WEBINAR

AFRICAN AVIATION
ALL TO PLAY FOR

WEDNESDAY 30th APRIL

www.oag.com

SPEAKERS

CHIEF ANALYST

John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

GUEST SPEAKER

Ogaga Udjo

Global Air Transport Expert, MD ZA Logics

With 15 years in airline management, private advisory, and development finance, Ogaga specializes in transforming air transport systems - particularly in emerging and frontier markets.

A sought-after keynote speaker and commentator, he bridges industry realities, policy agendas, and air transport's economic influence.

Ogaga holds master's degrees in International Business & Strategy (South Africa) and Finance (US) and is based in Washington, DC.

MODERATOR

Deirdre Fulton

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.

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Today's discussion

Join us as we take a deep dive into aviation in Africa.

- Where is growing fastest in aviation terms across this vast continent?
- Do the airline business models that work elsewhere work for Africa?
- Challenges and Opportunities: What does the future hold for African aviation?

We'll be taking questions as we go. Please use the chat function to ask your questions

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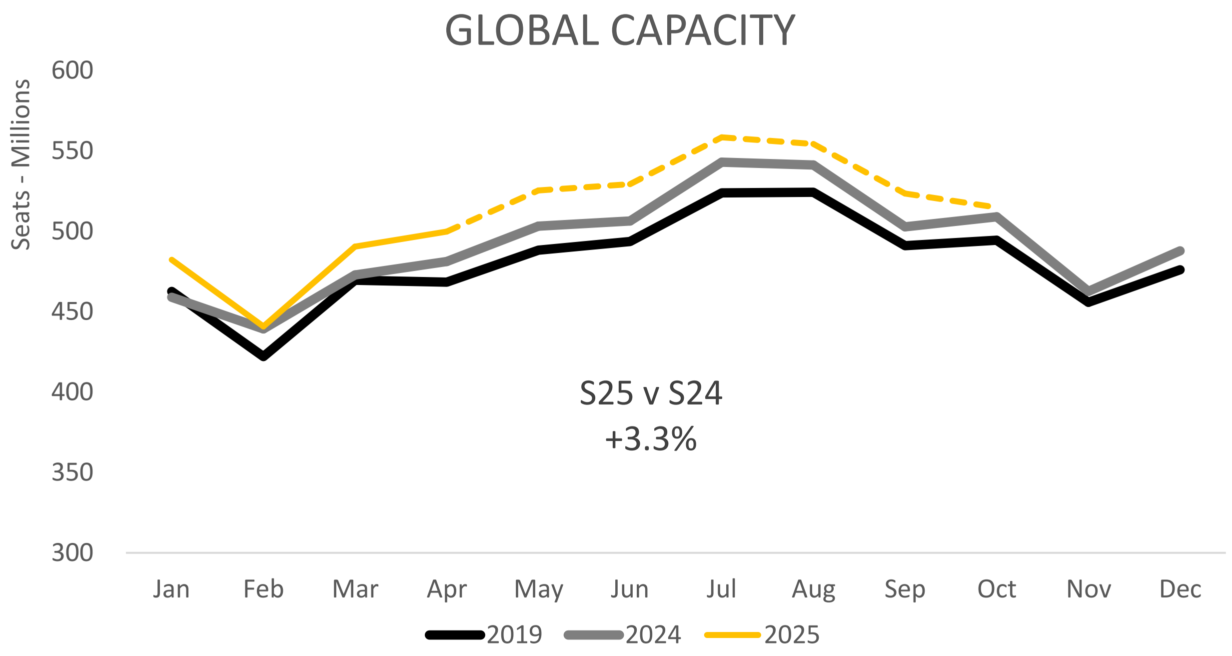
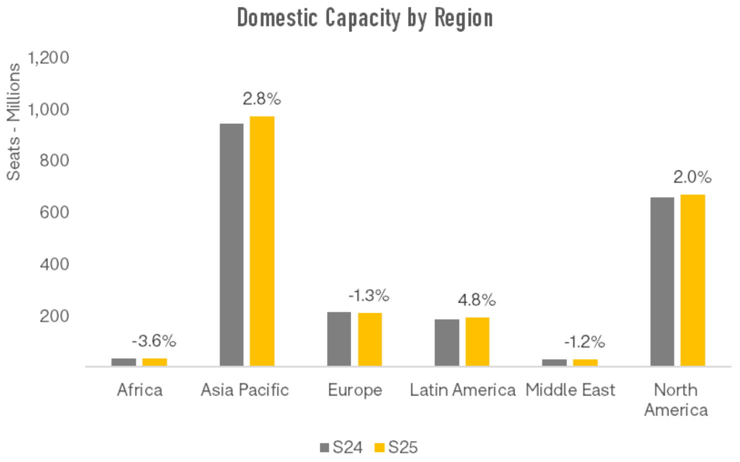
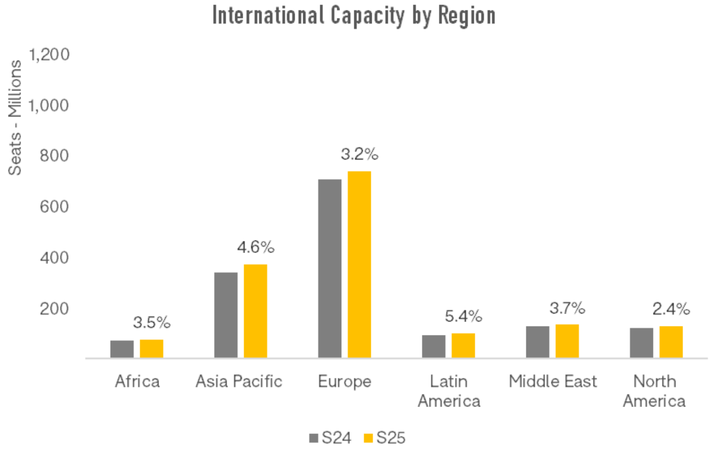
GLOBAL GROWTH TRENDS

