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Australian Aviation Network Overview

October 2026



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

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Executive Summary

Western Sydney International Airport commenced passenger operations on 25 October, marking a major milestone for Australia's aviation network and the travelling public, and the first major new airport in over 50 years. Significant coordination and collaboration across government and industry supported the airport's integration into the Sydney basin, one of Australia's most complex operating environments. Safety remains paramount as Airservices continues to work cooperatively with operators, airports and industry to support efficient and reliable operations across the Sydney Basin to accommodate continued growth in the sector.

More broadly, aviation activity in October reflected the seasonal moderation following the September peak period. Against a backdrop of elevated operating costs and a more challenging economic environment, airlines continued to focus on capacity discipline and yield management, influencing the pace and pattern of growth across the domestic network. International activity continued to be led by the Asia-Pacific region, while resource-sector demand and flight training remained important drivers of activity in parts of regional Australia.

It was pleasing to see industry on-time performance remaining stable, with cancellations continuing to track at historically low levels. Air traffic flow management (ATFM) ground delays accounted for 2.2% of total network delay in October, with no Airservices-attributable ground delays recorded. The continued focus on service resilience, particularly in Sydney, is delivering improved outcomes for our customers. However, we recognise that sustained effort, consistency and predictability is critical to stabilising and improving our performance.

Protected industrial action affecting ground service organisations at Sydney Airport highlighted the value of Airport Collaborative Decision Making (A-CDM) and strong cross-industry coordination. The provision of a shared operating picture across airport and airline stakeholders during this period supported informed decision-making, effective contingency responses and the containment of broader network disruption.

Airspace service variations were limited to two locations and aerodrome service variations were at the lowest level in four years. Aviation Rescue Fire Fighting (ARFF) service availability also remained high at above 99.9%. We remain focused on strengthening workforce planning, recruitment, training and endorsement pathways, rostering and supporting systems for consistent delivery of services across the network.

Planning with industry stakeholders is underway to strengthen joint preparedness and to support safe, efficient and resilient operations through the upcoming school holiday and Christmas peak, one of the busiest periods of the year.

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Economic and social trends



Economic factors

The economic outlook is increasingly challenging, as volatile energy prices, persistent inflation and 18-year high interest rate weigh on household spending, business confidence and the labour market. Against this backdrop of heightened economic uncertainty, demand for air travel remains resilient but is showing signs of moderation.

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

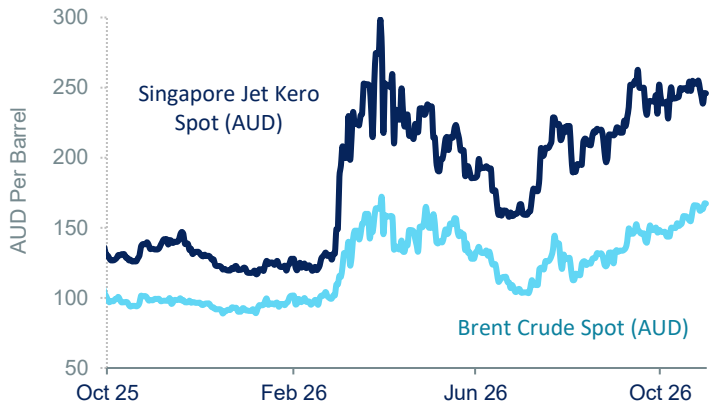


Figure 2. Australia's unemployment rate.

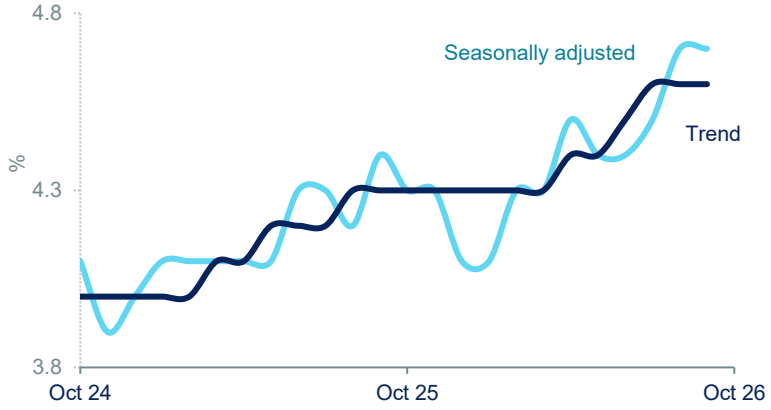


Figure 3. Australian business conditions by state.

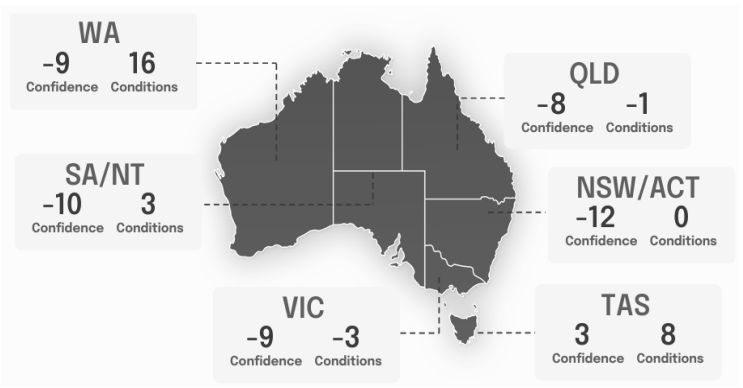


Figure 4. Australian Consumer Price Index (CPI).

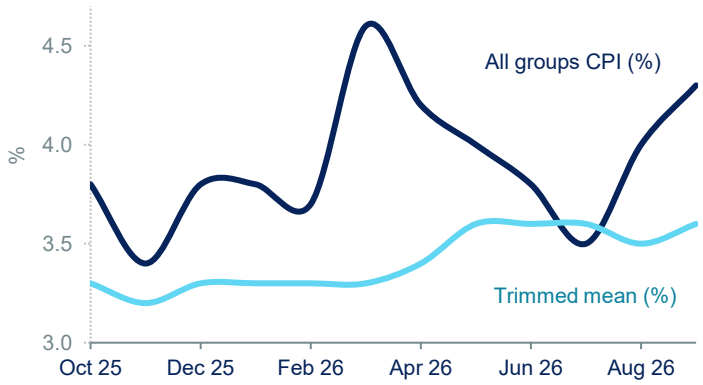


Figure 5. Australia weekly seat capacity outlook.

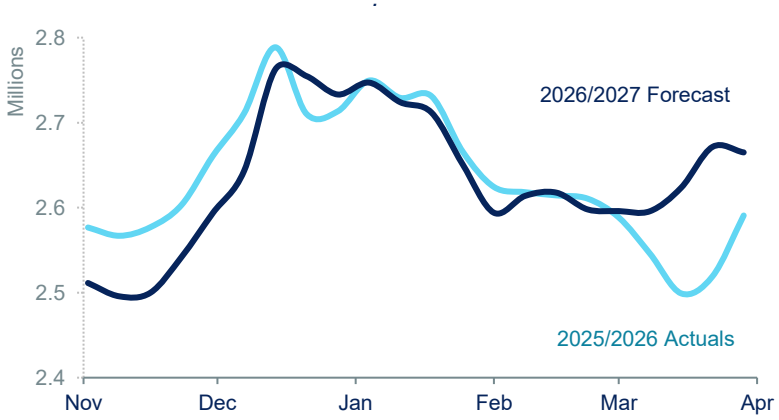
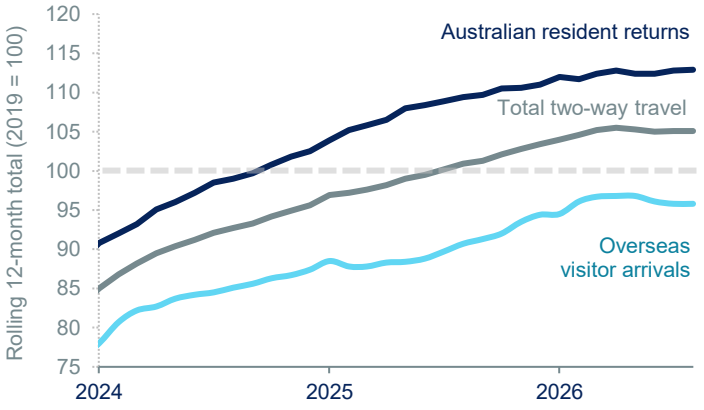


Figure 6. International travel activity.

