ICAO ESAF & WACAF | ATConf/7 Preparatory Webinar | 19 May 2026

AFRICAN STATES PERSPECTIVE:

Priorities, Challenges & Expectations for ATConf/7

Presented by: Ms. Toska Sem, Executive Director, Namibia Civil Aviation Authority

ATConf/7 Preparatory Webinar | Agenda Item 3.1

Conference Theme:

"Air Transport: Powering Global Connectivity, Economic Development and Resilience in a Dynamic World"

Africa's Scale — The Case for Global Priority Attention

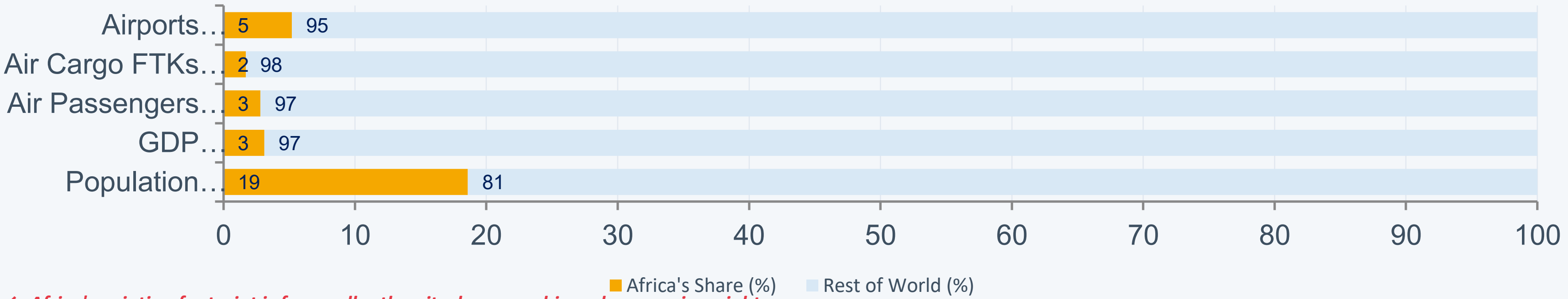
1.5B+
Population
UN 2024

55
AU Member States (most of any continent)
African Union

30.4M
km² — 2nd Largest continent by area
Geographic

USD 3.1T
GDP — projected USD 29T by 2050
World Bank / UNECA

Africa's Share of Global Total vs. Rest of World (%) — by Indicator



← Africa's aviation footprint is far smaller than its demographic and economic weight

Sources: IATA WATS 2024; ICAO 2024 Annual Report; UNECA; World Bank | Note: FTK = Freight Tonne-Kilometres

Africa's Most Vulnerable States: Air Transport Is Not a Luxury

Of the African Union's 55 Member States, the majority are classified under at least one UN vulnerability category — making aviation not a development preference, but a development necessity.

33 Least Developed Countries (LDCs)

33 of Africa's 55 AU States are UN-classified LDCs — the highest concentration of any region globally.

Includes: Africa (32): Angola, Benin, Burkina Faso, Burundi, Central African Republic, Chad, Comoros, Democratic Republic of the Congo, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Rwanda, Senegal, Sierra Leone, Somalia, South Sudan, Sudan, Togo, Uganda, United Republic of Tanzania, Zambia and Zimbabwe

Air transport is the primary gateway to global markets for exports of perishables, minerals and manufactured goods from LDCs with poor road and rail networks.

UN-OHRLLS / UNCTAD 2024

16 Landlocked Developing Countries (LLDCs)

16 African States have no sea access — half of all LLDCs globally. They face transit costs 50% higher than coastal peers.

Includes: Burkina Faso, Burundi, CAR, Chad, Ethiopia, Lesotho, Malawi, Mali, Niger, Rwanda, South Sudan, Swaziland, Uganda, Zambia, Zimbabwe, Botswana

For LLDCs, air cargo and passenger connectivity are often the only cost-effective route to regional and global markets — air is not an alternative to sea trade, it is the only viable trade corridor.