- Capacity for this summer is expected to be 3.3% ahead of 2024. For the year to date so far (Jan-Mar25), capacity is 3.1% ahead of the same months in 2024.
- Domestic growth has contracted in Africa, Europe and the Middle East, with the fastest rate of domestic growth currently taking place in Latin America
- For all regions, international capacity growth is ahead of domestic growth this summer. In Africa, international capacity is up by 3.5%.







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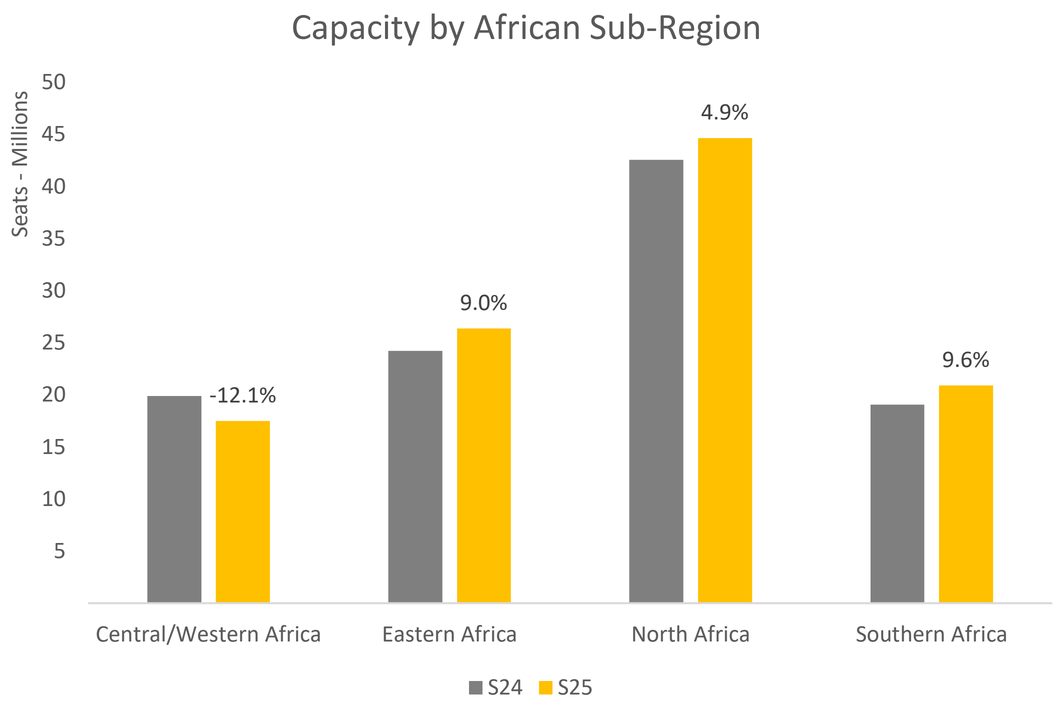
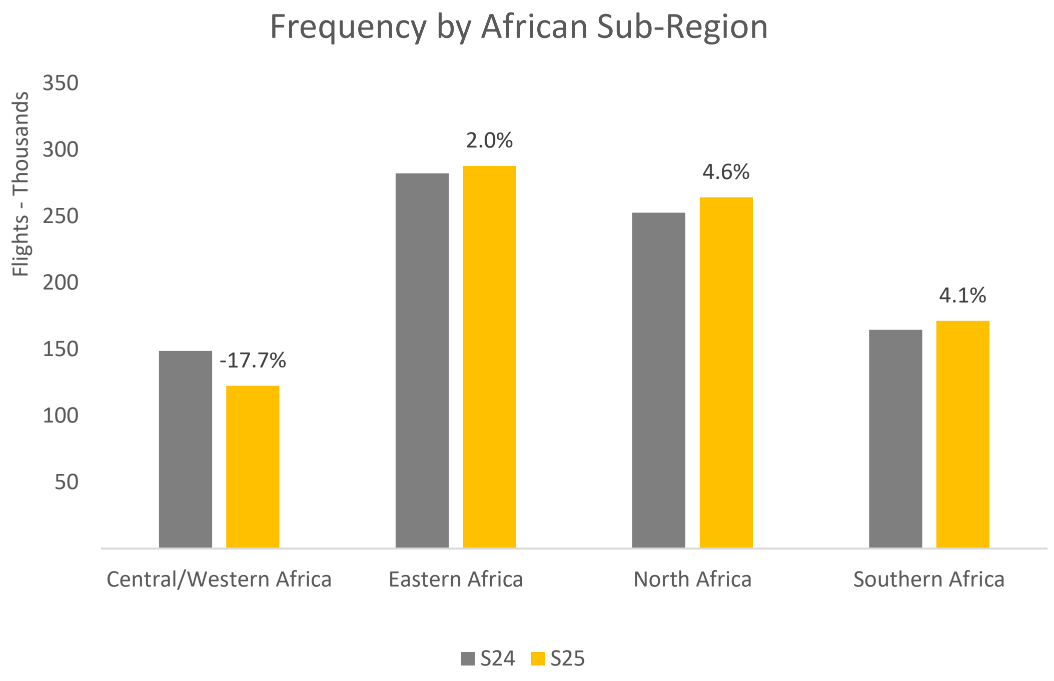
Africa S25 v S24 Capacity & Frequency Changes