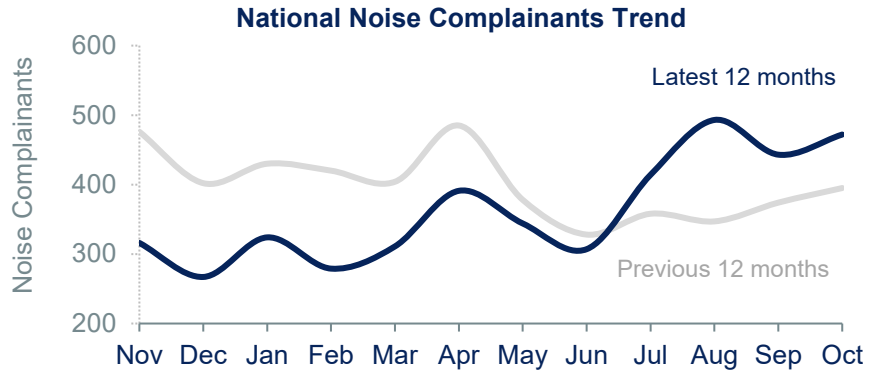


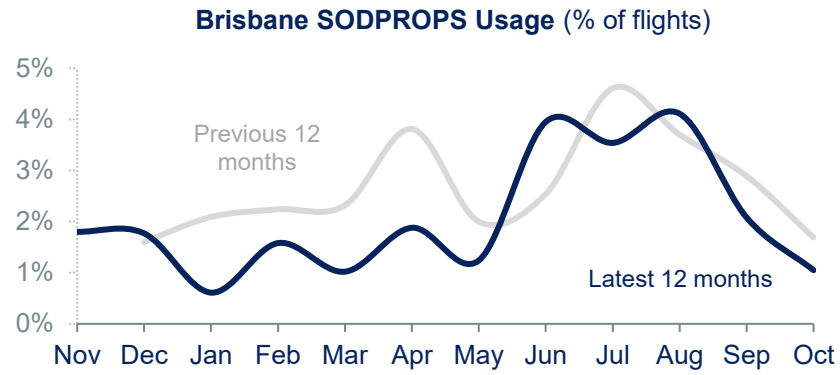
Sources: (1) Bloomberg (2) ABS - Unemployment (3) NAB Business Survey - September 2026 (4) ABS - CPI (5) CAPA (6) ABS - overseas arrivals and departures.

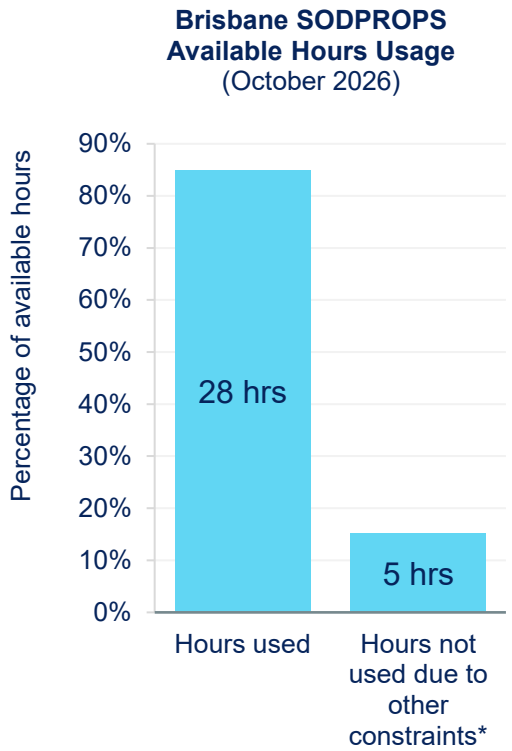
Social factors: aircraft noise

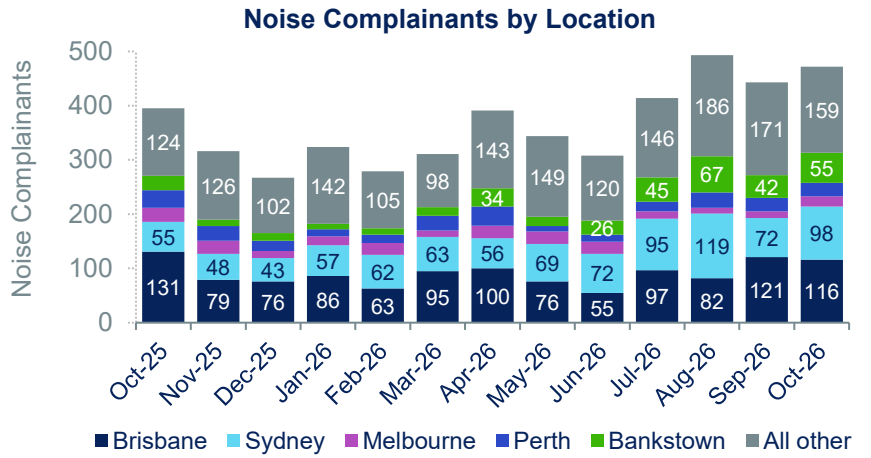
The commencement of passenger operations at Western Sydney International Airport underscores community sensitivity to airspace changes driven by operational and safety requirements. We are working closely with operators to ensure adherence to published flight and noise abatement procedures wherever safe and feasible. Additionally, in response to Package 4 of the Noise Action Plan for Brisbane, Airservices recently released respite and altitude improvement options that will provide noise relief to over half a million residents. Despite above-average rainfall limiting suitable conditions, Simultaneous Opposite Direction Parallel Runway Operations were delivered 82% of available hours at Brisbane.

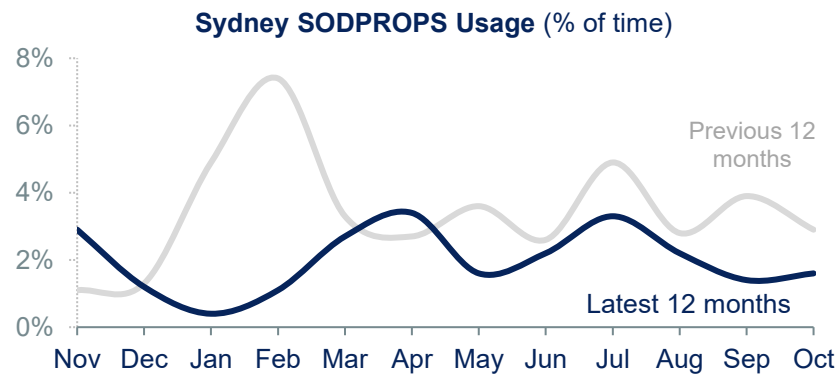
Figure 7. Aircraft noise complainants trend (left), SODPROPS usage trend at Brisbane and Sydney (middle) and SODPROPS available hours usage at Brisbane (right).