UN-OHRLLS 2024 — 16 of 32 global LLDCs are African

6 Small Island Developing States (SIDS)

6 African SIDS are entirely dependent on air connectivity for tourism, trade and economic resilience.

Cabo Verde · Comoros · Guinea-Bissau · Mauritius · São Tomé & Príncipe · Seychelles

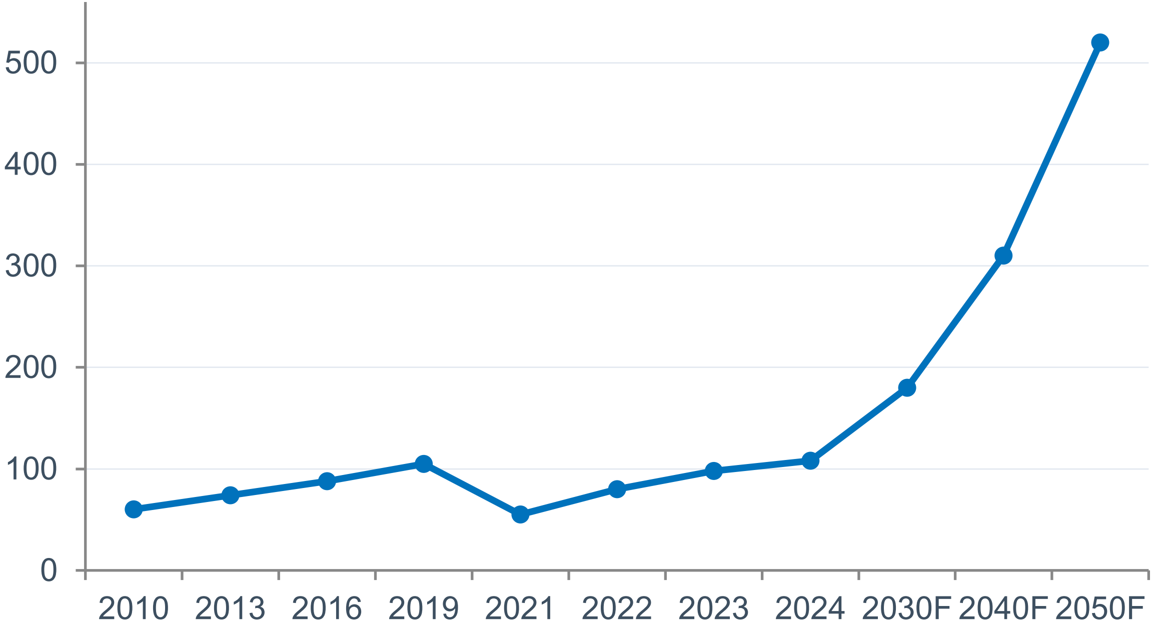
For SIDS, air transport represents between 30–70% of GDP through tourism linkages. Flight frequency reductions can trigger economic crises. Aviation is the economy.

UNECA / Africa Renewal 2024

Combined: at least 40 of 55 AU Member States face structural aviation vulnerability — ATConf/7 must deliver policies that serve these States, not just mature aviation markets.

Africa's Passenger Market: Underserved Yet Fastest-Growing

Africa Air Passenger Traffic — Historical & Projected (Millions)



Sources: IATA WATS 2024; AFRAA Annual Report 2024; ICAO Long-Term Traffic Forecasts 2024

108M

passengers in Africa 2024

IATA / AFRAA 2024

520M

projected by 2050 (5× growth)

