

## INTRODUCTION

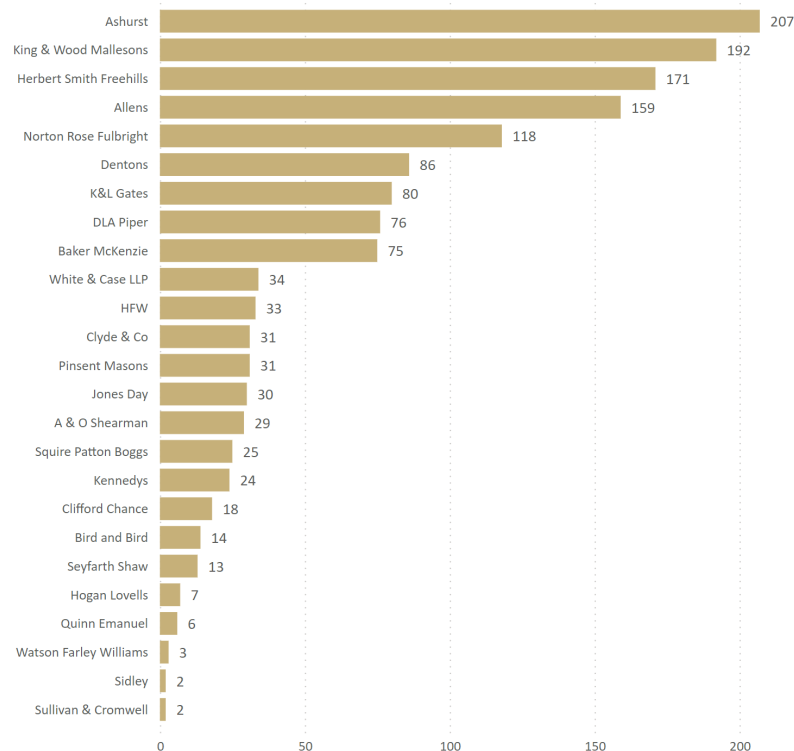
At the start of every financial year, CKG updates its map of the legal market in Australia. The underlying information is taken from CKG's own internal data, cross referenced with publicly available partnership surveys.

The map details the leading 25 global law firms present in Australia, and the leading 25 domestic firms. The first page of the map, ordered by current size of partnership, provides a 3 year trend analysis on the relative growth trajectories of the firms covered. The second page orders the firms by their respective growth of that period.

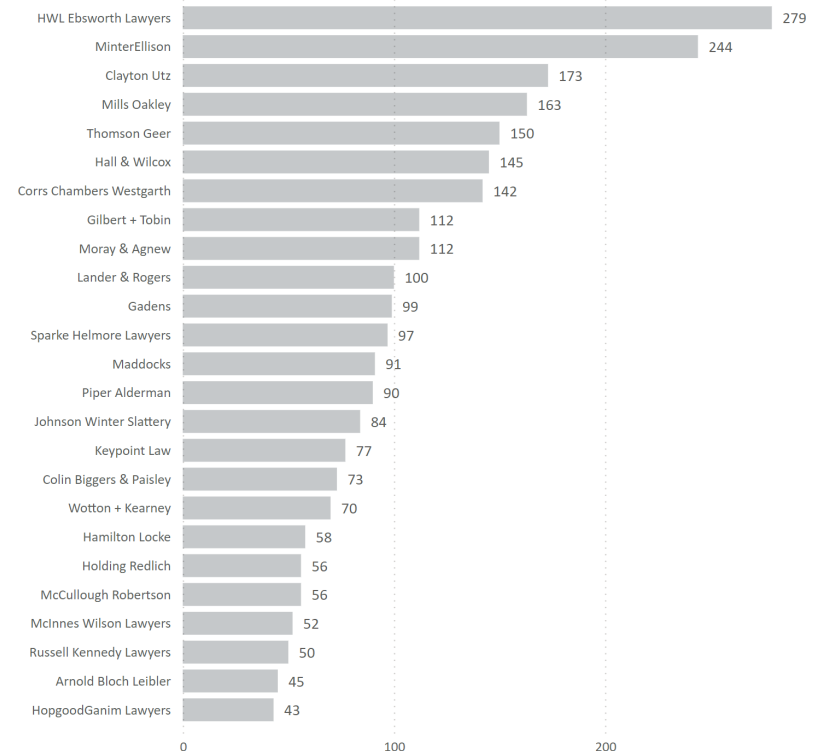
The data clearly illustrates which firms have been successful in growing their platform in Australia. We see the continuing year on year growth of ambitious domestic firms looking to compete and take market share from historically larger, more prestigious brands. We also see the push by a range of global firms to actively build out their Australian presence. Conversely, the data highlights those firms who have looked to restructure, or have otherwise seen a reduction in overall partner headcount for reasons relating to strategy, leadership or performance.