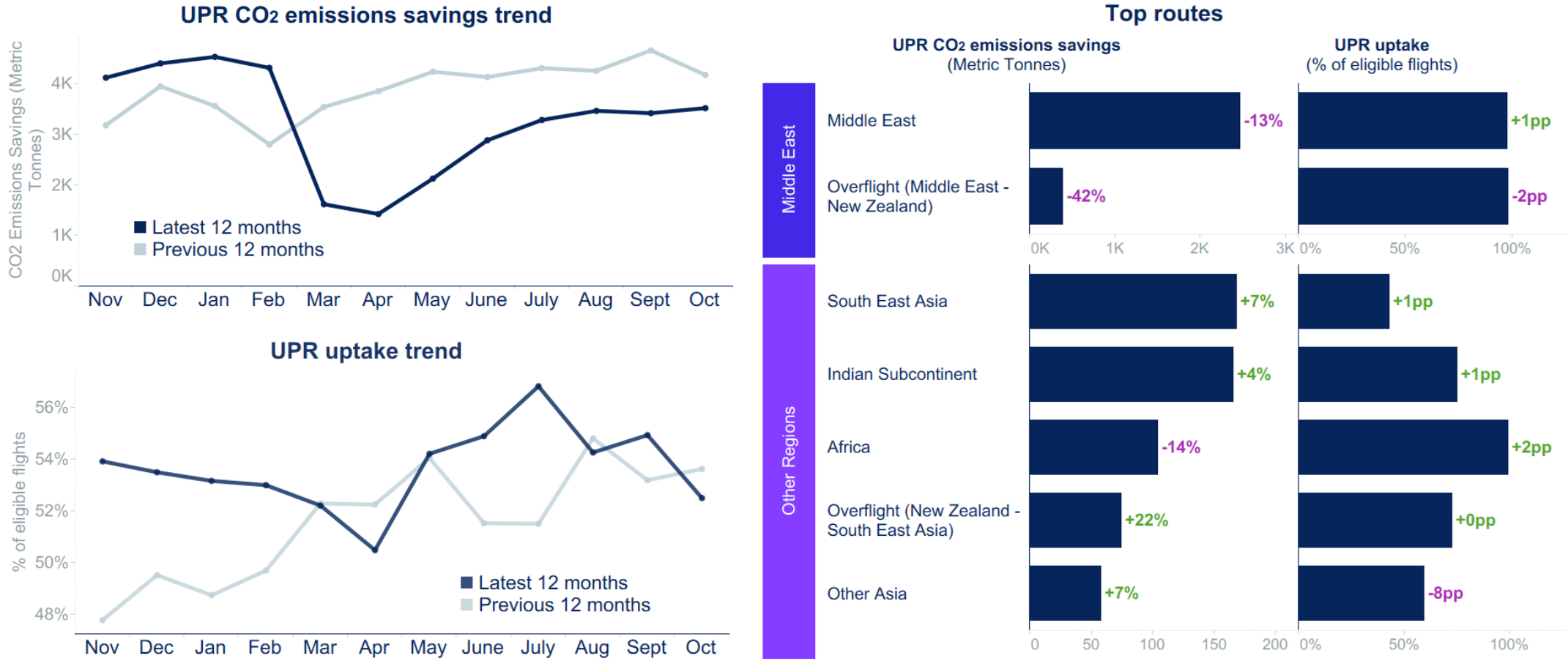


Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool (website).
* Usage constraints include airport maintenance (4 hours), military operations (0 hours), conflicting airfield operations (0 hours), periods with no aircraft movements (0 hours), and Airservices staffing (1 hour).
Excludes hours with operational constraints attributable to weather-related factors (e.g. unstable conditions) – 1 hour.

Social factors: aircraft emissions

Long-haul User Preferred Routes (UPR) saved over 3,500 tons of emissions in October, demonstrating the value of efficient routing. Although emissions savings from Middle East routes were 16% lower than last October's level, growing adoption across Asia and New Zealand provides broader potential to expand these benefits.

Figure 8. Monthly CO_2 emissions savings from User Preferred Routes and uptake among eligible flights (left), with October 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. CO_2 emissions savings are measured across the entire flight segment within Australian airspace.

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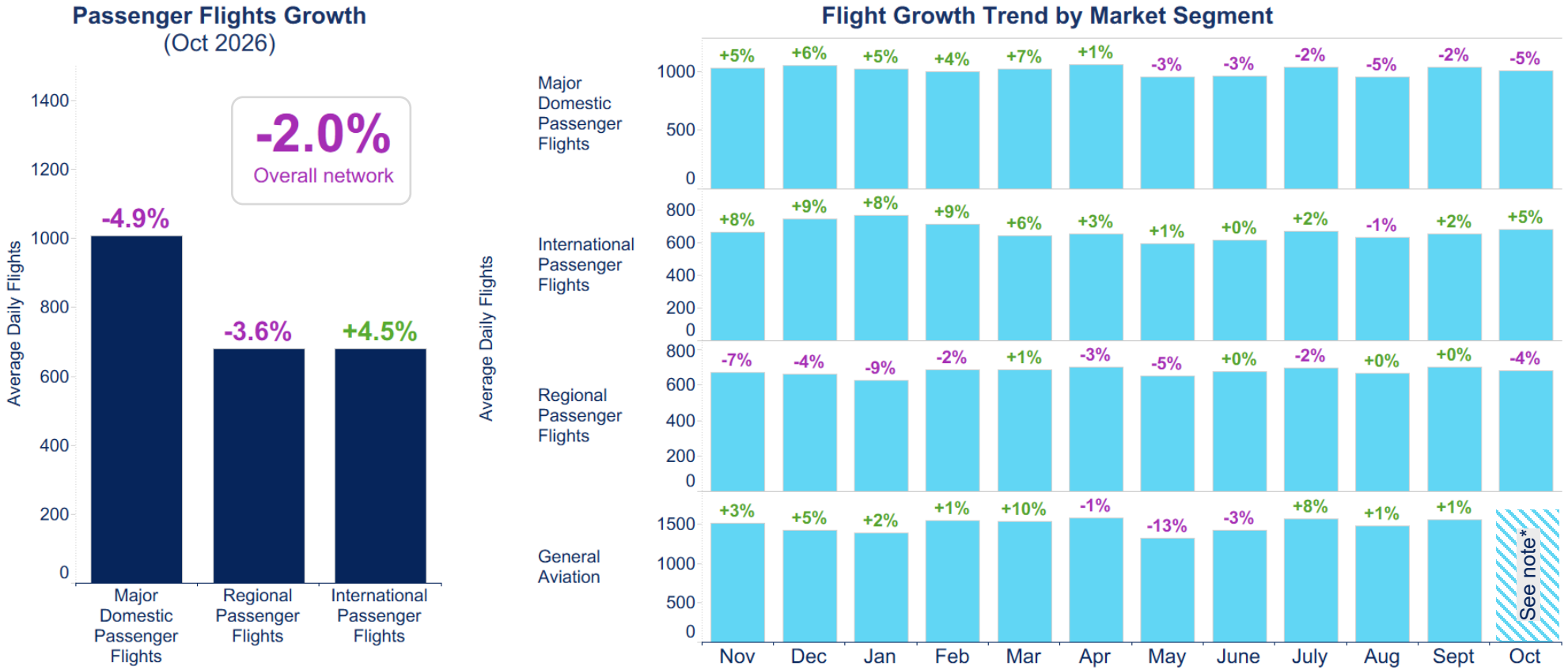
Australian aviation: domestic and international markets



State of Australian aviation growth

Aviation activity in October reflected the seasonal moderation following the September peak period. Major domestic aircraft movements remained 2-5% below prior-year levels for the sixth consecutive month, as airlines continued to prioritise capacity discipline and yield optimisation. International traffic grows at a measured rate, mainly driven by the Asia-Pacific markets.

