



# Growth Potential for Foreign Airlines

Published: November 2024

## Existing Bilateral Markets

Markets served by a foreign airline during the Northern Winter 2024/2025 season

| Market               | Capacity limit <sup>1</sup>        | In use <sup>2</sup> | Available    | Growth potential <sup>3</sup> |
|----------------------|------------------------------------|---------------------|--------------|-------------------------------|
| <b>Brunei</b>        | Majors: 23 services                | 5 services          | 18 services  | 360%                          |
|                      | Others: Open                       | 0 services          | Unlimited    | Unlimited                     |
| <b>Canada</b>        | Majors <sup>5</sup> : 50 services  | 17 services         | 33 services  | 194%                          |
|                      | Others: Open                       | 0 seats             | Unlimited    | Unlimited                     |
| <b>Chile</b>         | 21 services                        | 14 services         | 7 services   | 50%                           |
| <b>China</b>         | Open                               | 190 services        | Unlimited    | Unlimited                     |
| <b>Fiji</b>          | Majors: 7,900 seats                | 7,881 seats         | 19 seats     | 0.2%                          |
|                      | Others: Open                       | 850 seats           | Unlimited    | Unlimited                     |
| <b>Hong Kong</b>     | Majors <sup>5</sup> : 84 services  | 70 services         | 14 services  | 20%                           |
|                      | Others: Open                       | 7 services          | Unlimited    | Unlimited                     |
| <b>India</b>         | Open                               | 18 services         | Unlimited    | Unlimited                     |
| <b>Indonesia</b>     | Majors <sup>6</sup> : 25,000 seats | 16,345 seats        | 8,655 seats  | 53%                           |
|                      | Others: Open                       | 1,026 seats         | Unlimited    | Unlimited                     |
|                      | ERP <sup>4</sup> : 2,500 seats     | 0 seats             | 2,500 seats  | -                             |
| <b>Japan</b>         | Open                               | 9 services          | Unlimited    | Unlimited                     |
|                      | Haneda: 21 services                | 21 services         | 0 services   | 0%                            |
| <b>Malaysia</b>      | Majors <sup>5</sup> : 50,000 seats | 34,995 seats        | 15,005 seats | 43%                           |
|                      | Others: Open                       | 1,450 seats         | Unlimited    | Unlimited                     |
| <b>Mauritius</b>     | Majors: 7 services                 | 3 services          | 4 services   | 133%                          |
|                      | Others: Open                       | 0 services          | Unlimited    | Unlimited                     |
| <b>Nauru</b>         | Majors: 7 services                 | 5 services          | 2 services   | 40%                           |
|                      | Others: Open                       | 0 services          | Unlimited    | Unlimited                     |
| <b>New Caledonia</b> | 2,400 seats                        | 1,086 seats         | 1,314 seats  | 121%                          |
| <b>New Zealand</b>   | Open                               | 183 services        | Unlimited    | Unlimited                     |

| Market                      | Capacity limit <sup>1</sup>  | In use <sup>2</sup>                     | Available                             | Growth potential <sup>3</sup> |
|-----------------------------|--|---|---------------------------------------|-------------------------------|
| <b>Papua New Guinea</b>     | 3,520 seats  | 2,376 seats                             | 1,144 seats                           | 48%                           |
| <b>Philippines</b>          | Majors: 10,700 seats<br>Others: Open                                 | 10,211 seats<br>0 seats                 | 489 seats<br>Unlimited                | 5%<br>Unlimited               |
| <b>Qatar</b>                | Majors: 28 services<br>Others: Open<br>ERP <sup>4</sup> : 7 services | 28 services<br>7 services<br>7 services | 0 services<br>Unlimited<br>0 services | 0%<br>Unlimited<br>0%         |
| <b>Singapore</b>            | Open   | 183 services                            | Unlimited                             | Unlimited                     |
| <b>Solomon Islands</b>      | Majors: 2,000 seats<br>Others: Open                                  | 900 seats<br>0 seats                    | 1,100 seats<br>Unlimited              | 122%<br>Unlimited             |
| <b>South Africa</b>         | Majors: 21 services<br>Others: Open                                  | 7 services<br>0 services                | 14 services<br>Unlimited              | 200%<br>Unlimited             |
| <b>South Korea</b>          | Majors: 9,500 seats<br>Others: Open                                  | 8,935 seats<br>0 seats                  | 565 seats<br>Unlimited                | 6%<br>Unlimited               |
| <b>Sri Lanka</b>            | Majors <sup>5</sup> : 35 services<br>Others: Open                    | 11 services<br>0 services               | 24 services<br>Unlimited              | 218%<br>Unlimited             |
| <b>Taiwan</b>               | Open   | 19 services                             | Unlimited                             | Unlimited                     |
| <b>Thailand</b>             | Majors: 20,000 seats<br>Others: Open                                 | 13,406 seats<br>0 seats                 | 6,594 seats<br>Unlimited              | 49%<br>Unlimited              |
| <b>Türkiye</b>              | Majors <sup>5</sup> : 28 services<br>Others: Open                    | 7 services<br>0 services                | 21 services<br>Unlimited              | 300%<br>Unlimited             |
| <b>United Arab Emirates</b> | Majors: 168 services<br>Others: Open                                 | 91 services<br>7 services               | 77 services<br>Unlimited              | 85%<br>Unlimited              |
| <b>United Kingdom</b>       | Open   | 7 services                              | Unlimited                             | Unlimited                     |
| <b>United States</b>        | Open   | 78 services                             | Unlimited                             | Unlimited                     |
| <b>Vietnam</b>              | Majors <sup>5</sup> : 70 services<br>Others: Open                    | 47 services<br>0 services               | 23 services<br>Unlimited              | 49%<br>Unlimited              |

<sup>1</sup>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.