IATA 20-Year Forecast

4.8%

annual CAGR — fastest globally

ICAO Long-Term Forecast

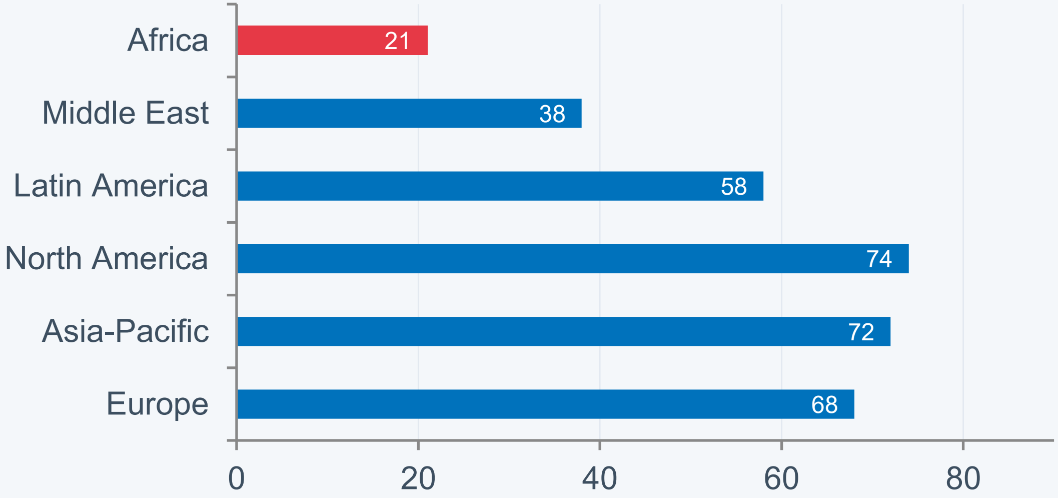
~61%

of seats on routes via non-African hubs

AFRAA 2024

The Intra-Africa Connectivity Gap: A Market Failure Requiring Policy Action

Intra-Regional Scheduled Seat Share by Region — 2024 (%)



- Many key African city pairs have no direct service — Nairobi–Marrakesh, Accra–Kinshasa, Lusaka–Dakar all require in many cases transit via non-African hubs (IATA/OAG 2024).
- COVID-19 wiped out 47% of African aviation capacity — recovery slower than other regions.
- **SAATM has the potential to add 300,000 jobs and USD 1.3 billion in GDP gains (IATA).**

Sources: IATA 2024; AFRAA African Aviation Report 2024; UNECA; World Bank

< 21%

of seats are on intra-African routes — lowest of any region (IATA 2024)

Only 21%

of intra-African city pairs have direct air services — vs 68%+ elsewhere (IATA/OAG 2024)

2–3×

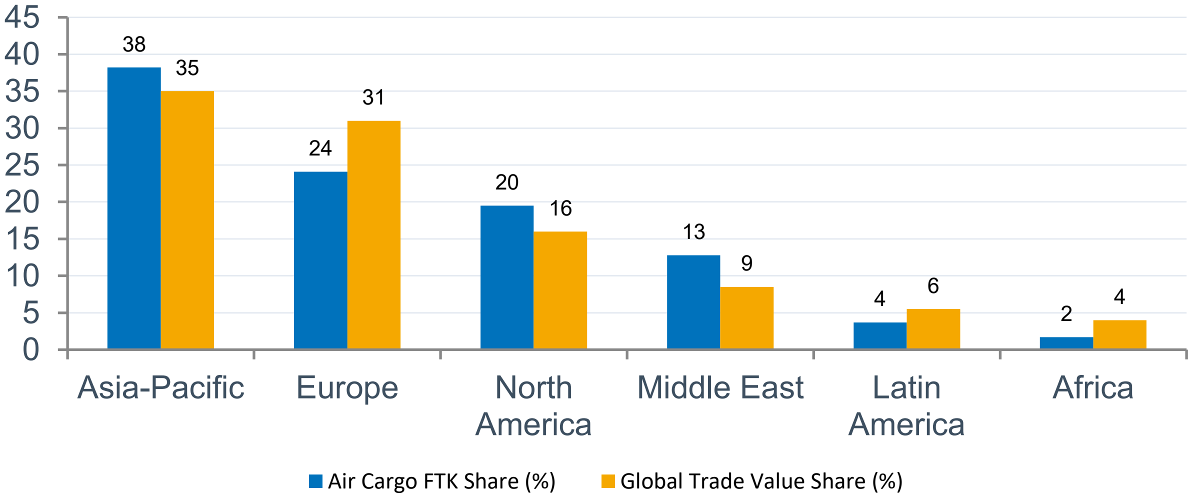
longer travel time via non-African hubs vs. direct routing