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

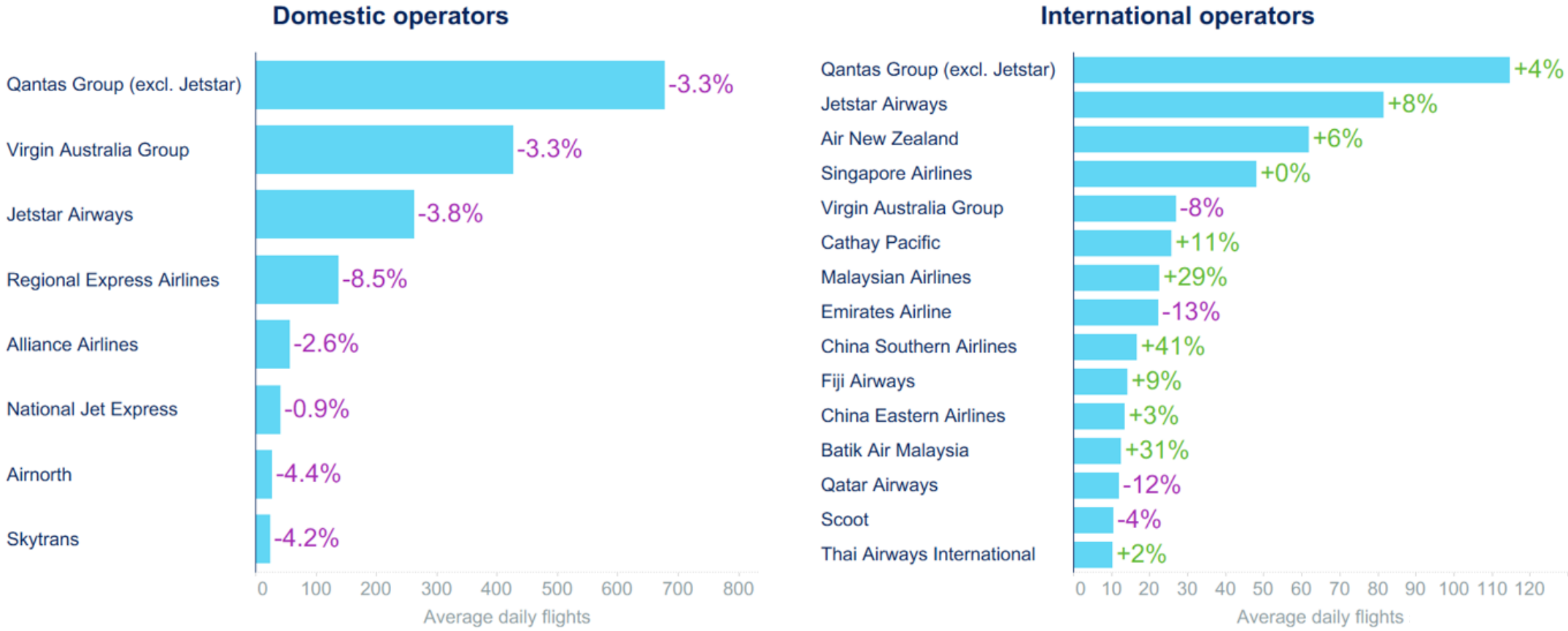


Source: Airservices ODAS (includes airline flights only).
* General aviation data is one month in arrears.

Top aircraft operators

Growth is concentrated among operators with the scale to absorb higher fuel and operating costs while maintaining capacity discipline. The resources sector continues to support resilience for some regional and charter operators.

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

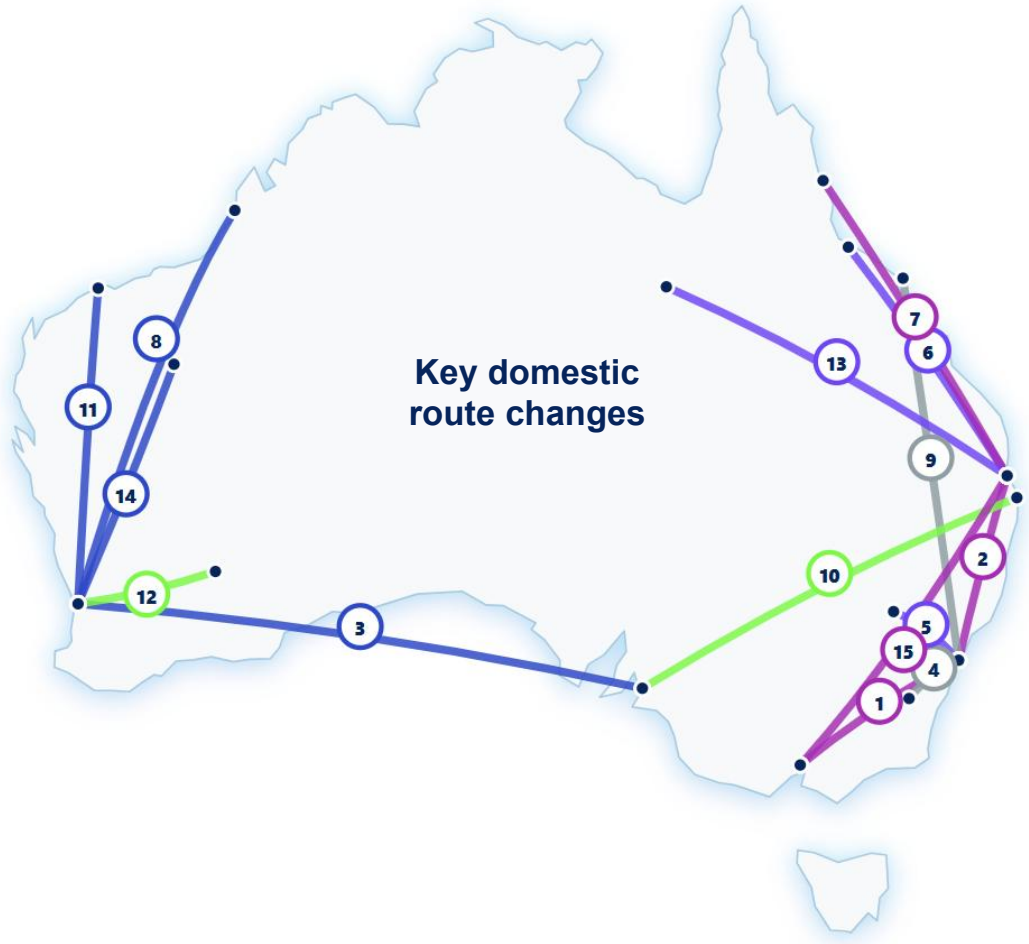


Source: Airservices ODAS (includes airline flights only).
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

Elevated operating costs and economic uncertainty are accelerating a shift towards disciplined capacity management and fleet modernisation. Airlines are increasingly relying on higher load factors, larger next-generation aircraft and targeted network growth, rather than additional frequencies, to support financial sustainability. As a result, passenger demand can remain resilient without corresponding growth in aircraft movements, with demand, service frequency and capacity increasingly diverging across markets, routes and airports.

Figure 11. Key domestic route changes based on year-on-year comparison for April-July 2026, capturing the period since the onset of the Middle East conflict.



