



# AIRLINES REGIONAL PERFORMANCE

RAPHAEL KUUCHI

Consulting Director Government, Legal & Industry  
Affairs





**AFRAA**

**57 years of existence**

A leading trade association of African airlines  
headquartered in **Nairobi**

**46 Member Airlines**

**36 Partners**

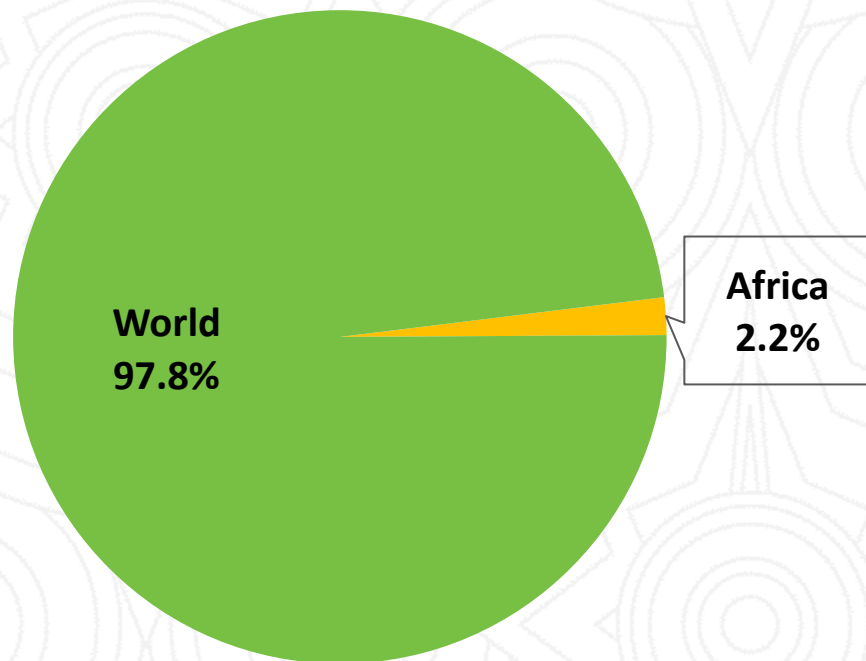
*Membership accounts for more than 85% of  
African Airlines traffic*

**VISION:**

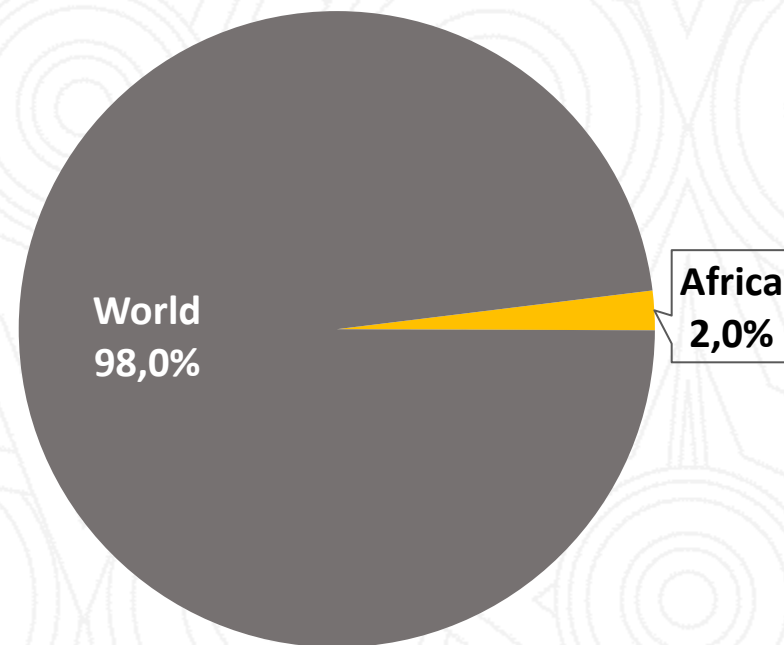
**A sustainable, interconnected, and  
affordable Air Transport industry in  
Africa where our Airlines drive  
economic development**

