



# Growth Potential for Australian Airlines

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## Existing Bilateral Markets

Markets served by an Australian airline during the Northern Summer 2025 season

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
Canada	Majors <sup>~</sup> : 100 services	3 services	97 services	3,233%
	Others: Open	0 seats	Unlimited	Unlimited
Chile	28 services	4 services	24 services	600%
Cook Islands	3,000 seats	1,718 seats	1,282 seats	75%
Fiji	Majors: 6,900 seats	6,807 seats	93 seats	1.4%
	Others: Open	0 services	Unlimited	Unlimited
France	3.0 units <sup>5</sup>	1.5 units	1.5 units	100%
Hong Kong	Majors <sup>~</sup> : 84 services	15 services	69 services	460%
	Others: Open	0 seats	Unlimited	Unlimited
India	Majors <sup>^</sup> : Open	8 services	Unlimited	Unlimited
Indonesia	Majors <sup>*</sup> : 25,000 seats	24,862 seats	138 seats	0.6%
	Others: Open	5,826 seats	Unlimited	Unlimited
	ERP <sup>4</sup> : 2,500 seats	2,320 seats	180 seats	7.8%
Italy	Majors <sup>^</sup> : 7 services	3 services	4 services	133%
Japan	Open	39 services	Unlimited	Unlimited
	Haneda: 21 services	14 services	7 services	50%
New Caledonia	2,400 seats	804 seats	1,596 seats	199%
New Zealand	Open	269 services	Unlimited	Unlimited
Palau	1200 seats	174 seats	1026 seats	590%
PNG	3,520 seats	1,218 seats	2302 seats	189%
Philippines	Majors <sup>~</sup> : 11,700 seats	3267 seats	8,433 seats	258%
	Others: Open	0 seats	Unlimited	Unlimited

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
<b>Qatar</b>	Majors: 28 services	21 services	7 services	33%
	Others: Unlimited	0 services	Unlimited	Unlimited
	ERP <sup>4</sup> : 7 services	0 services	7 services	-
<b>Samoa</b>	2,000 seats	1,432 seats	568	40%
<b>Singapore</b>	Open	70 services	Unlimited	Unlimited
<b>Solomon Islands</b>	Majors: 2,000 seats	376 seats	1,624 seats	432%
	Others: Open	0 seats	Unlimited	Unlimited
<b>South Africa</b>	Majors <sup>5</sup> : 21 services	6 services	15 services	250%
	Others: Open	0 services	Unlimited	Unlimited
<b>South Korea</b>	Majors: 9,500 seats	3,350 seats	6,150 seats	184%
	Others: Open	0 seats	Unlimited	Unlimited
	Jeju: Open	0 seats	Unlimited	Unlimited
<b>Thailand</b>	Majors <sup>6</sup> : 20,000 seats	9,504 seats	10,496 seats	110%
	Others: Open	0 seats	Unlimited	Unlimited
<b>Timor-Leste</b>	21 services	7 services	14 services	200%
<b>Tonga</b>	Majors: 1,600 seats	348 seats	1,252 seats	360%
	Others: Open	0 seats	0 seats	Unlimited
<b>United Kingdom</b>	Open	14 services	Unlimited	Unlimited
<b>United States</b>	Open	52 services	Unlimited	Unlimited
<b>Vanuatu</b>	Majors <sup>7</sup> : 4,000 seats	3770 seats	230 seats	6%
	Others: Open	0 seats	Unlimited	Unlimited
<b>Vietnam</b>	Majors <sup>8</sup> : 70 services	7 services	63 services	900%
	Others: Open	0 services	Unlimited	Unlimited

<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.

" '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.

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

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

~ 'Majors' refers to Manila and Clark.

# '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 2025 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.

# Unserved Markets

Markets without services operated by an Australian airline during the Northern Summer 2025 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>French 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: Open ERP <sup>2</sup> : 7 services
<b>China</b>	Open	<b>Kenya</b>	Majors: 7 services Others: Open
<b>Cote d'Ivoire</b>	Majors: 7 services Others: Open	<b>Kiribati</b>	Majors: 7 services Others: Open
<b>Croatia</b>	7 services	<b>Kuwait</b>	Majors: 7 services Others: Open ERP <sup>2</sup> : 7 services
<b>Cyprus</b>	Larnaka & Pafos: Open	<b>Laos</b>	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
<b>Czechia</b>	Majors: 7 services Others: Open	<b>Latvia</b>	14 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: 67,500 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>Mauritius</b>	Majors: 7 services Others: Open	<b>Rwanda</b>	14 services
<b>Mexico</b>	Majors: 4 services Others: Open	<b>Saudi Arabia</b>	Riyadh & Jeddah: 6 services Dammam: Open
<b>Mongolia</b>	14 services	<b>Serbia</b>	Majors: 7 services Others: Open
<b>Morocco</b>	Majors <sup>^</sup> : 7 services Others: Open	<b>Seychelles</b>	Majors: 7 services Others: Open
<b>Myanmar</b>	Majors: 7 services Others: Open	<b>Spain</b>	Madrid & Barcelona: 7 services Others: Open
<b>Nauru</b>	Majors <sup>*</sup> : 7 services Others: Open	<b>Sri Lanka</b>	Majors <sup>''</sup> : 35 services Others: Open
<b>Nepal</b>	Kathmandu: 7 services Others: 28 services	<b>Sweden</b>	2,800 seats
<b>Netherlands</b>	2,800 seats	<b>Switzerland</b>	Open
<b>Nigeria</b>	7 services	<b>Taiwan</b>	Open
<b>Niue</b>	500 seats	<b>Türkiye</b>	Majors <sup>''</sup> : 28 services Others: Open
<b>Norway</b>	2,800 seats	<b>United Arab Emirates</b>	Majors: 168 services Others: Open ERP <sup>2</sup> : 21 services
<b>Oman</b>	Majors: 4 services Others: Open ERP <sup>2</sup> : 7 services	<b>Zimbabwe</b>	1,600 seats
<b>Pakistan</b>	4 services		

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'' '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.