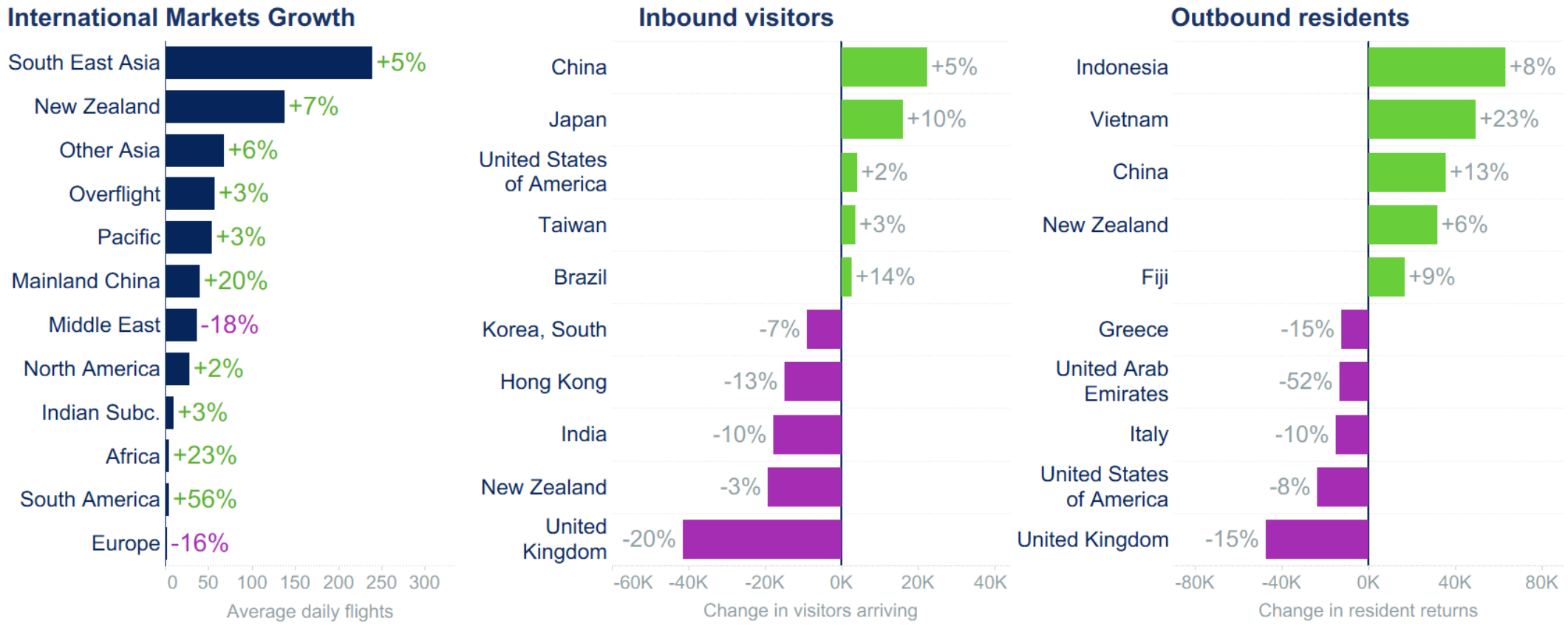
Route features	Examples
High load factor major routes	1: Melbourne–Sydney 2: Brisbane–Sydney 7: Brisbane–Cairns 15: Melbourne–Brisbane
Larger aircraft replacing frequency	5: Dubbo–Sydney 6: Brisbane–Townsville 13: Brisbane–Mount Isa
Demand-led growth	10: Adelaide–Gold Coast 12: Kalgoorlie–Perth
Capacity increase ahead of demand	3: Adelaide–Perth 8: Broome–Perth 11: Karratha–Perth 14: Newman–Perth
Overall contraction	4: Canberra–Sydney 9: Hamilton Island–Sydney

Source: BITRE domestic routes, with latest available data to July 2026.

International markets

Recovery in Middle East markets continues to be constrained by ongoing geopolitical uncertainty. By contrast, the Asia-Pacific region is the primary engine of global aviation growth. This is reflected in the Australian outbound travel growth concentrated in neighbouring tourism markets, such as Indonesia, Vietnam, China, New Zealand and Fiji.

Figure 12. International markets growth by average daily flights for October 2026, with year-on-year change (left) and five largest changes by country in overseas arrivals and departures for April-August 2026, with year-on-year change (middle, right).

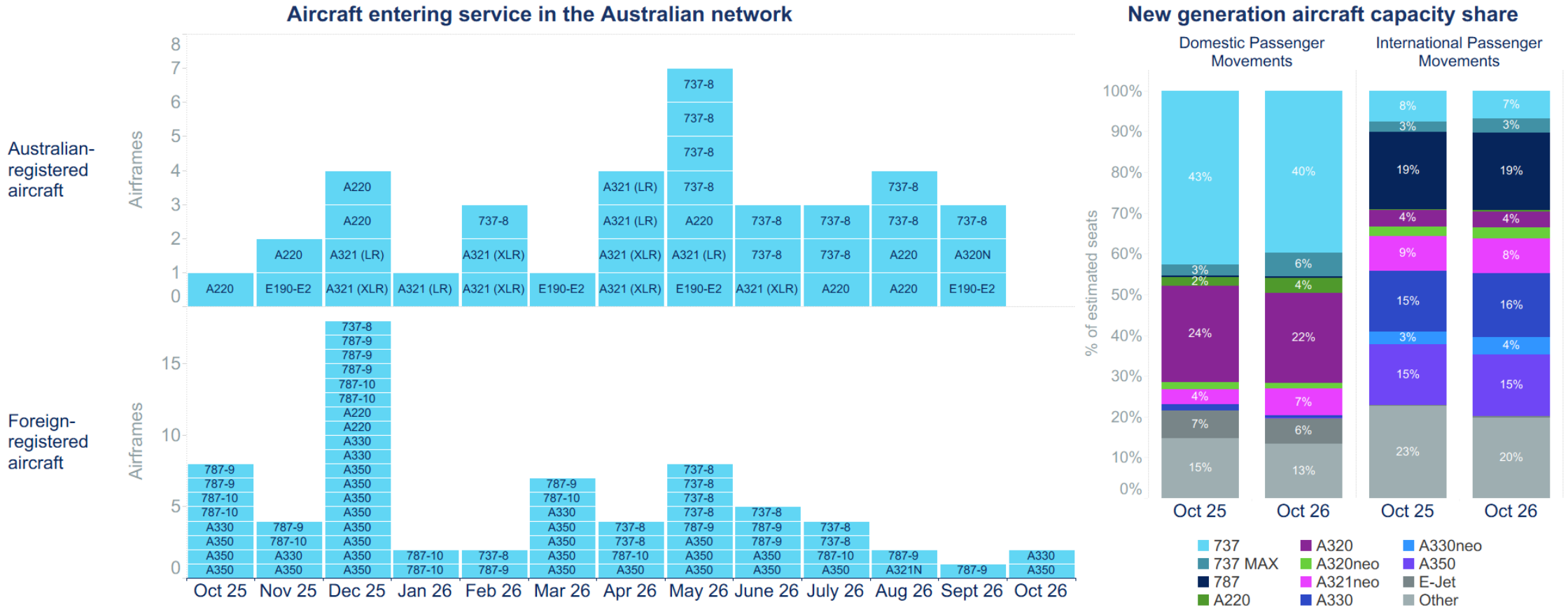


Source: Airservices ODAS (includes airline flights only) and ABS overseas arrivals and departures, latest data to August 2026.
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

New-generation aircraft are becoming an increasingly prominent feature of the Australian network. The A220 fleet is now operating across 30 regional and interstate routes, three times the network coverage of two years earlier, while A321neo-family and 737 MAX aircraft account for up to 30% of trunk-route flights, depending on airline. These aircraft are providing airlines with greater flexibility to optimise capacity, extend network reach and improve fuel and operating efficiency.