# AFRICA TRAFFIC MARKET SHARE

## Traffic Market Share 2024

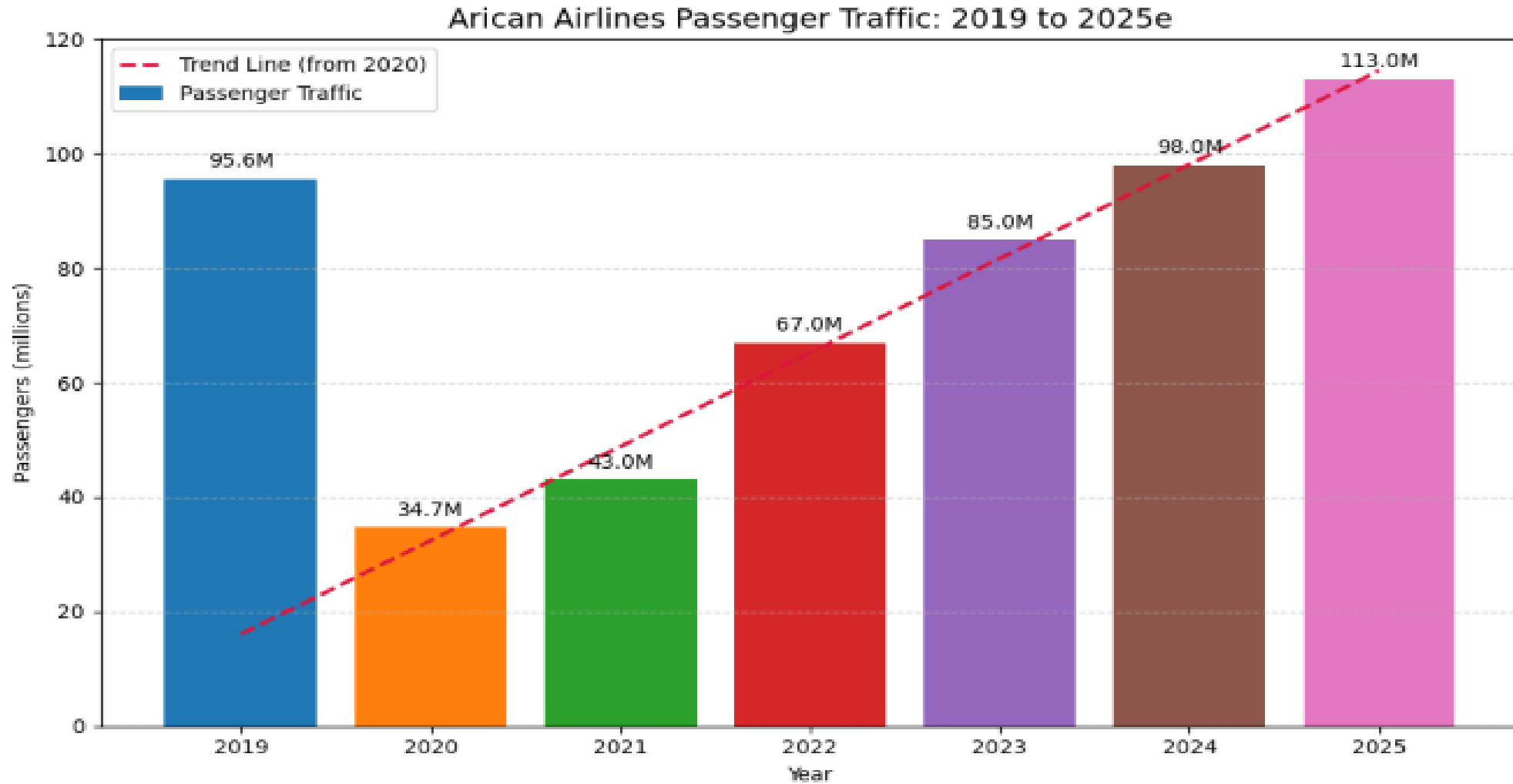


## Cargo Market share 2024



Source : IATA

# PAX TRAFFIC TREND 2019 TO 2025e

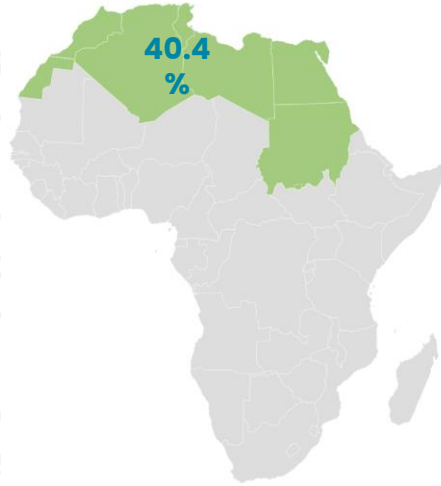


Source : OAG, AFRAA



