



Australian Aviation Network Overview

September 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

School holiday travel and the AFL Grand Final contributed to periods of strong demand across the Australian aviation network in September 2026. The network recorded its busiest day of 2026 on 24 September with 2,773 passenger flights. Proactive planning and enhanced daily coordination between Airservices and industry supported service delivery throughout the peak period.

While global economic conditions remained resilient, domestic conditions softened amid persistent inflationary pressures and recent interest rate increases. Operators continued to take a disciplined approach to optimise capacity to meet dynamic changes in demand. International trends are mixed, with Middle East traffic approximately 20% below pre-conflict levels, while Asia-Pacific traffic continued to grow by around 4% year-on-year.

Network performance outcomes continue to strengthen. Latest industry data covering August 2026 shows that domestic airline on-time performance was above long-term averages, and cancellation rates fell to near-record lows, with all major airports delivering some of their strongest reliability outcomes in recent years.

In September, ATFM ground delays accounted for 2.4% of total network delay, with 0.4% attributable to Airservices. Adverse weather, particularly in Melbourne where weather-related ground delays more than doubled year-on-year, along with demand exceeding scheduled capacity in Perth contributed to two thirds of ATFM ground delays. Our workforce constraints in Sydney contributed to four Ground Delay Programs. However, targeted school holiday resilience measures protected the peak travel period, with no Airservices-attributable ground delays recorded after 21 September.

National air traffic service variations fell to their lowest level in six months and remained 92% below the monthly average in the previous three years. Airservices is actively progressing the Sydney KSA Service Resilience Plan, focused on strengthening workforce planning, recruitment, training, roster resilience and system capability. These initiatives are intended to restore service consistency at Australia's busiest airport while supporting the safe, efficient and resilient operation of the broader national aviation network.

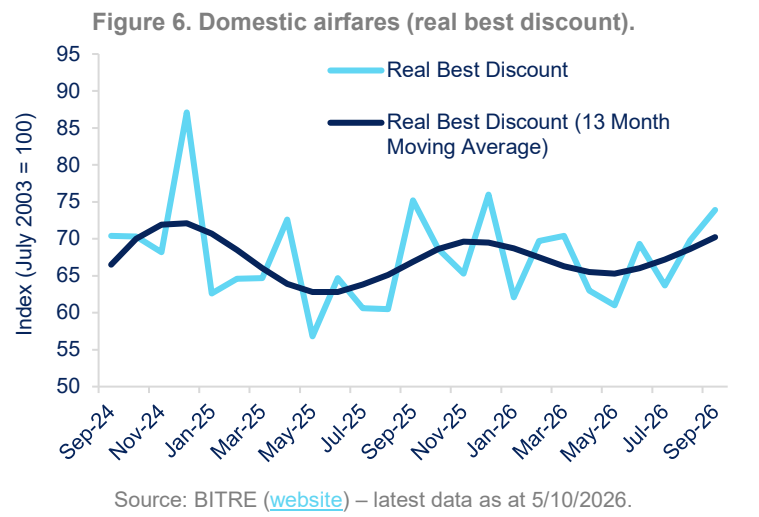
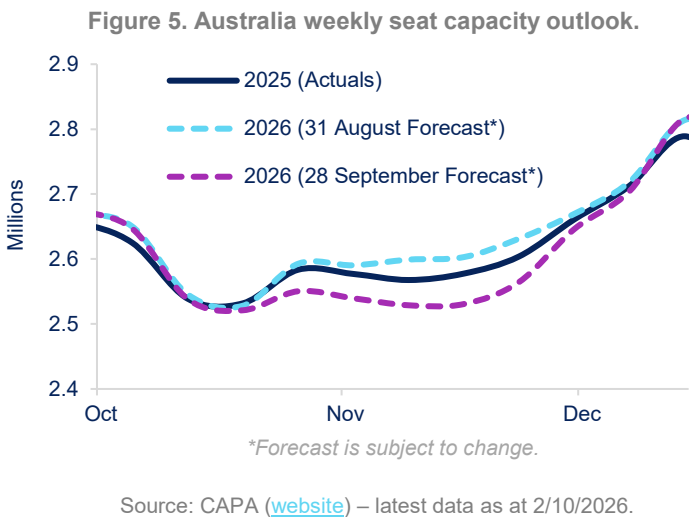
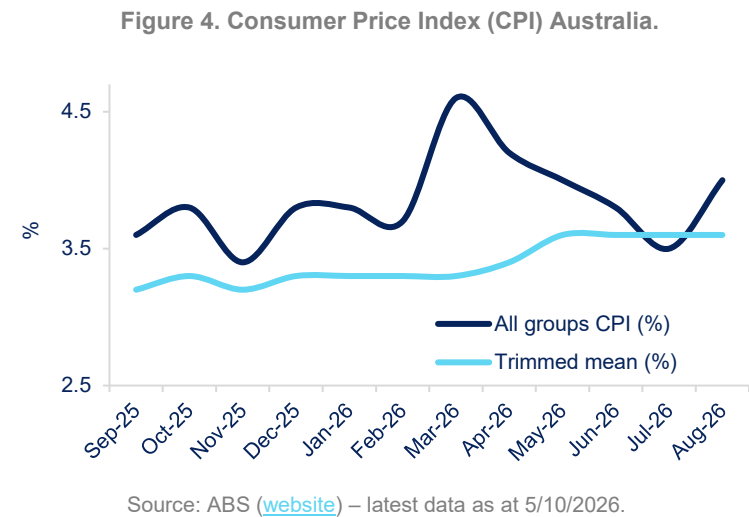
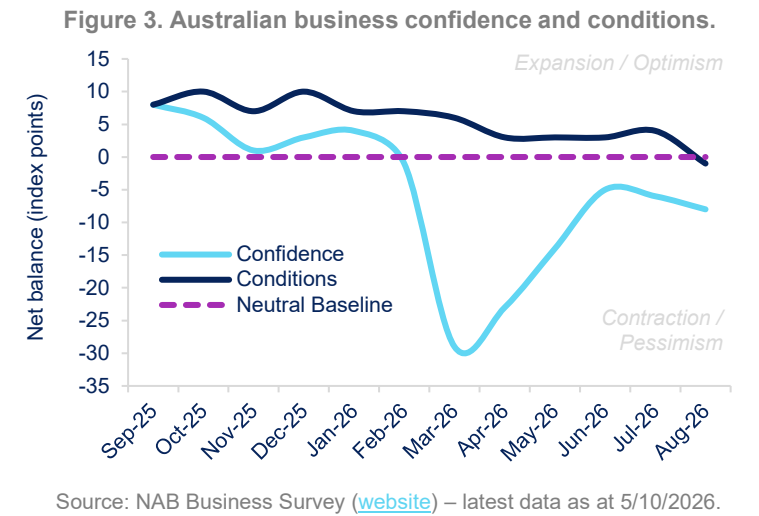
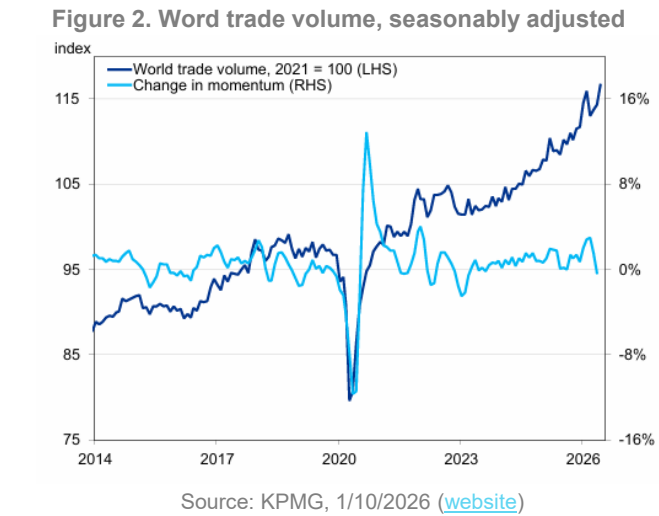
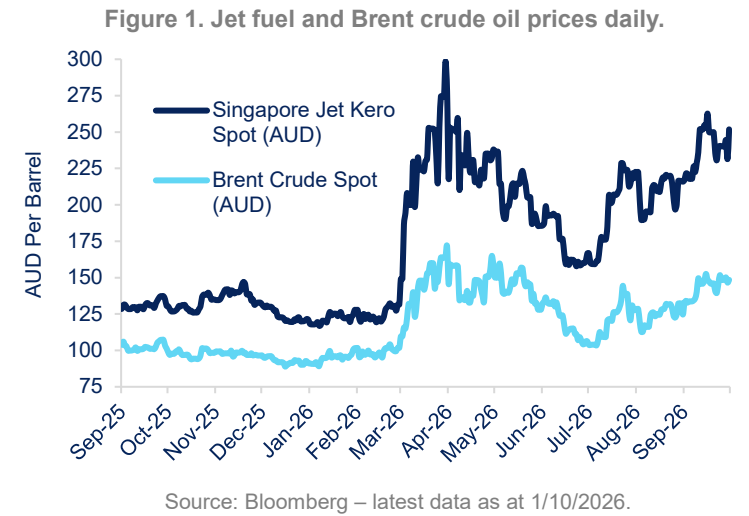