Figure 13. Aircraft newly entering in the Australian network monthly.



Source: CAPA (includes airline flights only). Only aircraft with at least 4 flights in a month are shown on left.

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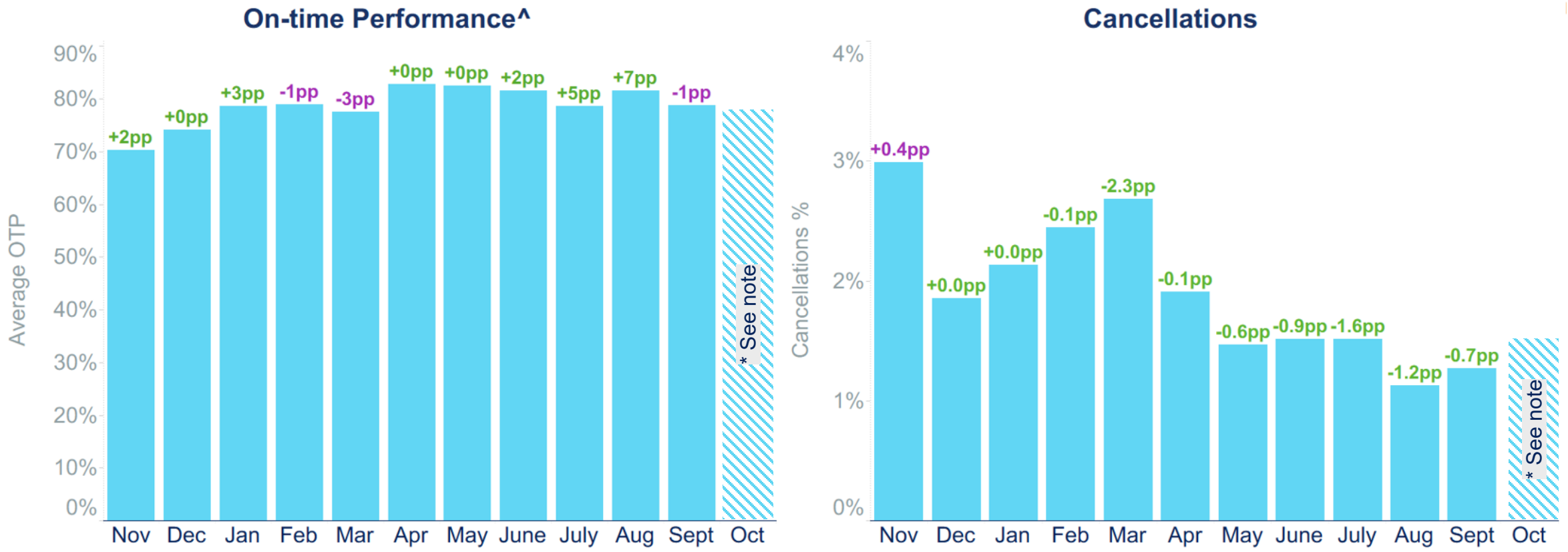
Australian aviation: network performance



Industry performance

Supported by proactive peak-period planning and industry coordination, September's cancellation rate was 1.3%, well below the long-term average of over 2%, and all major airports saw improvements in cancellation rates. Overall industry on-time performance held steady around 79%.

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



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



Flight Schedules

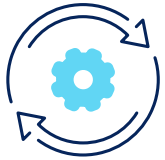
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline flight schedules are then based. Airlines send their final flight schedules to Airservices Network Operations Management Centre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



Capacity

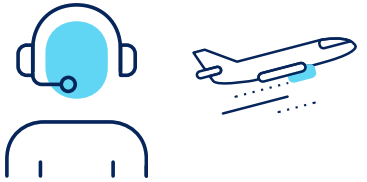
Airservices facilitates the available airport capacity through a collaborative process with airlines and the Bureau of Meteorology. Factors which impact available capacity include:

- 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.

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 October, ATFM ground delays accounted for 2.2% of total network delay, with no Airservices-attributable ground delays and improved ATFM outcomes in Sydney reflecting the ongoing focus on service resilience. Weather disruptions (such as thunderstorms across New South Wales, Victoria and Queensland in late October) and demand exceeding scheduled runway capacity at Perth Airport contributed to the majority (80%) of ATFM ground delays.

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

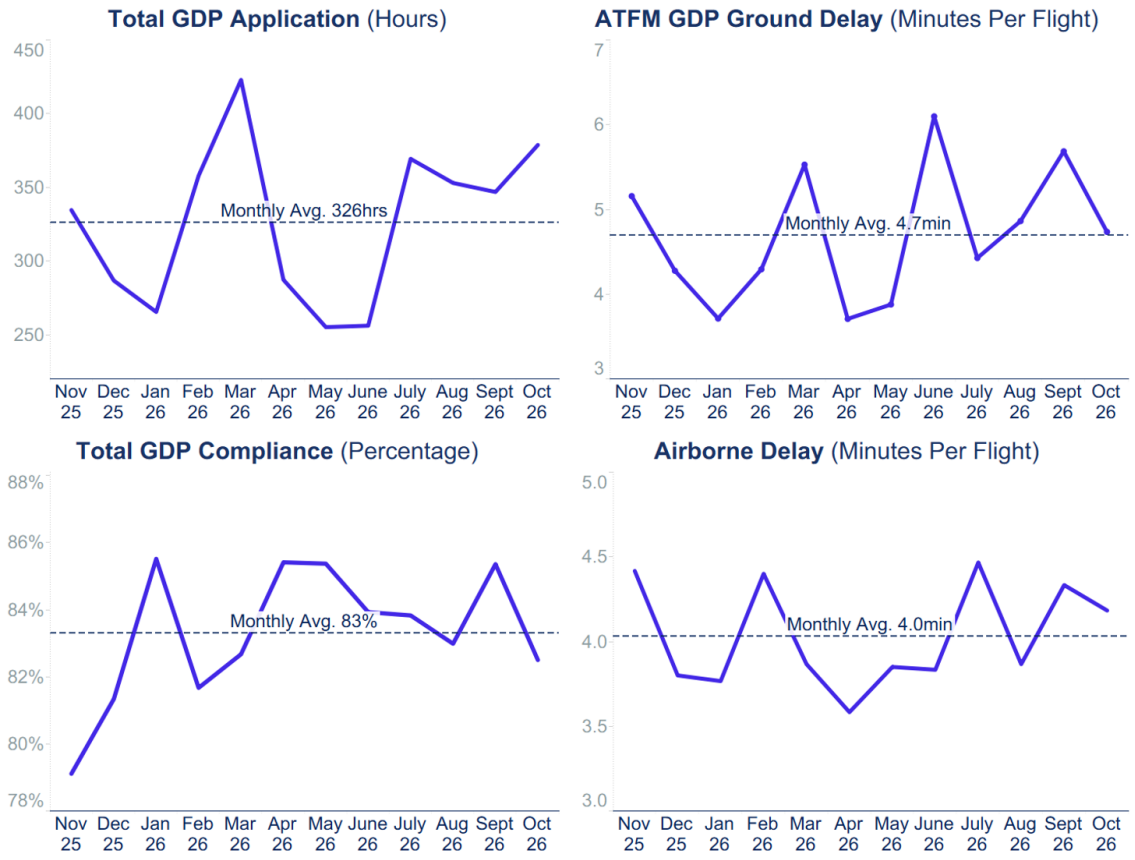
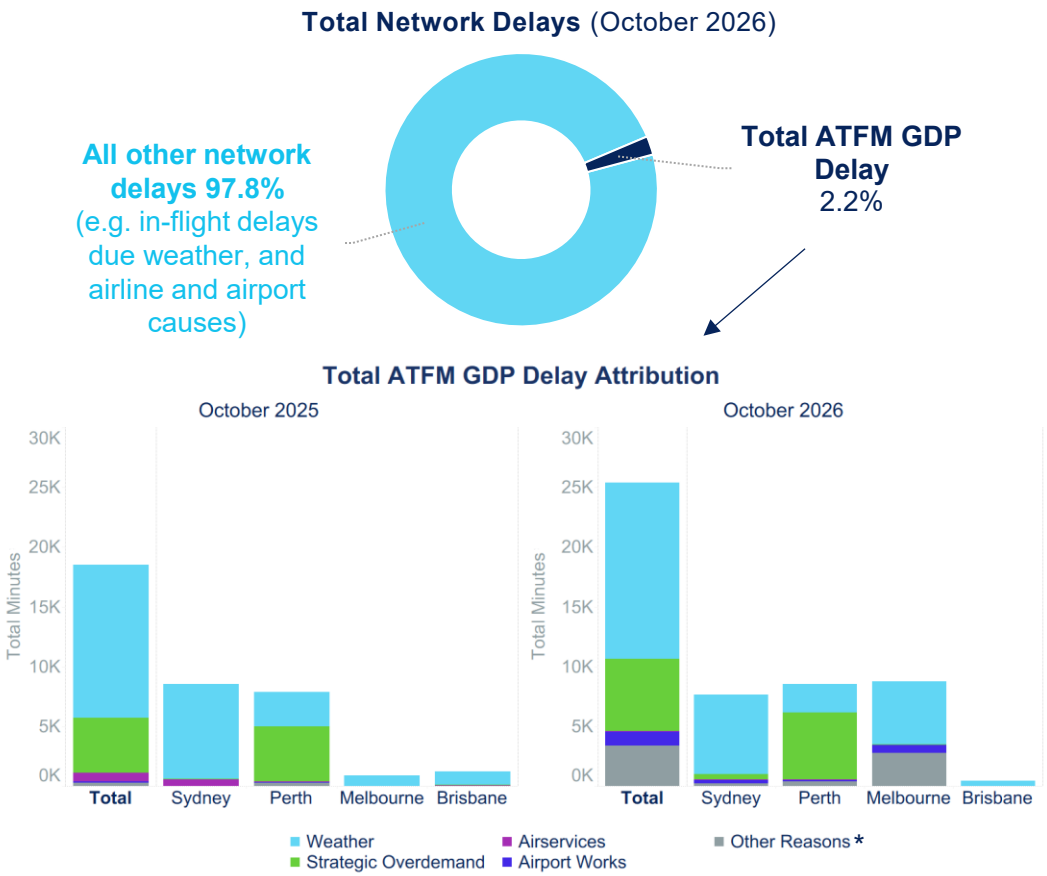


