



Australian Aviation Network Overview

August 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

Activity in the Australian aviation network moderated in August 2026. Domestic traffic eased following previously announced airline capacity reductions and the seasonal pullback after the July school holiday peak. International demand remained concentrated in Asia Pacific markets.

Against mixed domestic and global economic conditions, airlines continue to prioritise capacity discipline and network optimisation. Ongoing fleet renewal provides the foundation for long-term growth, with newer-generation aircraft now operating on around half of Australian routes, enhancing efficiency, passenger experience and network expansion.

As reported in July, we have publicly acknowledged workforce resilience challenges that affected air traffic service outcomes in August. While Air Traffic Flow Management (ATFM) ground delays remained a small component of total network delay at 2.4% in August, with Airservices contributing 0.6%, Sydney experienced higher ATFM ground delays at 3.7%, of which Airservices contributed 2.3%. As a consequence, Airservices attributable ground delays at Sydney this month were around four times higher than the monthly average in the previous financial year.

While average airborne and ground delay minutes per flight remained stable across the network during this period, Sydney's average ATFM ground delay minutes per flight were around 39% higher during the month. We are implementing a Sydney KSA Service Resilience Plan and providing transparency on progress through a Department-led Sydney KSA ATC Working Group, which includes representatives from unions, airlines, Sydney Airport and the Civil Aviation Safety Authority.

This program of work is focused on uplifting workforce planning, recruitment, training, roster resilience and system improvements. Restoring service consistency at Sydney remains our priority to underpin the effective operation of the national network, and we are committed to working collaboratively with all stakeholders to ensure long-term stability and resiliency.

Despite these challenges it was nonetheless pleasing to see industry on-time performance continuing to improve, with cancellations more than halved compared with July last year. Average airborne delays remained stable. This reflects the fundamental robustness of the sector and its resilience to withstand short-term operational headwinds.

Airservices maintains a consistent approach to measure delays and attributions based on available data. All delays, regardless of cause, can create consequential effects through factors such as airline crewing, aircraft availability or technical issues, gate unavailability, airport works, infrastructure or system outage, and ATFM measures. Reporting consequential delays would require an industry-wide approach to share data from all delay sources and a standardised methodology to consistently measure both initial and downstream impacts.

It is critical to note that safety remains our overriding priority. We are cooperating fully with the Australian Transport Safety Bureau on the investigations into six safety occurrences at Sydney Airport. Each occurrence involved different operational circumstances and demonstrated multiple layers of safety controls to prevent further incident. As the Sydney KSA ATC Working Group noted in its communique of 28 August, the aviation safety system is designed to manage operational risks through multiple safeguards and, based on the information currently available, the recent occurrences do not indicate an immediate safety risk to the travelling public.

We remain focused on continual improvement and collaboration with government and industry stakeholders to maintain the highest standards of aviation safety.



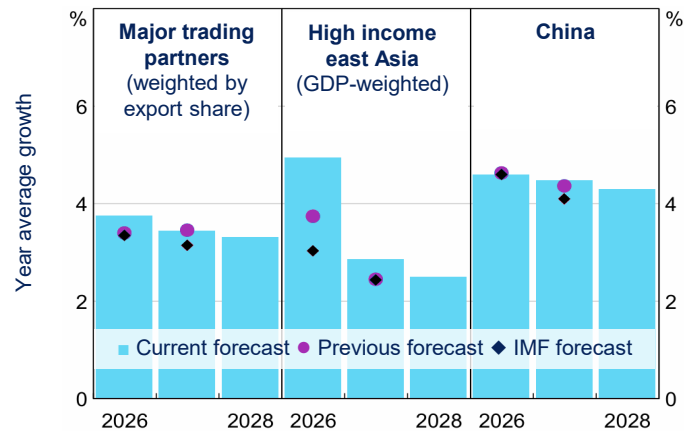
Economic and social trends



Economic factors

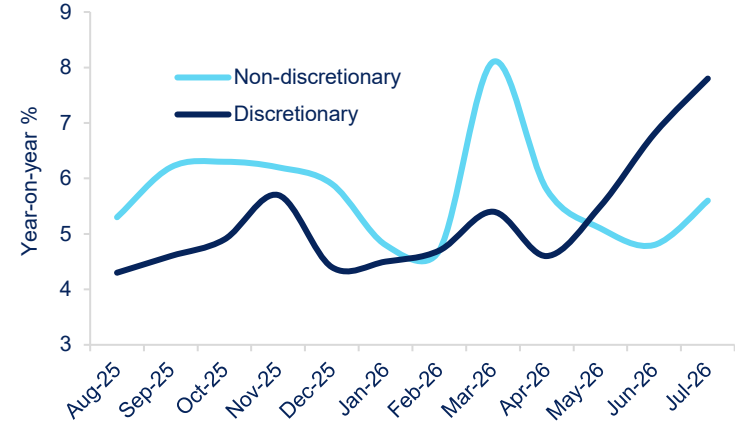
The Australian aviation sector continues to navigate a mixed economic environment. Persistent inflation, fuel price and supply chain volatility and elevated cost pressures are tempering domestic consumption and business confidence. In contrast, resilient growth in Australia's major trading partners may support continued demand for international travel.

Figure 1. Australia's major trading partners GDP forecast.



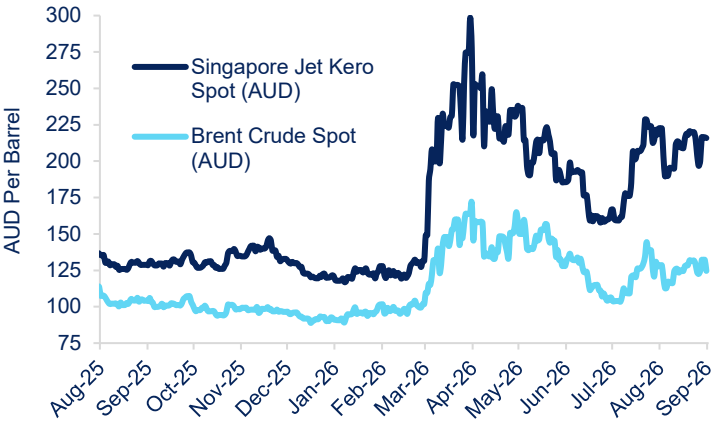
Source: Reserve Bank of Australia Statement on Monetary Policy 'SMP' ([website](#)) – latest data as at 1/9/2026.

Figure 2. Australian household spending.



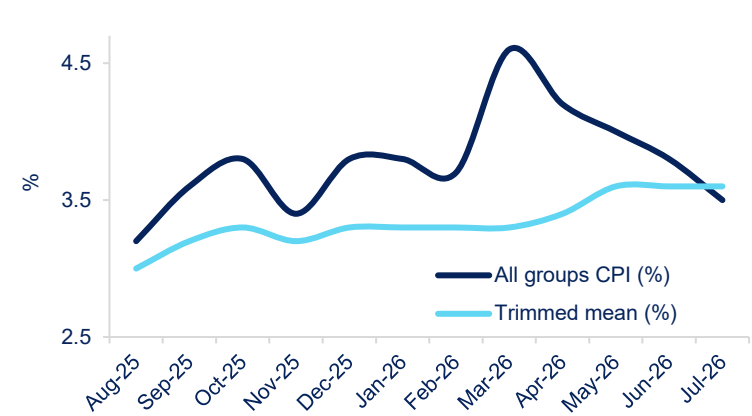
Source: ABS ([website](#)) – latest data as at 1/9/2026.