- Looking at total capacity growth in Africa by subregion highlights that growth is happening across the continent with the exception of Central/Western Africa. Southern Africa sees the highest growth rate, with an increase in capacity this summer of 9.6% on last summer.

- Frequency growth follows a similar trend, although the rate of capacity:frequency growth in Eastern Africa is being driven by an increase in the average seats per aircraft, up from 86 to 92.

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African Carrier Landscape – Is the market stable?

- In the last 10 years, Ethiopian has moved up to become Africa's largest carrier, with 17% of African capacity.
- SAA, once the largest carrier, is now 11th largest in the continent.
- 8 of the Top 20 largest carriers operating in Africa are domiciled outside of Africa
- High degree of churn in the market - In April 2015, there were 88 African domiciled carriers and today there are 109, but there are 37 carriers in April 2015 which don't exist today

Top 10 Carriers in Africa

Apr-15	Apr-25
South African Airways	Ethiopian Airlines
Ethiopian Airlines	Safair
Egyptair	Egyptair
Royal Air Maroc	Royal Air Maroc
Kenya Airways	Air Algerie
Air Algerie	Airlink
Arik Air	Kenya Airways
Comair	Air Cairo
Mango	South African Airways
Aero Contractors of Nigeria	Air Peace

Top 20 Carriers in Africa by Seats

Carrier Code	Carrier Name	Apr-15	Apr-25	Growth since Apr-15	African Domiciled?
ET	Ethiopian Airlines	800,075	1,845,374	131%	Yes
FA	Safair	86,335	1,012,926	1073%	Yes
MS	Egyptair	701,128	841,282	20%	Yes
AT	Royal Air Maroc	551,181	628,396	14%	Yes
AH	Air Algerie	448,348	610,968	36%	Yes
4Z	Airlink		493,059		Yes
FR	Ryanair	133,623	455,177	241%	No
EK	Emirates	332,881	379,140	14%	No
KQ	Kenya Airways	461,624	353,360	-23%	Yes
SM	Air Cairo	18,612	321,368	1627%	Yes
SA	South African Airways	1,029,820	315,047	-69%	Yes
TK	Turkish Airlines	197,797	314,218	59%	No
AF	Air France	252,376	292,604	16%	No
P4	Air Peace		286,566		Yes
U2	Easyjet	84,612	285,255	237%	No
TO	Transavia.com France	51,245	281,247	449%	No
SV	Saudi Arabian Airlines	169,129	262,182	55%	No
QR	Qatar Airways	144,559	250,870	74%	No
KP	ASKY Airlines	79,031	222,695	182%	Yes
3O	Air Arabia Maroc	48,114	168,084	249%	Yes