CKG has developed a deep understanding of the dynamics at play across the legal market over a 20 year period. We would welcome the opportunity to share our thoughts and observations with you and to hear your own insights on the industry.

**Partner Numbers by Law Firm - Tier 1**



**Partner Numbers by Law Firm - Tier 2**



# THE AUSTRALIAN LEGAL MARKET 2024

## LEADING GLOBAL AND DOMESTIC FIRMS BY PARTNER NUMBERS

FIRM	PARTNERS JULY 2024	PARTNERS JULY 2023	PARTNERS JULY 2022	% CHANGE 2022-2024
<b>INTERNATIONAL LAW FIRMS</b>				
Ashurst	207	192	179	16%
King & Wood Mallesons	192	189	183	5%
Herbert Smith Freehills	171	171	164	4%
Allens	159	156	156	2%
Norton Rose Fulbright	118	123	125	-6%
Dentons	86	85	66	30%
K&L Gates	80	75	66	21%
DLA Piper	76	76	75	1%
Baker McKenzie	75	84	86	-13%
White & Case	34	33	26	31%
HFW Australia	33	25	24	38%
Clyde & Co	31	40	39	-21%
Pinsent Masons	31	31	23	35%
Jones Day	30	29	30	0%
A&O Shearman	29	25	23	26%
Squire Patton Boggs	25	27	28	-11%
Kennedys	24	21	21	14%
Clifford Chance	18	18	18	0%
Bird & Bird	14	14	12	17%
Seyfarth Shaw	13	13	11	18%
Hogan Lovells	7	7	8	-13%
Quinn Emanuel	6	5	6	0%
Watson Farley Williams	3	3	2	50%
Sidley	2	2	3	-33%
Sullivan & Cromwell	2	2	1	100%
<b>TOTAL</b>	<b>1466</b>	<b>1446</b>	<b>1375</b>	<b>7%</b>

FIRM	PARTNERS JULY 2024	PARTNERS JULY 2023	PARTNERS JULY 2022	% CHANGE 2022-2024
<b>DOMESTIC LAW FIRMS</b>				
HWL Ebsworth Lawyers	279	281	277	1%
MinterEllison	244	250	252	-3%
Clayton Utz	173	173	168	3%
Mills Oakley	163	144	132	23%
Thomson Geer	150	143	133	13%
Hall & Wilcox	145	127	117	24%
Corrs Chambers Westgarth	142	143	145	-2%
Moray & Agnew	112	108	109	3%
Gilbert + Tobin	112	106	87	29%
Lander & Rogers	100	94	84	19%
Gadens	99	93	80	24%
Sparke Helmore	97	91	90	8%
Maddocks	91	90	91	0%
Piper Alderman	90	83	80	13%
Johnson Winter & Slattery	84	85	79	6%
Keypoint Law	77	66	59	31%
Colin Biggers & Paisley	73	73	77	-5%
Wotton+Kearney	70	62	48	46%
Hamilton Locke	58	51	43	35%
McCullough Robertson	56	56	53	6%
Holding Redich	56	65	73	-23%
McInnes Wilson	52	47	52	0%
Russell Kennedy	50	52	52	-4%
Arnold Bloch Liebler	45	43	43	5%
Hopgood Ganim	43	42	45	-4%
<b>TOTAL</b>	<b>2661</b>	<b>2568</b>	<b>2469</b>	<b>8%</b>

# THE AUSTRALIAN LEGAL MARKET 2024

## LEADING GLOBAL AND DOMESTIC FIRMS BY BY GROWTH (\*EXCLUDING SATELLITE OFFICES)

FIRM	PARTNERS JULY 2024	PARTNERS JULY 2023	PARTNERS JULY 2022	% CHANGE 2022-2024
<b>INTERNATIONAL LAW FIRMS</b>				
HFW Australia	33	25	24	38%
Pinsent Masons	31	31	23	35%
White & Case	34	33	26	31%
Dentons	86	85	66	30%
A&O Shearman	29	25	23	26%
K&L Gates	80	75	66	21%
Seyfarth Shaw	13	13	11	18%
Bird & Bird	14	14	12	17%
Ashurst	207	192	179	16%
Kennedys	24	21	21	14%
King & Wood Mallesons	192	189	183	5%
Herbert Smith Freehills	171	171	164	4%
Allens	159	156	156	2%
DLA Piper	76	76	75	1%
Jones Day	30	29	30	0%
Clifford Chance	18	18	18	0%
Quinn Emanuel	6	5	6	0%
Norton Rose Fulbright	118	123	125	-6%
Squire Patton Boggs	25	27	28	-11%
Hogan Lovells	7	7	8	-13%
Baker McKenzie	75	84	86	-13%
Clyde & Co	31	40	39	-21%
Sidley	2	2	3	-33%
Sullivan & Cromwell*	2	2	1	100%
Watson Farley Williams*	3	3	2	50%
<b>TOTAL</b>	<b>1461</b>	<b>1441</b>	<b>1372</b>	<b>6%</b>

