

AFI AVIATION WEEK – 8th EDITION

AFI Aviation Symposium



ICAO



Session 5: Air Transport connectivity in Africa

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African Airlines Association - AFRAA

Nairobi, Kenya: August 2023



AGENDA

- I. State of the industry
- II. The Connectivity Challenge in Africa
- III. Industry initiatives



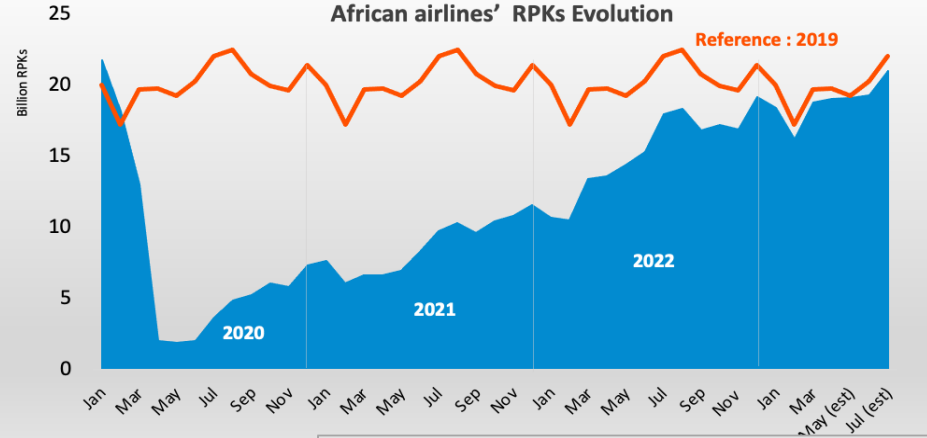
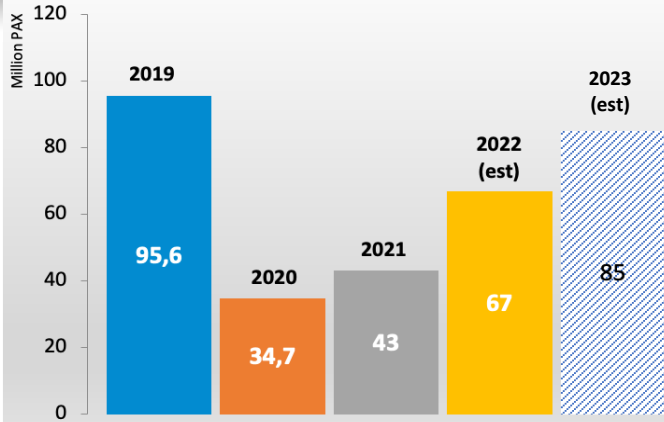
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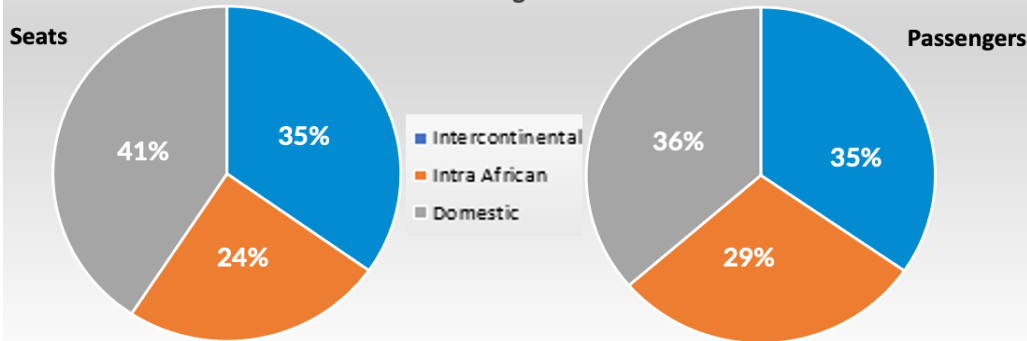