Economic and social trends



Economic factors

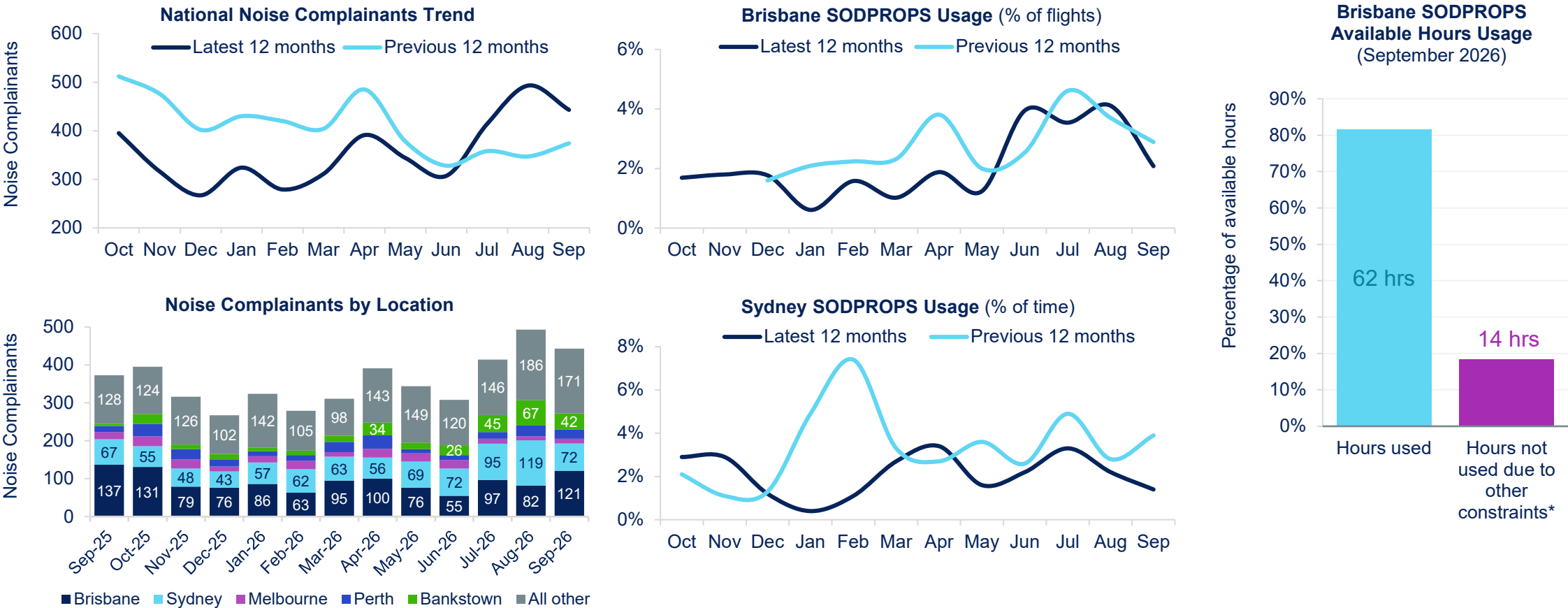
Global economic conditions remained resilient, supported by steady trade despite ongoing geopolitical instability and energy market volatility. These factors support Australia's resources sector and associated regional aviation demand. In September, the Government extended temporary fuel security measures, reinforcing confidence in critical fuel supplies. However, persistent inflationary pressures and recent interest rate increases point to a more cautious outlook for corporate and discretionary travel demand.



Social factors: aircraft noise

Aircraft noise complainant volumes decreased from August but remained elevated following the 9 July airspace changes supporting Western Sydney International Airport integration and redesigned flight paths in Brisbane. At Brisbane, Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) continue to be maximised when traffic and weather conditions are feasible, reaching 81% of available hours, largely impacted by airport works.

