



Growth Potential for Foreign Airlines

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Existing Bilateral Markets

Markets served by a foreign airline during the Northern Summer 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	Open	14 services	Unlimited	Unlimited
Chile	35 services	13 services	22 services	169%
China	Open	162 services	Unlimited	Unlimited
Fiji	Majors: 7,900 seats	7,708 seats	192 seats	2.5%
	Others: Open	1,530 seats	Unlimited	Unlimited
Hong Kong	Majors ⁵ : 91 services	91 services	0 services	0%
	Others: Open	0 services	Unlimited	Unlimited
India	Open	14 services	Unlimited	Unlimited
Indonesia	Majors ⁶ : 25,000 seats	18,479 seats	6,521 seats	35%
	Others: Open	1,800 seats	Unlimited	Unlimited
	ERP ⁴ : 2,500 seats	0 seats	2,500 seats	-
Japan	Open	11 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
Malaysia	Open	173 services	Unlimited	Unlimited
Mauritius	Majors ⁵ : 7 services	3 services	4 services	133%
	Others: Open	0 services	Unlimited	Unlimited
Nauru	Majors ⁵ : 7 services	3 services	4 services	133%
	Others: Open	0 services	Unlimited	Unlimited
New Caledonia	2,400 seats	1,254 seats	1,146 seats	91%
New Zealand	Open	174 services	Unlimited	Unlimited
Papua New Guinea	3,520 seats	3,134 seats	386 seats	12%

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Philippines	Majors ⁵ : 60 services	39 services	21 services	54%
	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%
Singapore	Open	181 services	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	1,200 seats	800 seats	67%
	Others: Open	0 seats	Unlimited	Unlimited
South Africa	Majors: 21 services	5 services	16 services	320%
	Others: Open	0 services	Unlimited	Unlimited
South Korea	Majors: 9,500 seats	7,698 seats	1,802 seats	23%
	Others: Open	0 seats	Unlimited	Unlimited
Sri Lanka	Majors ⁵ : 42 services	14 services	28 services	200%
	Others: Open	0 services	Unlimited	Unlimited
Taiwan	Open	20 services	Unlimited	Unlimited
Thailand	Majors: 20,000 seats	11,438 seats	8,562 seats	75%
	Others: Open	0 seats	Unlimited	Unlimited
Timor-Leste	21 services	4 services	17 services	425%
Türkiye	Majors ⁵ : 35 services	8 services	27 services	338%
	Others: Open	0 services	Unlimited	Unlimited
United Arab Emirates	Total to Majors: 168 services	84 services	84 services	100%
	Dubai to Majors: 105 services	63 services	42 services	67%
	Abu Dhabi to Majors: 56 services	21 services	35 services	167%
	Sharjah to Majors: 7 services	0 services	7 services	-
	Others: Open	7 services	Unlimited	Unlimited
	ERP ⁴ : 21 services	0 services	21 services	-
United Kingdom	Open	7 services	Unlimited	Unlimited
United States	Open	53 services	Unlimited	Unlimited
Vietnam	Majors ⁵ : 84 services	49 services	35 services	71%
	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.

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 'Majors' refers to Australia's major gateway airports of Sydney, Western Sydney, Melbourne, Brisbane 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 Summer 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 ³ : 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 ³ : 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 limit¹	Market	Capacity limit¹
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	Tonga	Majors: 1,600 seats Others: Open
Oman	Majors: 4 services Others: Open ERP ² : 7 services	Vanuatu	Majors ⁵ : 4,000 seats Others: Open
Pakistan	7 services	Zimbabwe	1,600 seats
Palau	1,200 seats		

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.

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

⁴ 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, 200-399 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.