# DOMESTIC TRAFFIC SHARE – 2024

## Northern Africa



**16%**

Share of Domestic traffic.

**58%**

of the total traffic directed to Europe

## Eastern Africa



**45%**

Share of Domestic traffic.

**30%**

of the total traffic directed to Europe

## Southern Africa



**64%**

Share of Domestic traffic.

**28%**

of the total traffic directed to Europe

## Central and Western Africa



**48%**

Share of Domestic traffic.

**38%**

of the total traffic directed to Europe

# INTRA AFRICA CONNECTIVITY

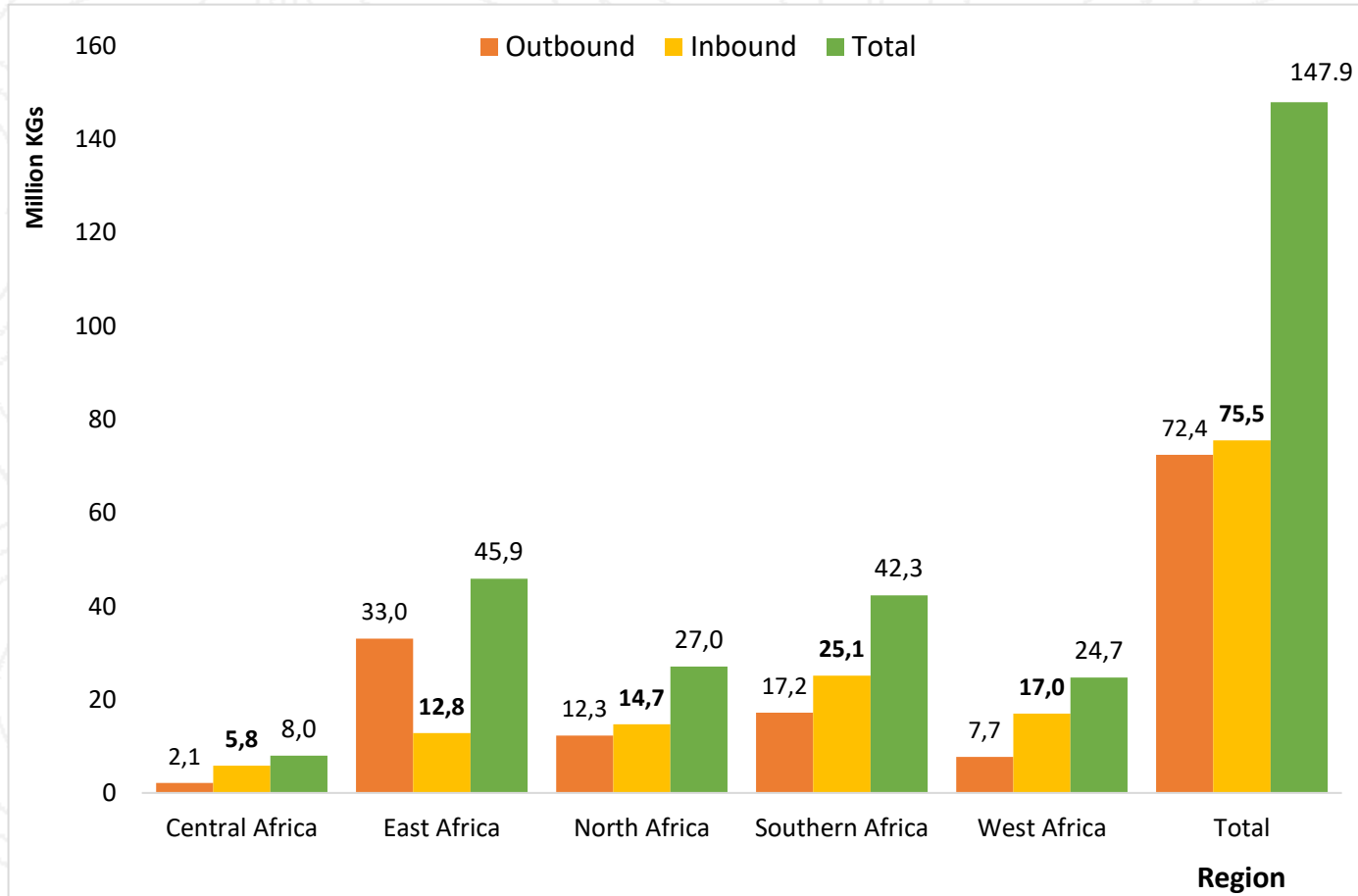
Connectivity between African regions September 2025

