



Australian Government

Department of Infrastructure, Transport,  
Regional Development, Communications and the Arts

# Growth Potential for Foreign Airlines

Published: April 2025

## Existing Bilateral Markets

Markets served by a foreign airline during the Northern Summer 2025 season

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
Brunei	Majors: 23 services	5 services	18 services	360%
	Others: Open	0 services	Unlimited	Unlimited
Canada	Majors <sup>5</sup> : 100 services	12 services	88 services	733%
	Others: Open	0 services	Unlimited	Unlimited
Chile	28 services	12 services	16 services	133%
China	Open	125 services	Unlimited	Unlimited
Fiji	Majors: 7,900 seats	7,845 seats	55 seats	0.7%
	Others: Open	1,530 seats	Unlimited	Unlimited
Hong Kong	Majors <sup>5</sup> : 84 services	77 services	7 services	9%
	Others: Open	0 services	Unlimited	Unlimited
India	Open	18 services	Unlimited	Unlimited
Indonesia	Majors <sup>6</sup> : 25,000 seats	16,590 seats	8,410 seats	51%
	Others: Open	1,800 seats	Unlimited	Unlimited
	ERP <sup>4</sup> : 2,500 seats	0 seats	2,500 seats	-
Japan	Open	8 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
Malaysia	Majors <sup>5</sup> : 67,500 seats	38,690 seats	28,810 seats	75%
	Others: Open	2,170 seats	Unlimited	Unlimited
Mauritius	Majors: 7 services	2 services	5 services	250%
	Others: Open	0 services	Unlimited	Unlimited
Nauru	Majors: 7 services	4 services	3 services	75%
	Others: Open	0 services	Unlimited	Unlimited
New Caledonia	2,400 seats	1,377 seats	1,023 seats	74.4%

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
<b>New Zealand</b>	Open	163 services	Unlimited	Unlimited
<b>Papua New Guinea</b>	3,520 seats	2,469 seats	1,051 seats	43%
<b>Philippines</b>	Majors: 11,700 seats Others: Open	10,325 seats 0 seats	1,375 seats Unlimited	13.% Unlimited
<b>Qatar</b>	Majors: 28 services Others: Open ERP <sup>4</sup> : 7 services	28 services 7 services 7 services	0 services Unlimited 0 services	0% Unlimited 0%
<b>Singapore</b>	Open	180 services	Unlimited	Unlimited
<b>Solomon Islands</b>	Majors: 2,000 seats Others: Open	750 seats 0 seats	1,250 seats Unlimited	167% Unlimited
<b>South Africa</b>	Majors: 21 services Others: Open	5 services 0 services	16 services Unlimited	320% Unlimited
<b>South Korea</b>	Majors: 9,500 seats Others: Open	8,006 seats 0 seats	1494 seats Unlimited	19% Unlimited
<b>Sri Lanka</b>	Majors <sup>5</sup> : 35 services Others: Open	11 services 0 services	24 services Unlimited	218% Unlimited
<b>Taiwan</b>	Open	18 services	Unlimited	Unlimited
<b>Thailand</b>	Majors: 20,000 seats Others: Open	11,760 seats 0 seats	8,240 seats Unlimited	70.% Unlimited
<b>Türkiye</b>	Majors <sup>5</sup> : 28 services Others: Open	8 services 0 services	20 services Unlimited	250% Unlimited
<b>United Arab Emirates</b>	Total to Majors: 168 services Dubai to Majors: 105 services Abu Dhabi to Majors: 56 services Sharjah to Majors: 7 services Others: Open ERP <sup>4</sup> : 21 services	98 services 70 services 28 services 0 services 7 services 0 services	70 services 35 services 28 services 7 services Unlimited 21 services	71% 50% 100% - Unlimited -
<b>United Kingdom</b>	Open	7 services	Unlimited	Unlimited
<b>United States</b>	Open	50 services	Unlimited	Unlimited
<b>Vietnam</b>	Majors <sup>5</sup> : 70 services Others: Open	43 services 0 services	27 services Unlimited	63% 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.

<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>'Majors' refers to Australia's major gateway airports of Sydney, Western Sydney, Melbourne, Adelaide and Perth.

<sup>6</sup>'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth.

# Unserved Markets

Markets without direct foreign airline services to Australia 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>Finland</b>	2,800 seats
<b>Austria</b>	Majors: 5,600 seats Others: Open	<b>France</b>	3.0 units <sup>4</sup>
<b>Azerbaijan</b>	Majors: 7 services Others: Open	<b>French Polynesia</b>	7 services
<b>Bahrain</b>	Majors: 7 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>Cambodia</b>	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services	<b>Israel</b>	Majors: 7 services Others: Open
<b>Cook Islands</b>	3,000 seats	<b>Italy</b>	Majors: 7 services
<b>Cote d'Ivoire</b>	Majors: 7 services Others: Open	<b>Jordan</b>	Majors: 7 services Others: Open ERP <sup>2</sup> : 7 services
<b>Croatia</b>	7 services	<b>Kenya</b>	Majors: 7 services Others: Open
<b>Cyprus</b>	Majors: 14 services Others: Open	<b>Kiribati</b>	Majors: 7 services Others: Open
<b>Czechia</b>	Majors: 7 services Others: Open	<b>Kuwait</b>	Majors: 7 services Others: Open ERP <sup>2</sup> : 7 services
<b>Denmark</b>	2,800 seats	<b>Latvia</b>	14 services
<b>Egypt</b>	Majors: 7 services Others: Open	<b>Laos</b>	Majors: 7 services Others: Open ERP <sup>2</sup> : 7 services
<b>Ethiopia</b>	7 services	<b>Lebanon</b>	2 services

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
<b>Macau</b>	3 services	<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>Rwanda</b>	14 services
<b>Mongolia</b>	14 services	<b>Samoa</b>	2,000 seats
<b>Morocco</b>	Majors: 7 services Others: Open	<b>Saudi Arabia</b>	Majors: 4 services Others: Open ERP <sup>2</sup> : 7 services
<b>Myanmar</b>	Majors: 7 services Others: Open	<b>Serbia</b>	Majors: 7 services Others: Open
<b>Nepal</b>	Majors: 7 services Others: Open	<b>Seychelles</b>	Majors: 7 services Others: Open
<b>Netherlands</b>	2,400 seats	<b>Spain</b>	Majors: 7 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>Timor-Leste</b>	21 services
<b>Oman</b>	Majors: 4 services Others: Open ERP <sup>2</sup> : 7 services	<b>Tonga</b>	Majors: 1,600 seats Others: Open
<b>Pakistan</b>	7 services	<b>Vanuatu</b>	Majors <sup>5</sup> : 4,000 seats Others: Open
<b>Palau</b>	1,200 seats	<b>Zimbabwe</b>	1,600 seats

<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.

<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.

<sup>3</sup>'Majors' refers to Australia's major gateway airports of Sydney, Western Sydney, Melbourne, Brisbane and Perth.

<sup>4</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.

<sup>5</sup>'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth.