# AUSTRALIA AIR CARGO PROFILE ICAO - ECONOMIC DEVELOPMENT - 2025

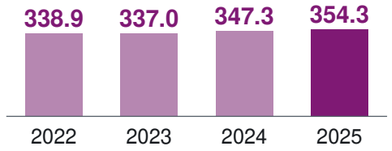
## AIRLINES AIR CARGO INDICATORS, 2025

| 354.3 | 1,527.4 | 182.1 | 5,088.4 | 33.6% |
|---|---|---|---|---|
| FREIGHT (thousand tonnes) | FREIGHT TONNE-KM (million) | MAIL TONNE-KM (million) | CARGO AVAILABLE (million tonne-km) | CARGO LOAD FACTOR (percent) |

Source: ICAO Forms A and A-S, 2025.

## FREIGHT EVOLUTION

Freight tonnes (thousand tonnes).




Source: ICAO COMP_MASTER, 2022-2024; ICAO Form A, 2025. 2025 preliminary.

## DOMESTIC vs INTERNATIONAL

| DOMESTIC | INTERNATIONAL |
|---|---|
| 32.7% | 67.3% |
| 115.7 freight | 238.6 freight |
| 67.6 FTK | 1,459.7 FTK |

Source: ICAO Forms A and A-S, 2025. Freight in thousands of tonnes. FTK in million.

## SERVICE TYPE

| | |
|---|---|
| Scheduled | 99.9% |
| Non-scheduled | 0.1% |

Source: ICAO Forms A and A-S, 2025.

## AVERAGE FREIGHT DISTANCE

| | |
|---|---|
| DOMESTIC | 584.6 km |
| INTERNATIONAL | 6,116.9 km |

Source: ICAO Forms A and A-S, 2025.

## FREIGHT INTENSITY

Freight tonnes per departure

| | |
|---|---|
| ALL INTERNATIONAL AIRLINES | 5.6 |
| DOMESTIC CARRIERS | 2.0 |

Source: ICAO Form C, 2025.

## CARGO OPERATING MODEL

| | |
|---|---|
| FREIGHTER | 11.3% |
| PASSENGER BELLY | 88.7% |

Source: ICAO Form C, 2025. Share of reported freight tonnes. All international airlines to/from Australia.

## DIFFERENT AIRCRAFT, DIFFERENT CARGO ROLES

| FREIGHTER AIRCRAFT | | PASSENGER BELLY CARGO | |
|---|---|---|---|
| BOEING 737 800BCF | 67.8% | AIRBUS A350-1000 | 62.7% |
| BOEING 737 300F | 64.9% | BOEING 787 10 | 53.0% |
| MCDONNELL DOUGLAS MD11 F | 57.0% | BOEING 777 300ER | 50.7% |

Source: ICAO Form C, 2025. Ranked by CLF within each cargo role. Leading aircraft types on international services to/from Australia.

## INTERNATIONAL NETWORK - FREIGHT

Top five round-trip routes; reported in thousands of tonnes.

| ALL INTERNATIONAL CARRIERS | | DOMESTIC CARRIERS | |
|---|---|---|---|
| MEL-SIN | 60.5 | SYD-HKG | 12.6 |
| SYD-SIN | 47.3 | SYD-SIN | 9.8 |
| SYD-HKG | 44.8 | MEL-SIN | 9.8 |
| SYD-HNL | 40.9 | SYD-AKL | 9.6 |
| MEL-HKG | 36.9 | SYD-HNL | 7.0 |

Source: ICAO Form B, 2025. Both directions combined.

## ROUTE CARGO LOAD FACTORS

International routes ranked by reported cargo load factor.

| ALL INTERNATIONAL CARRIERS | | DOMESTIC CARRIERS | |
|---|---|---|---|
| CNS-OSA | 95.0% | CNS-OSA | 95.0% |
| OOL-ZQN | 95.0% | OOL-AKL | 95.0% |
| OOL-DUD | 95.0% | CNS-DPS | 95.0% |
| OOL-HLZ | 95.0% | OOL-ZQN | 95.0% |
| CNS-CHC | 95.0% | OOL-DUD | 95.0% |

Source: ICAO Form C, 2025.