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



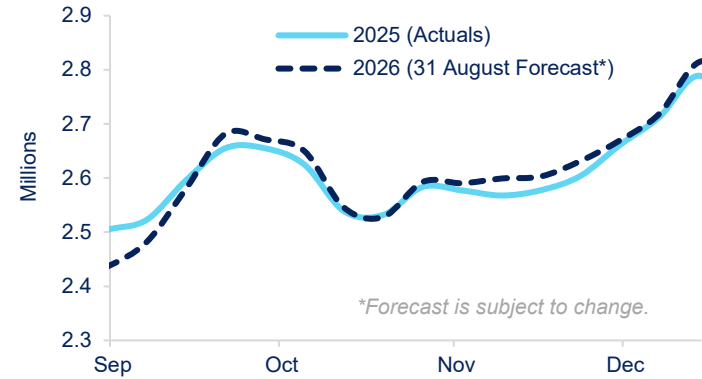
Source: Bloomberg – latest data as at 14/8/2026.

Figure 4. Consumer Price Index (CPI) Australia.



Source: ABS ([website](#)) – latest data as at 1/9/2026.

Figure 5. Australia weekly seat capacity outlook.



Source: CAPA ([website](#)) – latest data as at 1/9/2026.

Figure 6. Domestic airfares (real best discount).

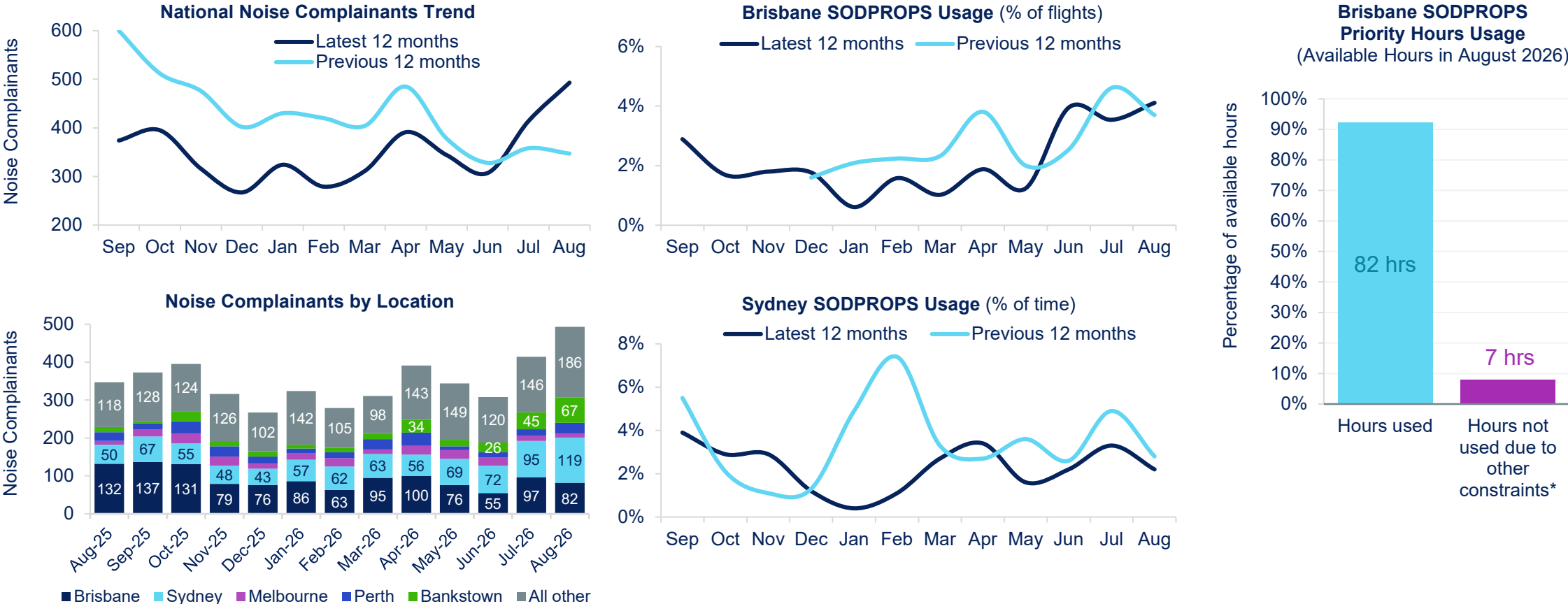


Source: BITRE ([website](#)) – latest data as at 1/9/2026.

Social factors: aircraft noise

Since early July 2026, the number of aircraft noise complainants in Sydney Basin have increased driven by recent engagement and commencement of freight operations at Western Sydney International Airport and associated airspace and flight path changes. This reflects the continued sensitivity of communities to changes to aircraft operations in support of aviation infrastructure development and long-term air traffic growth. Usage of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) in Brisbane increased to 92% of available hours, benefitting from more favourable weather conditions and the ongoing focus to maximise this mode when operationally feasible.

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



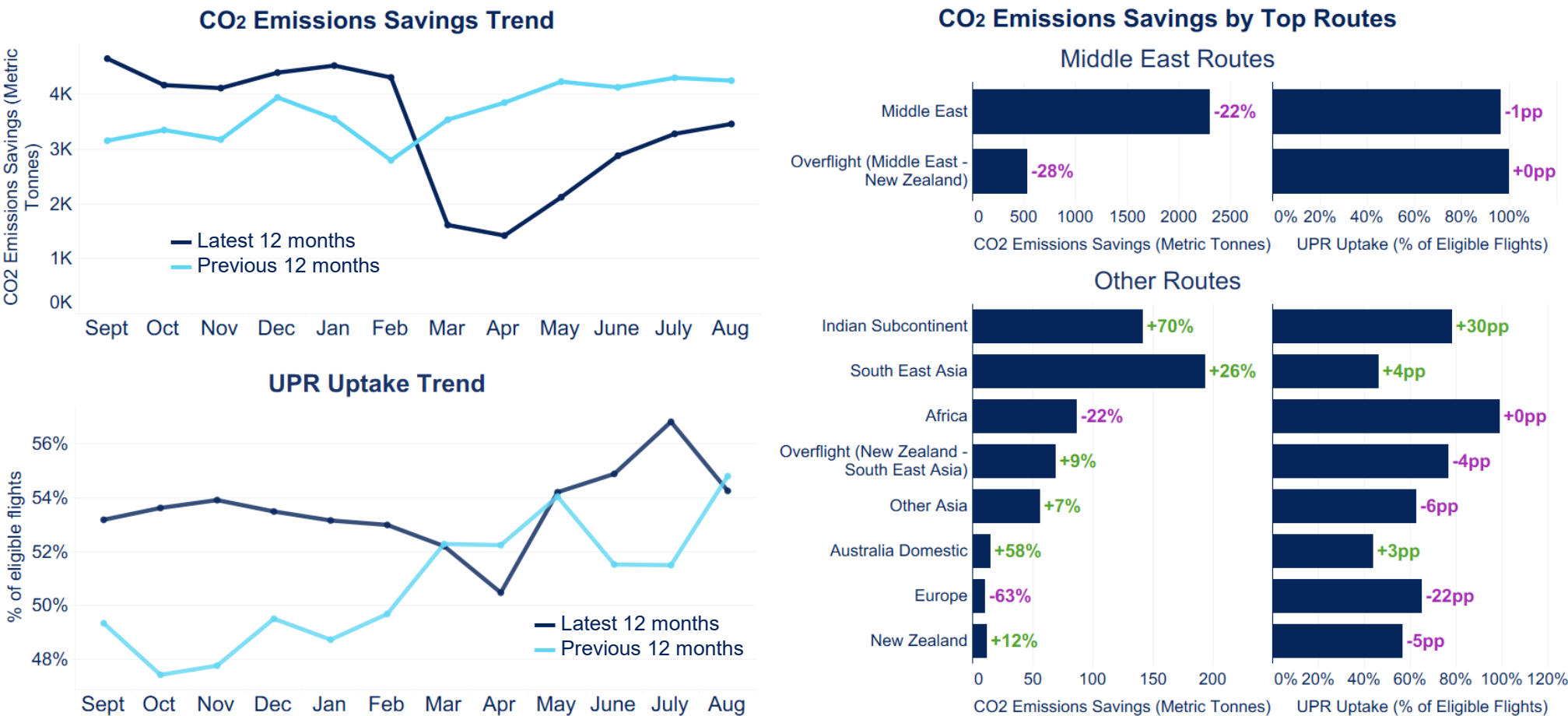
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool ([website](#)).

