



ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

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UNITING AVIATION

AFI AVIATION WEEK - EIGHTH EDITION

Africa Region State of Air Transport

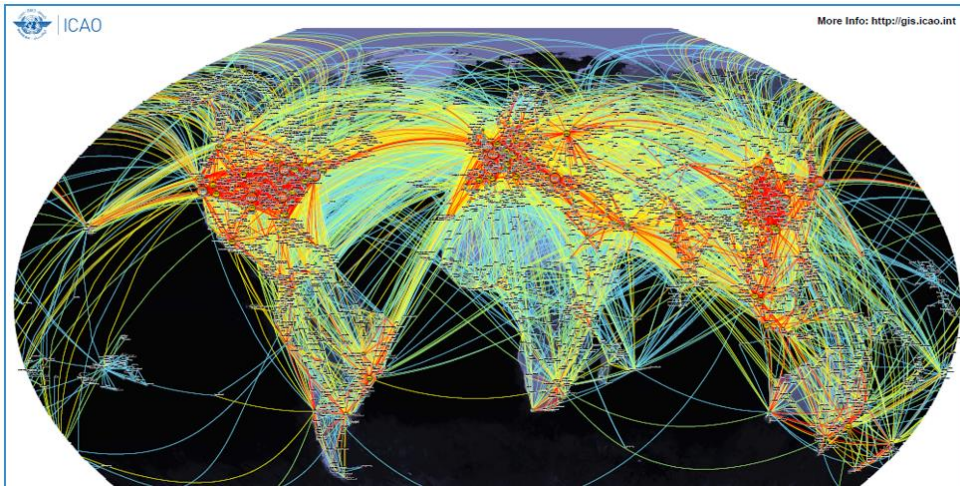


Session 5 Air Transport and Economic Development

