



# Growth Potential for Australian Airlines

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## Existing Bilateral Markets

Markets served by an Australian airline during the Northern Summer 2024 season

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
Canada	Majors*: 9,000 seats	708 seats	8,292 seats	1,171%
	Others: Open	0 seats	Unlimited	Unlimited
Chile	4,000 seats	944 seats	3,056 seats	324%
China	Open	1,485 seats	Unlimited	Unlimited
Cook Islands	3,000 seats	1,486 seats	1,514 seats	102%
Fiji	Majors: 6,900 seats	6,863 seats	37 seats	0.5%
	Others: Open	0 services	Unlimited	Unlimited
France	3.0 units <sup>5</sup>	2.0 units	1.0 units	50%
Hong Kong	Majors: 70 services	14 services	56 services	400%
	Others: Open	0 seats	Unlimited	Unlimited
India	Majors <sup>^</sup> : Open	2,040 seats	Unlimited	Unlimited
Indonesia	Majors*: 25,000 seats	24,901 seats	99 seats	0.4%
	Others: Open	7,372 seats	Unlimited	Unlimited
	ERP <sup>4</sup> : 2,500 seats	0 seats	2,500 seats	-
Italy	7 services	3 services	4 services	133%
Japan	Open	44 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
New Caledonia	2,400 seats	870 seats	1,530 seats	176%
New Zealand	Open	43,628 seats	Unlimited	Unlimited
PNG	3,520 seats	1,566 seats	1,954 seats	125%
Philippines	Majors <sup>~</sup> : 10,700 seats	2,079 seats	8,621 seats	415%
	Others: Open	0 seats	Unlimited	Unlimited

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
Samoa	2,000 seats	1,402 seats	598 seats	43%
Singapore	Open	16,777 seats	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	282 seats	1,718 seats	609%
	Others: Open	0 seats	Unlimited	Unlimited
South Africa	Majors: 21 services	6 services	15 services	250%
	Others: Open	0 services	Unlimited	Unlimited
South Korea	Majors: 9,500 seats	3,533 seats	5,967 seats	169%
	Others: Open	0 seats	Unlimited	Unlimited
Thailand	Majors <sup>#</sup> : 20,000 seats	8,164 seats	11,836 seats	145%
	Others: Open	0 seats	Unlimited	Unlimited
Timor-Leste	21 services	7 services	14 services	200%
Tonga	Majors: 1,600 seats	174 seats	1,426 seats	820%
	Others: Open	0 seats	0 seats	Unlimited
United Kingdom	Open	5,047 seats	Unlimited	Unlimited
United States	Open	15,575 seats	Unlimited	Unlimited
Vanuatu	Majors <sup>*</sup> : 4,000 seats	870 seats	3,130 seats	360%
	Others: Open	0 seats	Unlimited	Unlimited
Vietnam	Majors <sup>^</sup> : 56 services	7 services	49 services	700%
	Others: Open	0 services	Unlimited	Unlimited
	ERP <sup>4</sup> : 7 services	0 services	7 services	-

<sup>1</sup>All figures are on an 'each way, each week' basis. Sub-limits may apply in some markets. 'Majors' refers to Australia's major gateway airports of Sydney, Melbourne, Brisbane and Perth.

\* 'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth.

<sup>^</sup> 'Majors' refers to Australia's major airports of Sydney, Western Sydney, Melbourne, Brisbane and Perth.

<sup>^</sup> 'Majors' refers to Mumbai, New Delhi, Kolkata, Chennai, Bangalore and Hyderabad.

<sup>~</sup> 'Majors' refers to Manila and Clark.

<sup>#</sup> 'Majors' refers to Bangkok, Phuket, Utapao and Chiang Rai.

<sup>2</sup>Capacity utilisation is the maximum figure based on approved timetables at the start of the Northern Summer 2024 scheduling season.

<sup>3</sup>'Growth potential' is calculated as the ratio of available capacity to capacity in use.

<sup>4</sup>The Enhanced Regional Package (ERP) provides additional capacity in agreed markets (up to a limit) for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.