## SHARE OF INTERNATIONAL FTK BY REGION



**56.8%**
**ASIA/PACIFIC**

| MIDDLE EAST | NORTH AMERICA | OTHER REGIONS |
|---|---|---|
| 26.7% | 13.9% | 2.5% |

Source: ICAO Form C, 2025. Share of reported FTK. All international airlines to/from Australia.

## TOP AIRLINES BY REPORTED FTK

International services to/from Australia

| | | |
|---|---|---|
| 1 | EMIRATES | 1,494.2m FTK |
| 2 | CHINA ALL AIRLINES | 1,079.0m FTK |
| 3 | SIA | 1,038.5m FTK |
| 4 | CATHAY PACIFIC | 600.0m FTK |
| 5 | QANTAS | 541.1m FTK |

Source: ICAO Form C, 2025.

## NETWORK STRUCTURE

International freight, 2025.

**HERFINDAHL-HIRSCHMAN INDEX (HHI)**
**210.6**
**HIGHLY DIVERSIFIED**
Freight is spread across many routes.
Range: >0 to 10,000; higher values indicate greater route concentration.

**DIRECTIONAL ASYMMETRY**
**27.1%**
**MODERATELY IMBALANCED**
Freight volumes differ noticeably between opposite directions.
Lower percentages indicate more balanced two-way flows; higher percentages indicate greater directional imbalance.

**FLOW ORIENTATION**
**58.9%**
**Inbound**
**INBOUND-ORIENTED**
More freight moves to Australia than from Australia.

Source: ICAO Form B, 2025.

## KEY TAKEAWAYS

1. **Strong international orientation.** 67.3% of freight reported by Australia airlines is international.
2. **Diversified network.** Freight is spread across a broad set of routes; the leading route is MEL-SIN.
3. **Inbound-oriented flows.** A stronger import-oriented than export-oriented pattern is observed in terms of freight tonnage transported (58.9% inbound).
4. **Key strengths.** EMIRATES leads reported international FTK, and Asia/Pacific accounts for 56.8% of international FTK to/from Australia.
5. **Freight evolution.** Over 2015-2024, freight grew at a compound annual growth rate of 0.8%, while preliminary 2025 freight is higher than 2024 by 2.0%.

Sources: ICAO COMP_MASTER, 2015-2024; ICAO Forms A and A-S and Form B, 2025.

Methodology: round-trip routes combine both directions; cargo ATK = max(ATK - 0.1 x ASK, 0) per observation. Figures may not reconcile across forms because reporting scope and carrier coverage differ.

# ICAO - ECONOMIC DEVELOPMENT - 2025

## ATR DATA STATUS - 2025

| ATR Form | Status | Records used |
|---|---|---|
| ICAO Forms A/A-S | **REPORTED** | 189 |
| ICAO Form B | **MIXED** | 1,978 |
| ICAO Form C | **MIXED** | 1,123 |

## DATA STATUS DEFINITIONS AND REPORTING NOTE

**Reported**: source records used are classified as Reported in DATA_TYPE. **Provided**: source records used are classified as Provided in DATA_TYPE; a provenance label from the ICAO source dataset that does not imply a new estimate by the renderer. **Mixed**: both Reported and Provided records are present in the eligible source universe. **Unavailable**: no eligible records from the ATR enter the profile after the approved filters.

**Member States are encouraged to submit their Air Transport Reporting (ATR) Forms to the ICAO Secretariat in a timely and complete manner.**

