



Kenya Airports Authority
SETTING OUR SIGHTS HIGH

JKIA MASTER PLAN

July 2016

NASP

Objective:

1. To forecast future aggregate air traffic as well as individual airport traffic forecasts, and to eventually develop a strategy and policy framework to address long-term traffic and to develop master plan for 10 airports, upto Yr 2030.
2. Following completion of the NASP study, a master plan was developed for each of the 10 major airports in the country.

JKIA Master Plan

1. The NASP study was concluded in 2010; Addendum 1 was developed in February 2011 to respond to concerns raised by Kenya Airways following the development of its ambitious 10-year expansion plan, dubbed 'Project Mawingu'
2. As part of the National Airports System Plan, the consultant, Louis Berger Group, Inc, of Washington, DC, developed the JKIA master plan. Following its development, KAA advertised for a design-build team to undertake the design and construction of the 'Greenfield Terminal'
3. The airport saw a throughput of 6,768,255, +5.3% on 2014/15

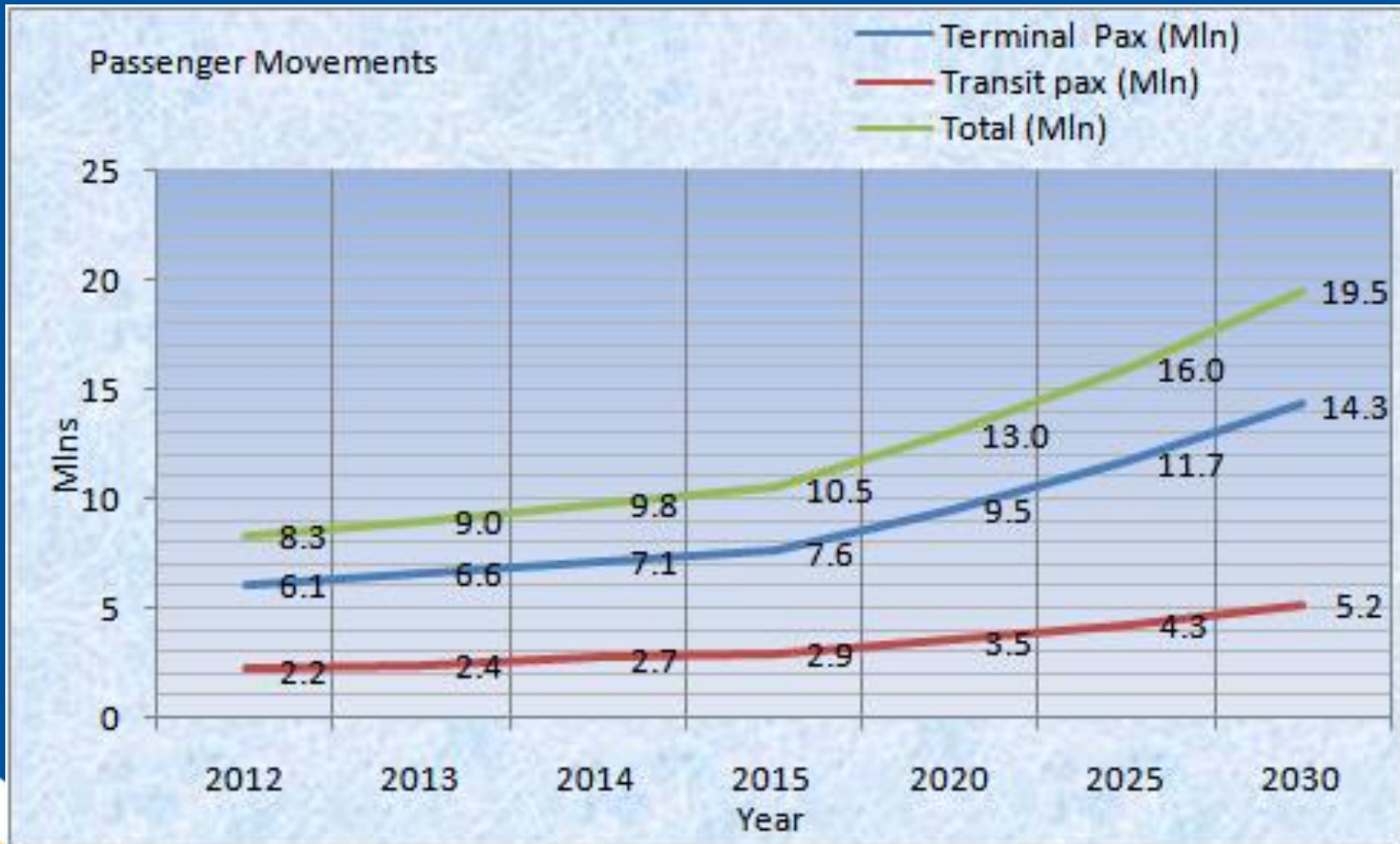


AIR TRAFFIC FORECAST

Assumptions in Preparation of Air Traffic Forecasts

- a) The air traffic forecasts were done using econometric modeling techniques and adjustments for short term trends made taking into account historical data, GDP forecast, etc.
- b) Fleet and route expansion plans for the next ten years of Kenya Airways and other operators were used to make a realistic ten year forecast. Forecasts between 2020 to 2030 were correlated to global GDP trends while taking into account our own Vision 2030 GDP forecasts.
- c) Traffic forecasts took into account local conditions such as the tourism sector and other local traffic generating activities. Stakeholder interviews were carried out and the tourist bed capacity for all major towns and regions in Kenya reviewed.

JKIA ~ Traffic Outlook 2012~2030



TOTAL PASSENGER FORECAST AT JKIA

Year	Terminal Passengers			Transit (*)	Total	Growth
	Intern.	Domestic	Total			
2009	3,159,976	911,811	4,071,787	1,006,181	5,077,968	