* 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

CO₂ emissions savings from User Preferred Routes (UPR) increased for the fourth consecutive month. However, rolling annual savings of 40,937 metric tonnes remained 8% below the previous period, due to lower traffic volumes in the Middle East despite continued strong uptake by operators from this region. Increased UPR adoption across Indian Subcontinent, Southeast Asian and domestic routes has partially offset some of the lost emissions savings.

Figure 8. Monthly CO₂ emissions savings from User Preferred Routes and uptake among eligible flights (left), with August 2026 savings and uptake by selected route, and 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.



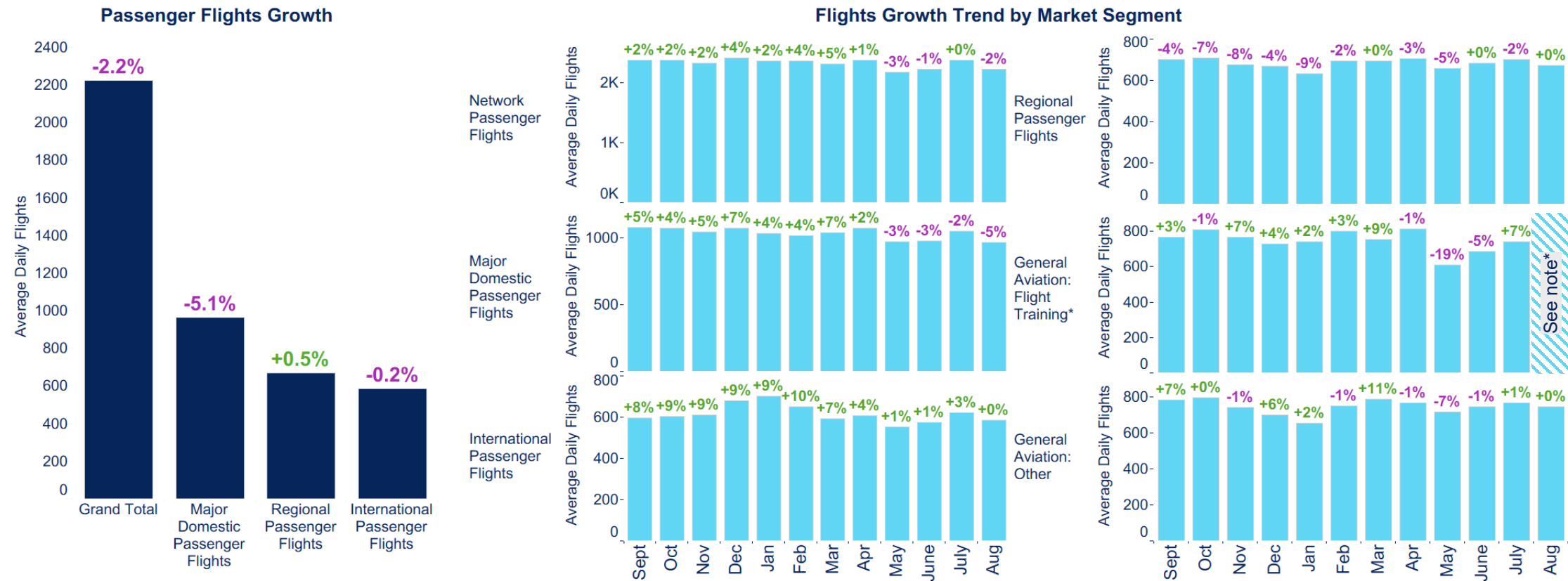
Australian aviation: domestic and international markets



State of Australian aviation growth

August network activity reflected seasonal trends following the July school holiday peak and airlines' previously announced capacity reduction. Major domestic flights were 5.1% below last year and this is expected to continue in the first half of this financial year. Regional activity remained steady. Overall international traffic contracted, in sharp contrast to the 9% growth recorded a year earlier.

Figure 9. Average daily passenger flights in August 2026 with year-on-year change (left) and average daily flight growth trend by market segments* monthly (right).

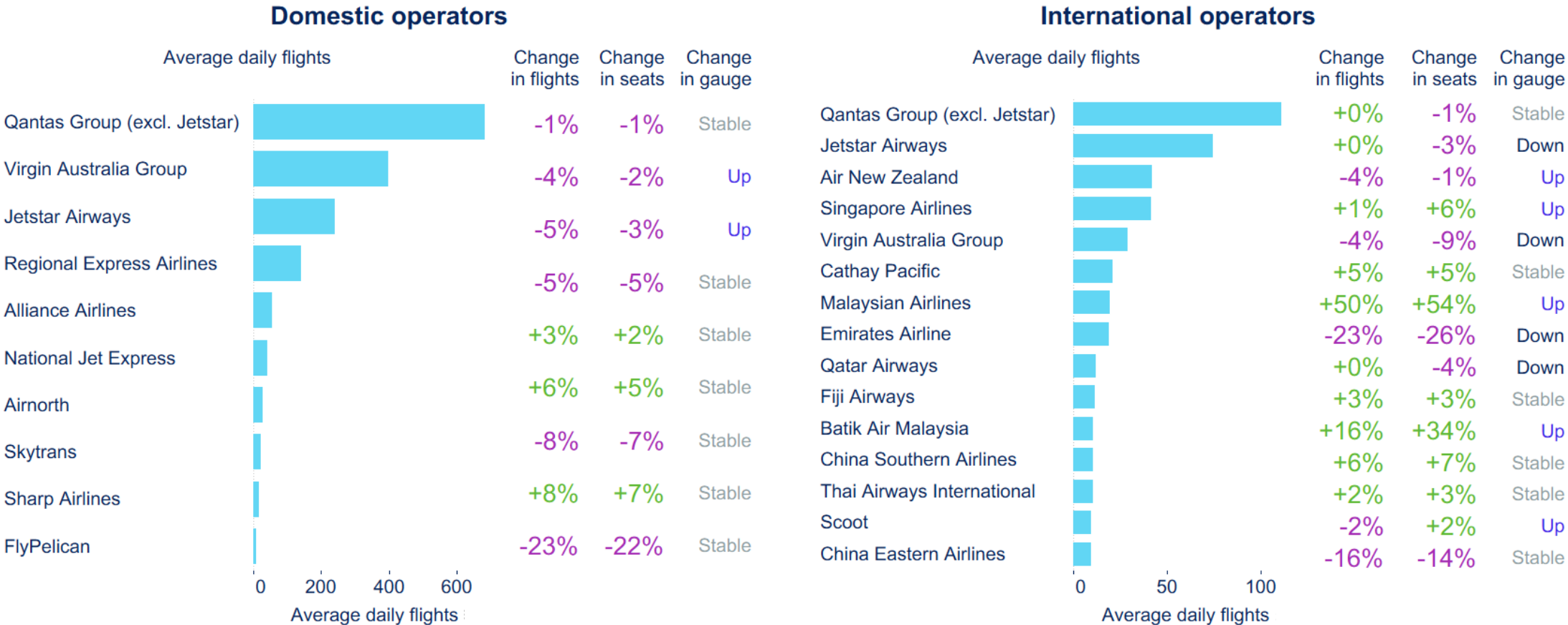


Source: Airservices ODAS (includes airline flights only, excludes overflights).
* Flight training data is one month in arrears.

