



Growth Potential for Foreign Airlines

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Existing Bilateral Markets

Markets served by a foreign airline during the Northern Winter 2025-2026 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	Majors ⁵ : 100 services	17 services	83 services	488%
	Others: Open	0 services	Unlimited	Unlimited
Chile	28 services	14 services	14 services	100%
China	Open	200 services	Unlimited	Unlimited
Fiji	Majors: 7,900 seats	7,875 seats	25 seats	0.3%
	Others: Open	1,530 seats	Unlimited	Unlimited
Hong Kong	Majors ⁵ : 91 services	87 services	4 services	4.6%
	Others: Open	6 services	Unlimited	Unlimited
India	Open	14 services	Unlimited	Unlimited
Indonesia	Majors ⁶ : 25,000 seats	20,840 seats	4,160 seats	20%
	Others: Open	1,260 seats	Unlimited	Unlimited
	ERP ⁴ : 2,500 seats	0 seats	2,500 seats	-
Japan	Open	14 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
Malaysia	Majors ⁵ : 67,500 seats	39,443 seats	28,057 seats	68%
	Others: Open	1,614 seats	Unlimited	Unlimited
Mauritius	Majors ⁵ : 7 services	3 services	4 services	133%
	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%
New Zealand	Open	185 services	Unlimited	Unlimited

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Papua New Guinea	3,520 seats	2,461 seats	1,059 seats	43%
Philippines	Majors ⁵ : 60 services Others: Open	39 services 0 seats	21 services Unlimited	54% Unlimited
Qatar	Majors: 28 services Others: Open ERP ⁴ : 7 services	28 services 7 services 7 services	0 services Unlimited 0 services	0% Unlimited 0%
Singapore	Open	182 services	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats Others: Open	900 seats 0 seats	1,100 seats Unlimited	122% Unlimited
South Africa	Majors: 21 services Others: Open	5 services 0 services	16 services Unlimited	320% Unlimited
South Korea	Majors: 9,500 seats Others: Open	9,500 seats 0 seats	0 seats Unlimited	0% Unlimited
Sri Lanka	Majors ⁵ : 42 services Others: Open	11 services 0 services	31 services Unlimited	282% Unlimited
Taiwan	Open	19 services	Unlimited	Unlimited
Thailand	Majors: 20,000 seats Others: Open	11,144 seats 0 seats	8,856 seats Unlimited	79% Unlimited
Türkiye	Majors ⁵ : 35 services Others: Open	10 services 0 services	25 services Unlimited	250% Unlimited
United Arab Emirates	Total to Majors: 168 services Dubai to Majors: 105 services Abu Dhabi to Majors: 56 services Sharjah to Majors: 7 services Others: Open ERP ⁴ : 21 services	80 services 63 services 17 services 0 services 7 services 0 services	88 services 42 services 39 services 7 services Unlimited 21 services	110% 67% 229% - Unlimited -
United Kingdom	Open	7 services	Unlimited	Unlimited
United States	Open	83 services	Unlimited	Unlimited
Vietnam	Majors ⁵ : 84 services Others: Open	45 services 0 services	39 services Unlimited	87% 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.

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

⁶ '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 Winter 2025-2026 season

Market	Capacity limit ¹	Market	Capacity limit ¹
Argentina	2,800 seats	Finland	2,800 seats
Austria	Majors: 5,600 seats Others: Open	France	3.0 units ⁴
Azerbaijan	Majors: 7 services Others: Open	French Polynesia	7 services
Bahrain	Majors: 7 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
Cambodia	Majors: 7 services Others: 7 services ERP ² : 7 services	Israel	Majors: 7 services Others: Open
Cook Islands	3,000 seats	Italy	Majors: 7 services
Cote d'Ivoire	Majors: 7 services Others: Open	Jordan	Majors ³ : 7 services Others: Open ERP ² : 7 services
Croatia	7 services	Kenya	Majors: 7 services Others: Open
Cyprus	Majors ³ : 14 services Others: Open	Kiribati	Majors: 7 services Others: Open
Czech Republic	Majors ³ : 7 services Others: Open	Kuwait	Majors: 7 services Others: Open ERP ² : 7 services
Denmark	2,800 seats	Latvia	14 services
Egypt	Majors: 7 services Others: Open	Laos	Majors: 7 services Others: Open ERP ² : 7 services
Ethiopia	7 services	Lebanon	2 services
Macau	3 services	Peru	7 services
Malta	Majors: 2 services Others: Open	Poland	Majors ³ : 2,800 seats Others: Open

Market	Capacity limit ¹	Market	Capacity limit ¹
Mexico	Majors: 4 services Others: Open	Rwanda	14 services
Mongolia	14 services	Samoa	2,000 seats
Morocco	Majors: 7 services Others: Open	Saudi Arabia	Majors: 4 services Others: Open ERP ² : 7 services
Myanmar	Majors: 7 services Others: Open	Serbia	Majors ³ : 7 services Others: Open
Nepal	Majors: 7 services Others: Open	Seychelles	Majors ³ : 7 services Others: Open
Netherlands	2,400 seats	Spain	Majors: 7 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 Others: Open ERP ² : 7 services	Tonga	Majors: 1,600 seats Others: Open
Pakistan	7 services	Vanuatu	Majors ⁵ : 4,000 seats Others: Open
Palau	1,200 seats	Zimbabwe	1,600 seats

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

⁴Units 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.

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