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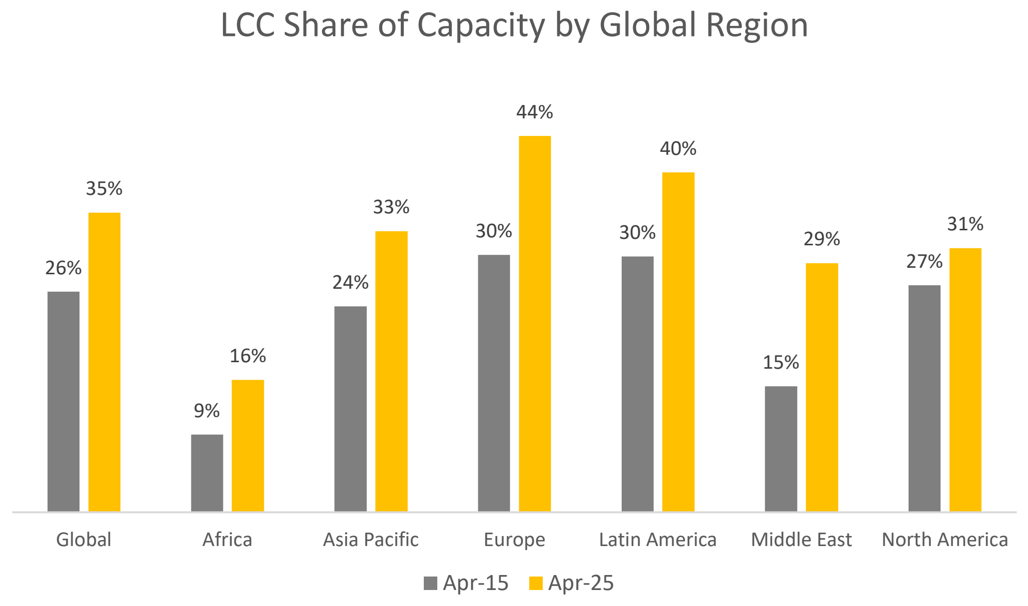
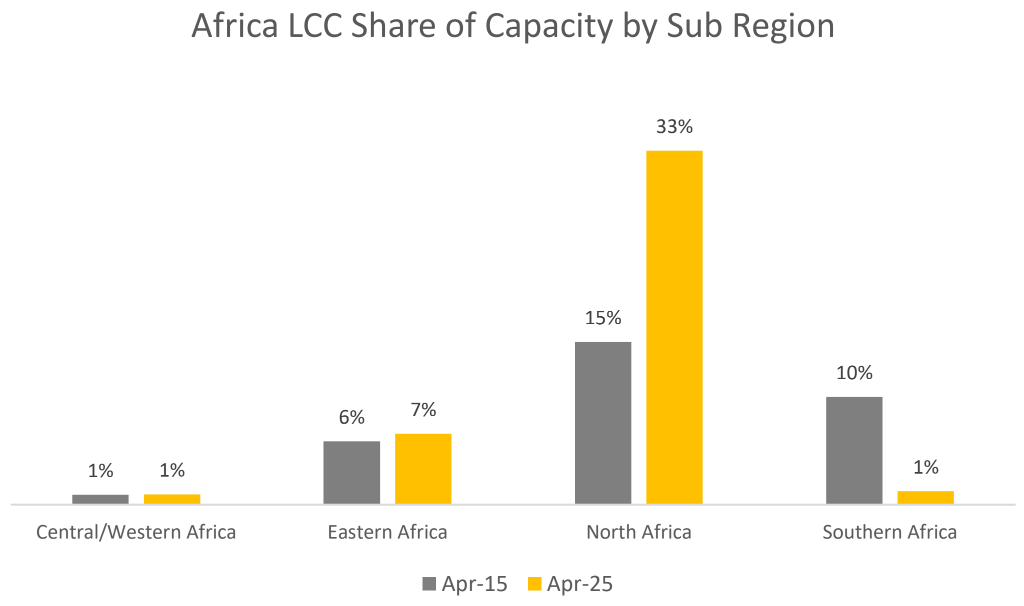
Which business model dominates in Africa?

- Africa lags behind the global norm for legacy/LCC capacity shares, where 35% of seats operate on low cost carriers (LCCs). Some regions are considerably higher than that, notably Europe, where 44% of seats operate on LCCs, and Latin America where the comparable share is 40%.