Top aircraft operators

Airlines continue to actively manage network capacity in response to near-term market uncertainty, balancing schedule frequency and aircraft deployment to meet demand. Capacity reductions across most domestic airline groups reflect a disciplined focus on yield management. International growth remains concentrated in those carriers that can capture long-haul demand via alternative hubs and meet demand in Asia Pacific.

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

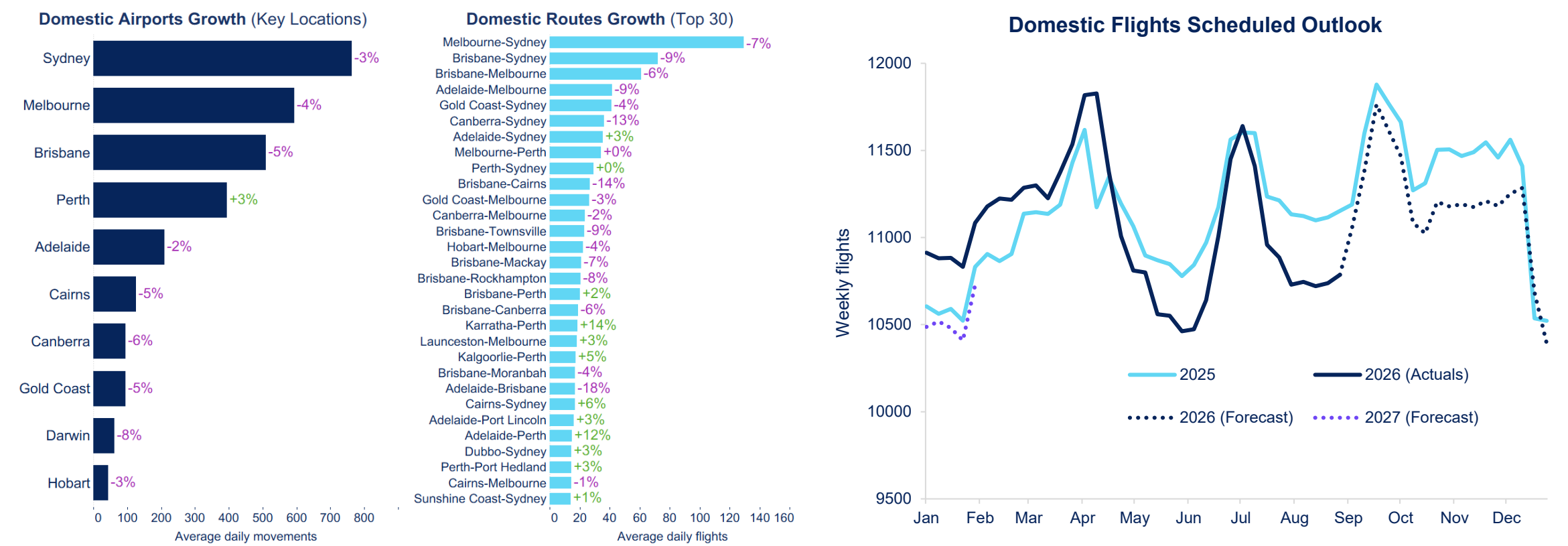


Source: Airservices ODAS (includes airline flights only) and CAPA (for estimated seats).
 Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

The Western Australian resources sector remains the primary source of growth in the domestic market. While leisure travel has been resilient, decreasing business and consumer confidence amid economic uncertainty and Middle East-related volatility has contributed to weaker demand on key East Coast trunk routes. This is also reflected in airlines' recent report of softening government and corporate travel activity. Reflecting these conditions, forward schedules indicate domestic airline flights are expected to be around 2% lower year-on-year during the first half of FY2027.

Figure 11. Change in average daily movements and flights for key airports and routes in August 2026 vs August 2025 (left) and domestic flights scheduled outlook (right).

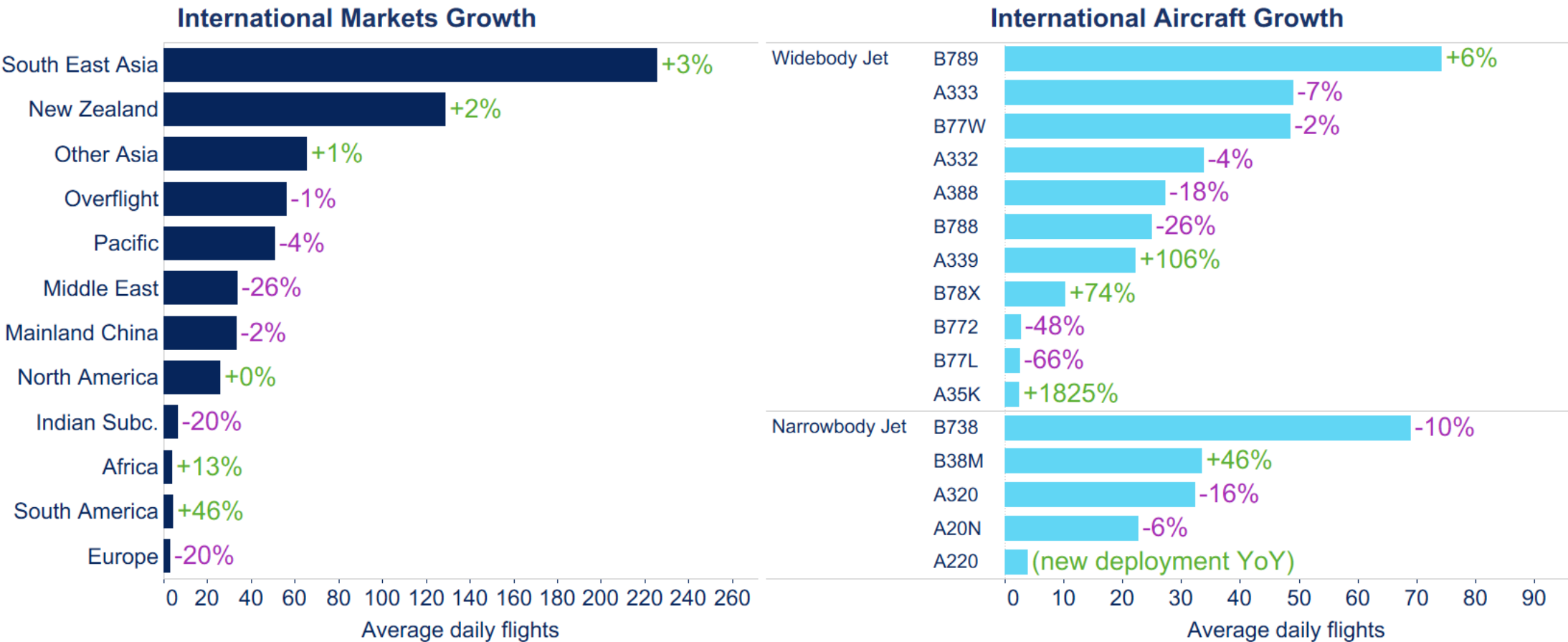


Source: Airservices ODAS (includes airline flights only) and CAPA for scheduled outlook (as at 1 September 2026).

