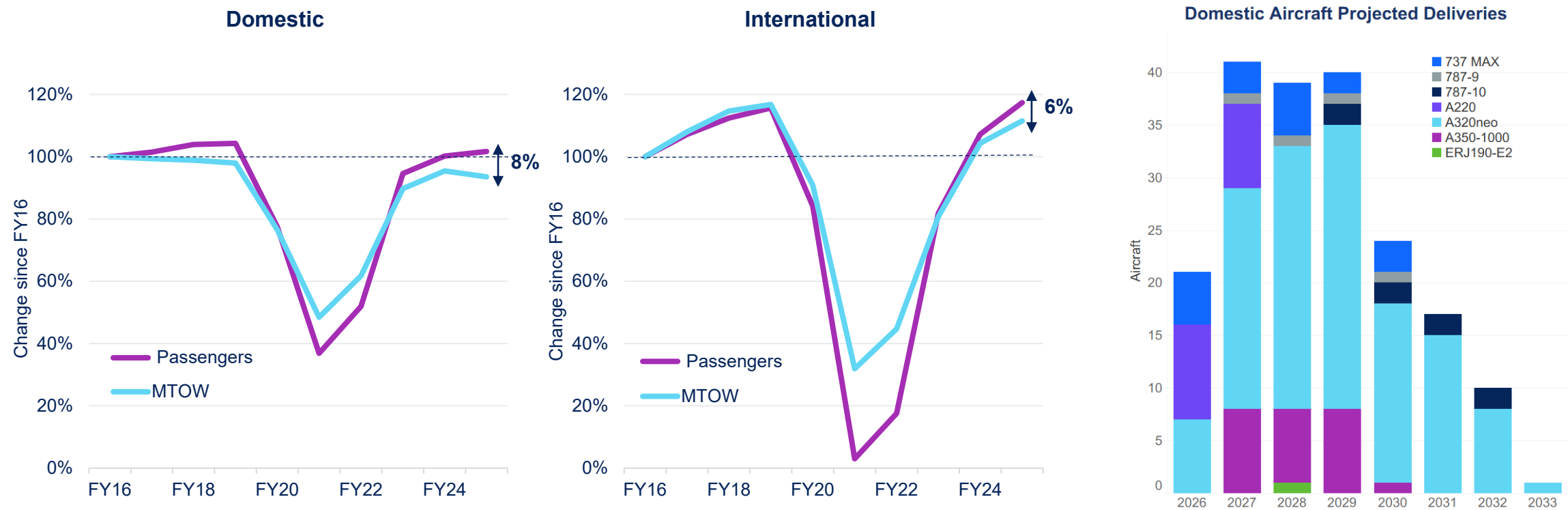


Source: CAPA (aircraft entering service) and Airservices ODAS (aircraft changes, includes airline flights only).

Network fleet – passengers and aircraft weight

The structural shift towards lighter and more efficient aircraft is evident in network outcomes, with passenger volumes continuing to outpace growth in aircraft movements and weight, and high load factors. Airlines are meeting demand by deploying right-sized fleets and optimising seat utilisation, rather than investing in larger airframes or frequency expansion. Forward fleet projections suggest this trend is likely to continue.

Figure 15. The relative change in Maximum Take Off Weight (MTOW) and passengers, which shows passenger levels have grown faster than MTOW over FY16 to FY25 (left, middle) and aircraft projected deliveries for Australian domestic operators (right).



Source: Airservices billing system (MTOW), BITRE (passengers), and CAPA (projected deliveries).



