



Growth Potential for Australian Airlines

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Existing Bilateral Markets

Markets served by an Australian airline during the Northern Summer 2026 season

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Canada	Open	4 services	Unlimited	Unlimited
Chile	35 services	6 services	29 services	367%
Cook Islands	3,000 seats	2,182 seats	818 seats	38%
Fiji	Majors: 6,900 seats Others: Open	6,863 seats 0 services	37 seats Unlimited	0.5% Unlimited
France	3.0 units ⁵	1.5 units	1.5 units	100%
Hong Kong	Majors ⁶ : 91 services Others: Open	14 services 0 seats	77 services Unlimited	550% Unlimited
India	Majors ⁷ : Open	6 services	Unlimited	Unlimited
Indonesia	Majors ⁸ : 25,000 seats Others: Open ERP ⁴ : 2,500 seats	24,862 seats 8,750 seats 2,320 seats	138 seats Unlimited 180 seats	0.5% Unlimited 7.8%
Italy	7 services	4 services	3 services	75%
Japan	Open Haneda: 21 services	33 services 21 services	Unlimited 0 services	Unlimited 0%
New Caledonia	2,400 seats	892 seats	1,508 seats	169%
New Zealand	Open	308 services	Unlimited	Unlimited
Palau	1,200 seats	168 seats	1,032 seats	614%
Papua New Guinea	3,520 seats	1,512 seats	2,008 seats	133%
Philippines	Majors ⁹ : 60 services Others: Open	18 services 3 services	42 services Unlimited	233% 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	1,918 seats	82 seats	4.3%
Singapore	Open	78 services	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	485 seats	1,515 seats	312%
	Others: Open	0 seats	Unlimited	Unlimited
South Africa	Majors ⁵ : 21 services	7 services	14 services	200%
	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
Sri Lanka	Majors: 42 services	3 services	39 services	1300%
	Others: Open	0 services	Unlimited	Unlimited
Thailand	Majors [#] : 20,000 seats	11,624 seats	8,376 seats	72%
	Others: Open	0 seats	Unlimited	Unlimited
Timor-Leste	21 services	7 services	14 services	200%
Tonga	Majors: 1,600 seats	336 seats	1,264 seats	376%
	Others: Open	0 seats	0 seats	Unlimited
United Kingdom	Open	14 services	Unlimited	Unlimited
United States	Open	47 services	Unlimited	Unlimited
Vanuatu	Majors [*] : 4,000 seats	2,697 seats	1,303 seats	48%
	Others: Open	0 seats	Unlimited	Unlimited
Vietnam	Majors [^] : 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, Utapao and Chiang Rai.

² Capacity utilisation is the maximum figure based on approved timetables at the start of the Northern Summer 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, or another airport according to the majors specified above.

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 Summer 2026 season

Market	Capacity limit ¹	Market	Capacity limit ¹
Argentina	2,800 seats	Finland	2,800 seats
Austria	Open	French Polynesia	7 services
Azerbaijan	Majors: 7 services Others: Open	Germany	25 services
Bahrain	Majors: 12 services Others: Open	Greece	Majors: 7 services Others: Open
Bangladesh	5 services	Hungary	Majors: 7 services Others: Open
Belgium	Majors*: 7 services Others: Open	Ireland	Majors: 7 services Others: Open
Brazil	14 services	Israel	Majors: 7 services Others: Open
Brunei	Majors: 27 services Others: Open	Jordan	Majors: 7 services Others: Open ERP ² : 7 services
Cambodia	Majors: 7 services Others: 7 services ERP ² : 7 services	Kenya	Majors: 7 services Others: Open
China	Open	Kiribati	Majors: 7 services Others: Open
Cote d'Ivoire	Majors: 7 services Others: Open	Kuwait	Majors: 7 services Others: Open ERP ² : 7 services
Croatia	7 services	Laos	Majors: 7 services Others: 7 services ERP ² : 7 services
Cyprus	Larnaka & Pafos: Open	Latvia	14 services
Czech Republic	Majors: 7 services Others: Open	Lebanon	2 services
Denmark	2,800 seats	Macau	3 services
Egypt	Majors: 7 services Others: Open	Malaysia	Open
Ethiopia	7 services	Malta	Majors: 3 services Others: Open

Market	Capacity limit ¹	Market	Capacity limit ¹
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
Peru	7 services		

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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.

² 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, or another airport according to the majors specified above.