International markets

International growth remains strongest in neighbouring Asia Pacific markets in terms of daily average flights, which continue to benefit from resilient leisure demand and traffic to Europe via alternative hubs. We are seeing the increased use of more efficient next-generation aircraft, such as Boeing 737 Max 8 and Airbus A220 for short-haul international services and Airbus A350s and Boeing 787s for long-haul markets.

Figure 12. International markets growth (left) and international aircraft growth (right), with average daily flights in August 2026 and change vs August 2025.

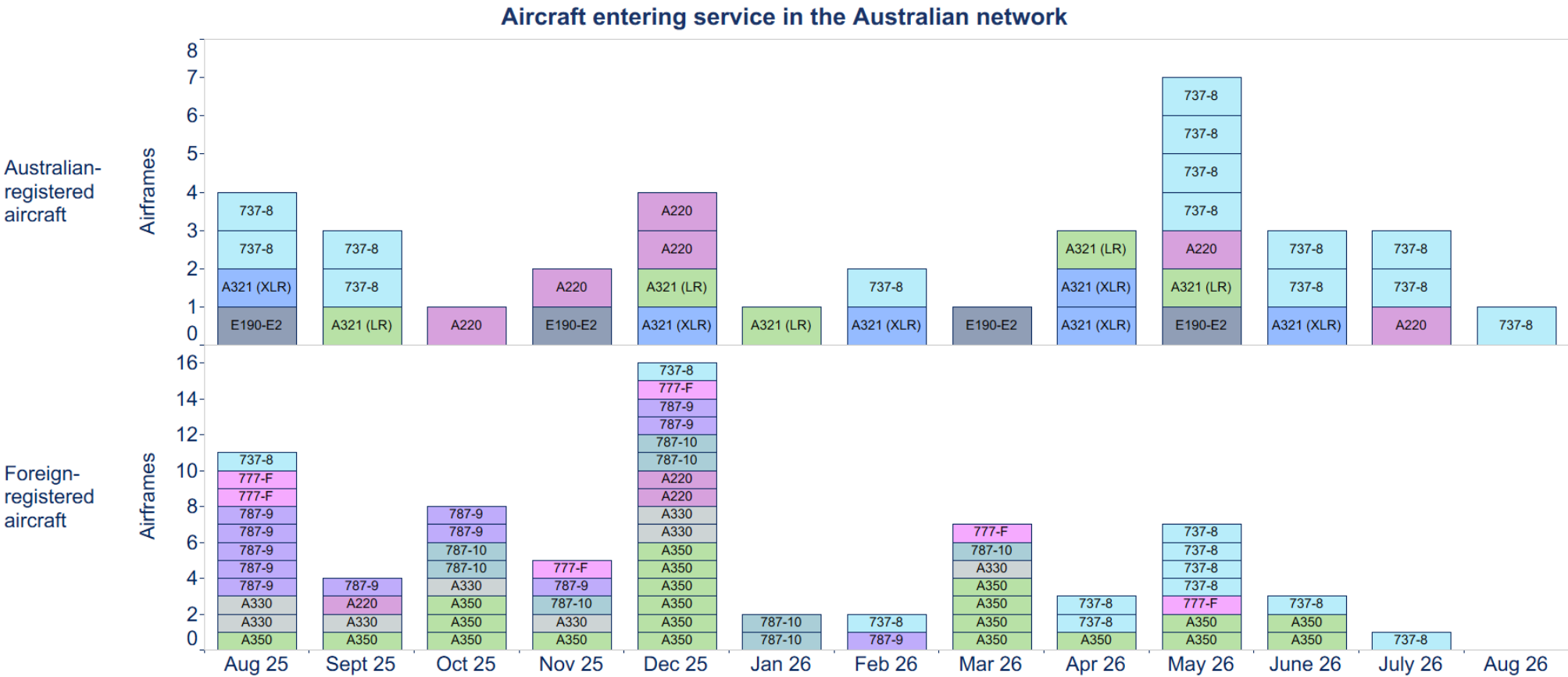


Source: Airservices ODAS (includes airline flights only).
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

In August, another 737-8 entered the Australian network, with newer-generation* aircraft now deployed on 50% of routes. Major domestic and international airlines continue to invest in large-scale fleet renewal programs that underpin long-term growth, supporting network expansion, improved passenger experience and greater operational efficiency.

Figure 13. Aircraft newly entering in the Australian network in the last 13 months.



Source: CAPA (includes airline flights only). Only aircraft with at least 8 flights in a month are shown.
* Newer-generation aircraft includes those with 10 years of service or less.



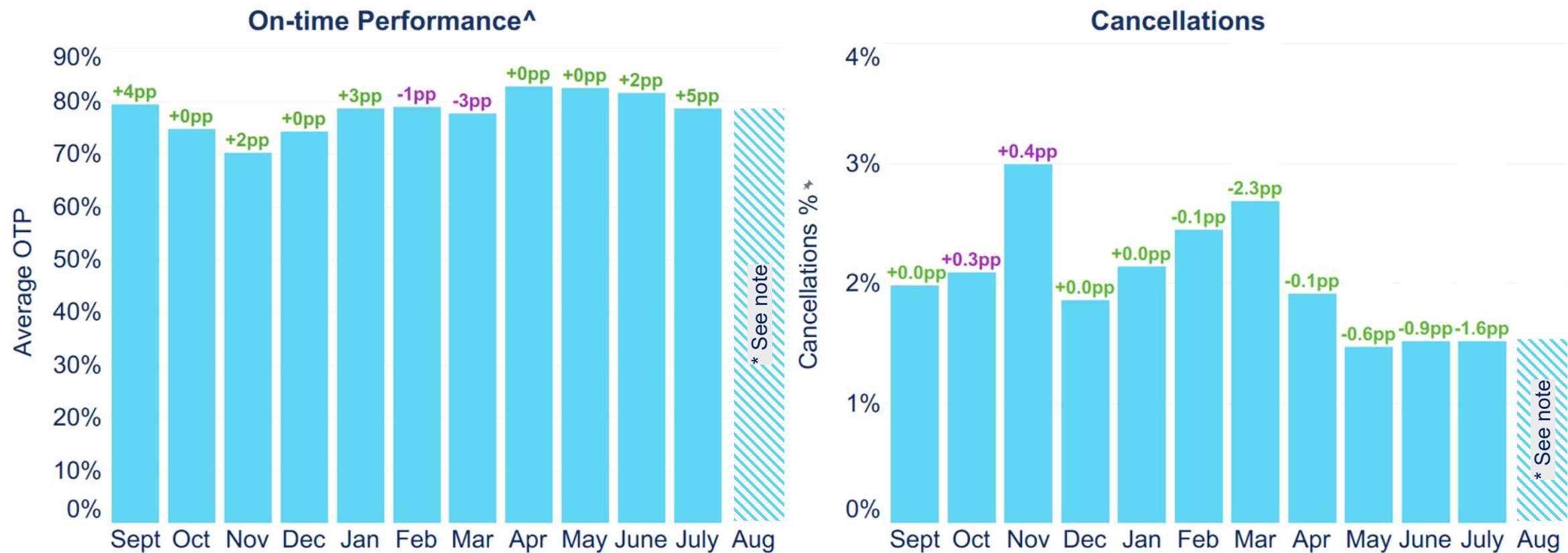
Australian aviation: network performance



Industry performance

Industry on-time performance (OTP) improved materially compared to July 2025, while cancellations more than halved. Sydney Airport, which has the greatest influence on overall network performance, recorded its strongest July OTP in recent years.

