



Australian Government

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

Growth Potential for Foreign Airlines

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Existing Bilateral Markets

Markets served by a foreign airline with their own aircraft during the Northern Summer 2023 season

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Brunei	Majors: 23 services	5 services	18 services	360%
	Others: Open	0 services	Unlimited	Unlimited
Canada	9,000 seats	4,186 seats	4,814 seats	115%
Chile	4,000 seats	3,040 seats	960 seats	32%
China	Open	17,042 seats	Unlimited	Unlimited
Fiji	Majors: 7,900 seats	7,900 seats	0 seats	0%
	Others: Open	332 seats	Unlimited	Unlimited
Hong Kong	Majors: 70 services	66 services	4 services	6%
	Others: Open	0 services	Unlimited	Unlimited
India	Open	5,120 seats	Unlimited	Unlimited
Indonesia	Majors: 25,000 seats	12,811 seats	12,189 seats	95%
	Others: Open	0 seats	Unlimited	Unlimited
	ERP ⁴ : 2,500 seats	0 seats	2,500 seats	-
Japan	Open	4 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
Malaysia	Majors: 36,500 seats	27,576 seats	8,924 seats	32%
	Others: Open	2,581 seats	Unlimited	Unlimited
Mauritius	Majors: 7 services	2 services	5 services	250%
	Others: Open	0 services	Unlimited	Unlimited
Nauru	Majors: 7 services	3 services	4 services	133%

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
	Others: Open	0 services	Unlimited	Unlimited
New Caledonia	2,400 seats	1,422 seats	978 seats	69%
New Zealand	Open	34,434 seats	Unlimited	Unlimited
Papua New Guinea	3,520 seats	2,303 seats	1,217 seats	53%
Philippines	Majors: 10,700 seats	8,892 seats	1,808 seats	20%
	Others: Open	0 seats	Unlimited	Unlimited
Qatar	Majors: 28 services	28 services	0 services	0%
	Others: Open	7 services	Unlimited	Unlimited
	ERP ⁴ : 7 services	7 services	0 services	0%
Republic of Korea	Majors: 9,500 seats	7,631 seats	1,869 seats	24%
	Others: Open	0 seats	Unlimited	Unlimited
Singapore	Open	48,999 seats	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	576 seats	1,424 seats	247%
	Others: Open	0 seats	Unlimited	Unlimited
Sri Lanka	Majors: 14 services	10 services	4 services	40%
	Others: Open	0 services	Unlimited	Unlimited
Taiwan	Open	6,570 seats	Unlimited	Unlimited
Thailand	Majors: 20,000 seats	9,660 seats	10,340 seats	107%
	Others: Open	0 seats	Unlimited	Unlimited
UAE	Majors: 168 services	91 services	77 services	85%
	Others: Open	0 services	Unlimited	Unlimited
United Kingdom	Open	1,512 seats	Unlimited	Unlimited
United States	Open	13,806 seats	Unlimited	Unlimited
Vanuatu	Majors: 4,000 seats	1,530 seats	2,470 seats	161%
	Others: Open	0 seats	Unlimited	Unlimited
Vietnam	Majors: 42 services	29 services	13 services	45%
	Others: Open	0 services	Unlimited	Unlimited
	ERP ⁴ : 7 services	0 services	7 services	-

¹All 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.

²Capacity utilisation is the maximum figure based on approved timetables as at the start of the Northern Summer 2023 scheduling season.

³Growth potential³ is calculated as the ratio of available capacity to capacity in use.

⁴The 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.

Unserved Markets

Markets without own-operated foreign airline services to Australia during the Northern Summer 2023 season

Market	Capacity limit ¹	Market	Capacity limit ¹
Argentina	2,800 seats	Egypt	Majors: 7 services Others: Open
Austria	Majors: 5,600 seats Others: Open	Ethiopia	7 services
Azerbaijan	Majors: 7 services Others: Open	Finland	2,800 seats
Bahrain	Majors: 7 services Others: Open	France	3 services
Bangladesh	5 services	France (Polynesia)	7 services
Belgium	Majors: 7 services Others: Open	Germany	25 services
Brazil	14 services	Greece	Majors: 7 services Others: Open
Cambodia	Majors: 7 services ² Others: 7 services	Hungary	Majors: 7 services Others: Open
Colombia	Majors: 7 services Others: Open	Ireland	Majors: 7 services Others: Open
Cook Islands	3,000 seats	Israel	Majors: 7 services Others: Open
Cote d'Ivoire	Majors: 7 services Others: Open	Italy	7 services
Croatia	Majors: 7 services Others: Open	Jordan	Majors: 7 services ² Others: 7 services
Cyprus	Majors: 14 services Others: Open	Kenya	Majors: 7 services Others: Open
Czech Republic	Majors: 7 services Others: Open	Kiribati	Majors: 7 services Others: Open
Denmark	2,800 seats	Kuwait	Majors: 7 services ² Others: 7 services

Market	Capacity limit ¹	Market	Capacity limit ¹
Laos	Majors: 7 services ² Others: 7 services	Peru	7 services
Lebanon	2 services	Poland	Majors: 2,800 seats Others: Open
Macau	3 services	Russia	2 services
Malta	Majors: 2 services Others: Open	Samoa	2,000 seats
Mexico	Majors: 4 services Others: Open	Saudi Arabia	Majors: 4 services ² Others: 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
Nepal	Majors: 7 services Others: Open	Spain	Majors: 7 services Others: Open
Netherlands	2,400 seats	South Africa	Majors: 21 services Others: Open
Nigeria	7 services	Sweden	2,800 seats
Niue	500 seats	Switzerland	Open
Norway	2,800 seats	Timor-Leste	21 services
Oman	Majors: 4 services ² Others: Open	Tonga	Majors: 1,600 seats Others: Open
Pakistan	7 services	Turkey	7 services
Palau	1,200 seats	Zimbabwe	1,600 seats

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