I. State of the industry

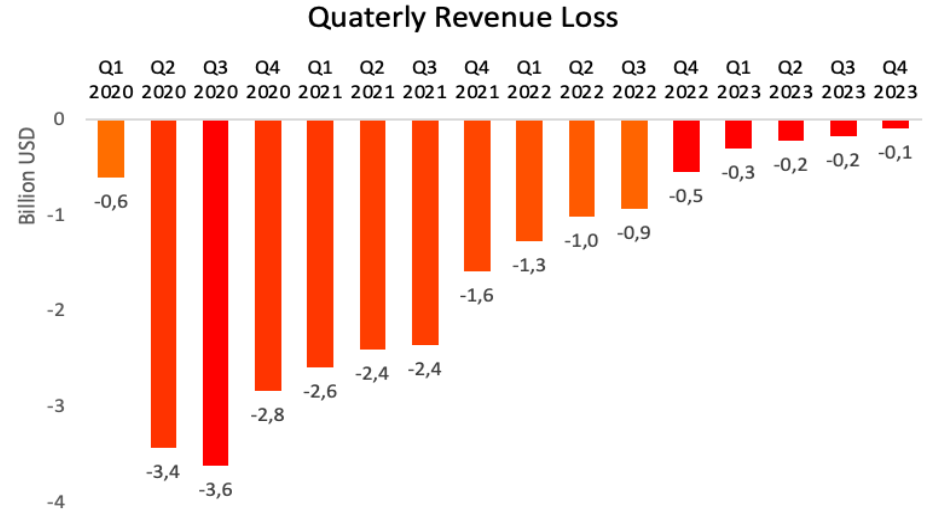
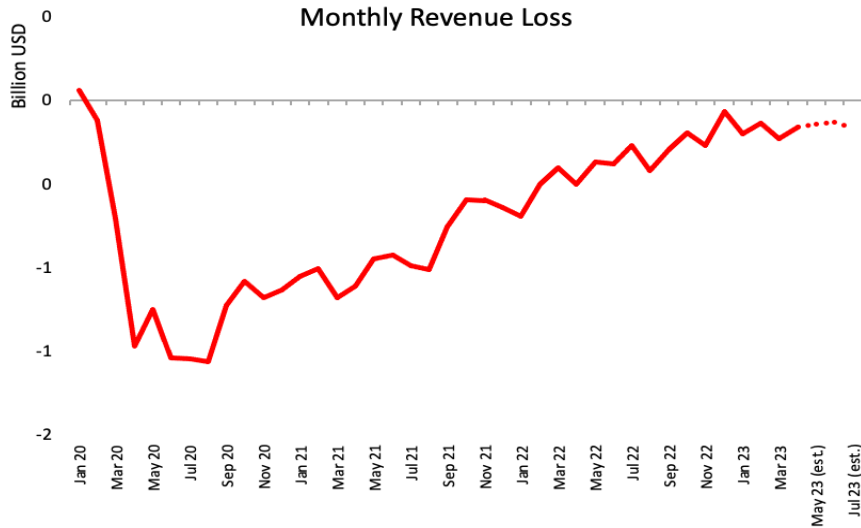
Passenger traffic evolution and repartition



Seats and Passengers distribution



- **85 million PAX** in 2023 (AFRAA estimations).
- Traffic is expected to reach **95.2%** of the 2019 levels in **July 2023**.
- In May 2023 (Final adjusted data) :
 - ✓ Domestic traffic represented **36% of the passengers carried**.
 - ✓ Intra-African passengers carried represented **29%**
 - ✓ Intercontinental traffic was **35%**



Source: AFRAA/OAG

90% traffic recovery in 2023 compared to 2019

- Estimated Revenue loss for **2022 USD 3.5 billion**, representing 20% of 2019 revenues.
- Estimated Revenue loss for **2023 USD 1 billion**, 6% of 2019 revenues.
- Estimated Revenue loss for **Q2 2023 : USD 0.2 billion and Q3 2023 : USD 0.2 billion**