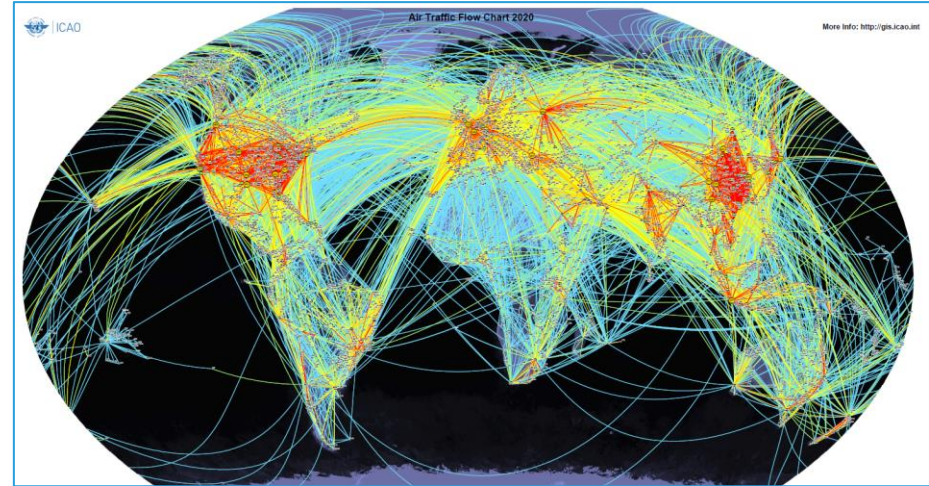
Nairobi, Kenya, 21 – 25 August 2023



COVID-19 pandemic impacted air connectivity



2019

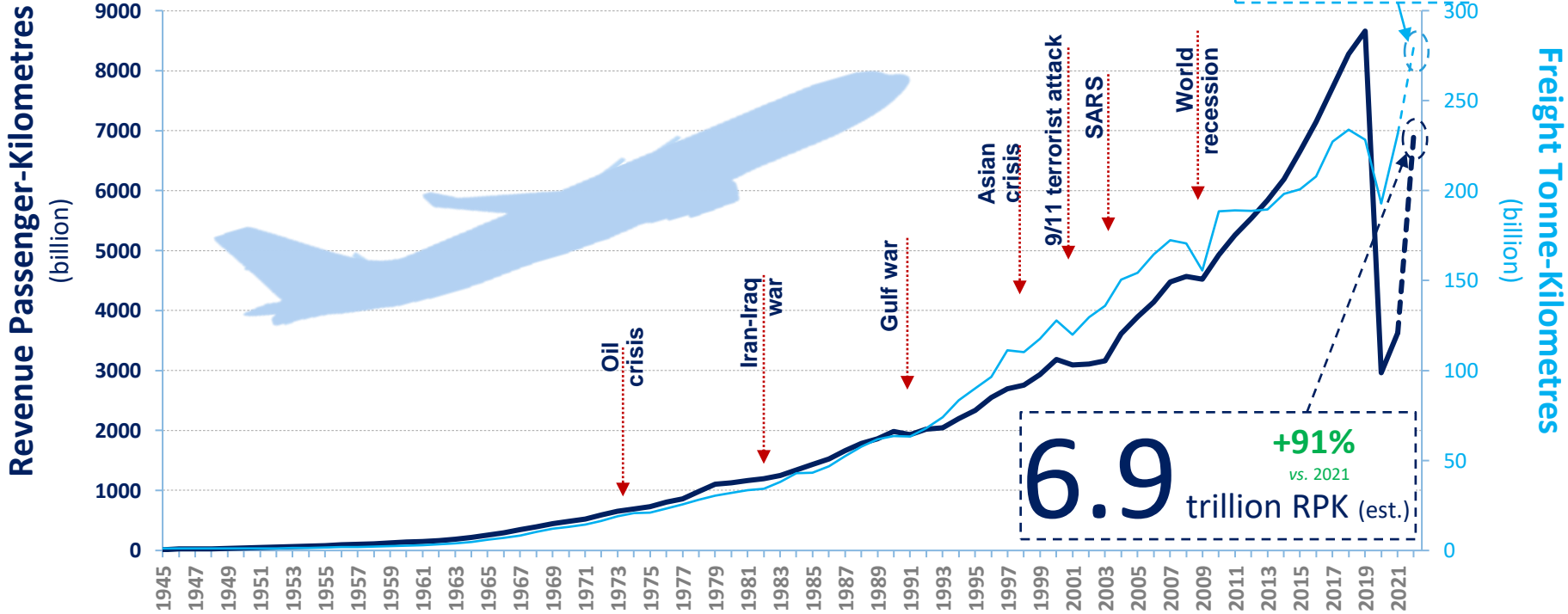


2020



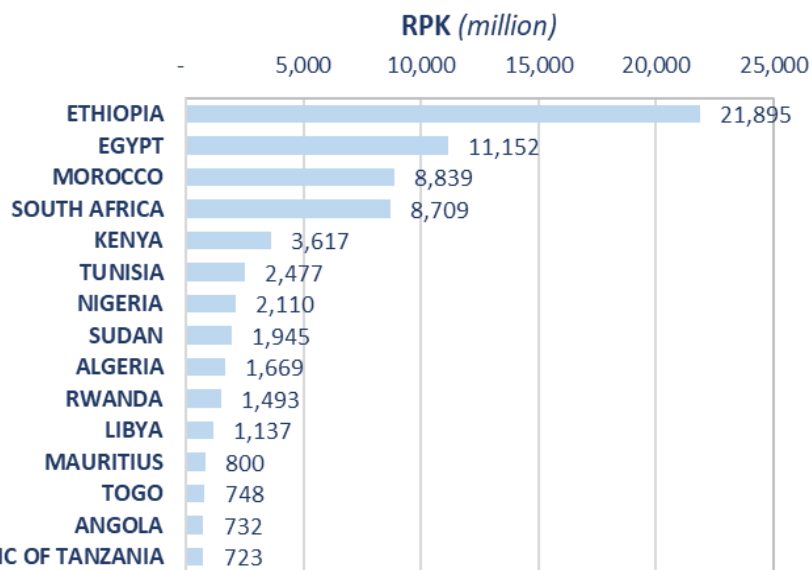
Global traffic: A recovery from the pandemic shock