- The region seeing the fastest degree of LCC penetration is the Middle East where in the last 10 years, LCC shares have grown from just 15% to 29%. Africa's LCC share remains stuck, at just 16% of all operations, an increase from 9% in 2015. This is in large part driven by the growth of European – North Africa services into Morocco.
- Will LCCs ever take off in Africa? Or is a different model needed for success?





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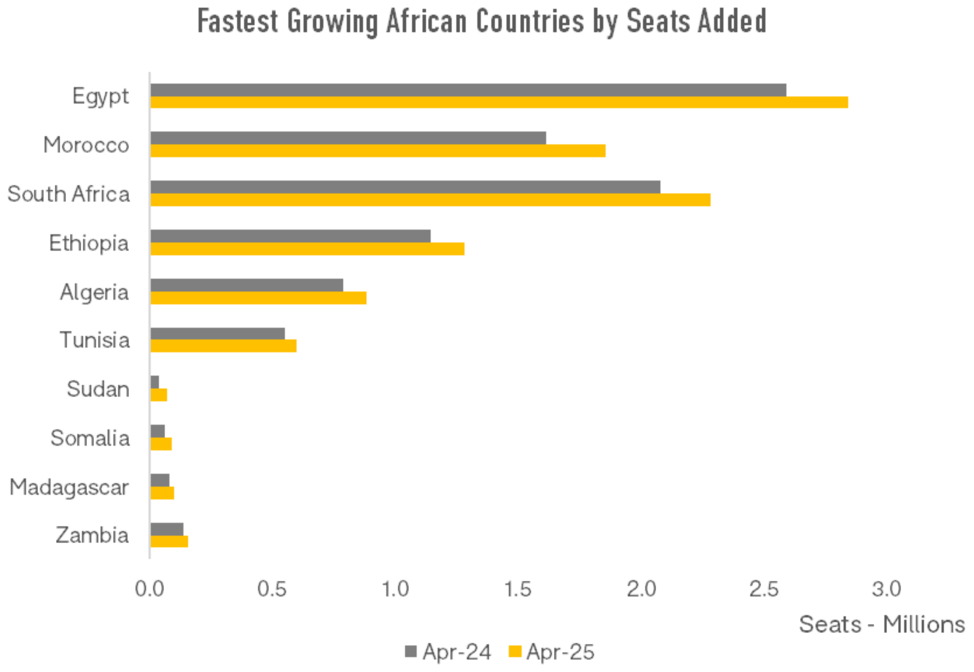
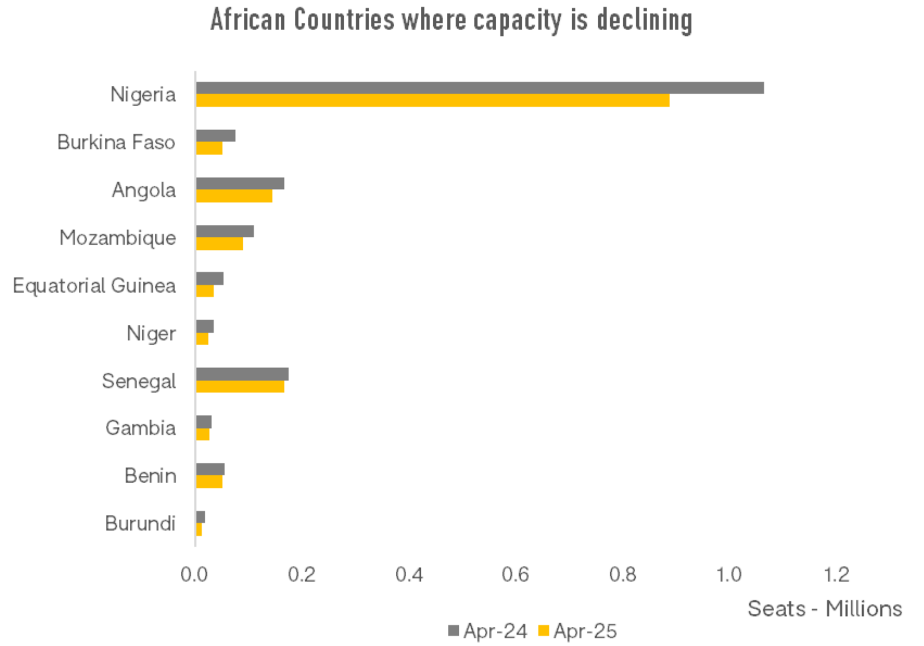
Where is growth taking place in Africa