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



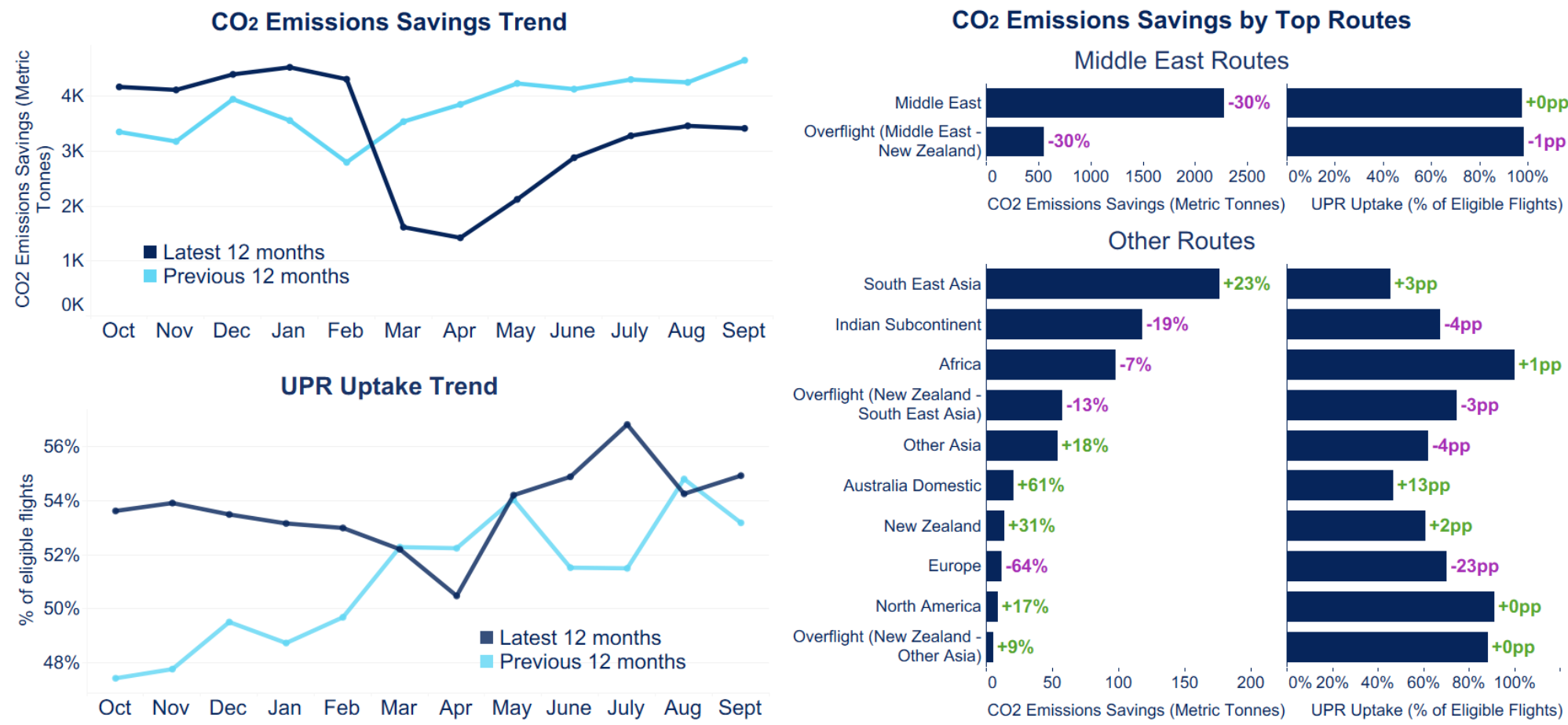
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool ([website](#)).

* 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

Around 98% of Middle East operations continued to use User Preferred Routes (UPR), contributing 83% of total CO₂ emissions savings in September. Beyond the Middle East, more than 50 operators used UPR, with increasing uptake across New Zealand and Asia, supporting a continued increase in emissions savings.

Figure 8. Monthly CO₂ emissions savings from User Preferred Routes and uptake among eligible flights (left), with September 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.



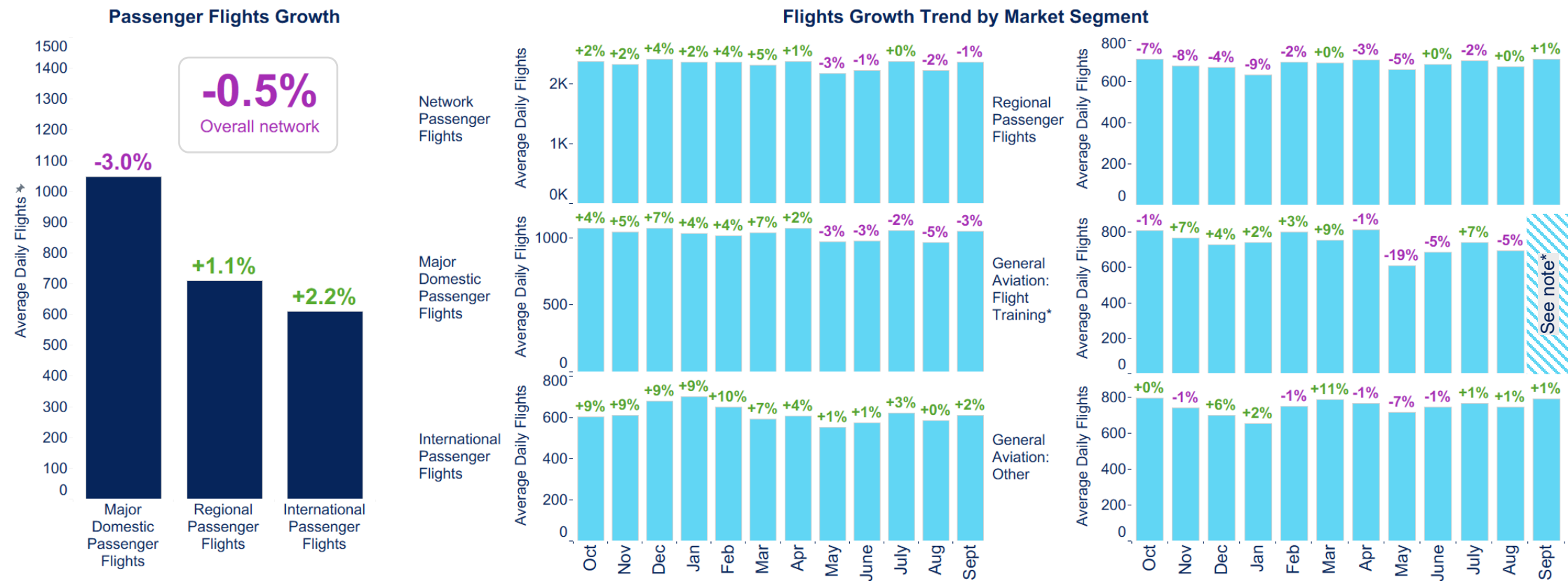
Australian aviation: domestic and international markets



State of Australian aviation growth

Average daily flights across major domestic airlines remained below last year's levels for a fifth consecutive month, reflecting capacity reductions following the Middle East conflict earlier this year. Nevertheless, the network recorded its busiest day of 2026 on 24 September with 2,773 passenger flights, driven by school holiday travel and the AFL Grand Final, which lifted Melbourne estimated seat capacity by 4.5% year-on-year. International traffic year-on-year growth has eased to around 1.4% since May, well below the 8-9% a year earlier.