Figure 16. ATFM (GDP) delay minutes as part of total network delays (top) and by airport and attribution (bottom).



Source: Airservices ODAS.

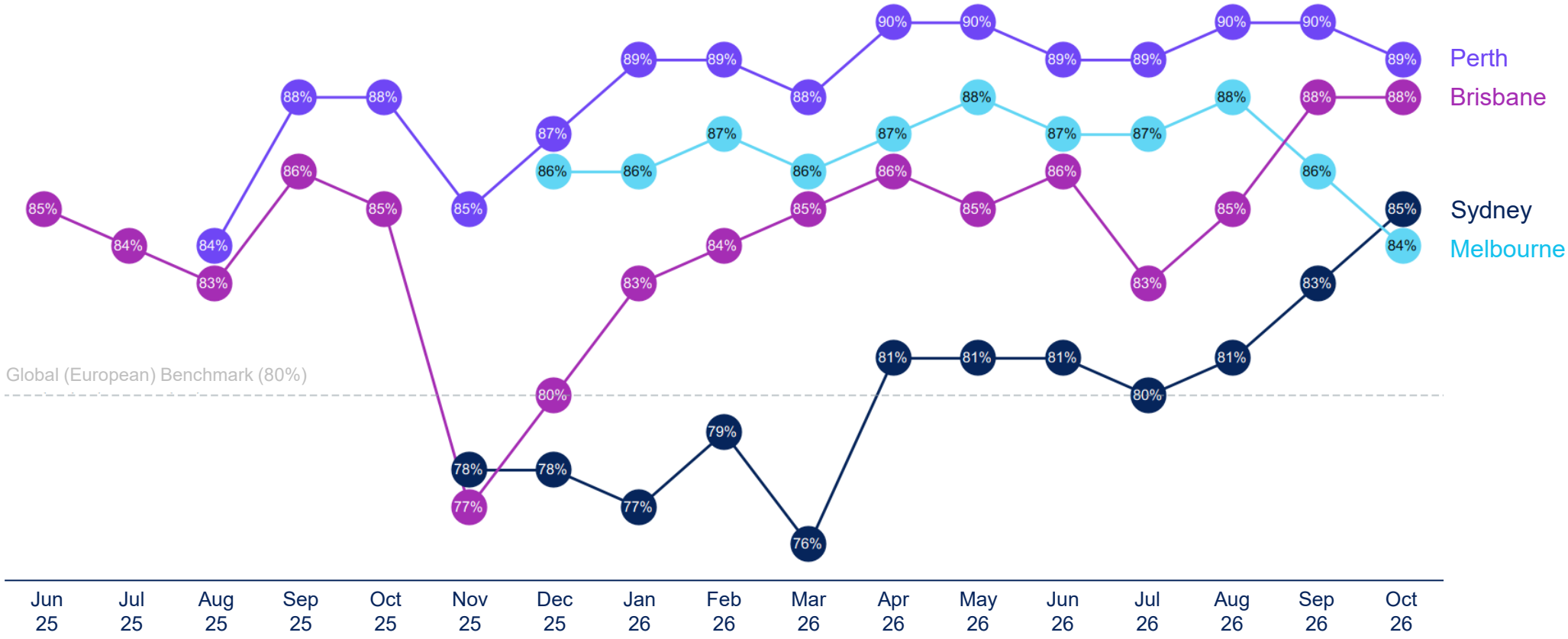
GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot. Ground delay is measured as the average, and airborne delay is measured as the 75th percentile.

* During low cloud and reduced visibility, Sydney and Melbourne Airport operated with additional spacing between arriving aircraft, providing operational assurance in the event of a missed approach. A temporary increase in spacing was introduced while Airservices reviewed the operating arrangements with CASA. Following confirmation that the long-standing arrangements remain safe and compliant, the temporary measure concluded 17 November 2026.

Airport Collaborative Decision Making (A-CDM)

Despite protected industrial action affecting ground service organisations at Sydney Airport, disruption impacts were contained through industry collaboration supported by A-CDM. By providing a shared operating picture across airport and airline stakeholders, A-CDM enabled informed decisions and coordinated responses as conditions evolved. Melbourne Airport is also working closely with their ground service providers to address a recent reduction in compliance to A-CDM procedures critical to airport operational predictability.

