Australian Government
Department of Infrastructure, Transport,
Regional Development, Communications, Sport and the Arts

Growth Potential for Australian Airlines

Published: November 2026

Existing Bilateral Markets

Markets served by an Australian airline during the Northern Winter 2026-27 season

Market	Capacity limit[1]	In use[2]	Available	Growth potential[3]
Canada	Open	7 services	Unlimited	Unlimited
Chile	35 services	7 services	28 services	400%
Cook Islands	3,000 seats	2,182 seats	818 seats	38%
Fiji	Majors¨: 6,900 seats Others: Open	6,867 seats 0 seats	33 seats Unlimited	0.5% Unlimited
France	3.0 units[5]	1.5 units	1.5 units	100%
Hong Kong	Majors¨: 91 services Others: Open	14 services 0 services	77 services Unlimited	550% Unlimited
India	Majors^: Open	9 services	Unlimited	Unlimited
Indonesia	Majors¨: 32,500 seats Others: Open	23,814 seats 12,076 seats	8,686 Unlimited	36% Unlimited
Japan	Open Haneda: 21 services	49 services 14 services	Unlimited 7 services	Unlimited 50%
New Caledonia	2,400 seats	1,048 seats	1352 seats	129%
New Zealand	Open	378 services	Unlimited	Unlimited
Palau	1,200 seats	336 seats	864 seats	257%
Papua New Guinea	3,520 seats	1,512 seats	2,008 seats	133%
Philippines	Majors~: 70 services Others: Open	17 services 4 services	53 services Unlimited	312% Unlimited

Market	Capacity limit[1]	In use[2]	Available	Growth potential[3]
Qatar	Majors¨: 35 services	28 services	7 services	25%
	Others: Unlimited	0 services	Unlimited	Unlimited
	ERP[4]: 7 services	0 services	7 services	-
Samoa	2,000 seats	1,008 seats	992 seats	98%
Singapore	Open	63 services	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	388 seats	1,612 seats	416%
	Others: Open	0 seats	Unlimited	Unlimited
South Africa	Majorsε: 21 services	8 services	13 services	163%
	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	11,289 seats	8,711 seats	77%
	Others: Open	0 seats	Unlimited	Unlimited
Timor-Leste	21 services	7 services	14 services	200%
Tonga	Majors: 1,600 seats	504 seats	1,096 seats	217%
	Others: Open	0 seats	0 seats	Unlimited
United Kingdom	Open	14 services	Unlimited	Unlimited
United States	Open	46 services	Unlimited	Unlimited
Vanuatu	Majors*: 4,000 seats	3,616 seats	384 seats	11%
	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, Western Sydney, Melbourne, Brisbane and Perth.

* 'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), 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 Winter 2026-2027 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 Winter 2026-27 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	**Italy**	Majors[+]: 7 services
China	Open	**Kenya**	Majors: 7 services Others: Open
Cote d'Ivoire	Majors: 7 services Others: Open	**Kiribati**	Majors: 7 services Others: Open
Croatia	7 services	**Kuwait**	Majors: 7 services Others: Open ERP[2]: 7 services
Cyprus	Larnaka & Pafos: Open	**Laos**	Majors: 7 services Others: 7 services ERP[2]: 7 services
Czech Republic	Majors[¨]: 7 services Others: Open	**Latvia**	14 services
Denmark	2,800 seats	**Lebanon**	2 services
Egypt	Majors*: 7 services Others: Open	**Macau**	3 services
Ethiopia	7 services	**Malaysia**	Open

Market	Capacity limit[1]	Market	Capacity limit[1]
Maldives	14 services	**Pakistan**	4 services
Malta	Majors: 3 services Others: Open	**Peru**	7 services
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
Naoero	Majors: 7 services Others: Open	**Spain**	Madrid & Barcelona: 7 services Others: Open
Nepal	Kathmandu: 7 services Others: 28 services	**Sweden**	2,800 seats
Netherlands	2,800 seats	**Switzerland**	Open
Nigeria	7 services	**Taiwan**	Open
Niue	500 seats	**Türkiye**	Majors¨: 35 services Others: Open
Norway	2,800 seats	**United Arab Emirates**	Majors¨: 175 services Others: Open ERP[2]: 21 services
Oman	Majors: 4 services Others: Open ERP[2]: 7 services	**Zimbabwe**	1,600 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.

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

+ 'Majors' refers to Rome, Milan, Venice, Bologna and Pisa.

^ 'Majors' refers to Casablanca, Marrakech, Agadir and Rabat.

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

[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.