3–5×

higher average fares than comparable intra-regional routes elsewhere (UNECA)

Air Cargo & Trade: Africa's Logistics Deficit

Africa Air Cargo FTKs vs. Share of Global Trade — Regional Comparison 2024 (%)



1.7%

Africa's share of global air cargo FTKs

IATA WATS 2024

~4%

Africa's share of global trade value

WTO / UNECA

65%

African exports on non-African carriers

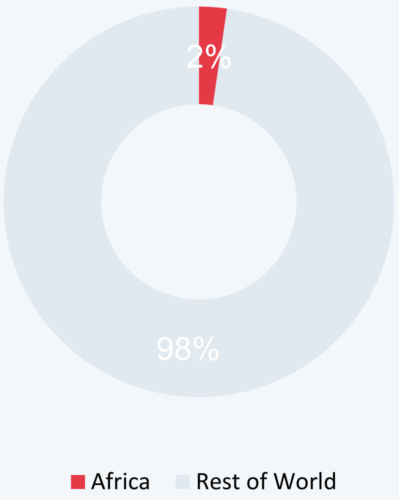
AFRAA July 2025

- 65% of African perishable exports (flowers, fish, vegetables) are carried on non-African airlines — value leakage from the continent.
- Poor cargo infrastructure and cold-chain logistics limit agricultural export competitiveness, particularly for LDCs and SIDS.
- **ATConf/7 must address policy frameworks for cargo market liberalization and logistics infrastructure investment.**

Sources: IATA WATS 2024; AFRAA 2024; WTO; UNECA African Trade Report; World Bank

African Airline Industry: Scale, Fragility & the Financing Gap

Africa's Share of Global Airline Revenue — 2024



African airlines pay 30–40% higher finance costs for aircraft than equivalent non-African carriers — a systemic disadvantage that limits fleet modernization and network growth.

Sources: IATA World Air Transport Statistics 2024; AFRAA Annual Report 2024; World Bank; Cirium Fleet Analysis

~2.3%

Africa's share of global airline revenue (IATA 2024)

~60

Commercial airlines in Africa — 6 of the top 200 globally by revenue (AFRAA)

< 5%

African airlines' share of seats on Africa-intercontinental routes (ICAO)

USD 3–8B

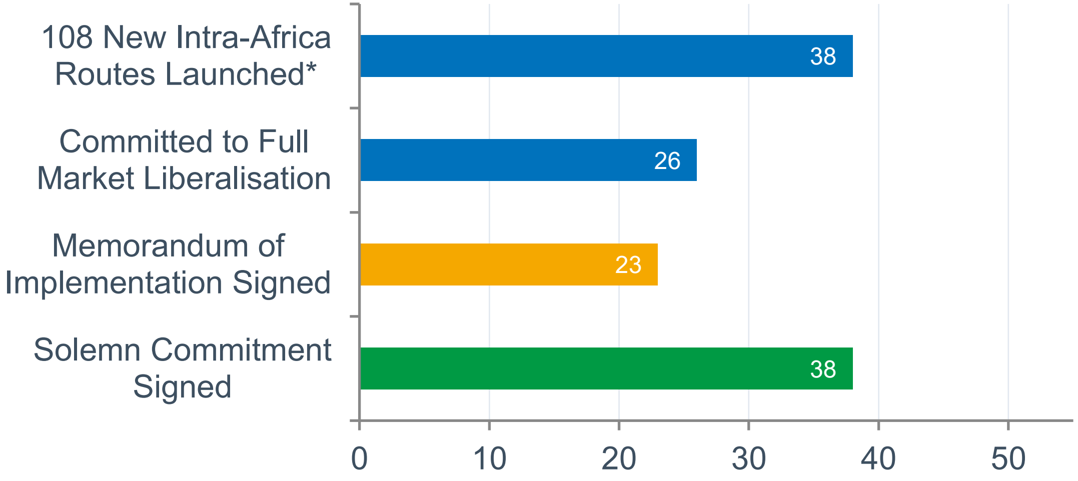
Estimated annual aircraft financing gap for African carriers (AFRAA)