Africa Regions	Central Africa	Eastern Africa	North Africa	Southern Africa	Western Africa
Central Africa	55%	11%	21%	11%	15%
Eastern Africa		53%	15%	19%	7%
North Africa			86%	3%	30%
Southern Africa				56%	3%
Western Africa					43%

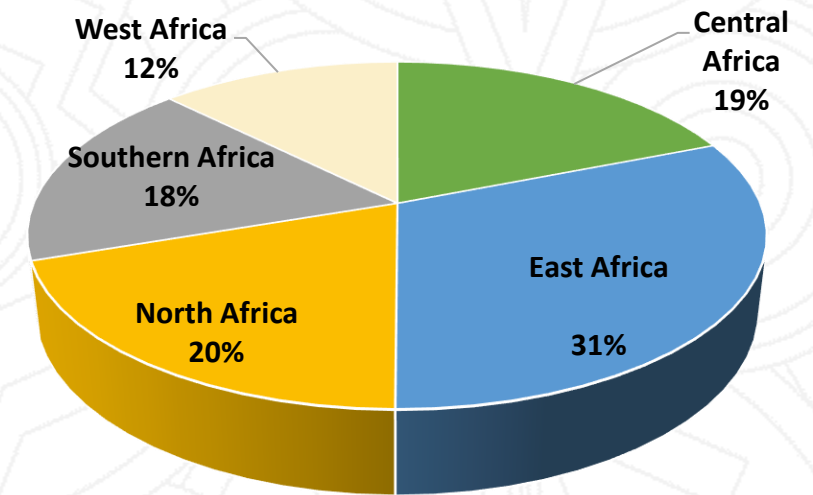
Source : OAG

# CARGO TRAFFIC IN AFRICA – SEPTEMBER 2025

Cargo traffic per sub-region in Africa



Market share of African airlines per origin



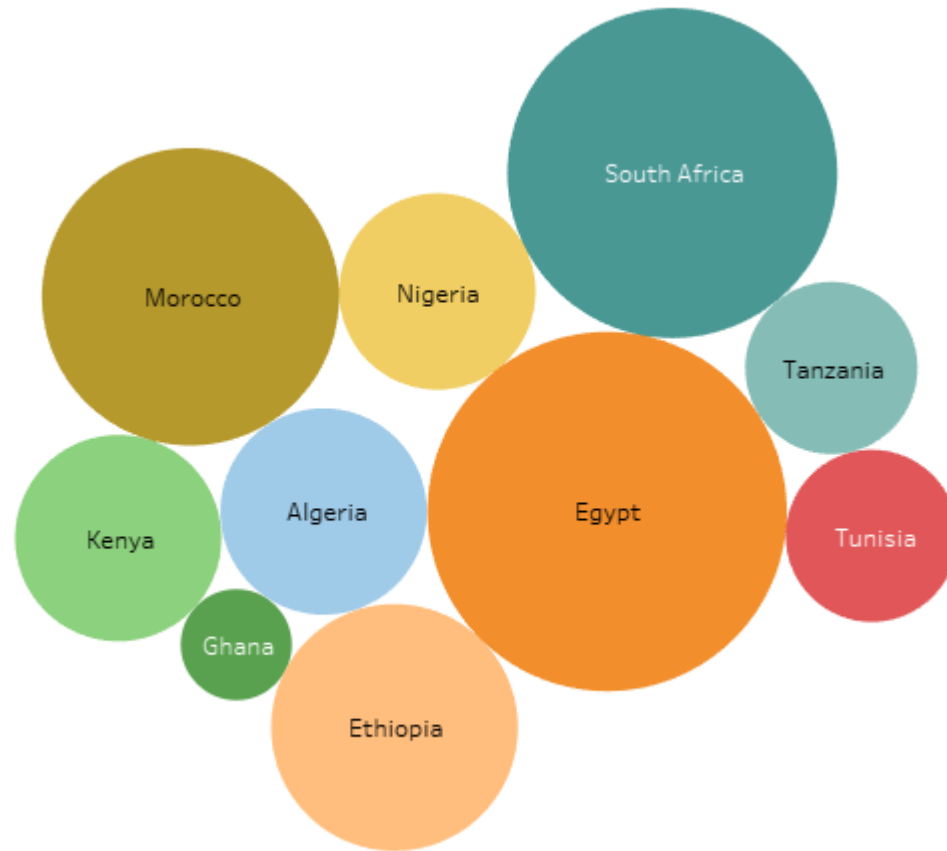
- Southern Africa, North Africa, West Africa Regions import more than it exports.