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

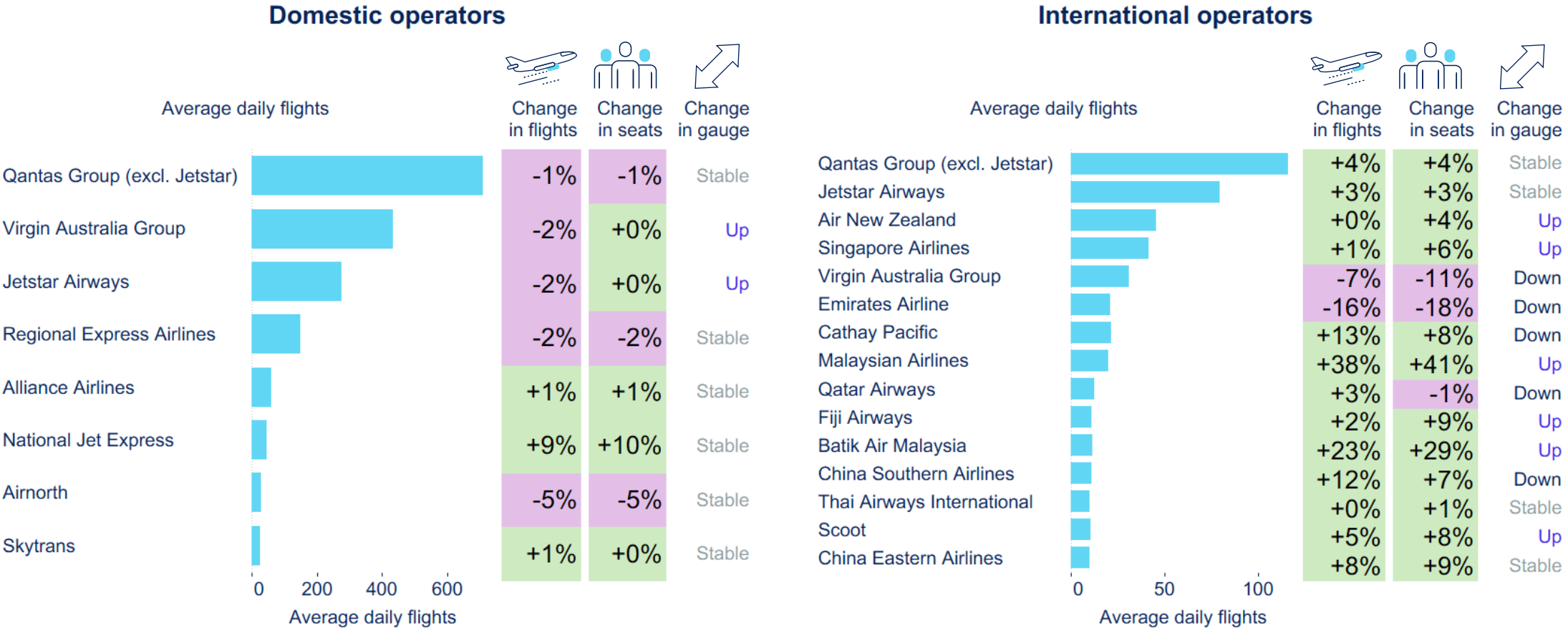


Source: Airservices ODAS (includes airline flights only, excludes overflights).
* Flight training data is one month in arrears.

Top aircraft operators

Airlines continued to optimise capacity, matching flying to periods and locations of stronger demand rather than pursuing broad network growth. This was reflected in frequency adjustments on domestic routes and targeted international aircraft up-gauging, particularly at Melbourne and Adelaide. Regional operators continued to benefit from resources-sector activity. International growth remained concentrated among carriers leveraging alternative hubs amid disruption to traditional Middle East transit routes.

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

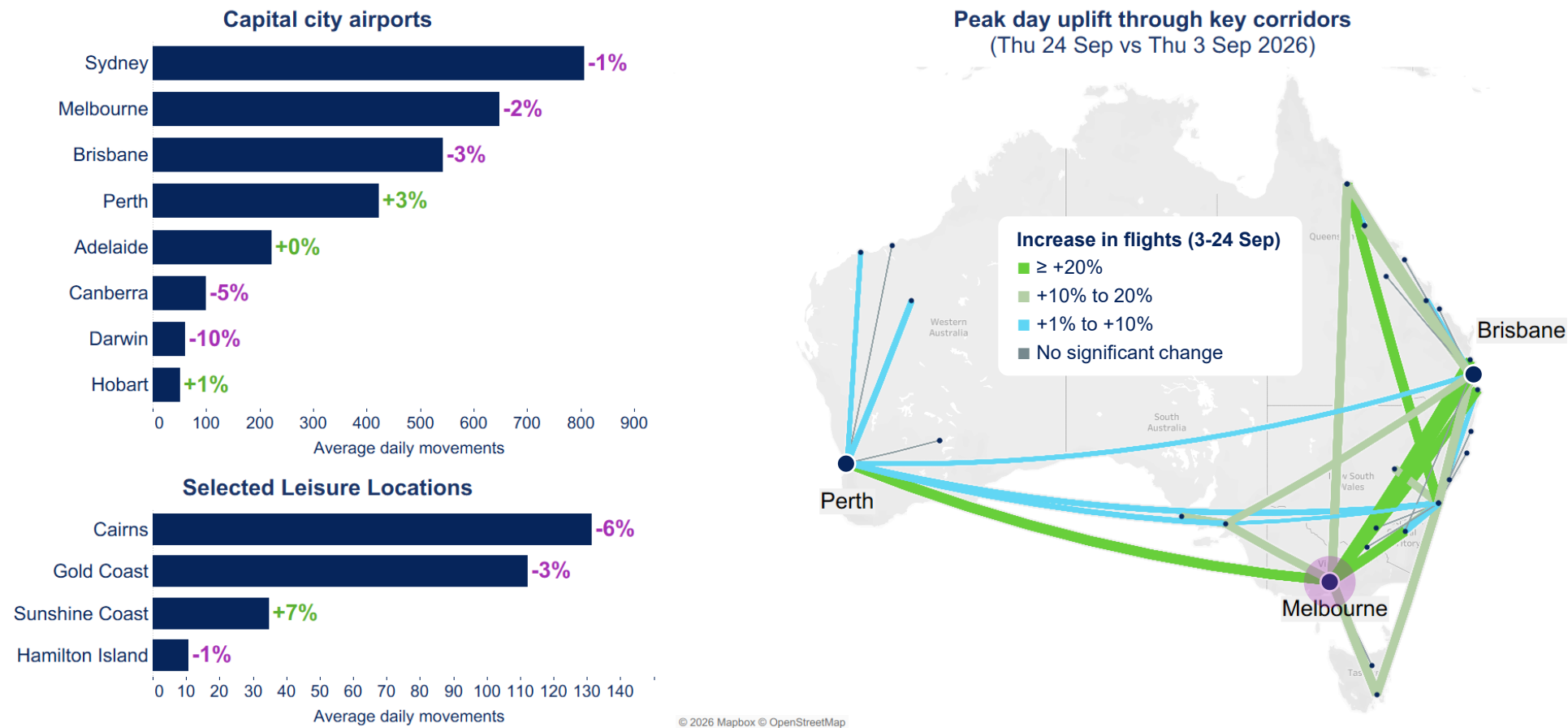


Source: Airservices ODAS (includes airline flights only) and CAPA (for estimated seats).
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

School holiday travel and the AFL Grand Final drove a significant increase in flying between Melbourne, Perth, Brisbane and surrounding airports. This resulted in consecutive days of peak demand before and after the match, demonstrating how major events can create network-wide demand surges requiring coordinated industry responses.