<sup>2</sup>Capacity utilisation is the maximum figure based on approved timetables at the start of the Northern Summer 2024 scheduling season.

<sup>3</sup>'Growth potential' is calculated as the ratio of available capacity to capacity in use.

<sup>4</sup>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.

<sup>5</sup>'Majors' refers to Australia's major gateway airports of Sydney, Western Sydney, Melbourne, Adelaide and Perth.

<sup>6</sup>'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth.

# Unserviced Markets

Markets without direct foreign airline services to Australia during the Northern Summer 2024 season

| Market                | Capacity limit <sup>1</sup>                           | Market                    | Capacity limit <sup>1</sup>                           |
|-----------------------|---|---------------------------|---|
| <b>Argentina</b>      | 2,800 seats   | <b>Finland</b>            | 2,800 seats   |
| <b>Austria</b>        | Majors: 5,600 seats<br>Others: Open                   | <b>France</b>             | 3.0 units <sup>4</sup>                                |
| <b>Azerbaijan</b>     | Majors: 7 services<br>Others: Open                    | <b>France (Polynesia)</b> | 7 services  |
| <b>Bahrain</b>        | Majors: 7 services<br>Others: Open                    | <b>Germany</b>            | 25 services   |
| <b>Bangladesh</b>     | 5 services  | <b>Greece</b>             | Majors: 7 services<br>Others: Open                    |
| <b>Belgium</b>        | Majors: 7 services<br>Others: Open                    | <b>Hungary</b>            | Majors: 7 services<br>Others: Open                    |
| <b>Brazil</b>         | 14 services   | <b>Ireland</b>            | Majors: 7 services<br>Others: Open                    |
| <b>Cambodia</b>       | Majors: 7 services <sup>2</sup><br>Others: 7 services | <b>Israel</b>             | Majors: 7 services<br>Others: Open                    |
| <b>Cook Islands</b>   | 3,000 seats   | <b>Italy</b>              | 7 services  |
| <b>Cote d'Ivoire</b>  | Majors: 7 services<br>Others: Open                    | <b>Jordan</b>             | Majors: 7 services <sup>2</sup><br>Others: 7 services |
| <b>Croatia</b>        | Majors: 7 services<br>Others: Open                    | <b>Kenya</b>              | Majors: 7 services<br>Others: Open                    |
| <b>Cyprus</b>         | Majors: 14 services<br>Others: Open                   | <b>Kiribati</b>           | Majors: 7 services<br>Others: Open                    |
| <b>Czech Republic</b> | Majors: 7 services<br>Others: Open                    | <b>Kuwait</b>             | Majors: 7 services <sup>2</sup><br>Others: 7 services |
| <b>Denmark</b>        | 2,800 seats   | <b>Laos</b>               | Majors: 7 services <sup>2</sup><br>Others: 7 services |
| <b>Egypt</b>          | Majors: 7 services<br>Others: Open                    | <b>Latvia</b>             | 14 services   |
| <b>Ethiopia</b>       | 7 services  | <b>Lebanon</b>            | 2 services  |

| Market             | Capacity limit <sup>1</sup>                     | Market              | Capacity limit <sup>1</sup>                       |
|--------------------|---|---------------------|---|
| <b>Macau</b>       | 3 services                                      | <b>Peru</b>         | 7 services  |
| <b>Malta</b>       | Majors: 2 services<br>Others: Open              | <b>Poland</b>       | Majors: 2,800 seats<br>Others: Open               |
| <b>Mexico</b>      | Majors: 4 services<br>Others: Open              | <b>Rwanda</b>       | 14 services                                       |
| <b>Mongolia</b>    | 14 services                                     | <b>Samoa</b>        | 2,000 seats                                       |
| <b>Morocco</b>     | Majors: 7 services<br>Others: Open              | <b>Saudi Arabia</b> | Majors: 4 services <sup>2</sup><br>Others: Open   |
| <b>Myanmar</b>     | Majors: 7 services<br>Others: Open              | <b>Serbia</b>       | Majors: 7 services<br>Others: Open                |
| <b>Nepal</b>       | Majors: 7 services<br>Others: Open              | <b>Seychelles</b>   | Majors: 7 services<br>Others: Open                |
| <b>Netherlands</b> | 2,400 seats                                     | <b>Spain</b>        | Majors: 7 services<br>Others: Open                |
| <b>Nigeria</b>     | 7 services                                      | <b>Sweden</b>       | 2,800 seats                                       |
| <b>Niue</b>        | 500 seats                                       | <b>Switzerland</b>  | Open  |
| <b>Norway</b>      | 2,800 seats                                     | <b>Timor-Leste</b>  | 21 services                                       |
| <b>Oman</b>        | Majors: 4 services <sup>2</sup><br>Others: Open | <b>Tonga</b>        | Majors: 1,600 seats<br>Others: Open               |
| <b>Pakistan</b>    | 7 services                                      | <b>Vanuatu</b>      | Majors <sup>5</sup> : 4,000 seats<br>Others: Open |
| <b>Palau</b>       | 1,200 seats                                     | <b>Zimbabwe</b>     | 1,600 seats                                       |

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<sup>4</sup>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.

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