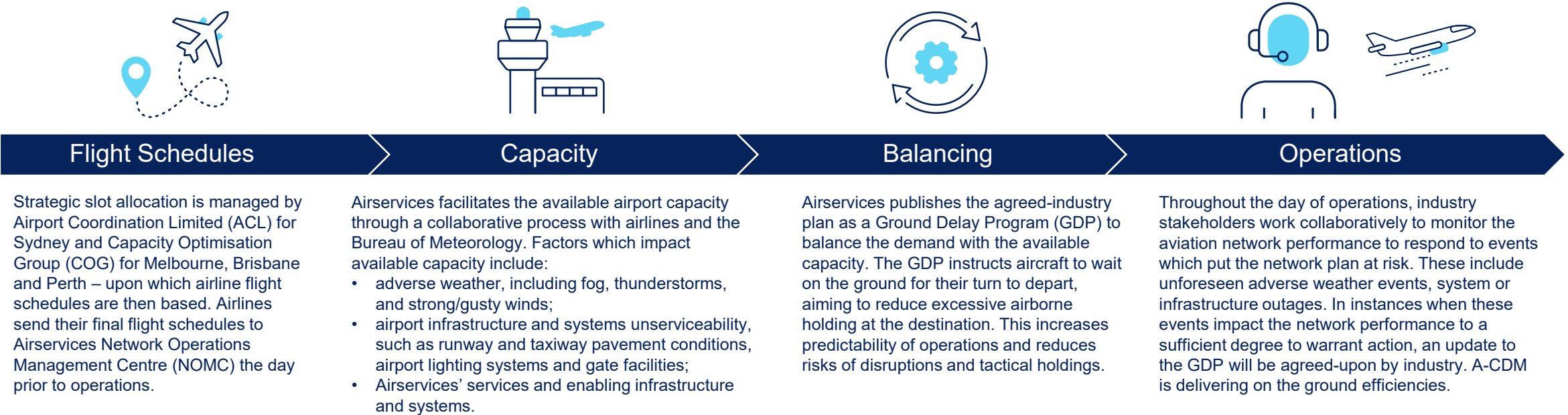
Figure 14. Total industry OTP^ and cancellations, up to July 2026* with year-on-year change.



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

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 Airport, to optimise arrival demand management and minimise airborne holding. Additionally, the implementation of Airport Collaborative Decision Making (A-CDM) at these locations are providing data-driven real-time situational awareness across airports, airlines and air traffic control, particularly for departure operations.



Delay reporting process

It is important to understand the basis of delay reporting. Delays are measured at an airport where they occur. Consequential delays are typically not categorised across industry due to the complexity and judgement required to attribute and quantify their ongoing impact.

All delays, regardless of cause, can create consequential effects through factors such as airline crewing, aircraft availability or technical issues, gate unavailability, airport works, infrastructure or system outage, and ATFM measures. Reporting consequential delays would therefore require an industry-wide approach to share data from all delay sources and a standardised methodology to consistently measure both initial and downstream impacts.

Airservices reports delay percentages capturing departure and arrival delays across all delay drivers. Airservices convenes a weekly industry meeting to review network performance events to ensure reporting is as accurate as possible. The reporting is consistent with international practice, and the approach was reviewed by the International Air Transport Association (IATA) in August 2023 which has been requested to undertake a further review this calendar year to refresh this independent input.

If all consequential delays were included, all delay categories would need to be adjusted to enable a consistent comparison. In practice, any adjustment for consequential delays would not materially change the relative percentage contributions.

Air Traffic Flow Management (ATFM)

ATFM ground delays remained a small proportion of total network delay at 2.4% in August, with Airservices contributing 0.6%. ATFM ground delays in Sydney were higher at 3.7%, with Airservices contributing 2.3%. As a consequence, Airservices attributable ground delay at Sydney this month was around four times higher than the monthly average in the previous financial year. While average airborne and ground delay minutes per flight remained stable across the network during this period, in Sydney ATFM ground delay minutes per flight increased from an average 7.4 min to 10.3 min (39% higher than average).

Figure 15. Key Ground Delay Program (GDP) metrics.

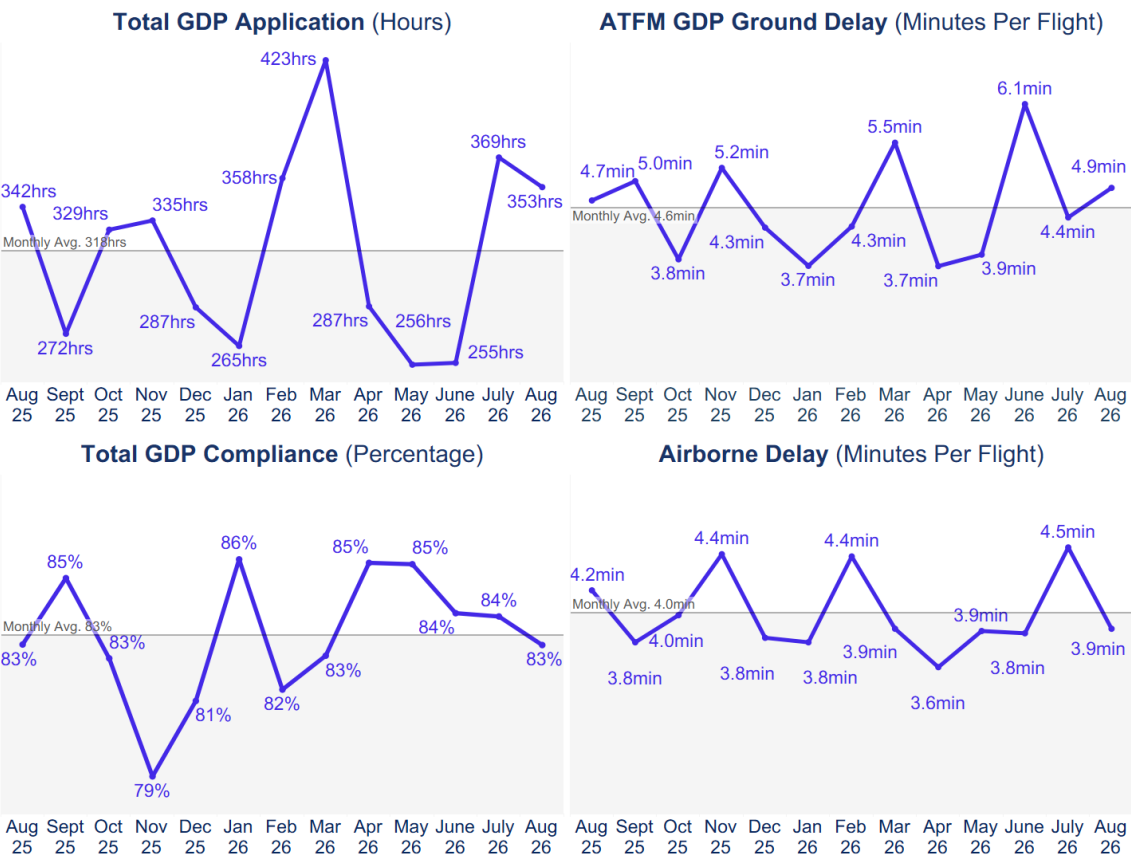
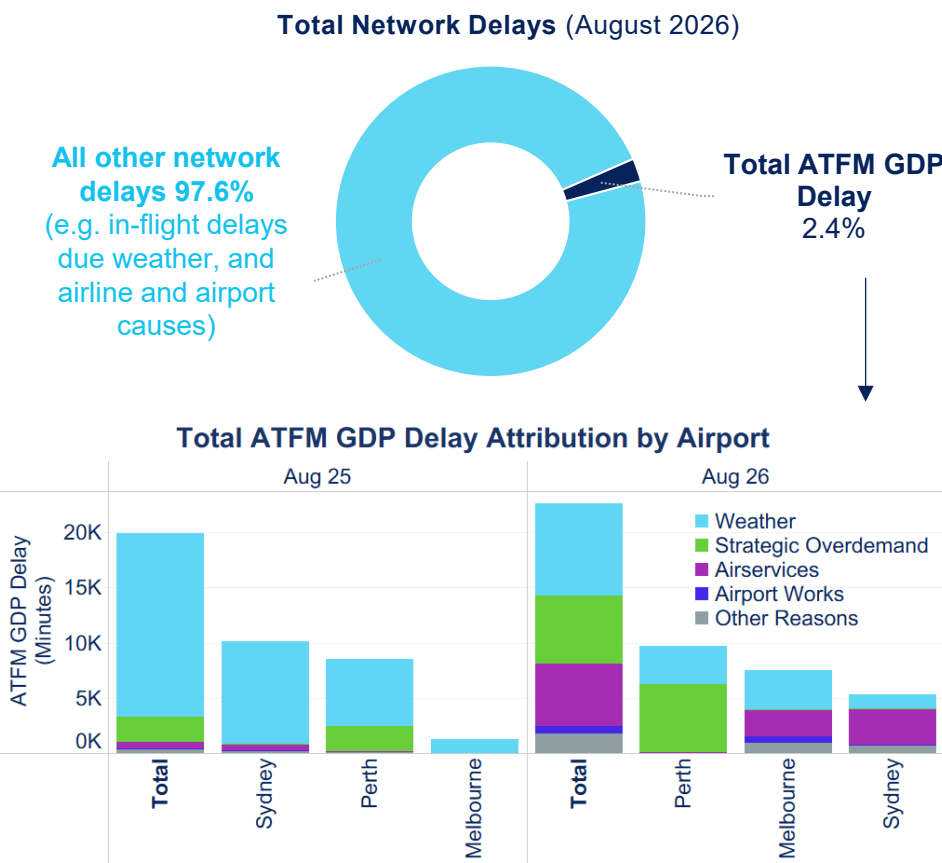


