



# Growth Potential for Foreign Airlines

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## Existing Bilateral Markets

Markets served by a foreign airline during the Northern Summer 2024 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>6</sup> : 9,000 seats	4,186 seats	4,814 seats	115%
	Others: Open	0 seats	Unlimited	Unlimited
<b>Chile</b>	4,000 seats	3,000 seats	1,000 seats	33%
<b>China</b>	Open	32,689 seats	Unlimited	Unlimited
<b>Fiji</b>	Majors: 7,900 seats	7,900 seats	0 seat	0%
	Others: Open	850 seats	Unlimited	Unlimited
<b>Hong Kong</b>	Majors: 70 services	66 services	4 services	6%
	Others: Open	0 services	Unlimited	Unlimited
<b>India</b>	Open	5,120 seats	Unlimited	Unlimited
<b>Indonesia</b>	Majors: 25,000 seats	16,238 seats	8,762 seats	54%
	Others: Open	1,620 seats	Unlimited	Unlimited
	ERP <sup>4</sup> : 2,500 seats	0 seats	2,500 seats	-
<b>Japan</b>	Open	6 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
<b>Malaysia</b>	Majors: 36,500 seats	34,676 seats	1,824 seats	5%
	Others: Open	3,161 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	3 services	4 services	133%
	Others: Open	0 services	Unlimited	Unlimited
<b>New Caledonia</b>	2,400 seats	2,239 seats	161 seats	7%
<b>New Zealand</b>	Open	32,356 seats	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	2,449 seats	1,071 seats	44%
<b>Philippines</b>	Majors: 10,700 seats Others: Open	8,892 seats 0 seats	1,808 seats Unlimited	20% Unlimited
<b>Qatar</b>	Majors: 28 services Others: Open ERP <sup>4</sup> : 7 services	28 services 7 services 7 services	0 services Unlimited 0 services	0% Unlimited 0%
<b>Singapore</b>	Open	52,833 seats	Unlimited	Unlimited
<b>Solomon Islands</b>	Majors: 2,000 seats Others: Open	738 seats 0 seats	1,262 seats Unlimited	171% Unlimited
<b>South Africa</b>	Majors: 21 services Others: Open	3 services 0 services	18 services Unlimited	600% Unlimited
<b>South Korea</b>	Majors: 9,500 seats Others: Open	7,491 seats 0 seats	2,009 seats Unlimited	27% Unlimited
<b>Sri Lanka</b>	Majors <sup>5</sup> : 28 services Others: Open	14 services 0 services	14 services Unlimited	100% Unlimited
<b>Taiwan</b>	Open	5,616 seats	Unlimited	Unlimited
<b>Thailand</b>	Majors: 20,000 seats Others: Open	12,315 seats 0 seats	7,685 seats Unlimited	62% Unlimited
<b>Türkiye</b>	Majors <sup>3</sup> : 21 services Others: Open	3 services 0 services	18 services Unlimited	600% Unlimited
<b>United Arab Emirates</b>	Majors: 168 services Others: Open	91 services 0 services	77 services Unlimited	85% Unlimited
<b>United Kingdom</b>	Open	1,588 seats	Unlimited	Unlimited
<b>United States</b>	Open	13,507 seats	Unlimited	Unlimited
<b>Vanuatu</b>	Majors: 4,000 seats Others: Open	1,902 seats 0 seats	2,098 seats Unlimited	110% Unlimited
<b>Vietnam</b>	Majors <sup>5</sup> : 56 services Others: Open ERP <sup>4</sup> : 7 services	45 services 0 services 2 services	11 services Unlimited 5 services	24% Unlimited 250%

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

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
<b>Lebanon</b>	2 services	<b>Palau</b>	1,200 seats
<b>Macau</b>	3 services	<b>Peru</b>	7 services
<b>Malta</b>	Majors: 2 services Others: Open	<b>Poland</b>	Majors: 2,800 seats Others: Open
<b>Mexico</b>	Majors: 4 services Others: Open	<b>Samoa</b>	2,000 seats
<b>Morocco</b>	Majors: 7 services Others: Open	<b>Saudi Arabia</b>	Majors: 4 services <sup>2</sup> Others: Open
<b>Myanmar</b>	Majors: 7 services Others: Open	<b>Serbia</b>	Majors: 7 services Others: Open
<b>Nepal</b>	Majors: 7 services Others: Open	<b>Seychelles</b>	Majors: 7 services Others: Open
<b>Netherlands</b>	2,400 seats	<b>Spain</b>	Majors: 7 services 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> Others: Open	<b>Tonga</b>	Majors: 1,600 seats Others: Open
<b>Pakistan</b>	7 services	<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.