## METHODOLOGY BY PANEL

| Panel | Source | Statistical universe, calculation and ranking/aggregation rule |
|---|---|---|
| **1. Airlines Air Cargo Indicators** | Forms A/A-S | Freight = sum(FRT) / 1,000; FTK = sum(TKF) / 1,000,000; MTK = sum(TKM) / 1,000,000. Cargo ATK is calculated per observation as max(ATK - 0.1 x ASK, 0), then aggregated and displayed in millions. Cargo Load Factor = [sum(FTK) + sum(MTK)] / sum(cargo ATK) x 100. SERVICE_TYPE = All Services; scheduled and non-scheduled flights. |
| **2. Freight Evolution** | ICAO Compfile Master + Form A | ICAO COMP_MASTER freight tonnes for 2022, 2023 and 2024 (carrier-level rows for the State; aggregate 'ALL AIRLINES' rows are used only when no carrier rows exist, to avoid double counting) and preliminary Form A freight tonnes for 2025, each in thousand tonnes. CAGR 2015-2024 = [(F2024/F2015)^(1/9)-1] x 100 and Growth 2024-2025 = [(F2025/F2024)-1] x 100 are analytical fields used in Key Takeaways Point 5 and are not rendered in the panel. 2025 is never estimated. |
| **3. Domestic vs International** | Forms A/A-S | Within the national-airline universe, aggregate freight tonnes and FTK by FLIGHT_STAGE_TYPE. Freight shares are calculated from domestic and international freight tonnes and reconcile to 100.0% within rounding tolerance. Freight displayed in thousands of tonnes and FTK in millions. |
| **4. Service Type** | Forms A/A-S | Aggregate freight tonnes by Scheduled flight and Non-scheduled flight within SERVICE_TYPE = All Services. Each share equals category freight / total scheduled plus non-scheduled freight x 100. |
| **5. Average Freight Distance** | Forms A/A-S | Calculated separately for Domestic and International operations: average freight distance = sum(FTK) / sum(freight tonnes). If the freight denominator is zero or unavailable, N/A is published. |
| **6. Freight Intensity** | Form C | Freight tonnes per departure = sum(FREIGHT) / sum(NB_OF_FLIGHT) for all international airlines serving the State (records with exactly one endpoint in the State) and for domestic carriers (airlines of the State) within the same universe. |
| **7. Cargo Operating Model** | Form C + aircraft lookup | Each aircraft type is classified from AIRCRAFT_TYPE -> PAX/FRT in the registered aircraft master (regiones_and_cuerpos.xlsx, 'cuerpos'). FREIGHTER maps to Freighter; PASSENGER maps to Passenger Belly. Role share = role freight / total international freight x 100. PASSENGER_SEATS is not used. Unmapped types are excluded and flagged in QC. |
| **8. Different Aircraft, Different Cargo Roles** | Form C + aircraft lookup | Aggregate FTK, MTK and cargo ATK by aircraft type within each cargo role. Aircraft CLF = [sum(FTK) + sum(MTK)] / sum(cargo ATK) x 100. Only 0.0%-100.0% values are retained; Top 3 ranked by CLF with FTK as deterministic secondary tie-breaker. |
| **9. International Network - Freight** | Form B | International records with exactly one endpoint in the State; both directions of each city pair are combined into one round-trip route key (State endpoint first); freight tonnes are aggregated and the Top 5 routes ranked. Right column: airlines of the State (displayed as DOMESTIC CARRIERS). |
| **10. Route Cargo Load Factors** | Form C | Both directions of each route combined. FTK, MTK and cargo ATK aggregated before calculating route CLF = [sum(FTK) + sum(MTK)] / sum(cargo ATK) x 100. Only valid 0.0%-100.0% routes are published, ranked by CLF with FTK as secondary tie-breaker; no traffic threshold applied. |
| **11. Share of International FTK by Region** | Form C | Each eligible international observation is assigned to the geographic region of the partner (non-State) endpoint using Form C region fields harmonised to the approved six-region taxonomy. Regional share = region FTK / total eligible international FTK x 100; leading, second and third regions shown; the remainder aggregated as OTHER REGIONS. |
| **12. Top Airlines by Reported FTK** | Form C | Aggregate eligible international FTK by reporting airline and rank the Top 5 within the State's international universe. Entities are shown exactly as reported in Form C. |
| **13. Network Structure** | Form B | From all valid round-trip routes in the Form B universe: HHI = sum[(100 x route freight share)^2]; Directional Asymmetry = sum\|Outbound - Inbound\| / sum(Outbound + Inbound) x 100; Flow Orientation shows the dominant outbound/inbound share. Route pairs with no reporting in the opposite direction are excluded from asymmetry and orientation and flagged. |
| **14. Key Takeaways** | Validated analytical object | Source-supported executive statements generated only from validated profile indicators. Point 2 does not repeat the numerical HHI. Point 3 translates Flow Orientation into freight-direction language and is not a customs trade statistic. Point 4 uses only profile indicators (leading airline and leading partner region); no external evidence. Point 5 translates CAGR 2015-2024 and Growth 2024-2025. |