Figure 16. ATFM (GDP) delay minutes as part of total network delays (top) and by airport and attribution (bottom).



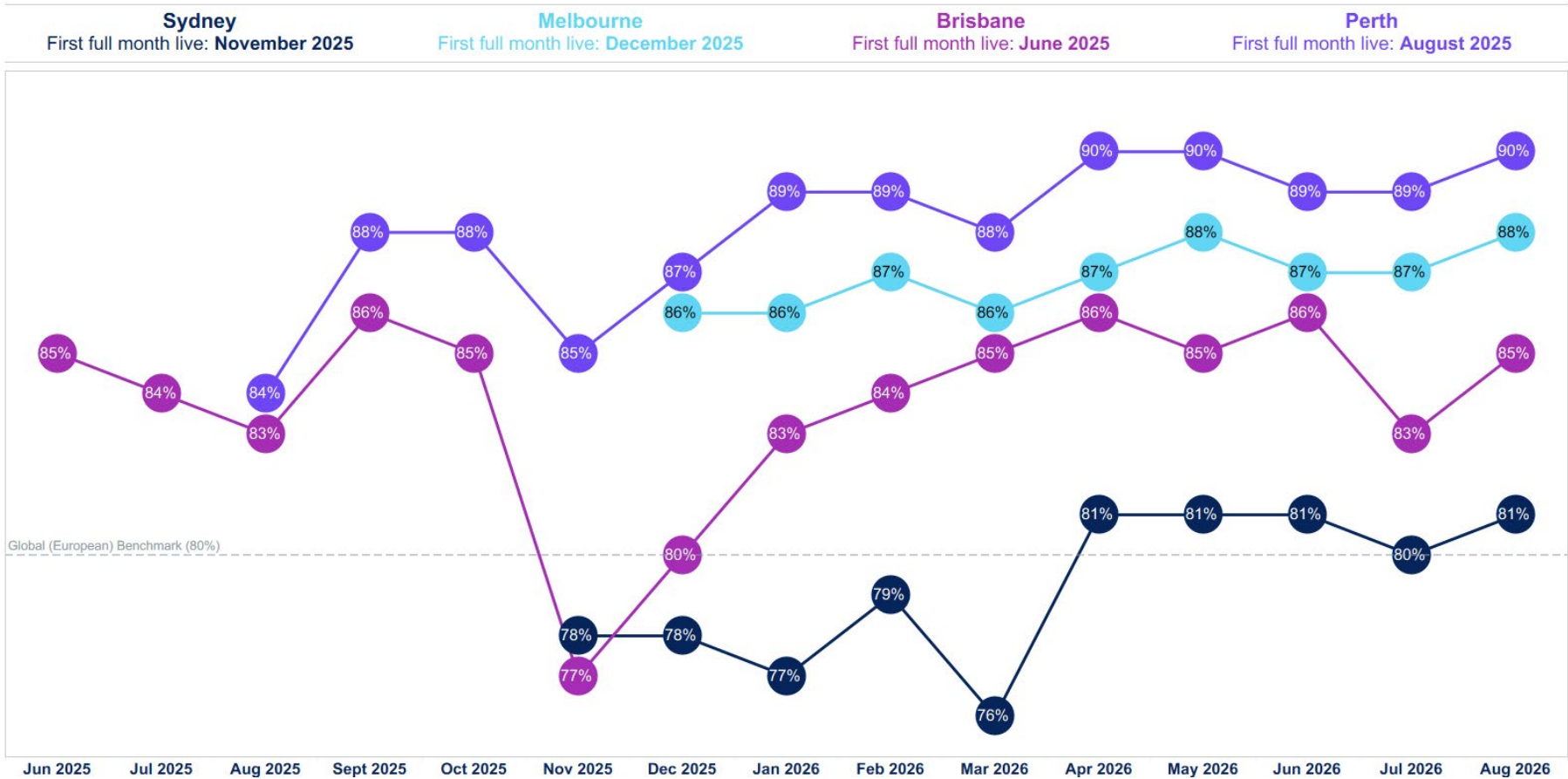
Source: Airservices ODAS.

GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.
Ground delay is measured as the average, and airborne delay is measured as the 75th percentile.

Airport Collaborative Decision Making (A-CDM)

Industry commitment to A-CDM remains strong, with a shared focus on maximising operational benefits and continuous improvement in the use of the technology and supporting process. Melbourne Airport's implementation of bay conflict alerting is strengthening collaborative decision-making by identifying potential bay conflicts earlier and enabling proactive resolution. This will establish valuable lessons learned and a blueprint for rolling out this capacity-enhancement capability across Sydney, Brisbane and Perth.

Figure 17. Monthly A-CDM compliance to Target Off Bock Time (TOBT) across airports.