II. The Connectivity Challenge in Africa

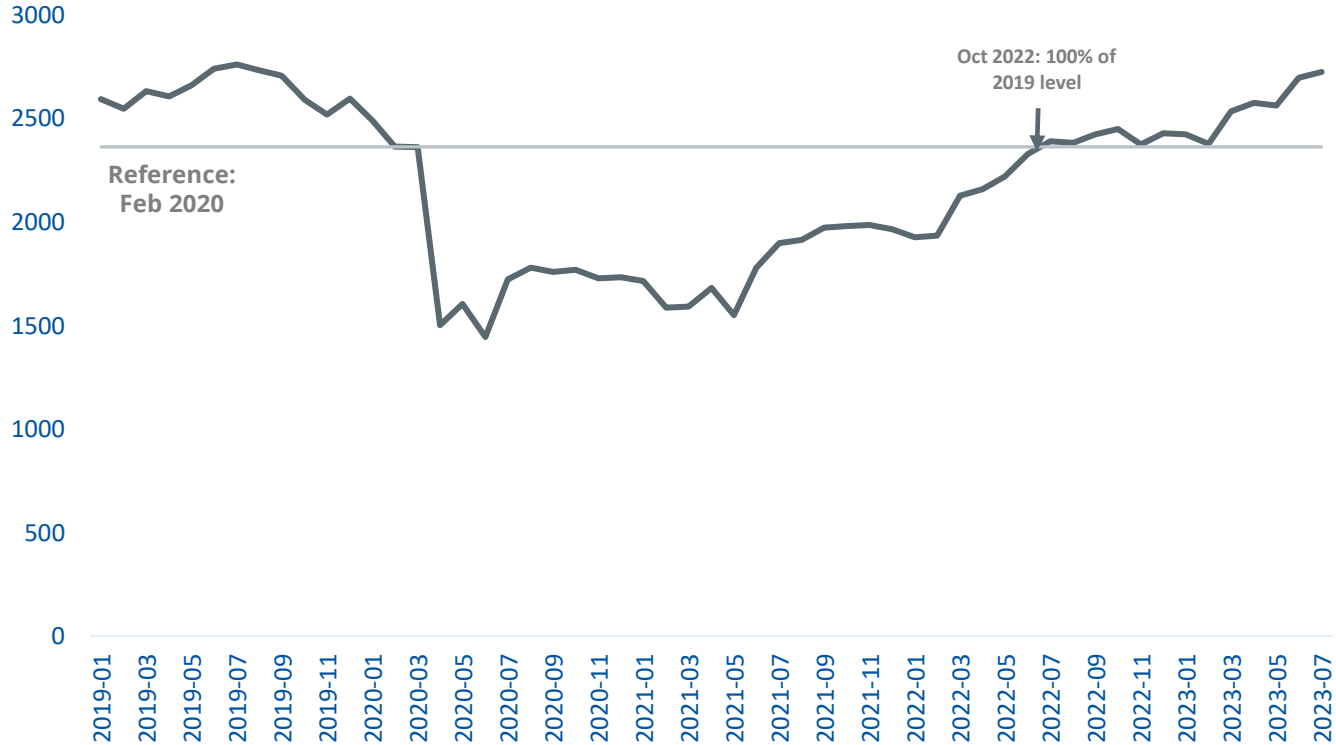


Air traffic
worldwide
10/08/2023
07:00 UTC

Source: Flightradar24

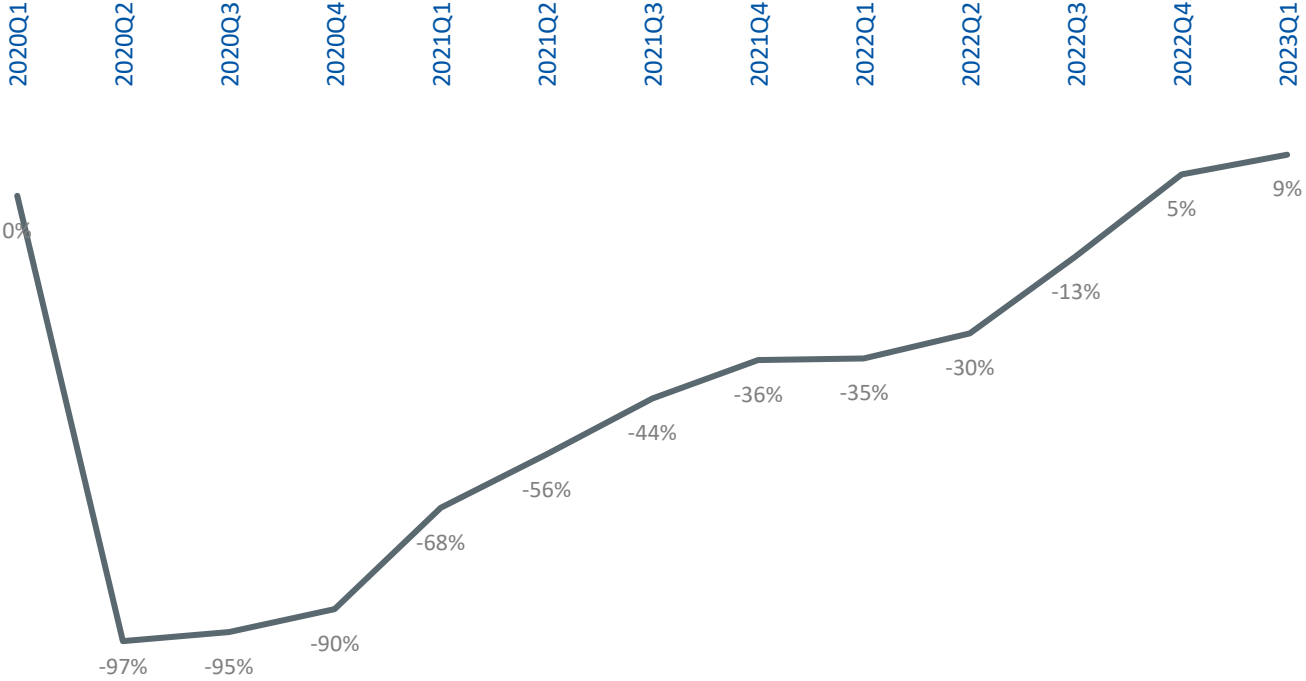


Number of international routes operated by African Airlines



African airlines exceeded their pre-Covid number of international routes in October 2022.

Evolution of Intra-African connectivity post Covid

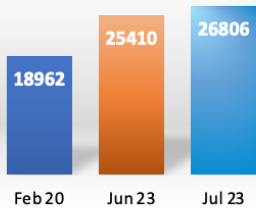


The intra-African connectivity reached 87% of the pre-Covid level during Q3 2022 and exceeded the pre-Covid level during Q4.

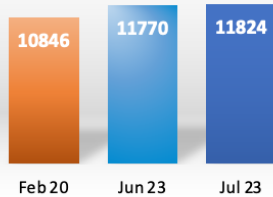
Number of Intra-African connections at major hubs per African Sub-regions