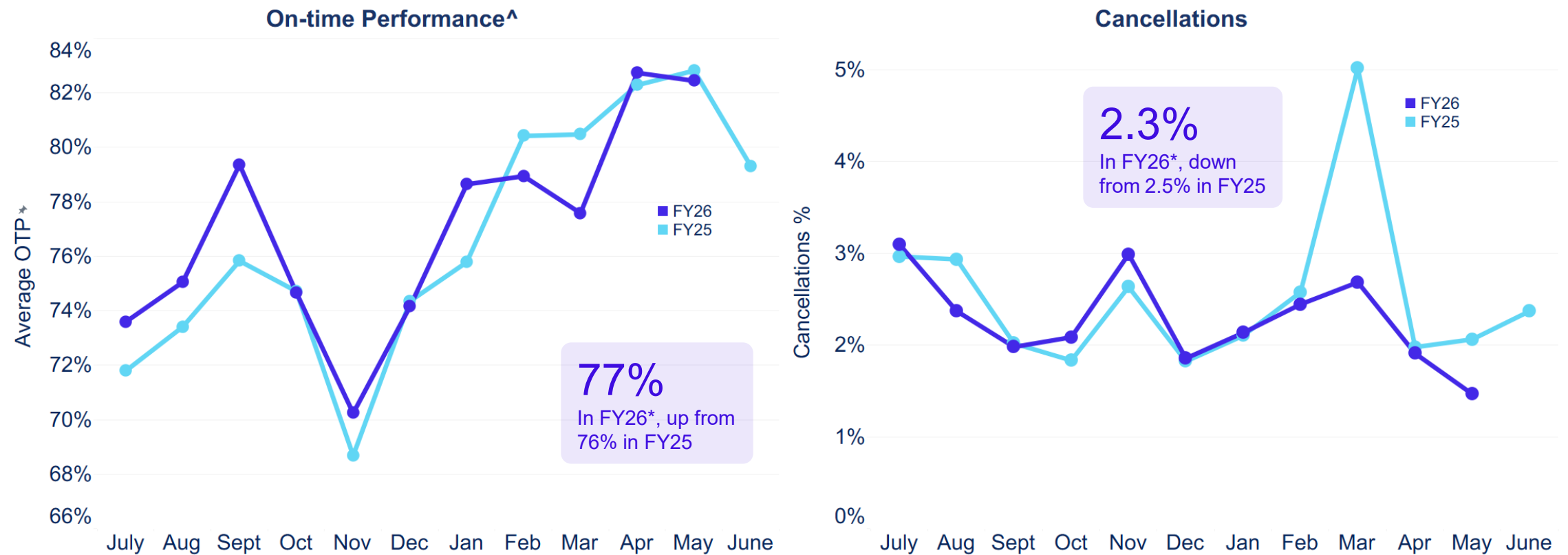
Australian aviation: network performance



Industry performance

Industry outperformed long-term averages for the second consecutive month in both on-time performance and cancellation rates, with Australian airlines now ranking among the world's top performers. Driven by stronger operational resilience and deeper collaboration across the sector, including the sharing of lessons learned following disruptions, these results reflect the aviation industry's collective commitment to reliability and continuous improvement.

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



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

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

^ Average of departure and arrival OTP. The long-term average refers to the average over the period of OTP reporting starting in November 2003.

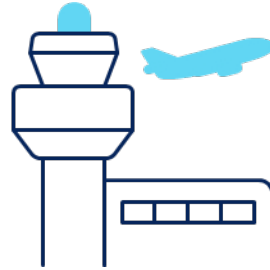
Network management process

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

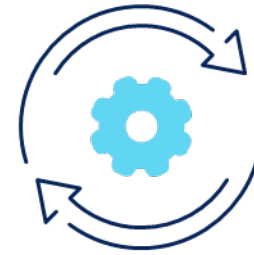
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management 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)

All key ATFM performance metrics improved in FY26, despite increasingly challenging weather conditions which accounted for 70% of all GDP delays. ATFM ground delays reduced by 6% and industry GDP compliance remained above 80%, supported by earlier demand-capacity balancing through enhanced industry collaboration. Strengthening resilience across the network remains a key priority, particularly at Sydney. Ongoing ATFM compliance monitoring at Perth also reduced flights experiencing ground delays by 9% whilst keeping airborne delays stable with rising demand, strengthening airport operational experience.