**2% World share of Cargo**

Source : World ACD

# CAPACITY RANKING BY SEATS – OCTOBER 2025

## Top Countries by Seats



## Top Airport by Seats



**1. Cairo International Airport**  
Cairo, Egypt, 1,636,977



**2. O. R. Tambo International Airport**  
Johannesburg, South Africa, 1,160,252



**3. Addis Ababa Bole International Airport**  
Addis Ababa, Ethiopia, 1,148,241



**4. Mohammed V International Airport**  
Casablanca, Morocco, 642,440



**5. Cape Town International Airport**  
Cape Town, South Africa, 594,489



**6. Houari Boumediene Airport**  
Algiers, Algeria, 556,849



**7. Marrakech Menara Airport**  
Marrakech, Morocco, 538,071



**8. Jomo Kenyatta International Airport**  
Nairobi, Kenya, 491,835



**9. Hurgada International Airport**  
Hurgada, Egypt, 469,097



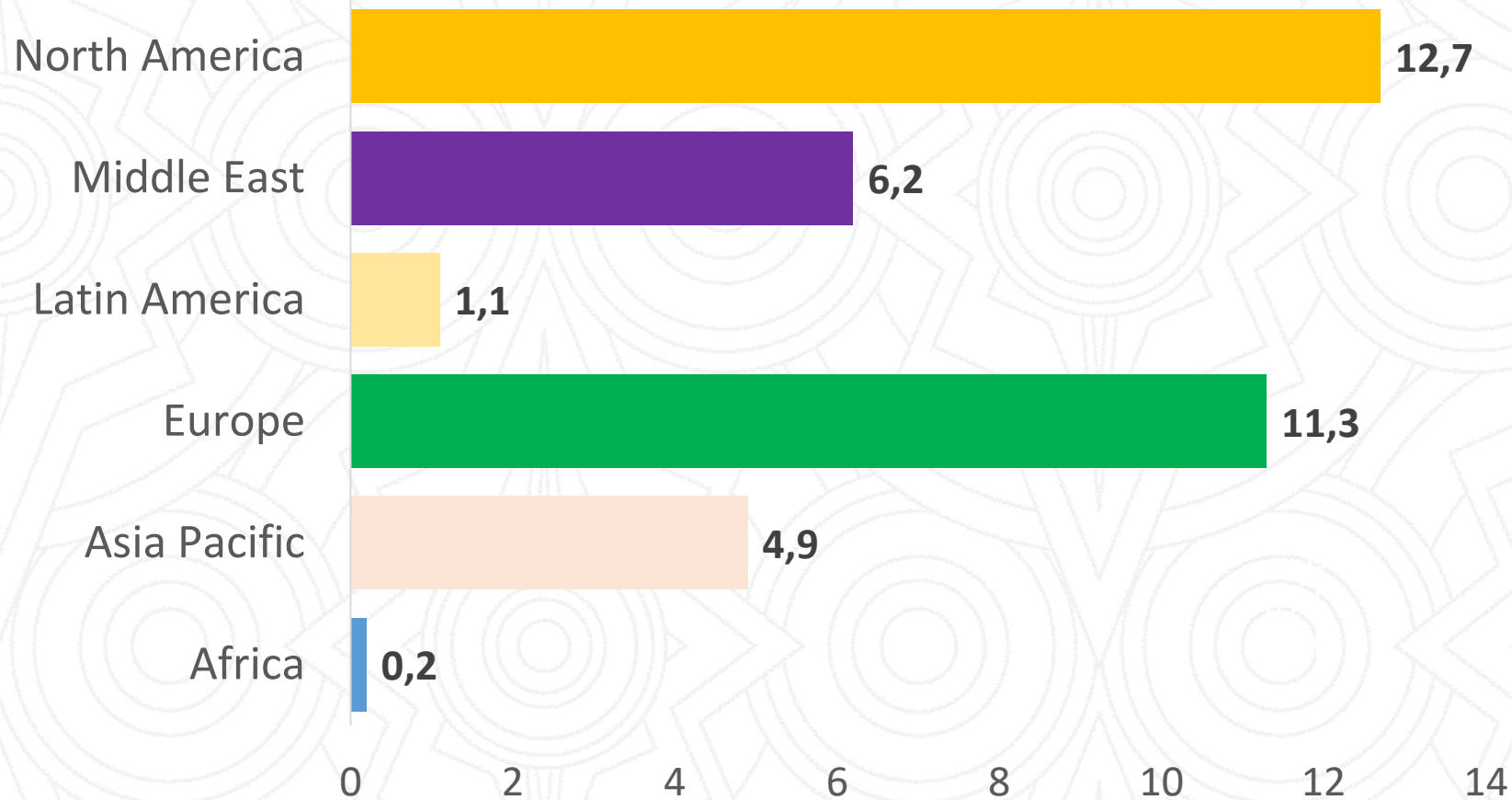
**10. Murtala Muhammed International Airport**  
Lagos, Nigeria, 409,005