- North Africa is experiencing a period of growth, with capacity increases this month of 10% or over in Egypt, Morocco, Algeria and Tunisia. Non African LCC's are driving much of the growth, particularly in Morocco and Tunisia
- In Morocco, Ryanair is driving this growth, with strong growth in routes to France, the UK, Spain and Italy, tapping into strong demand for inbound tourism to Morocco
- In Tunisia, growth is coming on routes to France with the French based LCC Transavia, and to the UK with easyJet.
- In Algeria, Transavia are also adding significant capacity into the market between Algeria and France, driven partly by the large Algerian expat population in France.
- Capacity in South Africa is up by 10% year on year
- Capacity in Nigeria is down year on year due to reductions in the domestic market where seats are down by 21%, largely from Air Peace and some other smaller domestic carriers





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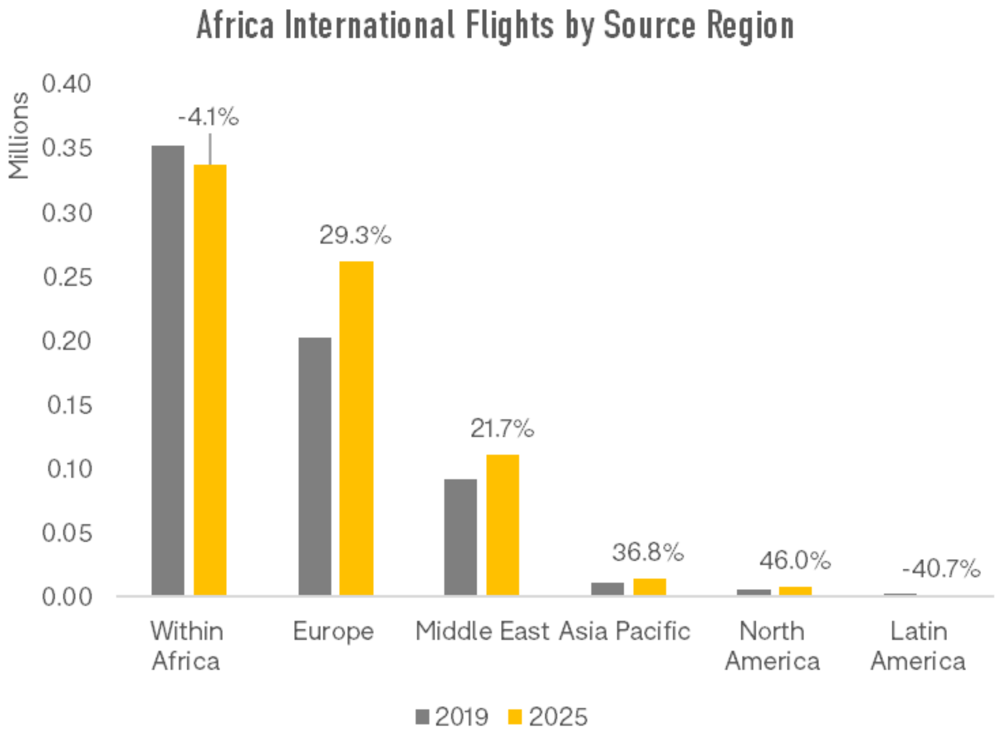
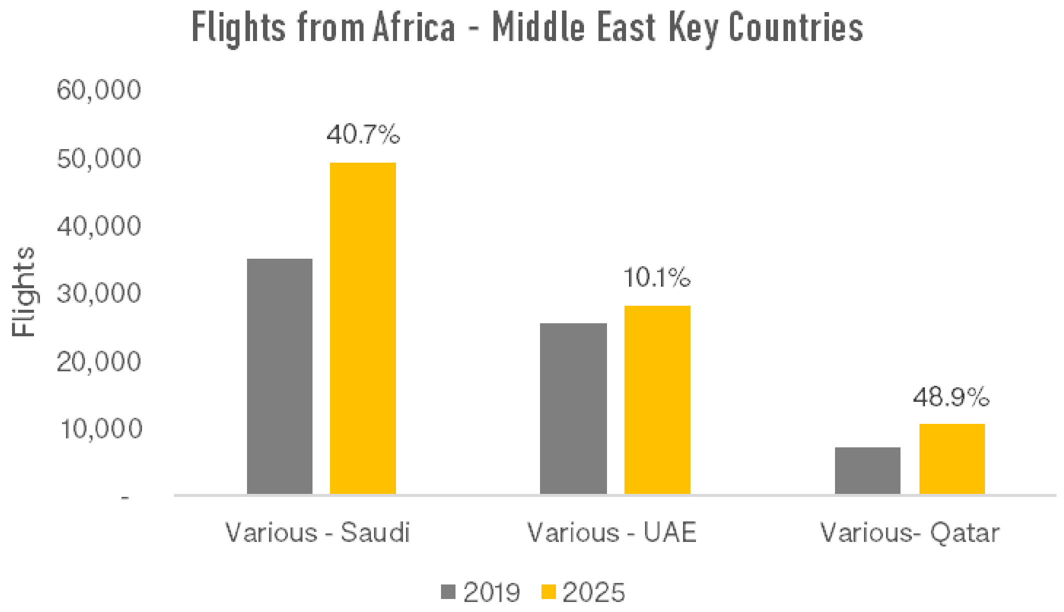
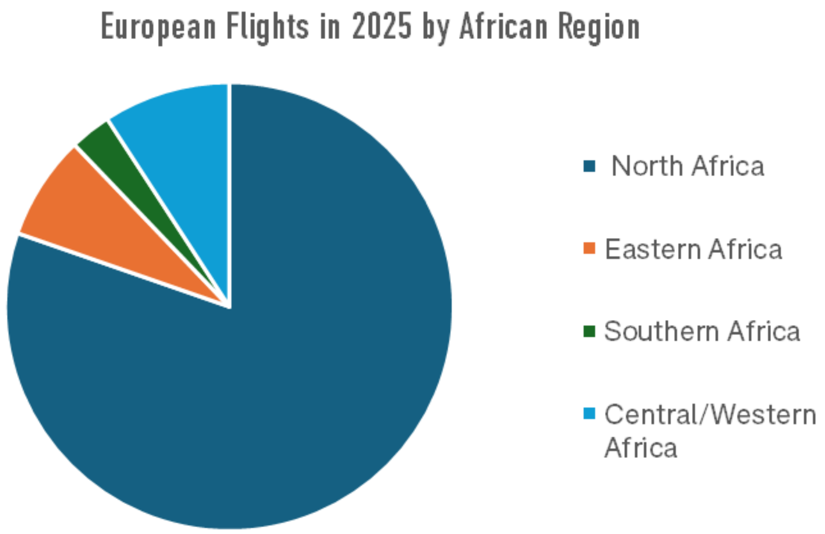
International markets driving growth in/out of Africa