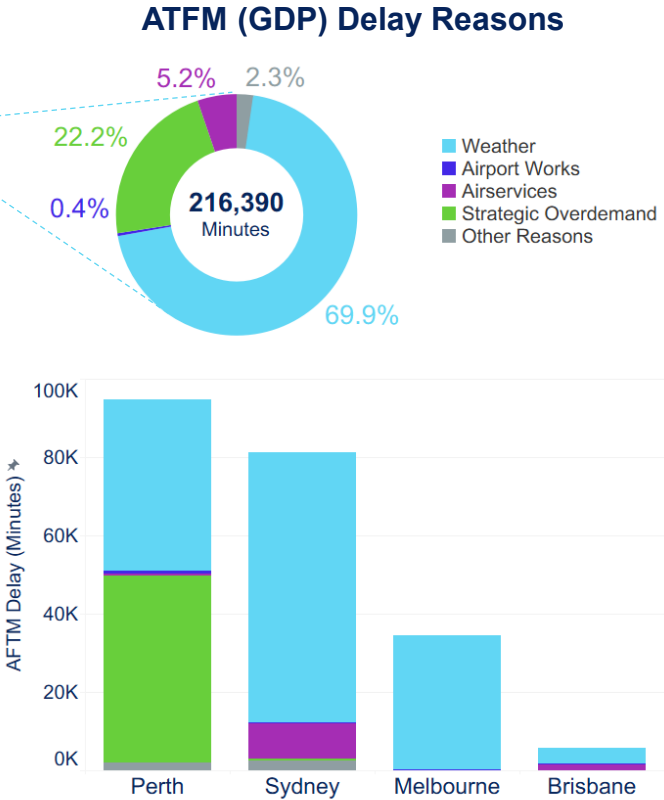
Figure 17. Key Ground Delay Program (GDP) metrics

GDP Performance		FY25	FY26	Change
Network	GDP Application	3,680 hrs	3,719 hrs	▲ 1%
	Ground Delay	3,820 hrs	3,607 hrs	▼ 6%
	GDP compliance	80%	83%	▲ 3pp
Per Flight	Ground Delay	4.6 min	4.5 min	▼ 2%
	Arrival Airborne Delay*	3.8 min	3.8 min	▼ 0%

Figure 18. Contribution of ATFM (GDP) Delay to total network delays in FY26.



Figure 19. ATFM (GDP) delay by attribution^ overall (top) and by airport (bottom) for FY26.



Source: Airservices ODAS. GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.

^Airservices contribution to total network delays is 0.1% in FY26, representing 5.2% of ATFM GDP delays, which account for 1.6% of all network delays. *Averaged monthly by 75th percentile.

Airport Collaborative Decision Making (A-CDM)

FY26 marked the completion of A-CDM roll-out across Australia’s four busiest airports. Strong industry adoption saw A-CDM compliance consistently exceed global benchmarks, as the foundation for predictable and efficient airport operations as industry partners work together to further mature A-CDM processes. We are starting to see early benefits from A-CDM, enabling improved on-time departure performance and unlocking peak-period capacity at Perth, more effective management of gate and bay constraints at Melbourne, and enhanced real-time situation awareness at Brisbane and Sydney. Ongoing programs and workshops to further enhance this decision-making tool will continue to drive benefits over the long term.

Figure 20. Departure on-time performance at four major airports.