Source : OAG, AFRAA



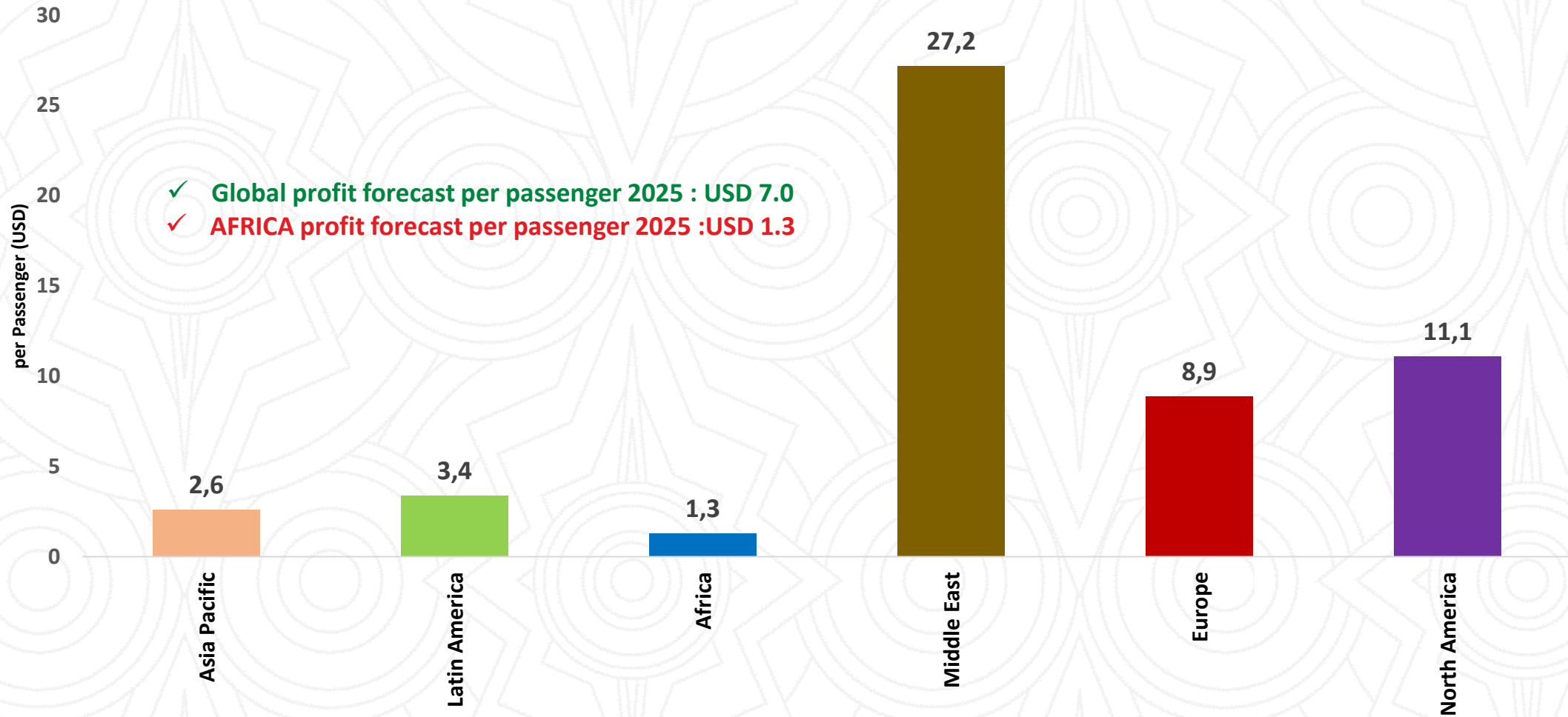
# GLOBAL/AFRICA FINANCIAL PERFORMANCE

Net Profit, USD Billion 2025e



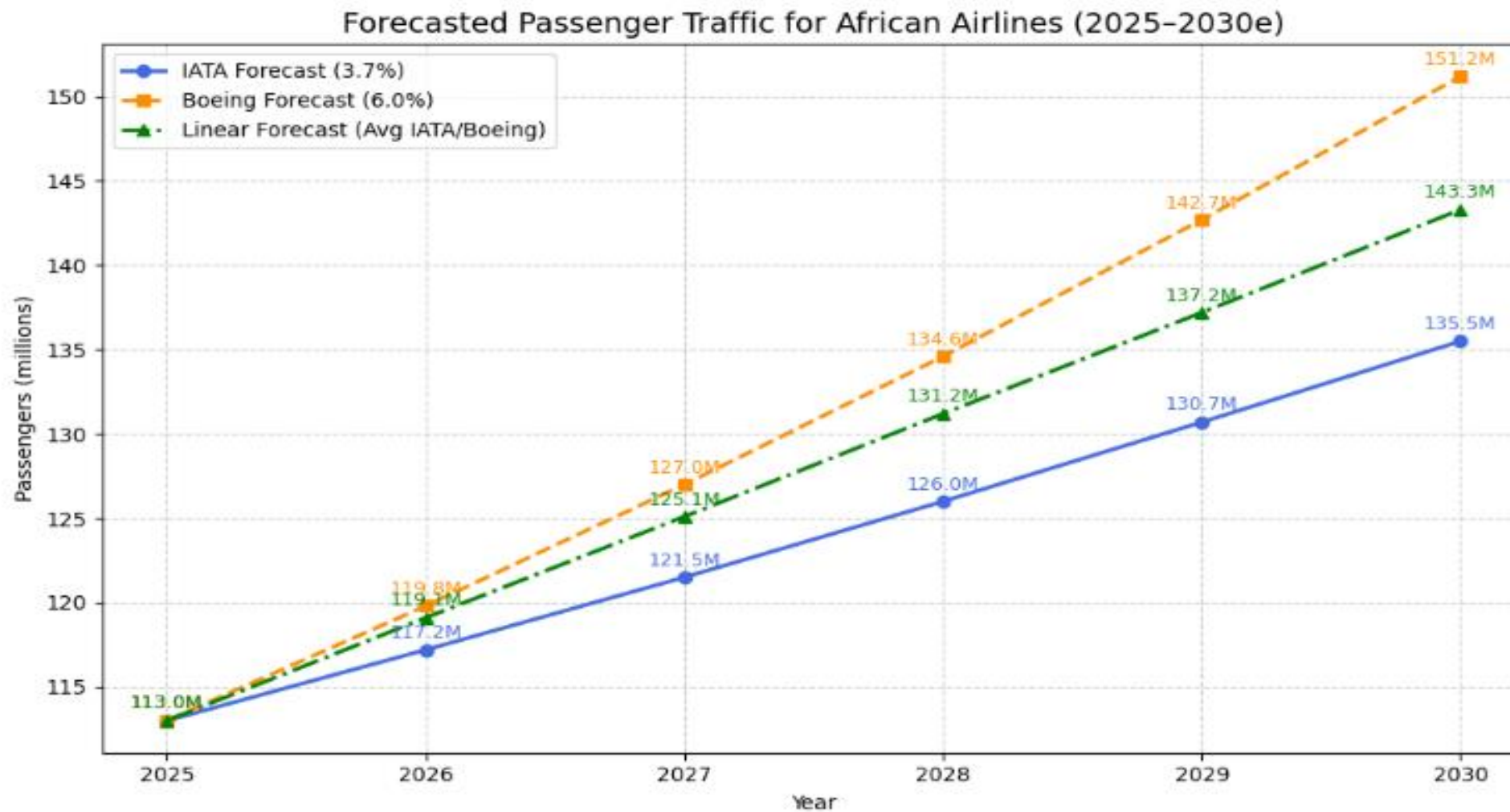
Source : IATA

# PROFIT PER PASSENGER IN 2025e



Source : IATA

# PAX TRAFFIC FORECAST 2025 TO 2030e



Source : IATA and Boeing

# KEY GROWTH DRIVERS

## Some Growth Drivers

- Growing economies and opportunities
- Middle class and disposal incomes
- Demographic Growth and urbanization
- Intra-Africa Connectivity
- New route development - SAATM
- Airport Infrastructure Upgrades
- Ease of travel restrictions

# AIR TRANSPORT CHALLENGES

## Some challenges

- **Safety and security perception**
- **High operating costs**
- **Market access and capacity constraints**
- **Infrastructure deficit**
- **Regulation harmonization**
- **Access to financing**
- **Technology and digitalization**
- **Partnerships and collaboration**
- **Blocked Funds**



## AFRICAN COUNTRIES WITH BLOCKED FUNDS (USD)

Mozambique	<b>\$234M</b>	Malawi	<b>\$21M</b>
XAF Zone	<b>\$205M</b>	Sudan	<b>\$19M</b>
Algeria	<b>\$172M</b>	Libya	<b>\$18M</b>
Eritrea	<b>\$75M</b>	Ghana	<b>\$4.1M</b>
Zimbabwe	<b>\$68M</b>	Egypt	<b>\$2.6M</b>
Ethiopia	<b>\$49M</b>		
XOF Zone	<b>\$35M</b>		

**Africa account for  
\$1,002.7Bln out of  
a global total of  
\$1,362 bln**

**73.6% of  
Blocked funds in  
Africa**

Source: IATA



# THANK YOU