Figure 11. Change in average daily movements for key domestic airports in September 2026 vs September 2025 (left) and peak day uplift on key corridors (Thu 24 September vs Thu 3 September) by change in flights (right).



Source: Airservices ODAS (includes airline flights only). Only top 40 routes are shown in view on right.

International markets

International trends remained mixed. Middle East activity is around 20% below last year's levels, and the region remains largely avoided by Australian flights. While selected service returns from December are expected to support recovery, ongoing geopolitical uncertainty remains a key risk. By contrast, Asia-Pacific traffic has grown by around 4% year-on-year, benefiting from regional leisure travel and some redistribution of Europe-bound traffic through Asian hubs. This supported growth at Australian gateways, including Brisbane through increased connectivity with New Zealand, Singapore and China, and Adelaide through international capacity expansion and the return of key carriers.

Figure 12. Middle East traffic growth trend in average daily flights, with year-on-year change (left), and international markets and gateway growth by average daily flights for September 2026, with change vs September 2025 (middle, right).

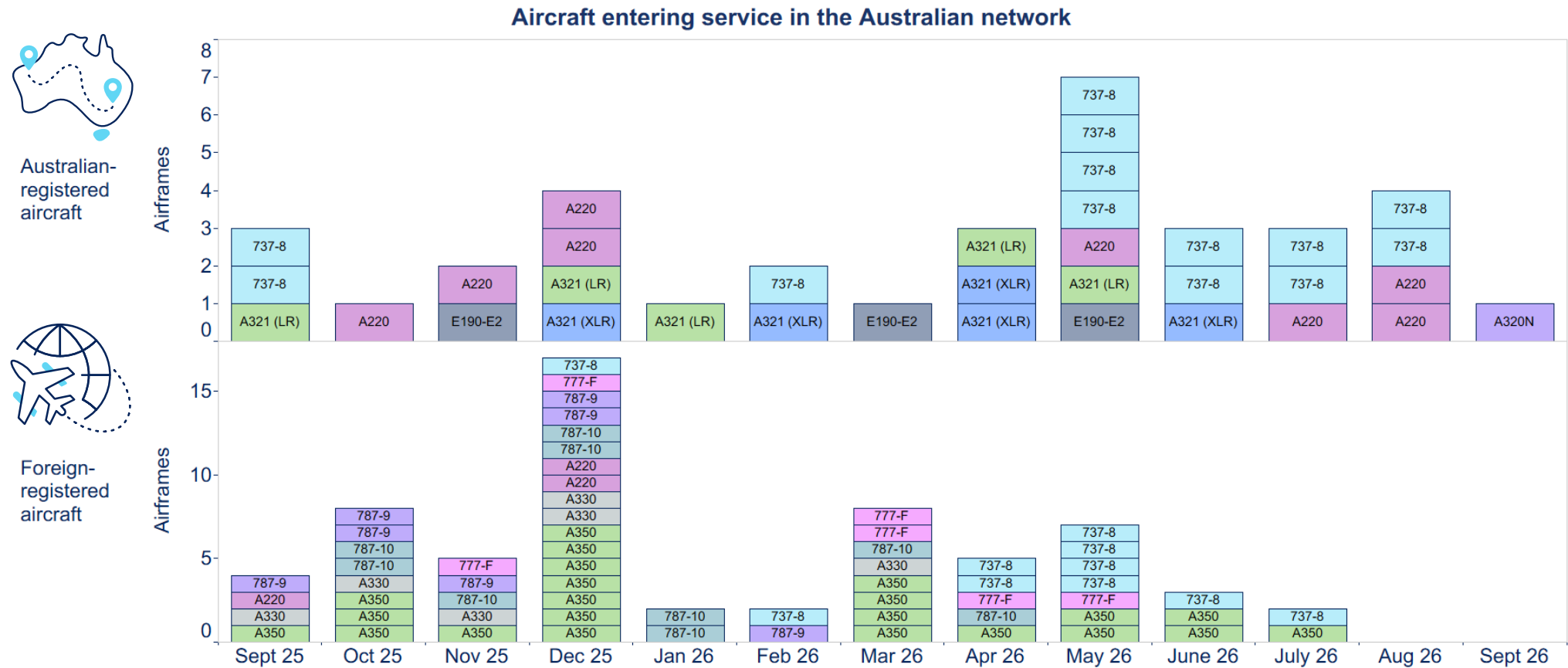


Source: Airservices ODAS (includes airline flights only).
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

Fleet renewal continued to broaden across the network, with newer-generation aircraft operating 34% of passenger aircraft movements across 62% of routes. Airlines are deploying these aircraft in different ways to optimise network performance through a combination of higher frequencies, selective up-gauging and retirement of ageing fleet.

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.



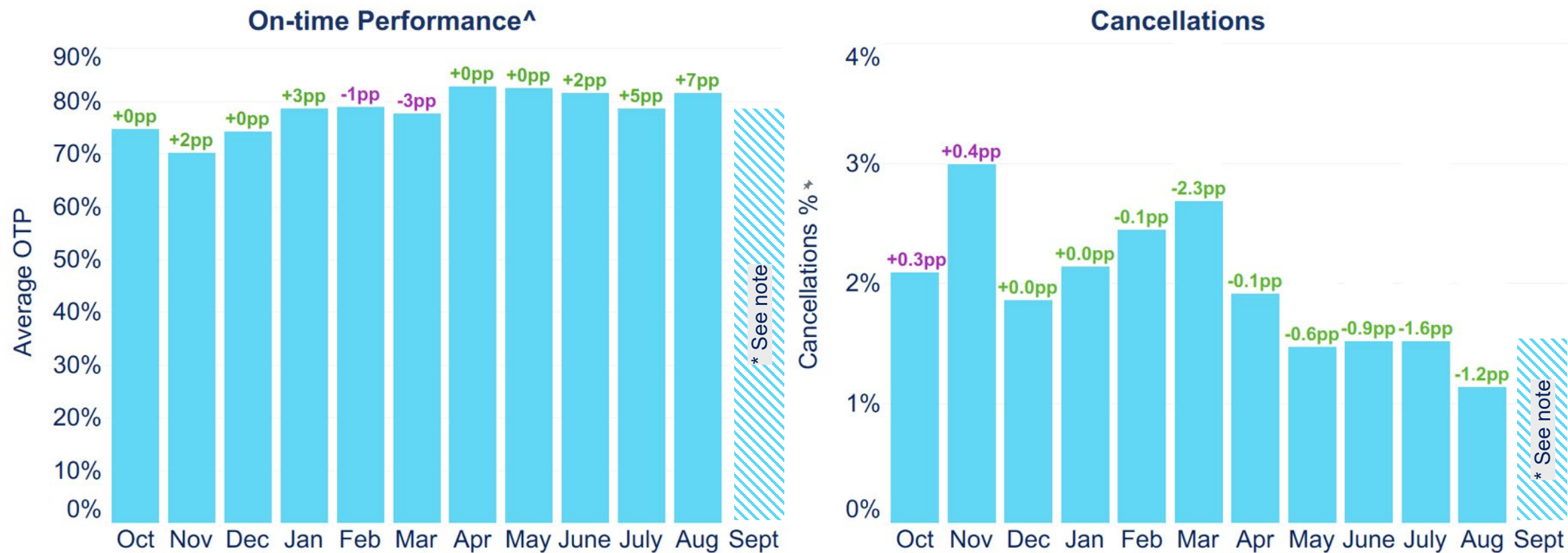
Australian aviation: network performance



Industry performance

Reliability strengthened across Australia’s major east and west coast gateways. Excluding the pandemic period, Sydney’s arrival On-time Performance (OTP) reached its highest August level since 2017 and cancellations fell to their lowest August rate since reporting began in 2003. Perth, Melbourne and Brisbane also recorded their strongest August OTP results in at least eight years.