<sup>5</sup>Units relate to the aircraft seat capacity with a substitution for different aircraft types. For example, an aircraft with 400 seats and above = 1 unit, 200-239 seats = 0.5 units and below 150 seats = 0.25 units.

# Unserviced Markets

Markets without services operated by an Australian airline during the Northern Summer 2024 season

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
<b>Argentina</b>	2,800 seats	<b>Ethiopia</b>	7 services
<b>Austria</b>	Open	<b>Finland</b>	2,800 seats
<b>Azerbaijan</b>	Majors: 7 services Others: Open	<b>France (Polynesia)</b>	7 services
<b>Bahrain</b>	Majors: 12 services Others: Open	<b>Germany</b>	25 services
<b>Bangladesh</b>	5 services	<b>Greece</b>	Majors: 7 services Others: Open
<b>Belgium</b>	Majors*: 7 services Others: Open	<b>Hungary</b>	Majors: 7 services Others: Open
<b>Brazil</b>	14 services	<b>Ireland</b>	Majors: 7 services Others: Open
<b>Brunei</b>	Majors: 27 services Others: Open	<b>Israel</b>	Majors: 7 services Others: Open
<b>Cambodia</b>	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services	<b>Jordan</b>	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
<b>Cote d'Ivoire</b>	Majors: 7 services Others: Open	<b>Kenya</b>	Majors: 7 services Others: Open
<b>Croatia</b>	7 services	<b>Kiribati</b>	Majors: 7 services Others: Open
<b>Cyprus</b>	Larnaka & Pafos: Open	<b>Kuwait</b>	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
<b>Czech Republic</b>	Majors: 7 services Others: Open	<b>Laos</b>	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
<b>Denmark</b>	2,800 seats	<b>Lebanon</b>	2 services
<b>Egypt</b>	Majors: 7 services Others: Open	<b>Macau</b>	3 services

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
<b>Malaysia</b>	Majors: 42,100 seats Others: Open	<b>Peru</b>	7 services
<b>Malta</b>	Majors: 2 services Others: Open	<b>Poland</b>	Majors: 2,800 seats Others: Open
<b>Mexico</b>	Majors: 4 services Others: Open	<b>Qatar</b>	Majors: 28 services Others: Open ERP <sup>2</sup> : 7 services
<b>Morocco</b>	Majors <sup>^</sup> : 7 services Others: Open	<b>Saudi Arabia</b>	Riyadh & Jeddah: 6 services Dammam: Open
<b>Myanmar</b>	Majors: 7 services Others: Open	<b>Serbia</b>	Majors: 7 services Others: Open
<b>Nauru</b>	Majors*: 7 services Others: Open	<b>Seychelles</b>	Majors: 7 services Others: Open
<b>Nepal</b>	Kathmandu: 7 services Others: 28 services	<b>Spain</b>	Madrid & Barcelona: 7 services Others: Open
<b>Netherlands</b>	2,800 seats	<b>Sri Lanka</b>	Majors <sup>o</sup> : 28 services Others: Open
<b>Nigeria</b>	7 services	<b>Sweden</b>	2,800 seats
<b>Niue</b>	500 seats	<b>Switzerland</b>	Open
<b>Norway</b>	2,800 seats	<b>Taiwan</b>	Open
<b>Oman</b>	Majors: 4 services Others: Open	<b>Türkiye</b>	Majors <sup>o</sup> : 21 services Others: Open
<b>Pakistan</b>	4 services	<b>United Arab Emirates</b>	Majors: 168 services Others: Open
<b>Palau</b>	1,200 seats	<b>Zimbabwe</b>	1,600 seats

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\* 'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth.

<sup>o</sup> 'Majors' refers to Australia's major airports of Sydney, Western Sydney, Melbourne, Brisbane and Perth.

<sup>^</sup> 'Majors' refers to Casablanca, Marrakech, Agadir and Rabat.

<sup>2</sup>The Enhanced Regional Package (ERP) provides additional capacity in agreed markets (up to a limit) for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.