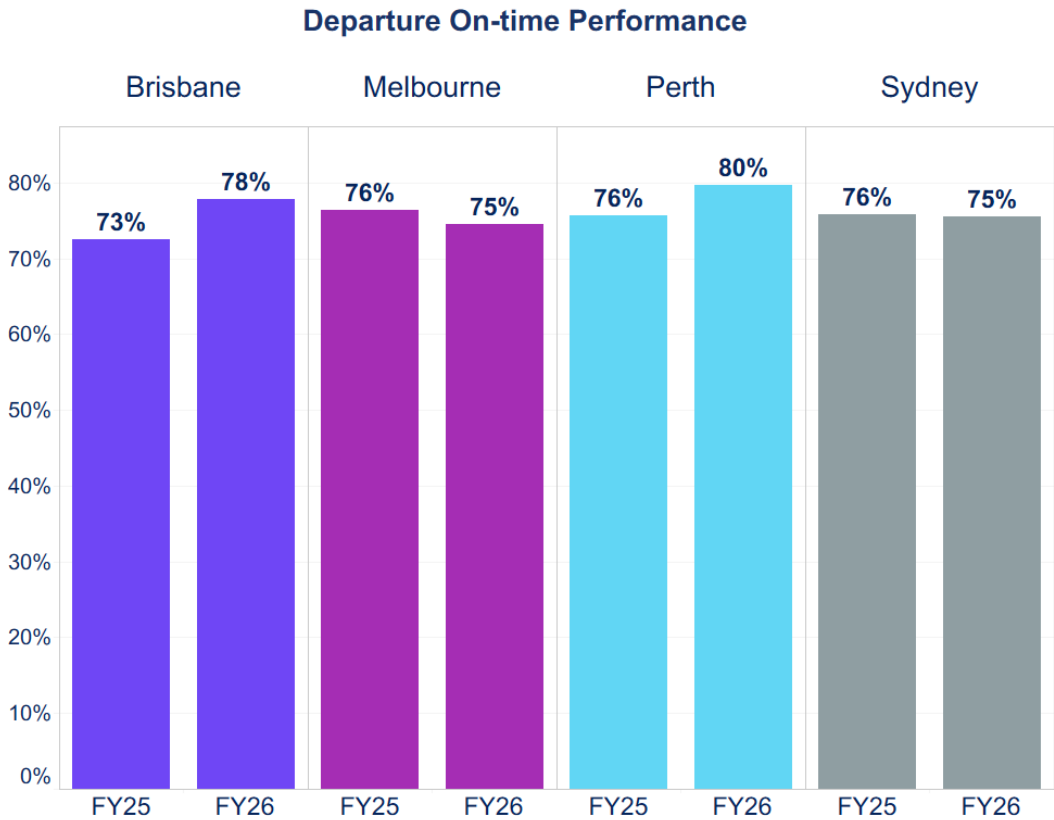
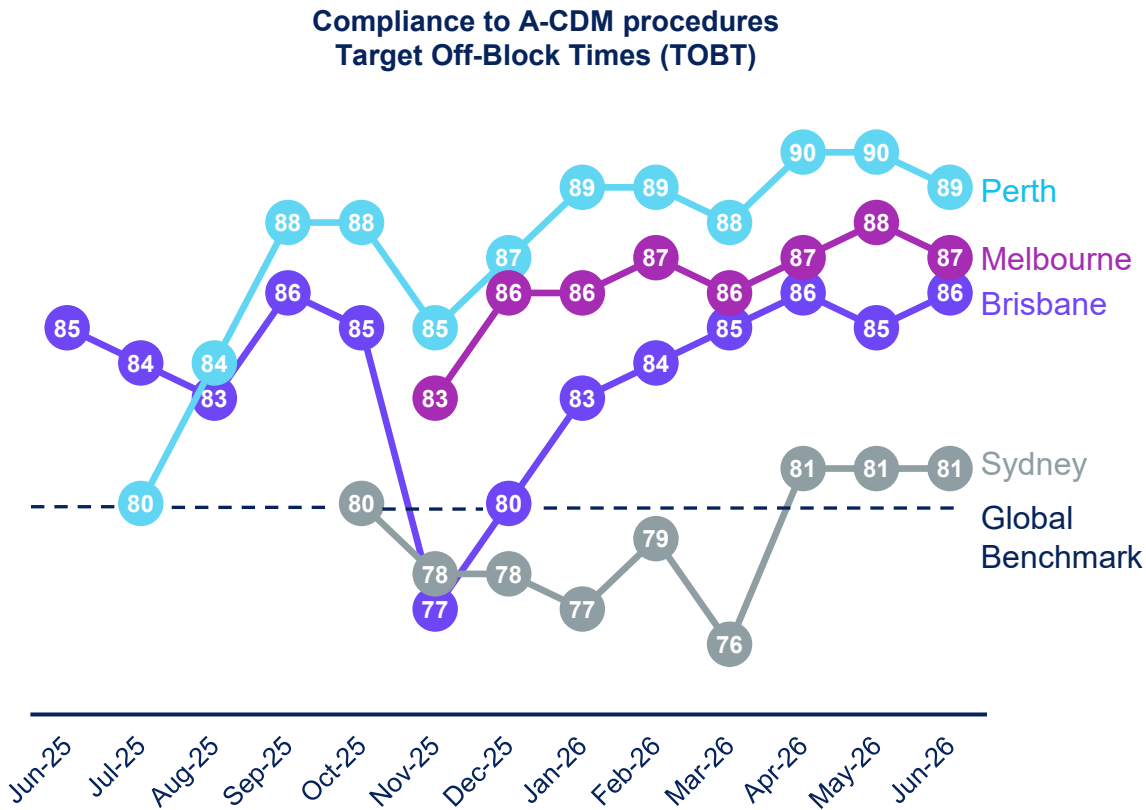


Figure 21. A-CDM compliance performance.

