



Growth Potential for Australian Airlines

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Existing Bilateral Markets

Markets served by an Australian airline during the Northern Winter 2025-2026 season

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Canada	Majors [~] : 100 services Others: Open	7 services 0 seats	93 services Unlimited	1329% Unlimited
Chile	28 services	7 services	21 services	300%
Cook Islands	3,000 seats	1,486 seats	1,514 seats	102%
Fiji	Majors: 6,900 seats Others: Open	6,858 seats 0 services	42 seats Unlimited	0.6% Unlimited
France	3.0 units ⁵	1.5 units	1.5 units	100%
Hong Kong	Majors [~] : 91 services Others: Open	14 services 0 seats	77 services Unlimited	550% Unlimited
India	Majors [^] : Open	8 services	Unlimited	Unlimited
Indonesia	Majors [*] : 25,000 seats Others: Open ERP ⁴ : 2,500 seats	24,862 seats 7,126 seats 2,320 seats	138 seats Unlimited 180 seats	0.6% Unlimited 7.8%
Japan	Open Haneda: 21 services	43 services 16 services	Unlimited 5 services	Unlimited 31%
New Caledonia	2,400 seats	987 seats	1,596 seats	199%
New Zealand	Open	349 services	Unlimited	Unlimited
Palau	1,200 seats	174 seats	1,026 seats	590%
Papua New Guinea	3,520 seats	1,218 seats	2,302 seats	189%
Philippines	Majors [~] : 60 services Others: Open	15 services 3 services	45 services Unlimited	300% Unlimited

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Qatar	Majors: 28 services	28 services	0 services	0%
	Others: Unlimited	0 services	Unlimited	Unlimited
	ERP ⁴ : 7 services	0 services	7 services	-
Samoa	2,000 seats	1,780 seats	220 seats	12.4%
Singapore	Open	70 services	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	376 seats	1,624 seats	432%
	Others: Open	0 seats	Unlimited	Unlimited
South Africa	Majors ⁵ : 21 services	9 services	12 services	133%
	Others: Open	0 services	Unlimited	Unlimited
South Korea	Majors: 9,500 seats	3,350 seats	6,150 seats	184%
	Others: Open	0 seats	Unlimited	Unlimited
	Jeju: Open	0 seats	Unlimited	Unlimited
Thailand	Majors ⁶ : 20,000 seats	10,844 seats	9,156 seats	84%
	Others: Open	0 seats	Unlimited	Unlimited
Timor-Leste	21 services	7 services	14 services	200%
Tonga	Majors: 1,600 seats	522 seats	1,078 seats	207%
	Others: Open	0 seats	0 seats	Unlimited
United Kingdom	Open	14 services	Unlimited	Unlimited
United States	Open	50 services	Unlimited	Unlimited
Vanuatu	Majors ⁷ : 4,000 seats	3,634 seats	366 seats	10%
	Others: Open	0 seats	Unlimited	Unlimited
Vietnam	Majors ⁸ : 84 services	7 services	77 services	1100%
	Others: Open	0 services	Unlimited	Unlimited

¹ 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.

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

^ 'Majors' refers to Mumbai, New Delhi, Kolkata, Chennai, Bangalore and Hyderabad.

ε 'Majors' refers to Johannesburg, Cape town and Durban.

~ 'Majors' refers to Manila and Bulacan.

'Majors' refers to Bangkok, Phuket, Utao and Chiang Rai.

² Capacity utilisation is the maximum figure based on approved timetables at the start of the Northern Winter 2025-2026 scheduling season.

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

⁴ 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.

⁵ 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.

Unserved Markets

Markets without services operated by an Australian airline during the Northern Winter 2025-2026 season

Market	Capacity limit ¹	Market	Capacity limit ¹
Argentina	2,800 seats	Ethiopia	7 services
Austria	Open	Finland	2,800 seats
Azerbaijan	Majors: 7 services Others: Open	French Polynesia	7 services
Bahrain	Majors: 12 services Others: Open	Germany	25 services
Bangladesh	5 services	Greece	Majors: 7 services Others: Open
Belgium	Majors*: 7 services Others: Open	Hungary	Majors: 7 services Others: Open
Brazil	14 services	Ireland	Majors: 7 services Others: Open
Brunei	Majors: 27 services Others: Open	Israel	Majors: 7 services Others: Open
Cambodia	Majors: 7 services Others: 7 services ERP ² : 7 services	Italy	Majors ^λ : 7 services
China	Open	Jordan	Majors ^π : 7 services Others: Open ERP ² : 7 services
Cote d'Ivoire	Majors: 7 services Others: Open	Kenya	Majors: 7 services Others: Open
Croatia	7 services	Kiribati	Majors: 7 services Others: Open
Cyprus	Larnaka & Pafos: Open	Kuwait	Majors: 7 services Others: Open ERP ² : 7 services
Czech Republic	Majors ^π : 7 services Others: Open	Laos	Majors: 7 services Others: 7 services ERP ² : 7 services
Denmark	2,800 seats	Latvia	14 services
Egypt	Majors: 7 services	Lebanon	2 services

Market	Capacity limit ¹	Market	Capacity limit ¹
	Others: Open		
Malaysia	Majors: 67,500 seats Others: Open	Macau	3 services
Malta	Majors: 3 services Others: Open	Peru	7 services
Mauritius	Majors [∞] : 7 services Others: Open	Poland	Majors [∞] : 2,800 seats Others: Open
Mexico	Majors: 4 services Others: Open	Rwanda	14 services
Mongolia	14 services	Saudi Arabia	Riyadh & Jeddah: 6 services Dammam: Open
Morocco	Majors [^] : 7 services Others: Open	Serbia	Majors [∞] : 7 services Others: Open
Myanmar	Majors: 7 services Others: Open	Seychelles	Majors [∞] : 7 services Others: Open
Nauru	Majors [*] : 7 services Others: Open	Spain	Madrid & Barcelona: 7 services Others: Open
Nepal	Kathmandu: 7 services Others: 28 services	Sri Lanka	Majors [∞] : 42 services Others: Open
Netherlands	2,800 seats	Sweden	2,800 seats
Nigeria	7 services	Switzerland	Open
Niue	500 seats	Taiwan	Open
Norway	2,800 seats	Türkiye	Majors [∞] : 35 services Others: Open
Oman	Majors: 4 services Others: Open ERP ² : 7 services	United Arab Emirates	Majors: 168 services Others: Open ERP ² : 21 services
Pakistan	4 services	Zimbabwe	1,600 seats

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[∞] 'Majors' refers to Australia's major airports of Sydney, Western Sydney, Melbourne, Brisbane and Perth.

^λ 'Majors' refers to Rome, Milan, Venice, Bologna and Pisa.

[^] 'Majors' refers to Casablanca, Marrakech, Agadir and Rabat.

²The 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.