- The region with the largest increase in international flights in the period between 2019 and 2025 to/from Africa is Europe, with an increase of 29.3%, equivalent to 59,000 additional flights. This accounts for much of the growth in international flights to, from and within Africa







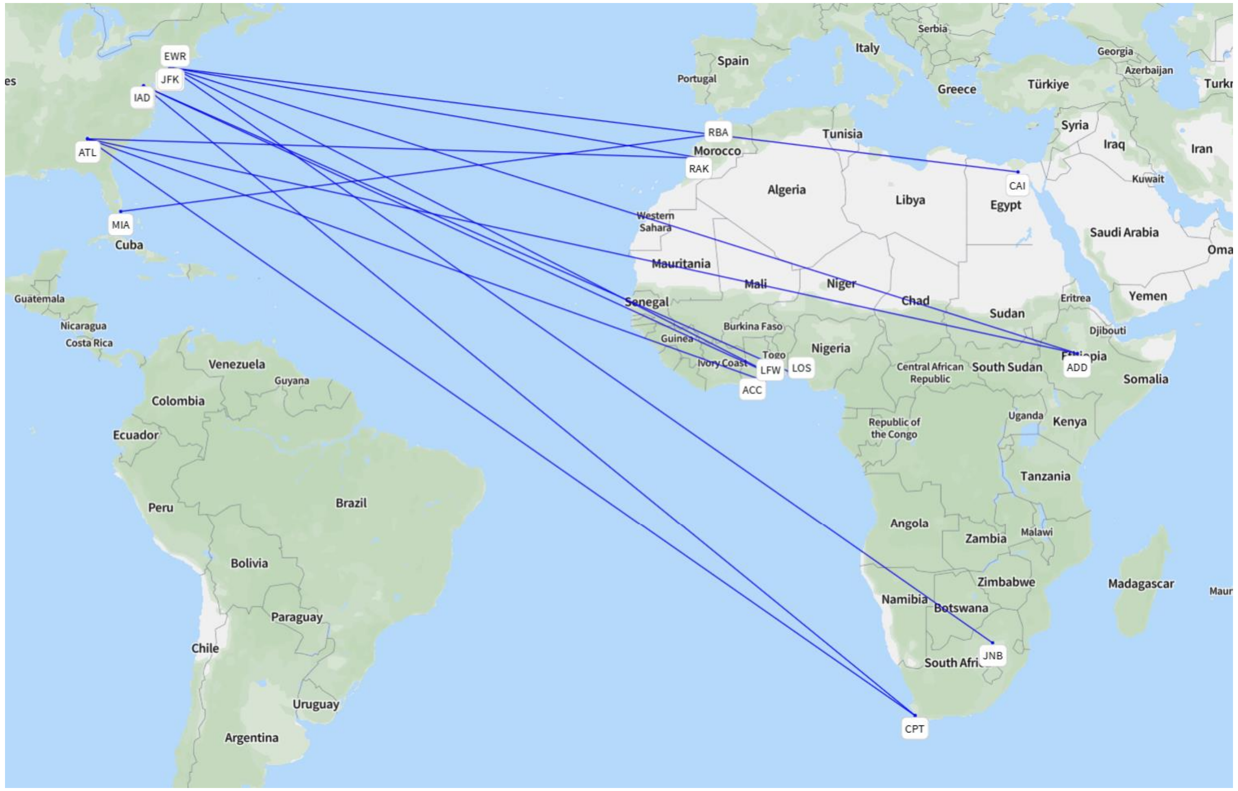
Strong growth continues from US

Top 10 US – Africa routes

Route	Summer 2024	Summer 2025	S25 vs S24	S25 vs S24 (%)
CMN-JFK	92,128	99,146	7,018	8%
ADD-IAD	70,876	82,598	11,722	17%
CAI-JFK	69,757	71,339	1,582	2%
ACC-JFK	47,051	59,010	11,959	25%
ATL-JNB	60,354	57,750	-2,604	-4%
EWR-JNB	53,970	53,970		0%
ADD-ORD	53,868	49,283	-4,585	-9%
JFK-NBO	58,266	47,736	-10,530	-18%
CMN-IAD	41,756	47,264	5,508	13%
ATL-LOS	46,830	46,830		0%

New US – Africa Routes in 2025

Carrier Name	Market Pair (Airport)	New in 2025
Delta Air Lines	ATL-CPT	48,400
	ATL-RAK	8,806
	ACC-ATL	8,711
Egyptair	CAI-EWR	43,717
Ethiopian Airlines	IAD-LFW	54,528
	ADD-ATL	45,219
	ADD-EWR	30,952
	JFK-LFW	21,717
United Airlines	EWR-JNB	91,235
	IAD-LOS	55,890
	CPT-IAD	40,092
	EWR-RAK	13,527



Although one of the smallest markets, North America has seen flights increase by 46% in 2025 v 2019. There are 12 new routes this year, connecting the East Coast of the US with various points in Africa.

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Ethiopian Airlines – Africa’s most connected carrier

Ethiopian operates 103 routes from their base in Addis Ababa

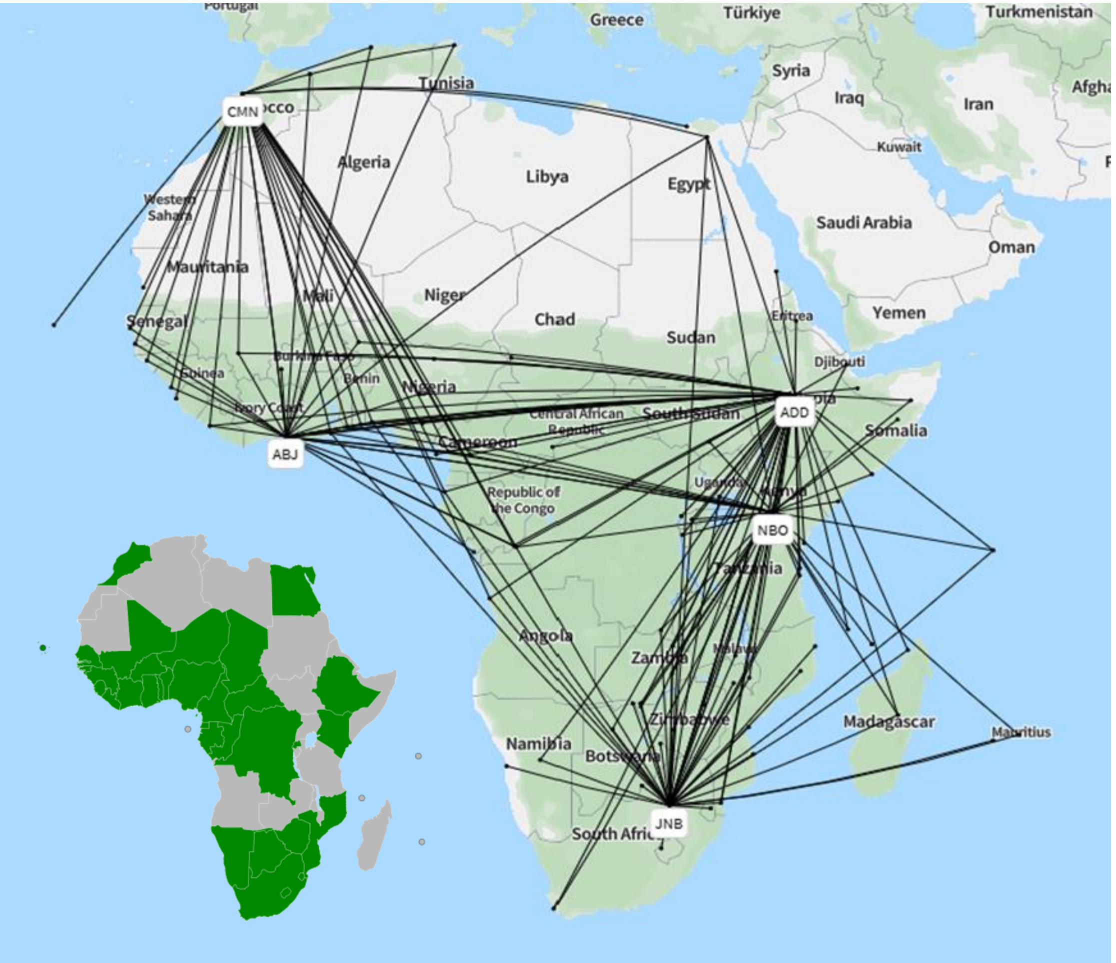
Still plenty of scope for greater connectivity within Africa