280 billion FTK (est.)
 +21% vs. 2021

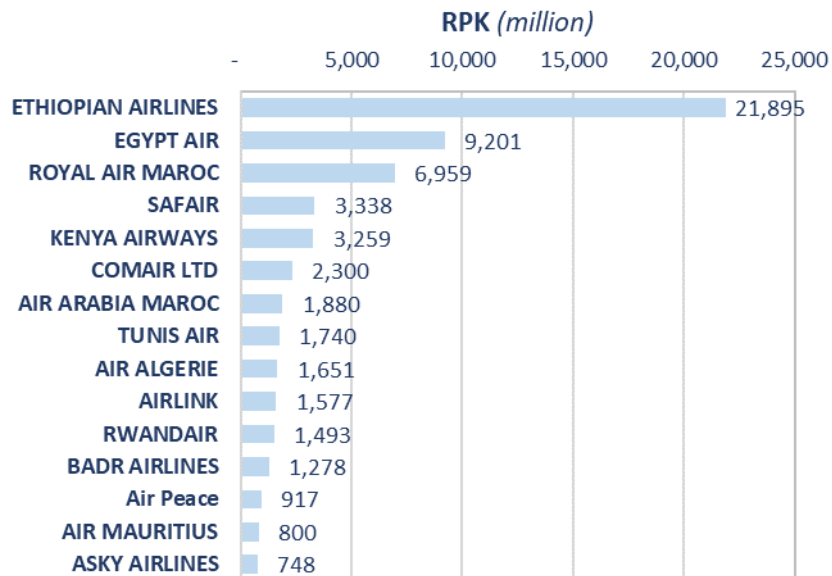




Top 15 States ranking in 2021 by Revenue Passenger-Kilometres

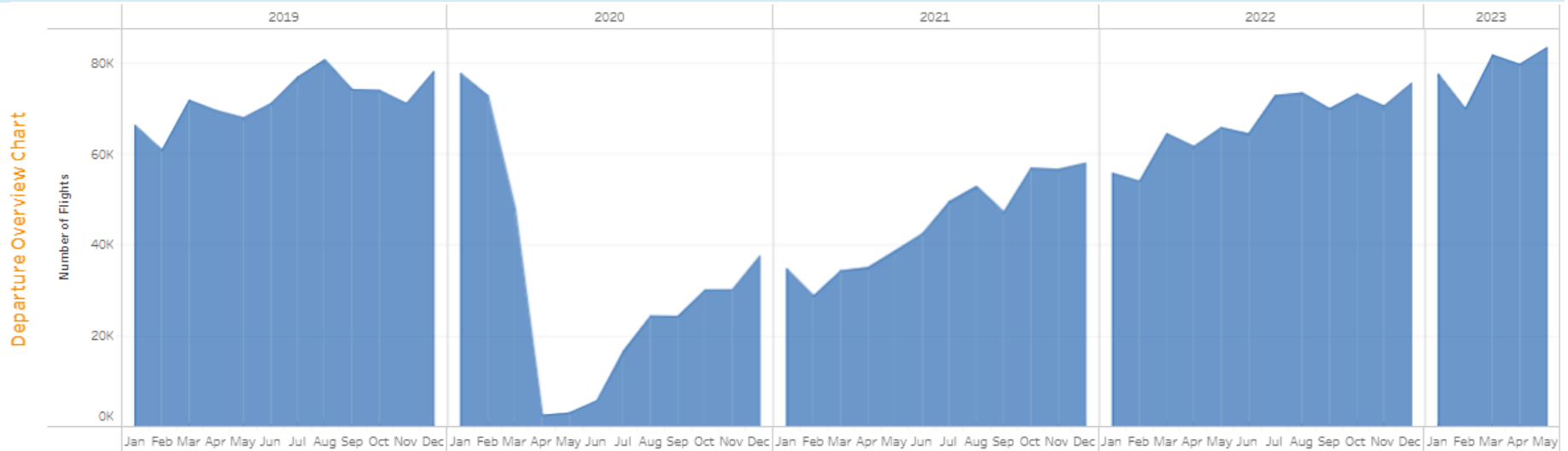


Top 15 Airlines ranking in 2021 by Revenue Passenger-Kilometres



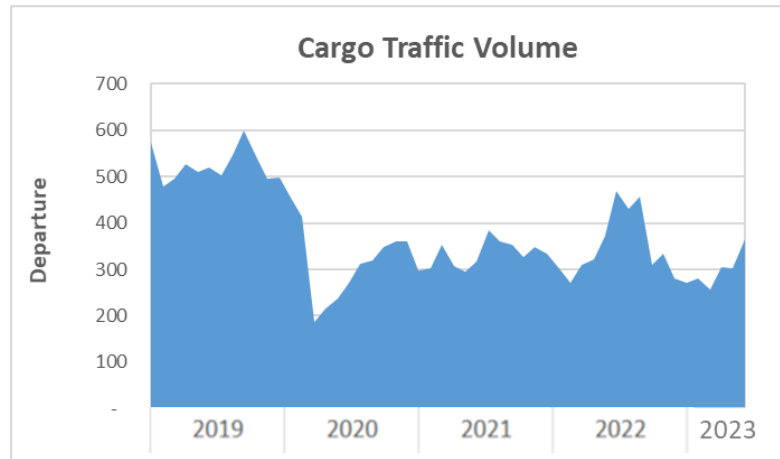
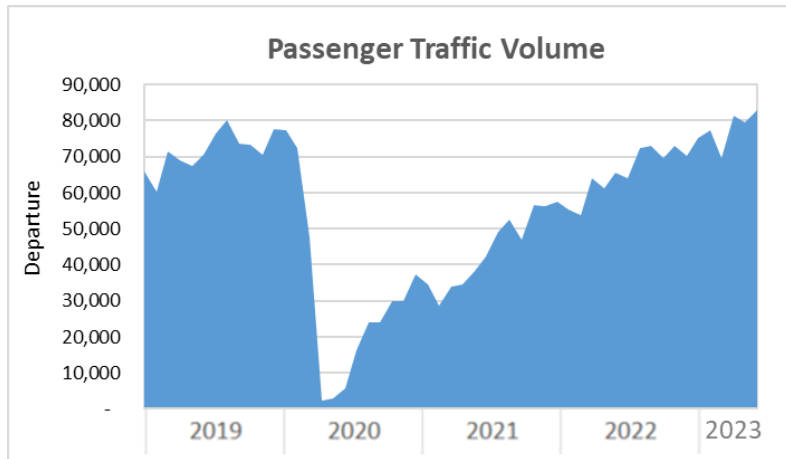