30–40%

Higher borrowing costs for African carriers vs. global peers (World Bank)

SAATM: Real Progress, But the Job Is Unfinished

SAATM Implementation Funnel — AFCAC Data (Aug 2025) | Total AU Member States: 55



- * 108 routes figure = routes launched via the SAATM pilot cluster programme (Sep 2022 – Apr 2025), incl. 19 Fifth Freedom routes. DSM Secretariat operational since Oct 2023; Administrative Council inaugurated Jun 2025. (Source: AFCAC, Aug 2025)

✅ Momentum Building

38 States signed; 26 committed to full liberalisation — a doubling of commitment since 2018 launch.

📈 Route Expansion

108 new intra-Africa routes since 2022; 19 Fifth Freedom routes; 5th freedom capacity: 15% (2018) → 23% (2024).

⚠️ Remaining Gap

Only 10 States have implemented all SAATM measures. Lack of political will & reciprocity remain top barriers (AFRAA survey).

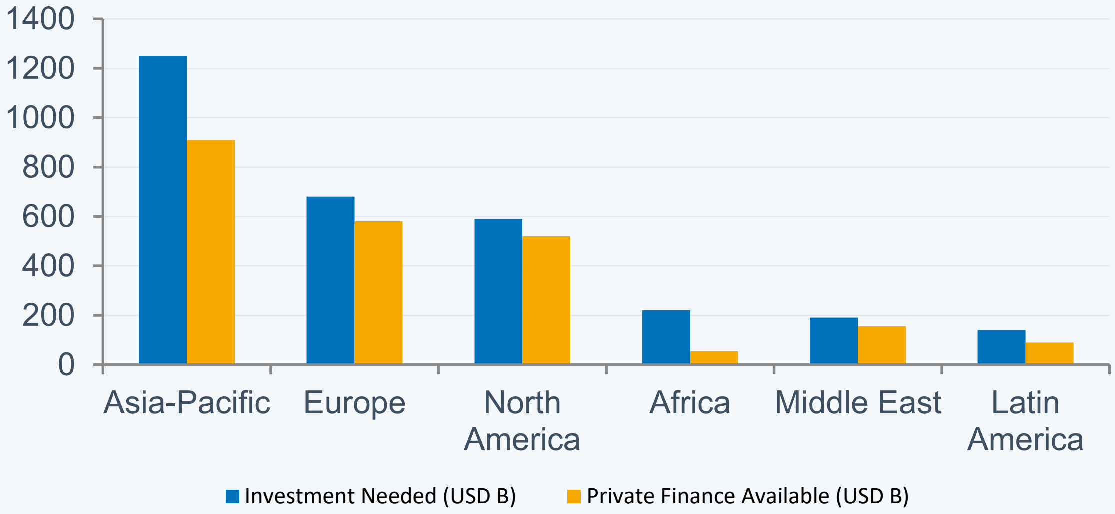
🎯 ATConf/7 Role

Global political endorsement of SAATM + ICAO technical assistance for BASA modernisation & DSM capacity.