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



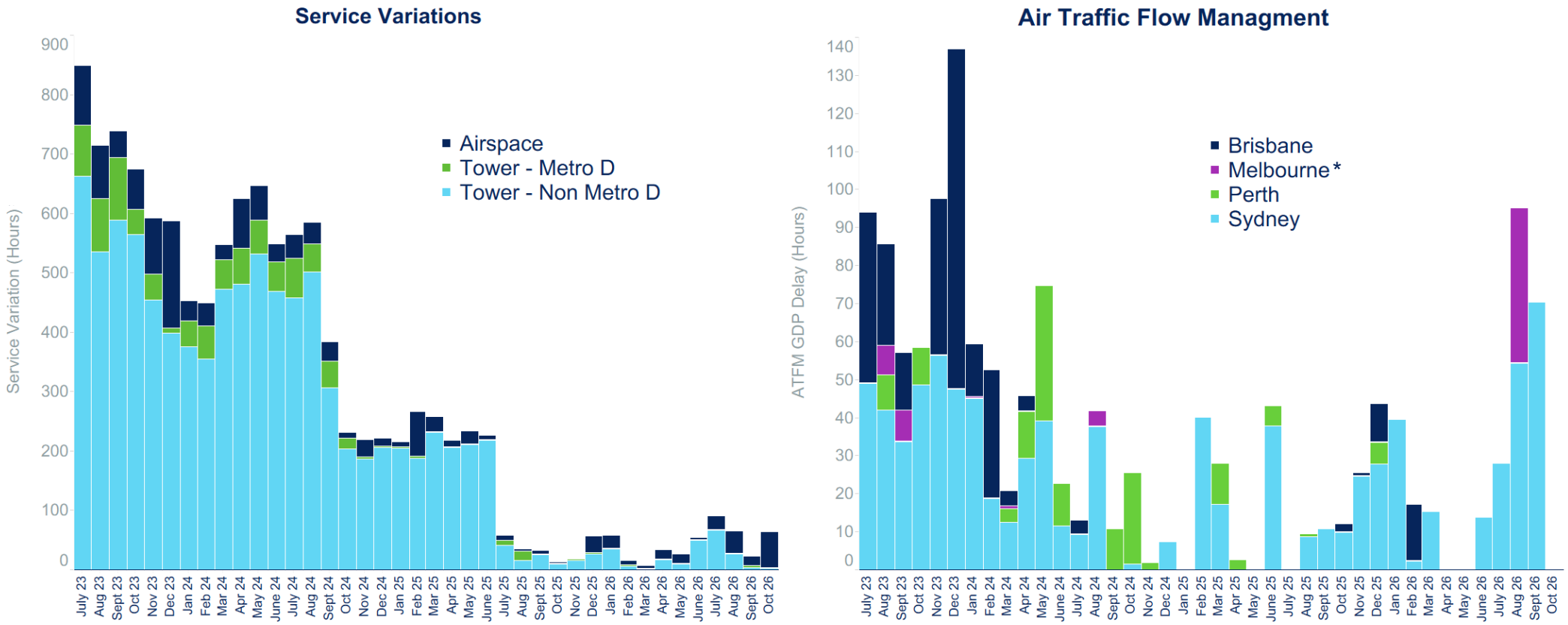
Source: A-CDM.

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

The continued focus on service resilience, particularly in Sydney, is delivering improved outcomes for our customers. There was no Airservices-attributable ATFM ground delay in October. Airspace service variations were limited to two locations and aerodrome service variations are at the lowest level in four years. However, we recognise that sustained effort, consistency and predictability is critical to stabilising our performance over the long-term. We continue to implement targeted improvements across workforce planning, recruitment, training and endorsement pathways, rostering and system improvements to strengthen operational resilience and support the reliable delivery of services across the network.

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

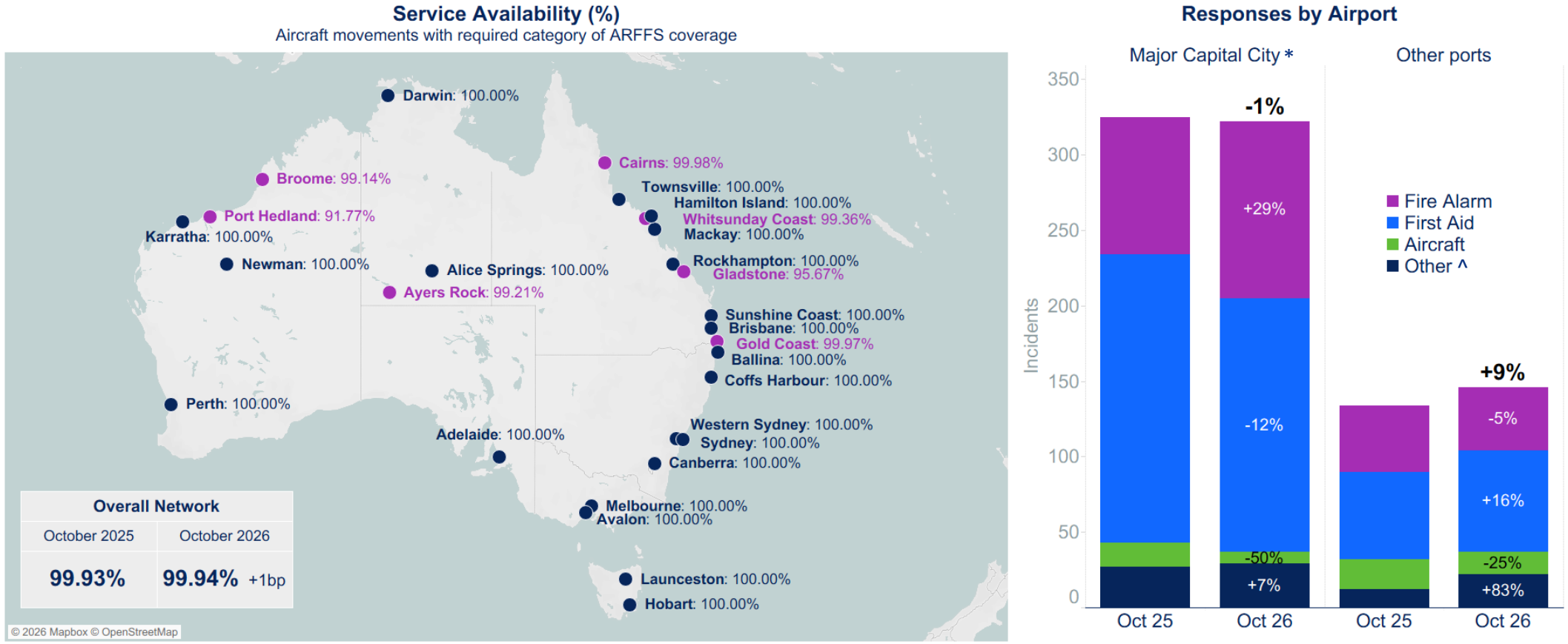


Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at aerodromes, services in adjacent airspace are generally unaffected (e.g. provision of flight, traffic information and 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.
* During low cloud and reduced visibility, Sydney and Melbourne Airport operated with additional spacing between arriving aircraft, providing operational assurance in the event of a missed approach. A temporary increase in spacing was introduced while Airservices reviewed the operating arrangements with CASA. Following confirmation that the long-standing arrangements remain safe and compliant, the temporary measure concluded 17 November 2026.

Aviation Rescue Fire Fighting Service

National ARFF service availability remained above 99.9%, while meeting growing airport response needs. This includes the introduction of ARFF service at Western Sydney International Airport, featuring next-generation hybrid electric vehicles and advanced facilities to support the commencement of passenger operations from 25 October.

Figure 19. ARFFS service availability by airport and overall network (left) and emergency responses (right) in October 2026 with year-on-year change.



Source: Airservices ODAS and ARFFS TRAX. Service availability is based on aircraft movements that received applicable category of ARFFS coverage during published ERSA hours.
*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 other events - including hazardous materials, medical emergencies, security threats, non-aircraft fires, and mutual aid requests.

For more information

stakeholder@airservicesaustralia.com