Total Number of flights from African States 2019-2023



- **+30% increase in departure from Jan-May 2023 compared to the same period in 2022.**
- **+19% increase in departure from Jan-May 2023 compared to the same period in 2019.**

Evolution of traffic – Africa

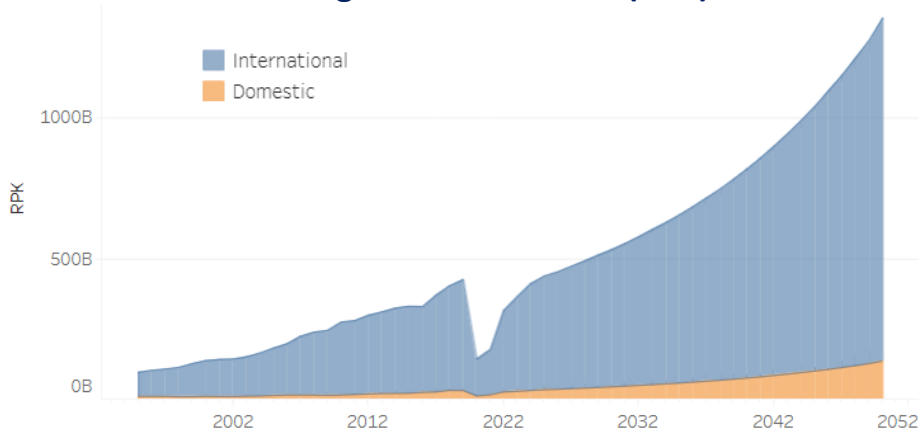


- Passenger traffic in Africa region in departure volume shows constant recovery since the pandemic shock in 2020.
- Scheduled passenger departure volume in 2022 recovered by 93% compared with 2019.
- Scheduled cargo departure volume, on the other hand, shows a slight decrease after the pandemic.



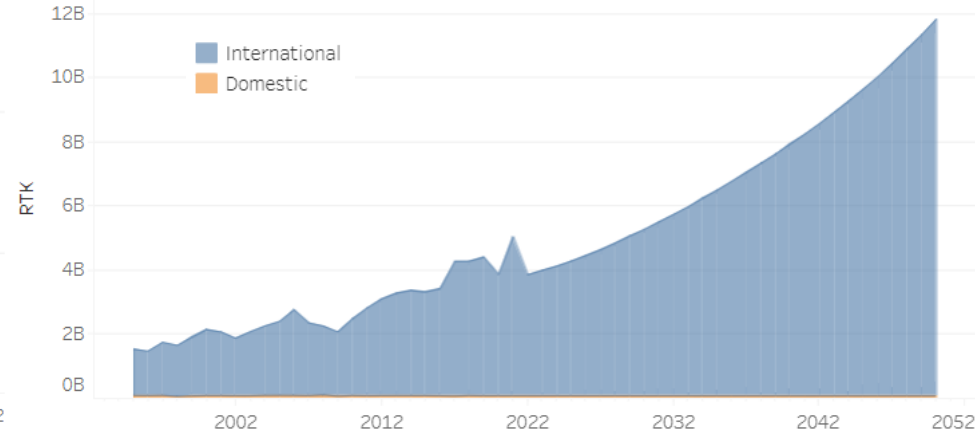
Long-term traffic forecasts - Africa (2021 baseline – mid scenario)

Passenger traffic forecast (RPK)



- Passenger traffic (RPK) CAGR* 2018-2050 forecast is 3.8%, 4.7% and 3.9% for international, domestic and total, respectively.

Cargo traffic forecasts (RTK)



- Cargo traffic (RTK) CAGR 2018-2050 forecast is 3.2% for total.



Economic Impact Analysis of COVID-19:

<https://www.icao.int/sustainability/Pages/Economic-Impacts-of-COVID-19.aspx>

COVID-19 Air Traffic Dashboards:

<https://www.icao.int/sustainability/Pages/COVID-19-Air-Traffic-Dashboard.aspx>

Regional Personnel by Gender Analysis:

<https://public.tableau.com/app/profile/icaodataanalytics/viz/RegionalPersonnelByGenderAnalysis/PersonnelbyGender/>



Operational impact



Aircraft utilization



Country-pair traffic



Economic impact - Air carriers



ECONOMIC IMPACT - AIRPORTS



ECONOMIC IMPACT - ANSPs



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(EUR/NAT) Office
Paris

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Beijing

Asia and Pacific
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Bangkok



THANK YOU