FIRM	PARTNERS JULY 2024	PARTNERS JULY 2023	PARTNERS JULY 2022	% CHANGE 2022-2024
<b>DOMESTIC LAW FIRMS</b>				
Wotton+Kearney	70	62	48	46%
Hamilton Locke	58	51	43	35%
Keypoint Law	77	66	59	31%
Gilbert + Tobin	112	106	87	29%
Hall & Wilcox	145	127	117	24%
Gadens	99	93	80	24%
Mills Oakley	163	144	132	23%
Lander & Rogers	100	94	84	19%
Thomson Geer	150	143	133	13%
Piper Alderman	90	83	80	13%
Sparke Helmore	97	91	90	8%
Johnson Winter & Slattery	84	85	79	6%
McCullough Robertson	56	56	53	6%
Arnold Bloch Liebler	45	43	43	5%
Clayton Utz	173	173	168	3%
Moray & Agnew	112	108	109	3%
HWL Ebsworth Lawyers	279	281	277	1%
Maddocks	91	90	91	0%
McInnes Wilson	52	47	52	0%
Corrs Chambers Westgarth	142	143	145	-2%
MinterEllison	244	250	252	-3%
Russell Kennedy	50	62	52	-4%
Hopgood Ganim	43	42	45	-4%
Colin Biggers & Paisley	73	73	77	-5%
Holding Redich	56	65	73	-23%
<b>TOTAL</b>	<b>2661</b>	<b>2578</b>	<b>2469</b>	<b>8%</b>

# THE AUSTRALIAN LEGAL MARKET 2024

## LEADING GLOBAL AND DOMESTIC FIRMS ALPHABETICALLY

FIRM	PARTNERS JULY 2024	PARTNERS JULY 2023	PARTNERS JULY 2022	% CHANGE 2022-2024
<b>INTERNATIONAL LAW FIRMS</b>				
A&O Shearman	29	25	23	26%
Allens	159	156	156	2%
Ashurst	207	192	179	16%
Baker McKenzie	75	84	86	-13%
Bird & Bird	14	14	12	17%
Clifford Chance	18	18	18	0%
Clyde & Co	31	40	39	-21%
Dentons	86	85	66	30%
DLA Piper	76	76	75	1%
Herbert Smith Freehills	171	171	164	4%
HFW Australia	33	25	24	38%
Jones Day	30	29	30	0%
K&L Gates	80	75	66	21%
Kennedys	24	21	21	14%
King & Wood Mallesons	192	189	183	5%
Norton Rose Fulbright	118	123	125	-6%
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Quinn Emanuel	6	5	6	0%
Sidley	2	2	3	-33%
Seyfarth Shaw	13	13	11	18%
Hogan Lovells	7	7	8	-13%
Squire Patton Boggs	25	27	28	-11%
Sullivan & Cromwell	2	2	1	100%
Watson Farley Williams	3	3	2	50%
White & Case	34	33	26	31%
<b>TOTAL</b>	<b>1466</b>	<b>1446</b>	<b>1375</b>	<b>7%</b>

FIRM	PARTNERS JULY 2024	PARTNERS JULY 2023	PARTNERS JULY 2022	% CHANGE 2022-2024
<b>DOMESTIC LAW FIRMS</b>				
Arnold Bloch Liebler	45	43	43	5%
Clayton Utz	173	173	168	3%
Colin Biggers & Paisley	73	73	77	-5%
Corrs Chambers Westgarth	142	143	145	-2%
Gadens	99	93	80	24%
Gilbert + Tobin	112	106	87	29%
Hall & Wilcox	145	127	117	24%
Hamilton Locke	58	51	43	35%
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Piper Alderman	90	83	80	13%
McCullough Robertson	56	56	53	6%
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Russell Kennedy	50	62	52	-4%
Sparke Helmore	97	91	90	8%
Thomson Geer	150	143	133	13%
Wotton+Kearney	70	62	48	46%
<b>TOTAL</b>	<b>2661</b>	<b>2578</b>	<b>2469</b>	<b>8%</b>