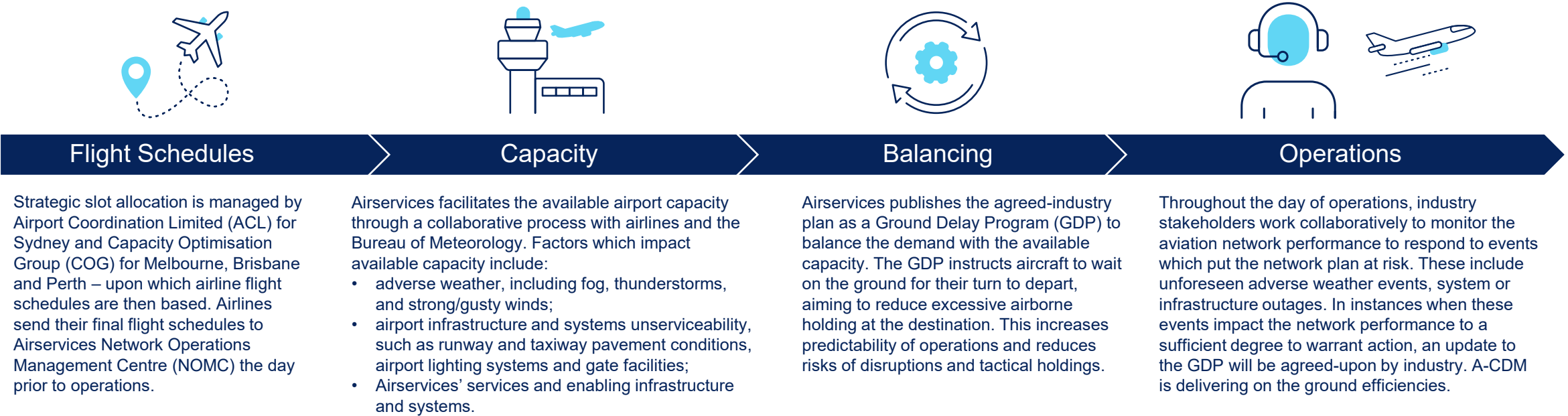
Figure 14. Total industry OTP^ and cancellations, up to August 2026* with year-on-year change.



Source: BITRE ([website](#)). March 2025 performance was impacted by ex-tropical cyclone Alfred.
* Data available up to August 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)

In September, ATFM ground delays accounted for 2.4% of total network delay, with 0.4% attributable to Airservices. Nearly two-thirds of ATFM delays were driven by adverse weather, particularly in Melbourne where weather-related ground delays more than doubled year-on-year, along with demand exceeding scheduled capacity in Perth. Workforce constraints in Sydney, as reported in the last two months, contributed to four Ground Delay Programs. However, additional school holiday resilience measures protected peak demand periods, with no Airservices-attributable ground delays recorded after 21 September.

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

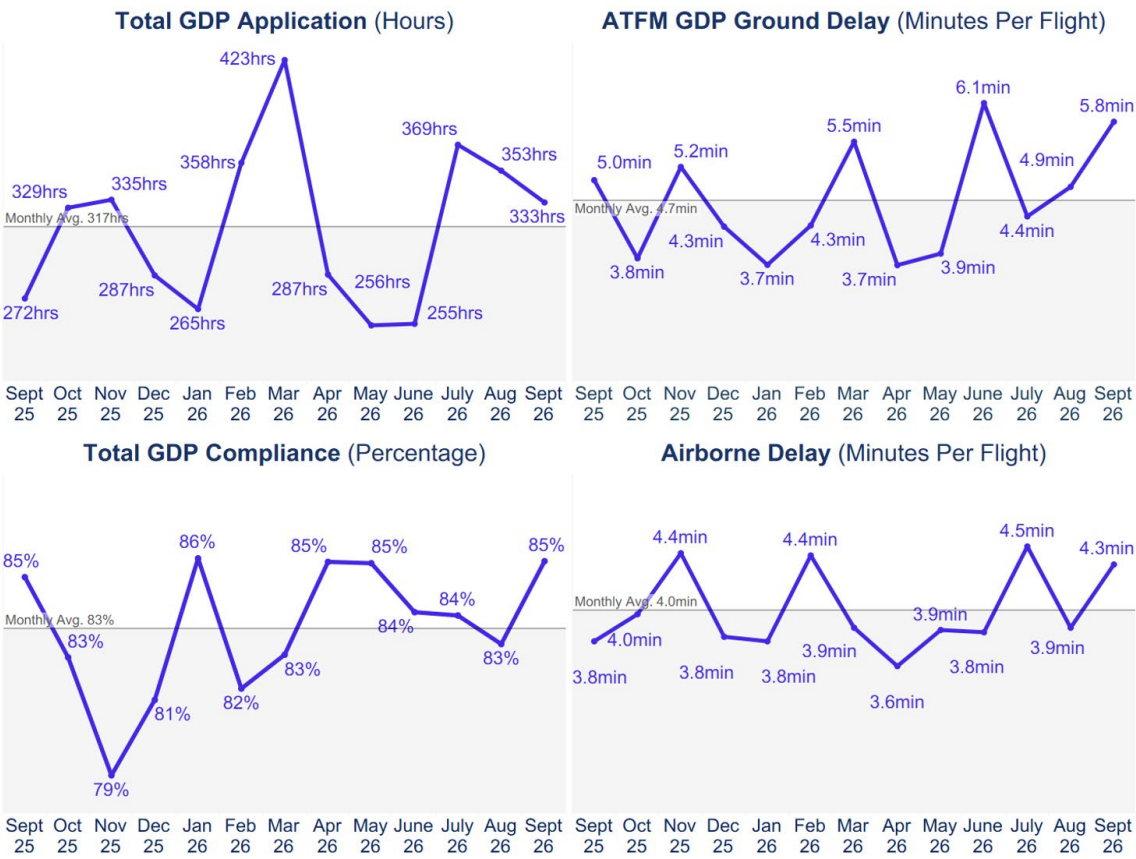
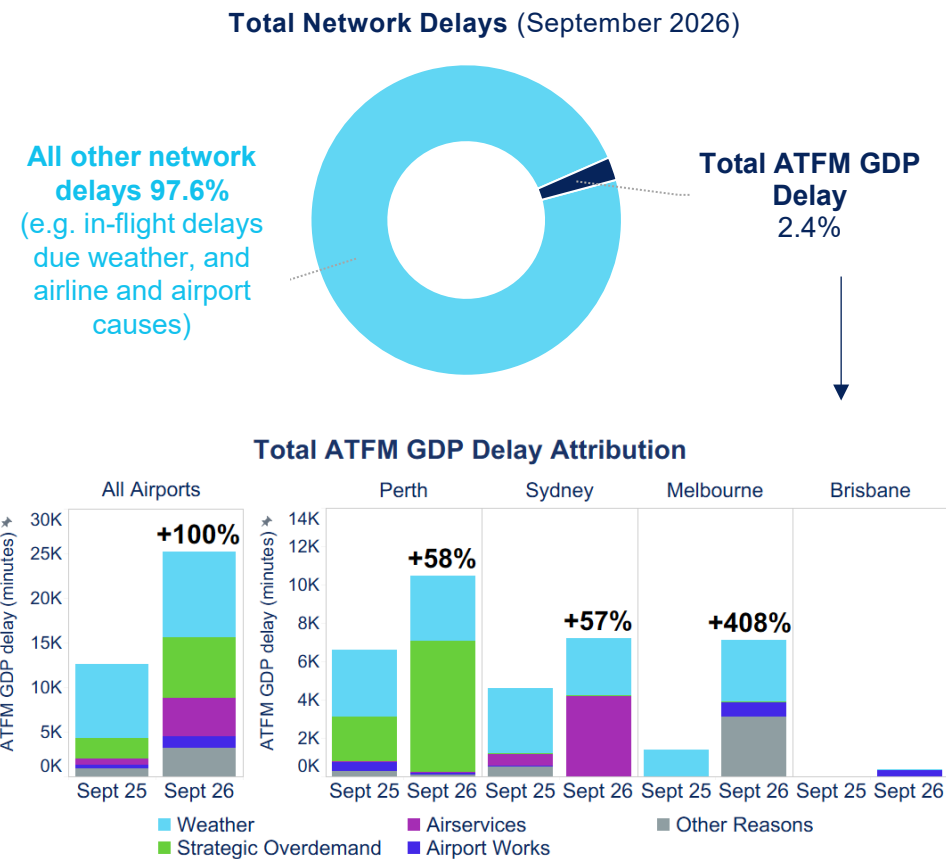


