



Growth Potential for Foreign Airlines

Data correct as at 21 November 2019

Existing bilateral markets

Markets served by a foreign airline with their own aircraft during the Northern Winter 2019-20 season

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Brunei	Majors: 23 services	11 services	12 services	109%
	Others: Open	0 services	Unlimited	Unlimited
Canada	9,000 seats	4,905 seats	4,095 seats	84%
Chile	4,000 seats	2,402 seats	1,598 seats	67%
China	Open	48,016 seats	Unlimited	Unlimited
Cook Islands	3,000 seats	312 seats	2,688 seats	862%
Fiji	Majors: 7,700 seats	6,904 seats	796 seats	12%
	Others: Open	328 seats	Unlimited	Unlimited
Hong Kong	Majors: 70 services	70 services	0 services	0%
	Others: Open	6 services	Unlimited	Unlimited
India	Open	2,048 seats	Unlimited	Unlimited
Indonesia	Majors: 25,000 seats ⁴	15,077 seats	9,923 seats	66%
	Others: Open	0 seats	Unlimited	Unlimited
Japan	Open	21 services	Unlimited	Unlimited
	(Haneda – 7 services)	7 services	0 services	0%
Korea	Majors: 8,500 seats ⁵	7,721 seats	779 seats	10%
	Others: Open	0 seats	Unlimited	Unlimited
Malaysia	Majors: 36,500 seats	28,920 seats	7,580 seats	26%
	Others: Open	10,087 seats	Unlimited	Unlimited
Mauritius	Majors: 7 services	3 services	4 services	133%
	Others: Open	0 services	Unlimited	Unlimited
Nauru	Majors: 7 services	3 services	4 services	133%
	Others: Open	0 services	Unlimited	Unlimited
New Caledonia	2,400 seats	2,077 seats	323 seats	16%
New Zealand	Open	44,956 seats	Unlimited	Unlimited
PNG	3,520 seats	3,107 seats	413 seats	13%

Market	Capacity limit ¹	In use ²	Available	Growth potential ³
Philippines	Majors: 10,700 seats	8,664 seats	2,036 seats	23%
	Others: Open	0 seats	Unlimited	Unlimited
Qatar	Majors: 21 services	21 services	0 services	0%
	Others: Open	7 services	Unlimited	Unlimited
	ERP ⁴ : 7 services	7 services	0 services	0%
Samoa	1,000 seats	626 seats	374 seats	60%
Singapore	Open	61,962 seats	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	680 seats	1,320 seats	194%
	Others: Open	0 services	Unlimited	Unlimited
South Africa	Majors: 21 services	7 services	14 services	200%
	Others: Open	0 services	Unlimited	Unlimited
Sri Lanka	Majors: 14 services	7 services	7 services	100%
	Others: Open	0 services	Unlimited	Unlimited
Taiwan	Unlimited	9,490 seats	Unlimited	Unlimited
Thailand	Majors: 20,000 seats	11,469 seats	8,531 seats	74%
	Others: Open	0 seats	Unlimited	Unlimited
UAE	Majors: 168 services ⁴	112 services	56 services	50%
	Others: Open	7 services	Unlimited	Unlimited
UK	Open	7 services	Unlimited	Unlimited
USA	Open	55 services	Unlimited	Unlimited
Vanuatu	Majors: 4,000 seats	2,330 seats	1,670 seats	72%
	Others: Open	0 seats	Unlimited	Unlimited
Vietnam	Majors: 28 services	17 services	11 services	65%
	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 based on approved timetables as at the start of the Northern Winter 2019-20 scheduling season. Quoted figures are the maximum utilisation that occurs during the 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 Existing arrangements provide for additional, phased capacity in future scheduling seasons.

Unserved Markets

Markets without own-operated foreign airline services to Australia (Northern Winter 2019-2020)

Market	Capacity limit ¹	Market	Capacity limit ¹
Argentina	2,800 seats	Kuwait	Majors: 7 services ² Others: Open
Austria	Majors: 5,600 seats Others: Open	Laos	Majors: 7 services ² Others: Open
Azerbaijan	Majors: 7 services Others: Open	Lebanon	2 services
Bahrain	Majors: 7 services Others: Open	Macau	3 services
Bangladesh	5 services	Malta	Majors: 2 services Others: Open
Belgium	Majors: 7 services Others: Open	Mexico	Majors: 4 services Others: Open
Brazil	14 services	Morocco	Majors: 7 services Others: Open
Burma (Myanmar)	Majors: 7 services Others: Open	Netherlands	2,400 seats
Cambodia	Majors: 7 services ² Others: 7 services	Niue	500 seats
Croatia	Majors: 7 services Others: Open	Norway	2,800 seats
Czech Republic	Majors: 7 services Others: Open	Oman	Majors: 4 services ² Others: Open
Denmark	2,800 seats	Pakistan	7 services
Egypt	Majors: 7 services Others: Open	Palau	1,200 seats
Ethiopia	7 services	Peru	7 services
Finland	2,800 seats	Russia	2 services
France	3 services	Saudi Arabia	Majors: 4 services ² Others: Open
France (Polynesia)	7 services	Seychelles	Majors: 7 services Others: Open
Germany	25 services	Sweden	2,800 seats
Greece	Majors: 7 services Others: Open	Switzerland	Open
Hungary	Majors: 7 services Others: Open	Tonga	Majors: 600 seats Others: Open



Ireland	Majors: 7 services Others: Open	Turkey	7 services
Italy	7 services	Zimbabwe	1,600 seats
Jordan	Majors: 7 services ² Others: Open		
Kenya	Majors: 7 services Others: Open		

¹ All figures are on an 'each way, each week' basis; sub-limits may apply in some markets.

² The Enhanced Regional Package (ERP) provides additional capacity (up to a limit) in agreed markets for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.