Sources: AFCAC Official Data Aug 2025 (@Afcac_Cafac); Airspace Africa Aug 2025; Africa Visa Openness Report 2025; AFRAA H1 2024 Survey

Infrastructure Investment Gap: Airports, ANS & Ground Infrastructure

Estimated Aviation Infrastructure Investment Needed 2024–2040 by Region (USD Billion)



- **Africa needs USD 220 billion in aviation infrastructure investment through 2040 — yet private finance covers less than 25% of that need. Blended finance models, development bank instruments, and PPPs are essential.**

USD 220B

infrastructure investment needed in Africa 2024–2040

ICAO / World Bank

< 25%

of needed investment is currently accessible via private finance

World Bank 2024

35+

African major airports operating beyond design capacity

ACI Africa 2024

18

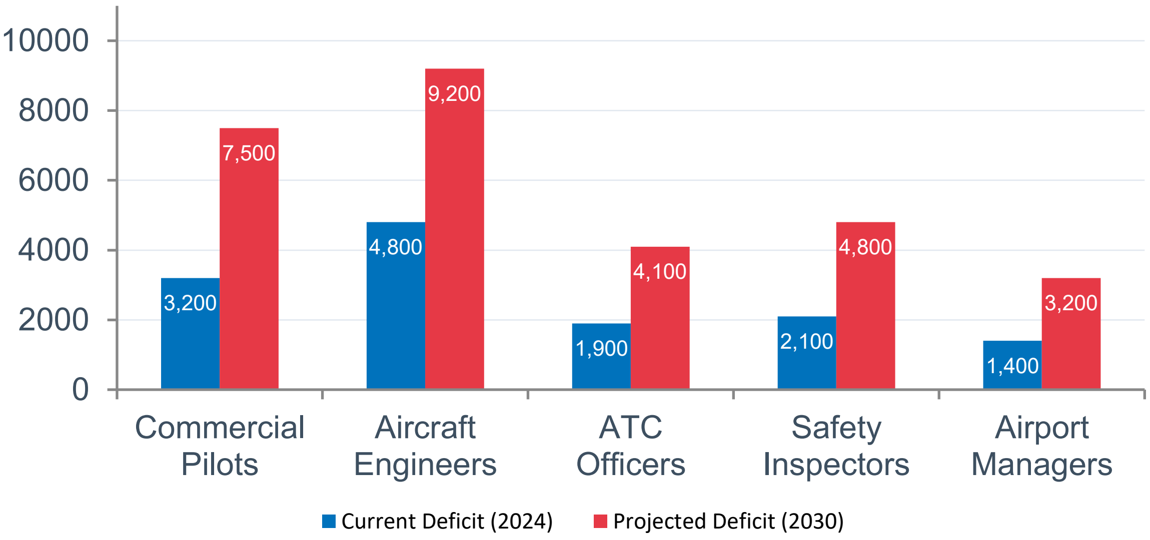
States lack instrument approach procedures at main airports (ICAO USOAP)

ICAO 2024

Sources: ICAO Investment Report 2024; World Bank Aviation Finance; ACI Africa; UNECA Infrastructure Report 2023

Human Capital Crisis: Workforce Gaps Across the Aviation Value Chain

Estimated African Aviation Workforce Gap vs. Required Levels — 2024 & 2030 Projection



- **Africa's aviation workforce deficit will nearly double by 2030 without urgent investment in training infrastructure, ICAO-aligned curricula, and regional cooperation on personnel licensing.**

< 3%

of global licensed pilots are African (ICAO Personnel Licensing data)

~40

ICAO-approved aviation training organisations in all of Africa (ICAO)

High

brain drain — trained pilots migrate to Gulf, European & Asian carriers

~35%

of CAA staff positions unfilled across ESAF region (ICAO USOAP)

Sources: ICAO Personnel Licensing Database 2024; ICAO USOAP; AFRAA HR Survey 2024;

Emerging Technologies: Opportunity & Risk for African States

Drones & UAS

Opportunity: Medical delivery, agricultural monitoring, logistics in remote/LDC areas — Africa is a natural use-case leader.