2010	3,423,894	958,925	4,382,819	1,097,369	5,480,188	7.9%
2011	4,081,692	1,185,371	5,267,063	1,581,971	6,849,034	25.0%
2012	4,842,387	1,235,900	6,078,288	2,169,331	8,247,618	20.4%
2013	5,288,569	1,357,044	6,645,613	2,429,490	9,075,102	10.0%
2014	5,724,302	1,422,537	7,146,838	2,665,426	9,812,265	8.1%
2015	6,144,512	1,457,874	7,602,386	2,870,873	10,473,259	6.7%
2020	7,654,820	1,803,658	9,458,477	3,488,945	12,947,423	
2025	9,406,872	2,279,416	11,686,288	4,287,503	15,973,790	
2030	11,426,601	2,848,486	14,275,086	5,208,063	19,483,149	
Avg Growth						
2010-2015	12.4%	8.7%	11.6%	21.2%	13.8%	
2016-2020	4.5%	4.3%	4.5%	4.0%	4.3%	
2021-2030	4.1%	4.7%	4.2%	4.1%	4.2%	
2010-2030	6.2%	5.6%	6.1%	8.1%	6.5%	

(*) Transit passengers counted twice, once on arrival and again on departure

Adopted Traffic Forecast

- Presentation of traffic forecast in Addendum 1 was queried by KQ and an agreement reached at the ministry level to review the traffic forecast to take into consideration Kenya Vision 2030 and KQ Strategic Plan.
- Decision therefore reached to use KQ pessimistic forecast and to adopt Addendum 1 traffic forecast for the other airlines.

Adopted Total Traffic Forecast

Design Year	2010	2015	2020	2025	2030
International	3,423,894	6,318,732	9,570,978	13,702,330	19,098,977
Domestic	958,925	1,630,931	2,510,914	3,637,847	5,117,415
Transit	1,097,369	2,995,750	4,985,752	7,615,369	11,133,078
Total	5,480,188	10,945,414	17,067,646	24,955,547	35,349,471

Development Phasing

Project Phases/Stages	Year
PHASE 1 / STAGE 1 ~ Immediate	2011 – 2012
PHASE 1 / STAGE 2 ~ Short Term	2013 ~ 2015
PHASE 2 ~ Medium Term	2016 ~ 2020
PHASE 3 ~ Long Term	2021 ~ 2030

Strategic Environmental & Social Assessment of JKIA Master Plan

Standard Terms of Reference for preparing the Strategic Environment Assessment plan were prepared and used by the consultant to develop the SEA as part of the master plan study .

The SEA document details anticipated impacts of airport expansion and makes recommendations for mitigation measures and monitoring plans.

THANK YOU

Q&A