Figure 16. ATFM (GDP) delay minutes as part of total network delays (top) and by airport and attribution (bottom).



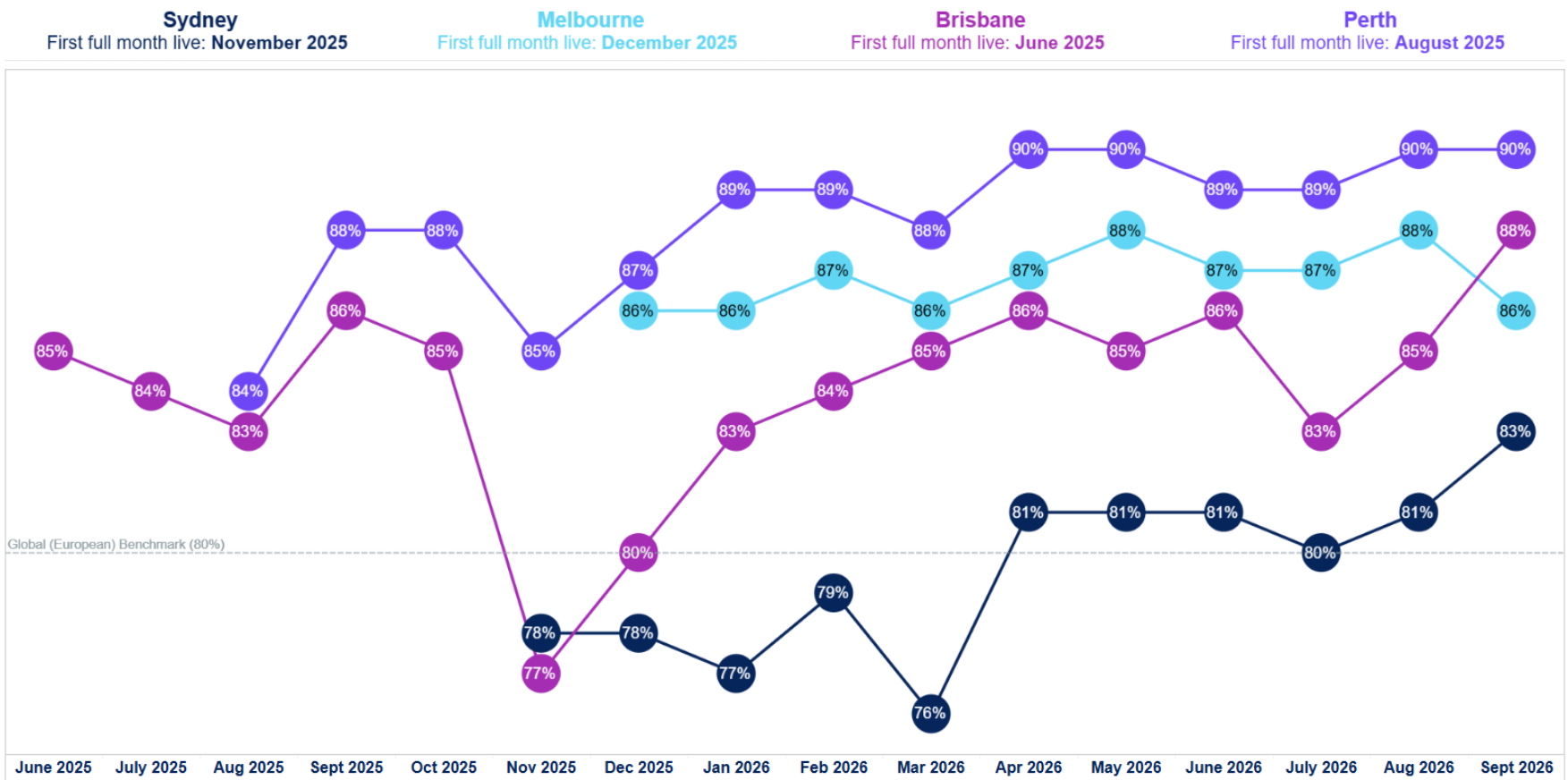
Source: Airservices ODAS.

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 compliance with A-CDM processes remains strong. Improved visibility of operational constraints and departure delays is enabling aircraft to remain at the bay rather than queue at runway holding points, reducing congestion. The four major airports have seen an overall uplift in departure on-time performance since the national rollout of A-CDM, particularly since June. An independent review of the Australian implementation is being progressed to ensure A-CDM is optimised for delivering network benefits.