Risk: Absence of harmonized UAS regulatory frameworks creates safety risks and market fragmentation.

ATConf/7: Harmonized economic regulatory frameworks for UAS with proportionate oversight for developing States.

Sustainable Aviation Fuel (SAF)

Opportunity: Africa has enormous biomass and solar feedstock potential for SAF production.

Risk: No African SAF supply chain currently exists; global SAF mandates may penalize African carriers unable to access or afford SAF.

ATConf/7: Equitable SAF transition frameworks; development finance for African SAF production; exemptions for LDCs and SIDS.

Digital Transformation

Opportunity: E-enabled oversight, digital CAA functions, real-time data analytics for air transport planning.

Risk: Most African CAAs lack digital infrastructure, cybersecurity capacity, and data management systems.

ATConf/7: Technical assistance fund for CAA digitalization; ICAO data-sharing initiatives inclusive of African States.

Advanced Air Mobility (AAM)

Opportunity: Electric vertical take-off and landing (eVTOL) has unique potential for African inter-city and peri-urban mobility.

Risk: Economic regulatory frameworks will be set by developed-world pioneers — African States risk being excluded or disadvantaged.

ATConf/7: Inclusive policy design for AAM ensuring developing States shape the regulatory architecture from the outset.

African States' Strategic Priorities for ATConf/7

Aligned with ATConf/7 Agenda Items 1–4 | Rooted in Agenda 2063 | Consistent with SAATM & AFCAC Frameworks

1. Accelerate SAATM — Full Liberalization of African Skies

AI 3.2

Global endorsement of SAATM; technical assistance for ASA modernization; AU/AFCAC accountability framework with binding timelines.

2. Mobilize Blended Finance for Aviation Infrastructure

AI 2.2

Establish an ICAO-facilitated blended finance mechanism; MDB partnerships for airport development; de-risking instruments for African projects.

3. Binding Technical Assistance & Capacity Building

AI 3.1

Funded NGAP programme for Africa; regional training institution support; mutual recognition of licences across AFI States; CAA digitalization assistance.

4. Equitable SAF & Clean Energy Transition Frameworks

AI 4.2

SAF transition plans that protect developing States; development finance for African SAF production; LDC/SIDS exemption provisions.

5. Inclusive Emerging Technology Governance

AI 4.1

Harmonized UAS/drone regulatory framework with proportionate rules for developing States; African inclusion in AAM policy design from the outset.

6. Strengthen Consumer Protection & Resilience Frameworks

AI 3.3

Emergency preparedness standards adapted to African CAA capacity; consumer protection baseline applicable to all African carriers and routes.

Conclusion: Africa's Ask of ATConf/7

Africa has the scale, the growth, and the need. What is missing is the policy architecture to unlock it.

① Endorse Africa's 6 Priorities

Validate these as the consolidated AFI position and carry them into ATConf/7 negotiations with a unified voice.

② Mandate AFCAC to Coordinate

Task AFCAC to lead joint working paper development by the 25 September 2026 deadline — coordinated, not fragmented.

③ Commit to Active Negotiation

Send senior, empowered delegations to Montréal in November. Seek binding outcomes — not aspirational language.

ATConf/7 is a once-in-a-generation opportunity. 55 AU Member States — including 33 LDCs, 16 LLDCs and 6 SIDS — are counting on it to deliver.

Thank You

Ms. Toska Sem

Executive Director | Namibia Civil Aviation Authority

ATConf/7 Preparatory Webinar for AFI States | 19 May 2026 | 12:00–14:00 UTC

Seventh Worldwide Air Transport Conference | ICAO Headquarters, Montréal | 16–20 November 2026

Data sources: IATA · ICAO · AFRAA · UNECA · AFCAC · World Bank · UN-OHRLLS · ACI Africa