- Africa’s most connected airport is Addis Ababa with services to 37 African countries, considerably ahead of Nairobi with services to 25 other African countries.

African Countries Served

Dep Airport Code	Apr-15	Apr-25
ADD	28	37
NBO	28	25
CMN	26	24
JNB	25	23
ABJ	17	22

- A quarter of a century on from the Yamoussoukro Decision in 1999, what has changed?
- Has the Single African Air Transport Market (SAATM) stalled? Is 2063 an ambitious enough target?



SAATM Members

Source: au.int/saatm

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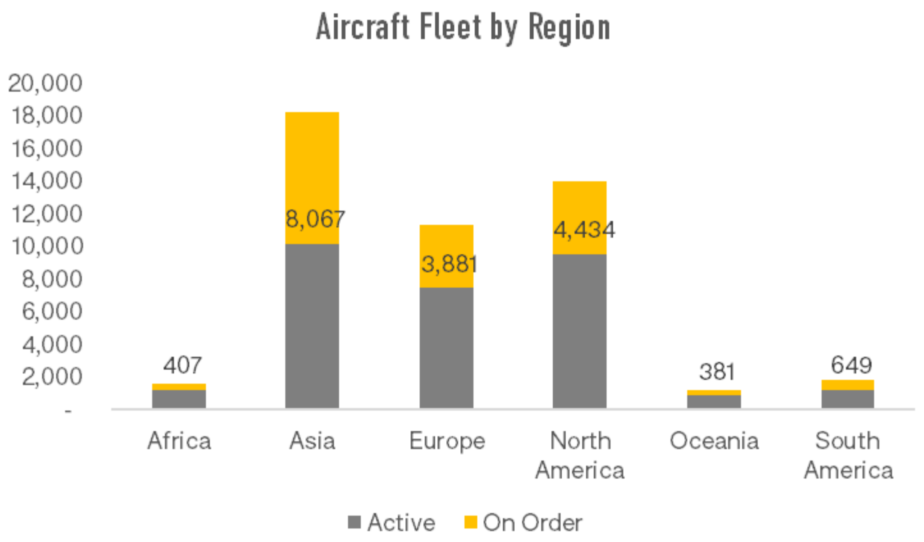
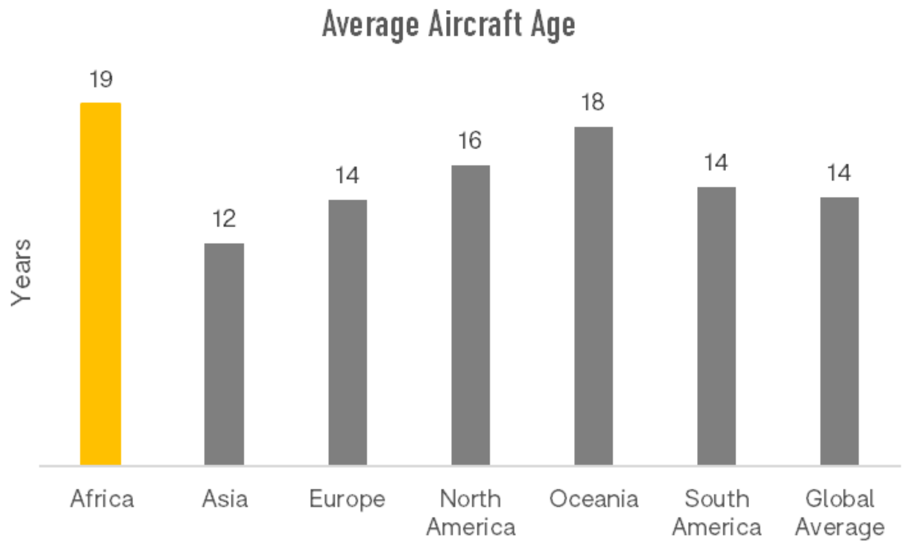
What does the future hold?

- With the exception of the Oceania region (which has the smallest population) Africa has the smallest aircraft fleet, at just 1,153 active aircraft.
- It has the oldest average fleet age, 19 years, which is 5 years above the global average of 14 years
- Yet, aircraft orders are very low and the availability of aircraft for leasing, or replacement to populate ageing fleets is increasingly challenging
- How can African aviation work to overcome these challenges, and ensure African carriers retain an appropriate level of control and market share in the continent's biggest markets?





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