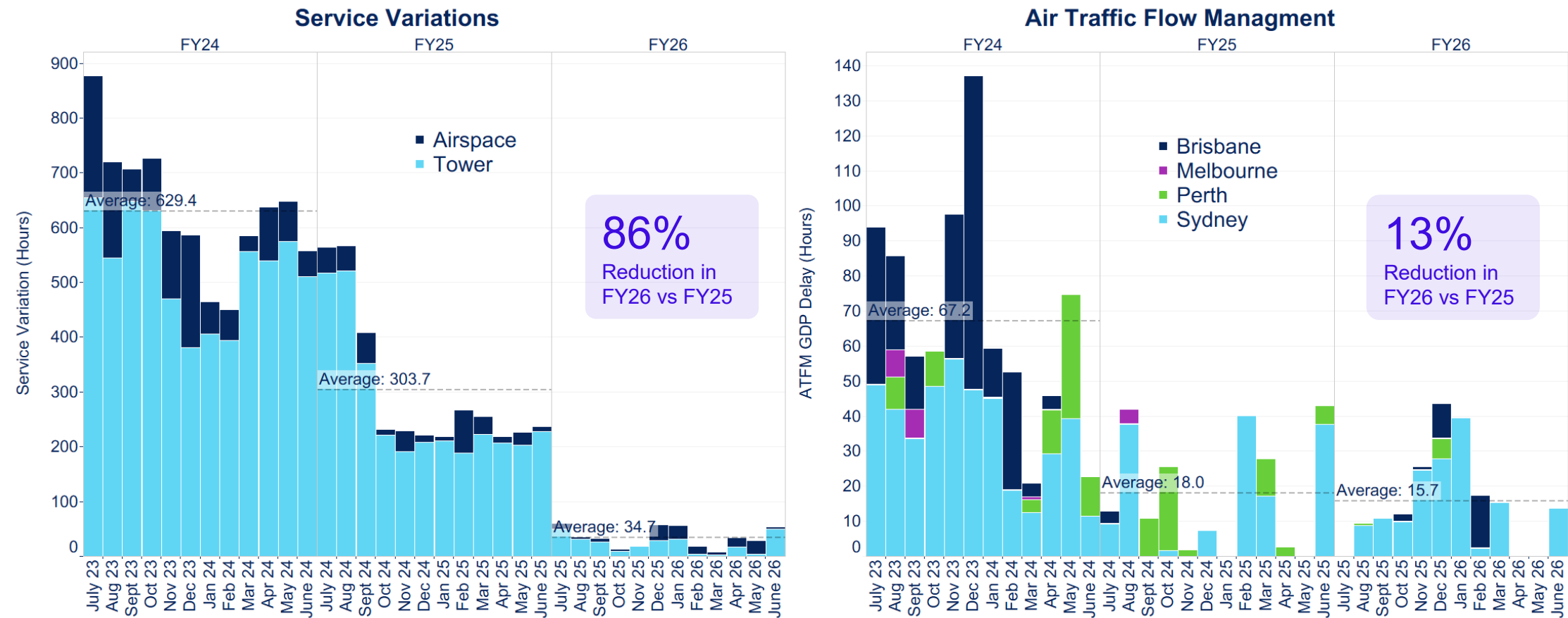


Source: BITRE (latest data up to May 2026) and A-CDM.
A-CDM go live dates: Brisbane 10 May 2025, Perth 18 July 2025, Sydney 11 October 2025, Melbourne 12 November 2025

Air traffic service provision

Air traffic service variations reduced by 86% year-on-year and Airservices-attributable GDP delays fell by 13% to less than 0.1% of total network delays in FY26. The addition of 109 new air traffic controllers in FY26 lifted workforce numbers to a record high, with an ongoing strong training pipeline (currently 125 in training with an additional 130 to commence training in FY27). While this improving trend is pleasing to see, strengthening resilience across the network remains a key priority, particularly at Sydney.