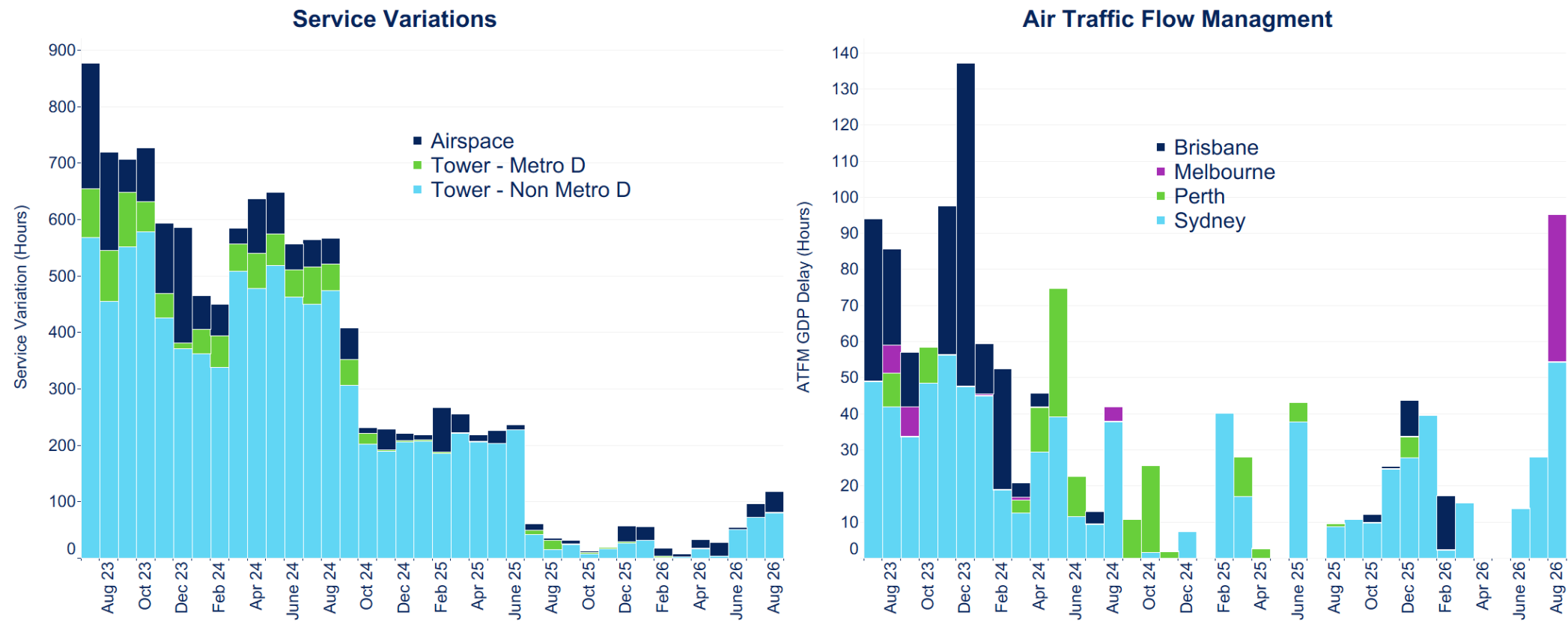
Source: A-CDM.

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

In August, network service outcomes were impacted by workforce resilience challenges at Sydney and short-notice implementation of amended arrival management procedures at Melbourne Airport. There were isolated service variations in a small number of locations, including Sunshine Coast Tower where full service coverage was restored in the second half of the month. Airservices is progressing a comprehensive resilience plan including recruitment, training, roster resilience and system initiatives to enhance service consistency across the network, with Sydney remaining a priority focus.

Figure 18. Hours of variation from published levels across Airspace Groups and Air Traffic Control Towers (left) and Airservices attributable ATFM GDP delay (right).

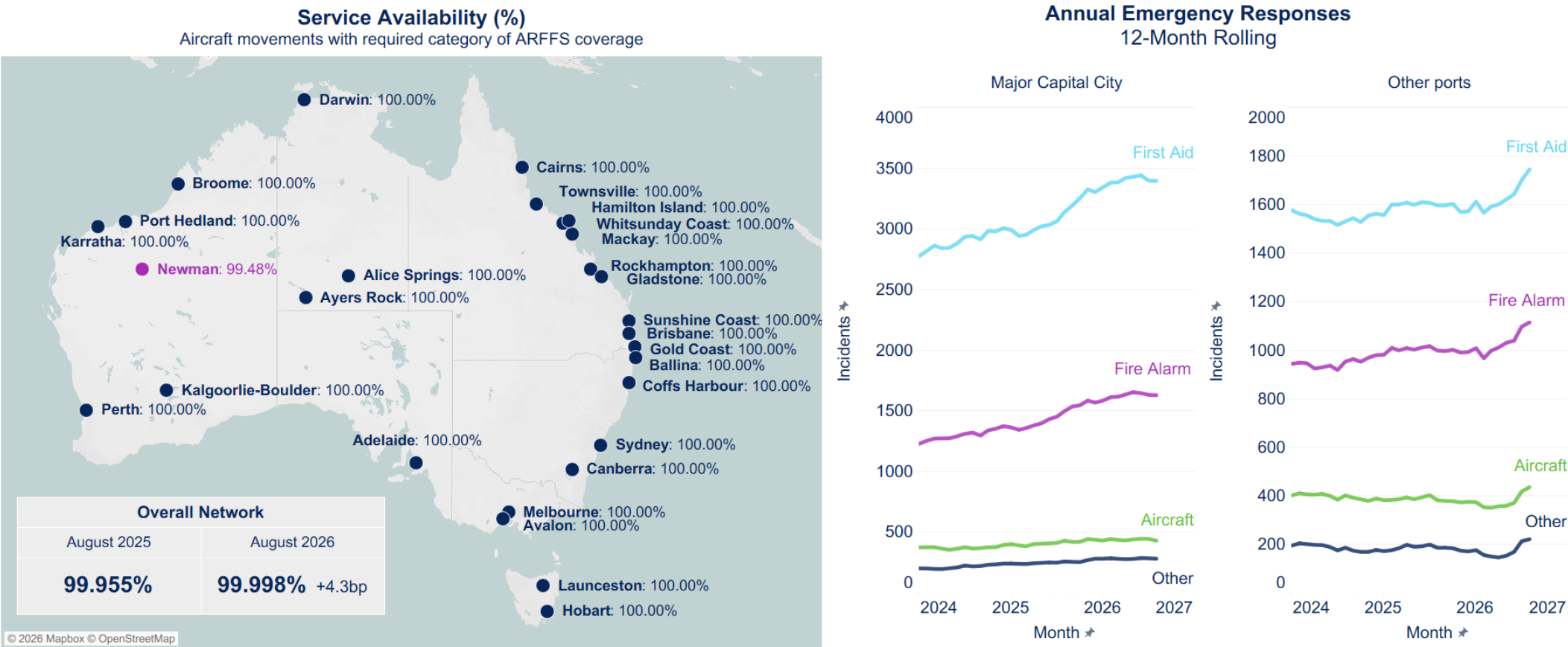


Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information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

National ARFF service availability reached its highest level since reporting began in September 2023, while demand for ARFFS continued to grow, with callouts increasing by an average of more than 7% per annum over the past two years.

Figure 19. ARFFS service availability by airport and overall network in August 2026 with year-on-year change (left) and rolling annual 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 ERSR 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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