Eastern Africa

Addis Ababa

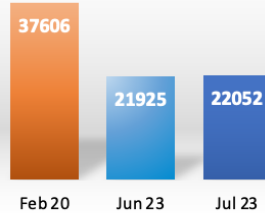


Nairobi

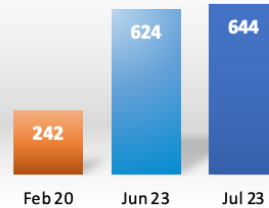


Southern Africa

Johannesburg

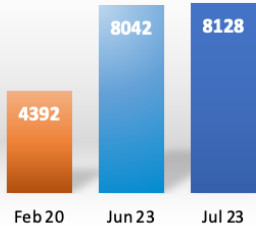


Lusaka

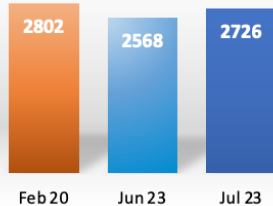


Northern Africa

Cairo

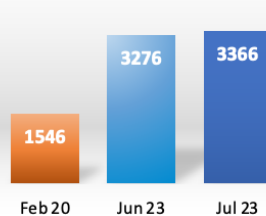


Casablanca

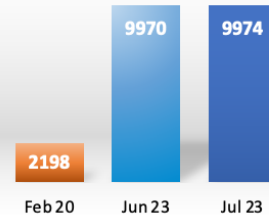


Central and Western Africa

Abidjan

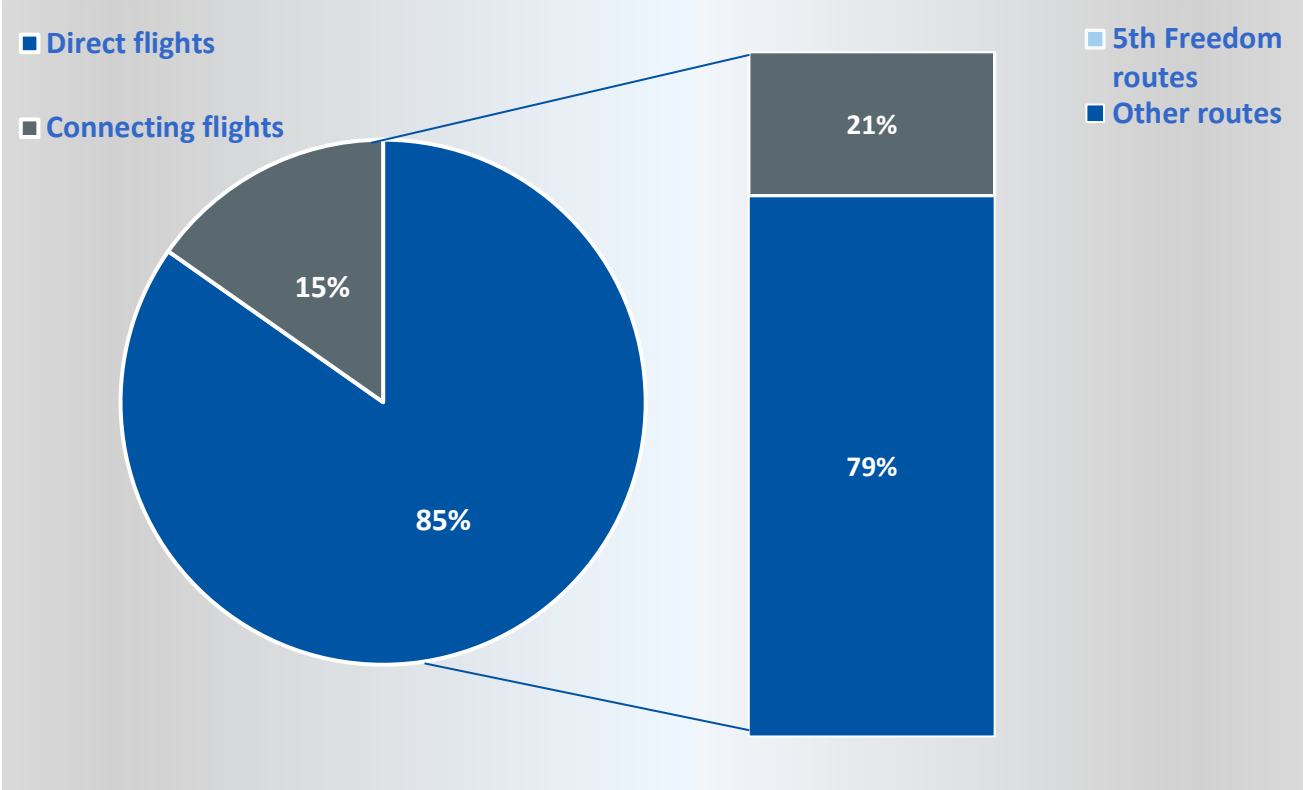


Lome



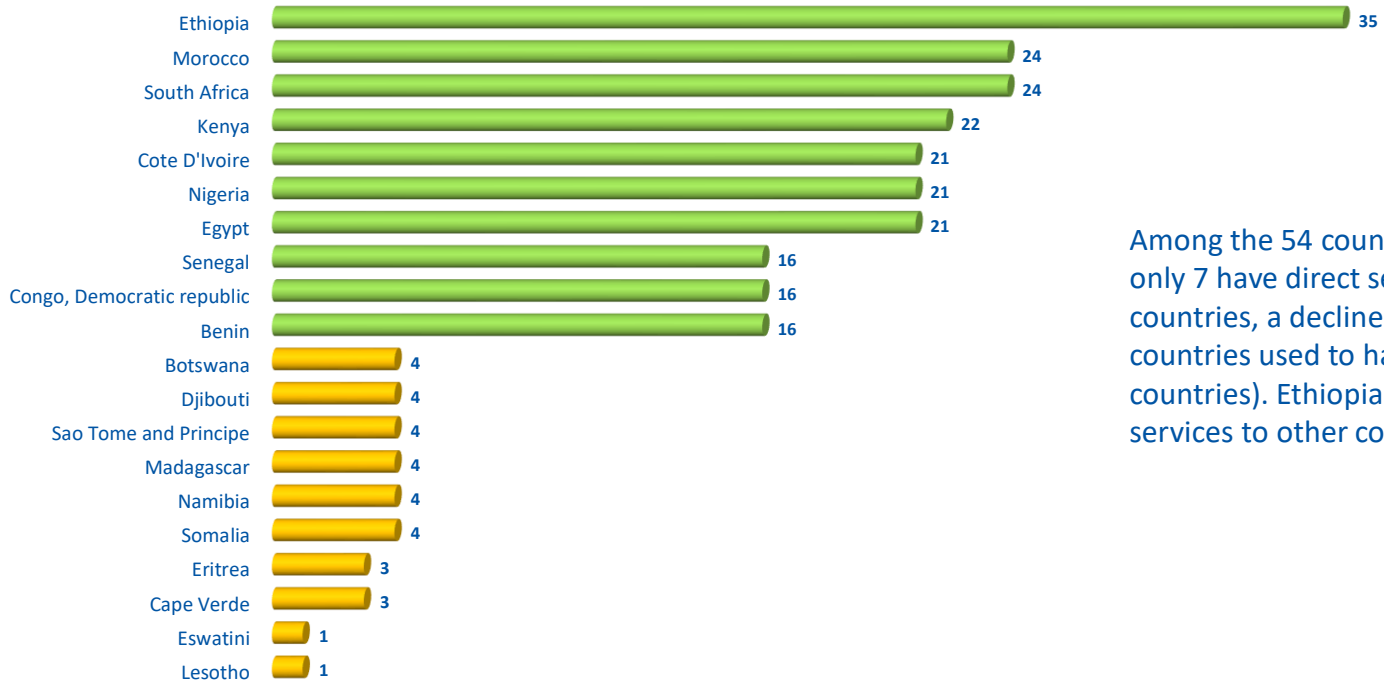
The general Intra-African connectivity is estimated to have reached the pre-Covid level since December 2022. However, the number of existing connections is far lower than the real potential. We can see a slight improvement from June to July.

Share of Fifth Freedom flights - Q1 2023



- 85% of intra-African flights are direct vs 15% connecting with one-stop or more.
- Among those direct flights, 5th freedom represent only 21%, while the share of 3rd and 4th freedom flights is 79%

Direct services between African countries – Q1 2023



Among the 54 countries in the African continent, only 7 have direct services to more than 20 African countries, a decline compared to 2020 (13 countries used to have direct flights toward other countries). Ethiopia is leading with 35 direct services to other countries within Africa.



III. Industry initiatives

- Improving intra-African connectivity is one of AFRAA's priorities.
- To achieve this, AFRAA has taken a series of initiatives :
 - The Route Network and Cargo Committee, which objectives are stated as follows:
 - ❖ Network coordination,
 - ❖ Harmonization of flight schedules,
 - ❖ Increased intra-Africa flight frequency,
 - ❖ Synergy through collaborative network development
 - ❖ Development of virtual alliances through commercial agreements
 - ❖ Ensure that the Cargo business portfolio grows significantly
 - The AFRAA route intelligence portal;
- AFRAA is involved in joint aviation stakeholders' initiatives :
 - Collaboration with AFCAC for the implementation of the Single Air Transport Market (SAATM);
 - The Air Transport Sustainability LAB under AAIG hosted by AFRAA in June 2022;
 - The Route Development Strategy, under the AFCAN project : states, industry, airports to work together.



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Dakar

European and
North Atlantic
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Paris

Middle East
(MID) Office
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Southern African
(ESAF) Office
Nairobi

Asia and Pacific
(APAC) Sub-office
Beijing

Asia and Pacific
(APAC) Office
Bangkok



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