Figure 22. Hours of variation from published levels across Airspace Groups and Air Traffic Control Towers (left) and Airservices attributable ATFM GDP delay (right).

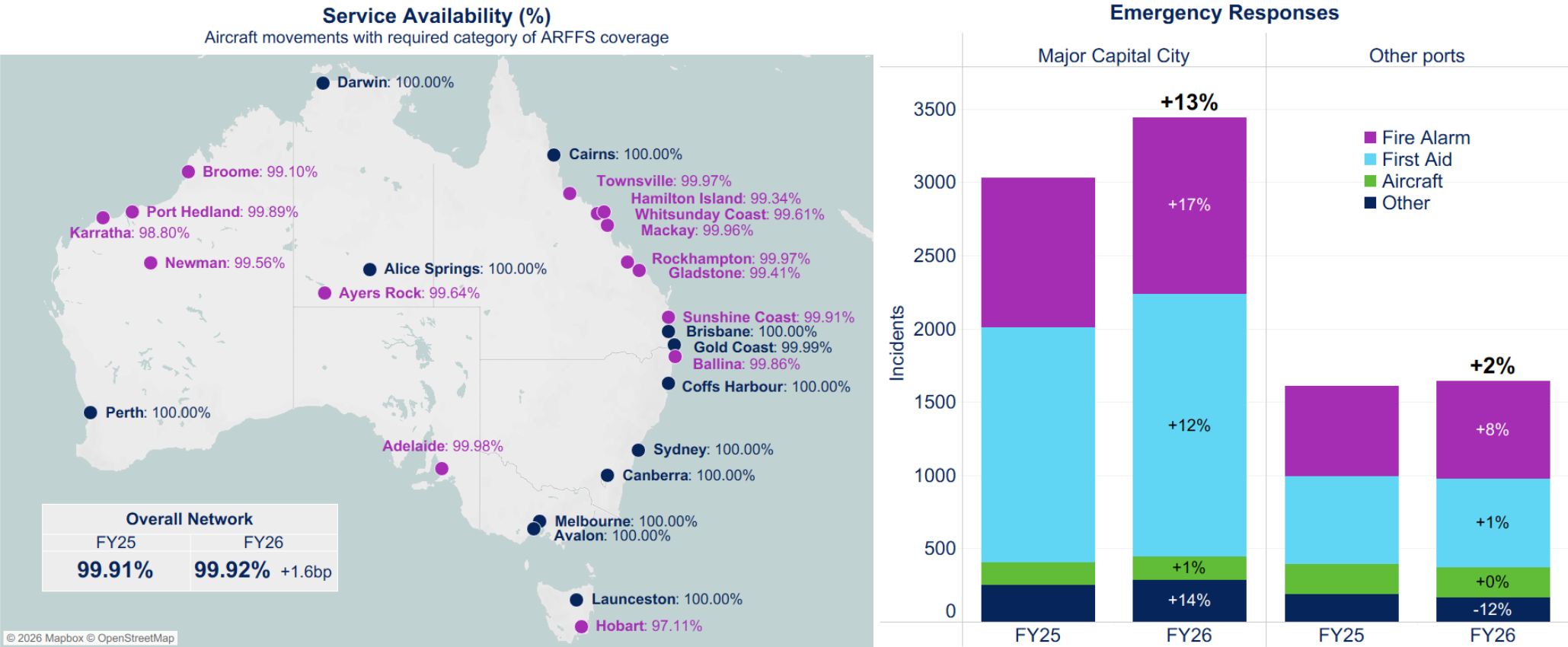


Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information 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 maintained high service reliability in FY26, delivering 99.9% availability across the network while meeting growing emergency call-outs. This reflects the strength of ARFF capability and its critical role in supporting airport resilience capability.

Figure 23. ARFFS service availability by airport and overall network in FY26 with year-on-year change (left) and emergency responses for FY26, FY25 and year-on-year change (right).



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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