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



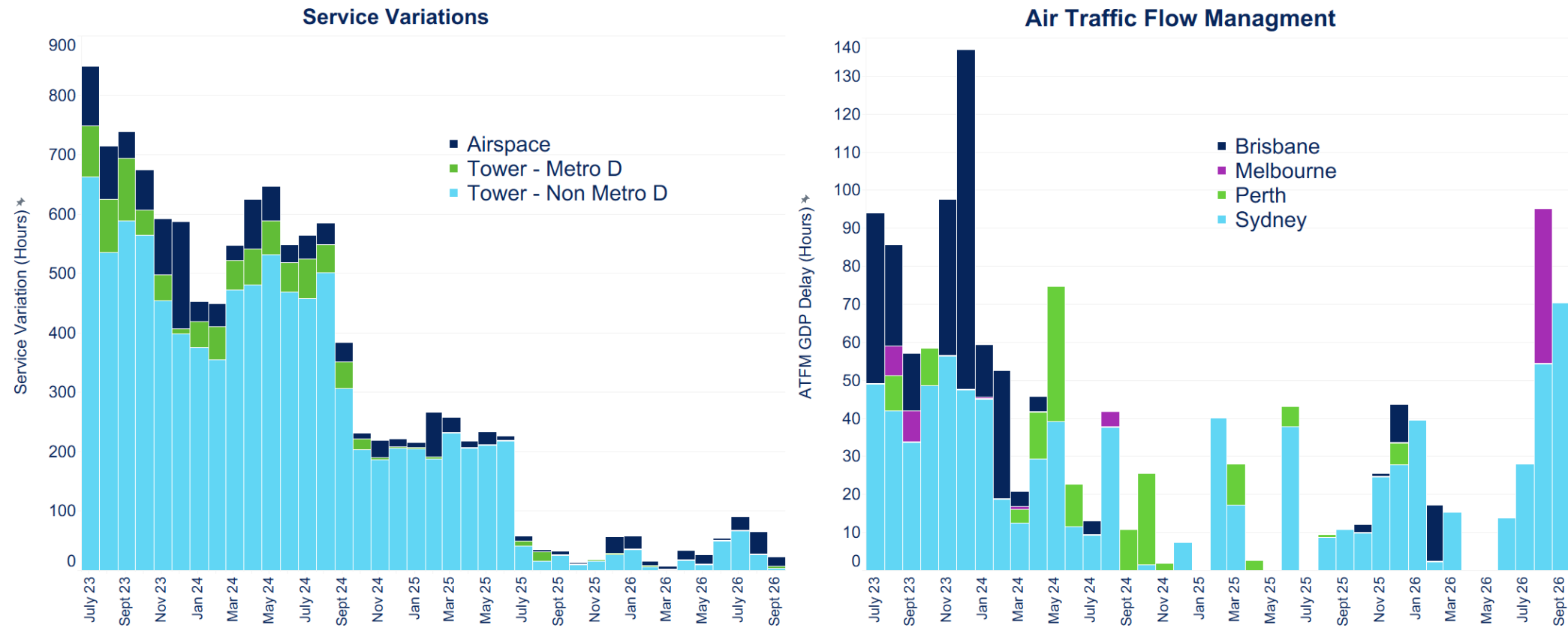
Source: A-CDM.

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

Airspace and tower service variations fell to their lowest level in six months and remained 92% below the monthly average in the previous three years. Workforce resilience challenges in Sydney continued to impact ATFM performance, resulting in elevated Airservices-attributable ground delays. Airservices is progressing the Sydney KSA Service Resilience Plan and enhanced resilience measures, which are beginning to deliver results, with performance improving in late September and continuing into October.

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



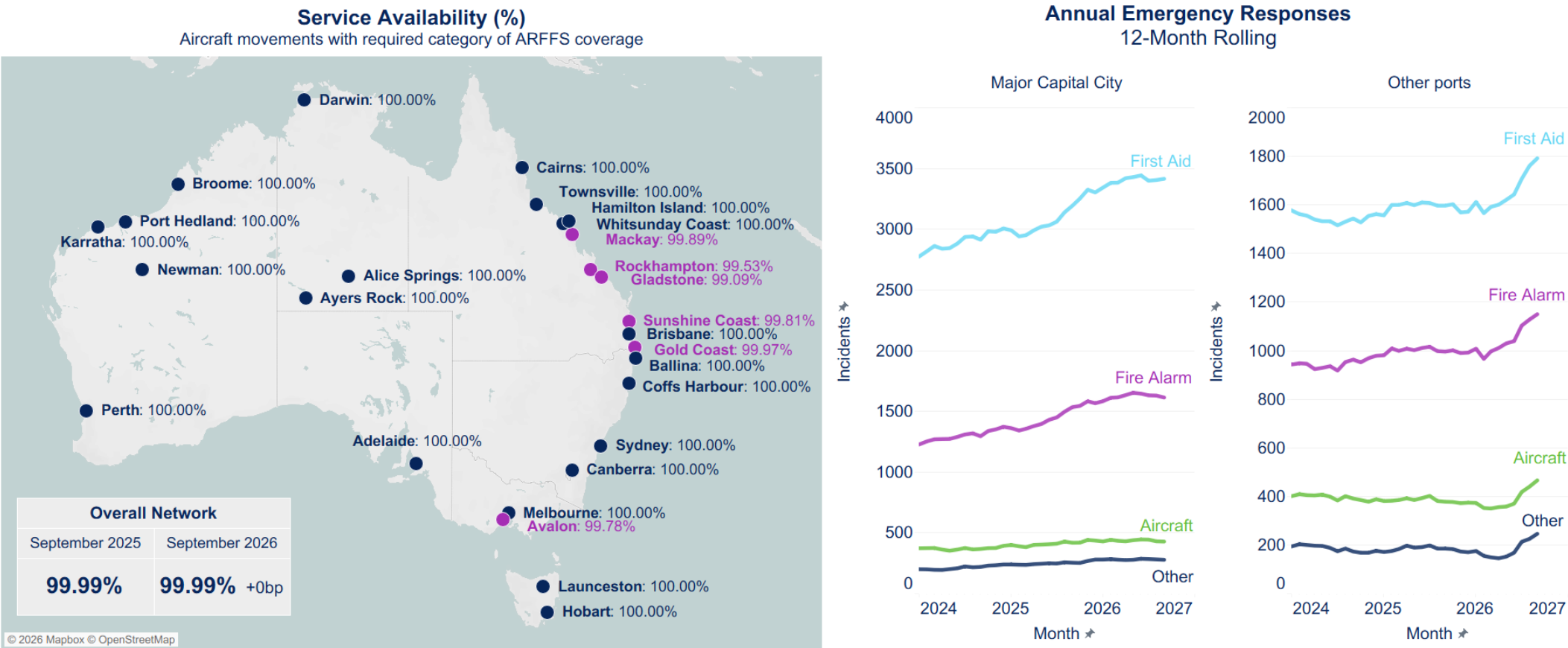
Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information and safety alerting). Service variations are with respect to published services as per ERSAs including any approvals by the Civil Aviation Safety Authority (CASA) for temporary amendments.

Excludes aerodrome control service variation at Western Sydney International Airport in place until late October ahead of the commencement of passenger flight operations.

Aviation Rescue Fire Fighting Service

National ARFF service availability remained at 99.99%, exceeding the long-term monthly average achieved over the past four years. This demonstrates our commitment to maintaining high levels of ARFF service reliability while responding to increasing emergency call volumes to support growing airport operational demand.

Figure 19. ARFFS service availability by airport and overall network in September 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 ERSAs 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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