Africa’s Aviation Growth story: Connectivity, capital and capacity

Wednesday 29 July

Speakers

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.

Sean Mendis

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Sean Mendis has over two decades of experience in senior management roles within the aviation sector in Africa. He carries the unofficial title of "Chief Troublemaker", earned through a long habit of asking inconvenient questions. He is presently based in Malawi, where he offers executive level consulting and intelligence to aviation stakeholders.

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.

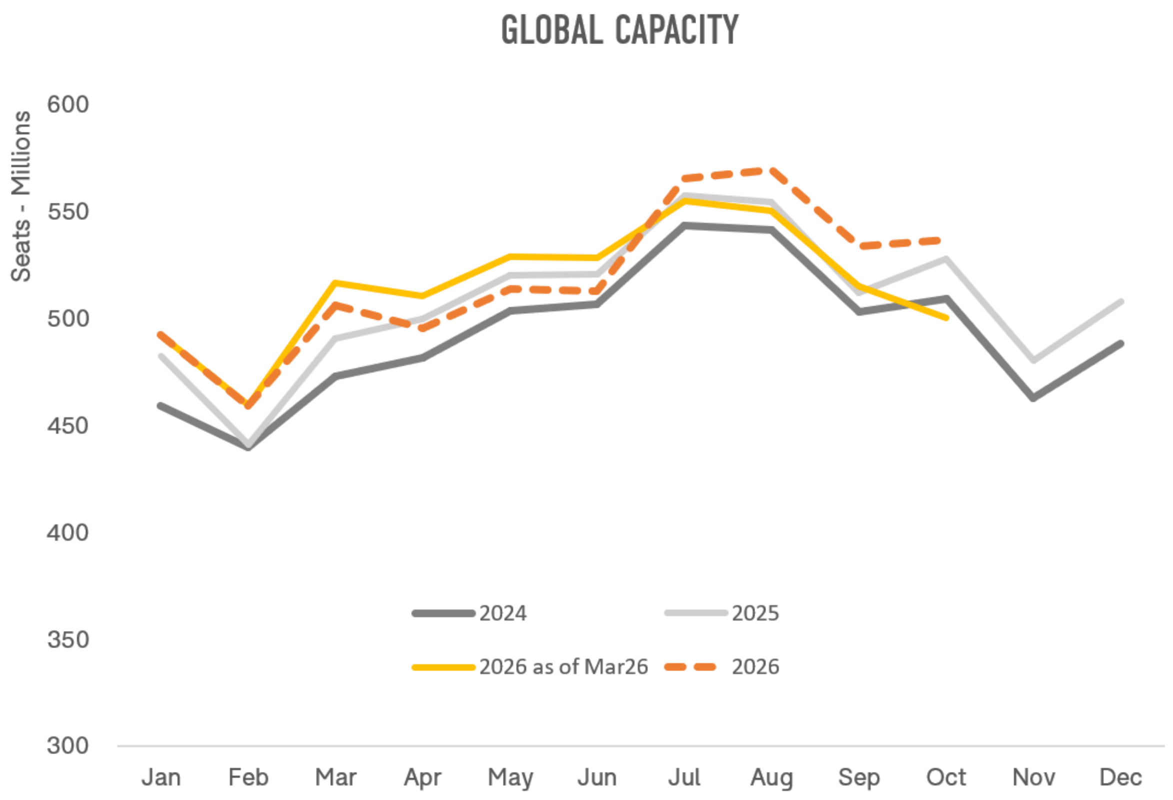
Today’s discussion

Join us as we explore the intersection of network growth, fleet planning, financing and policy reforms in Africa today.

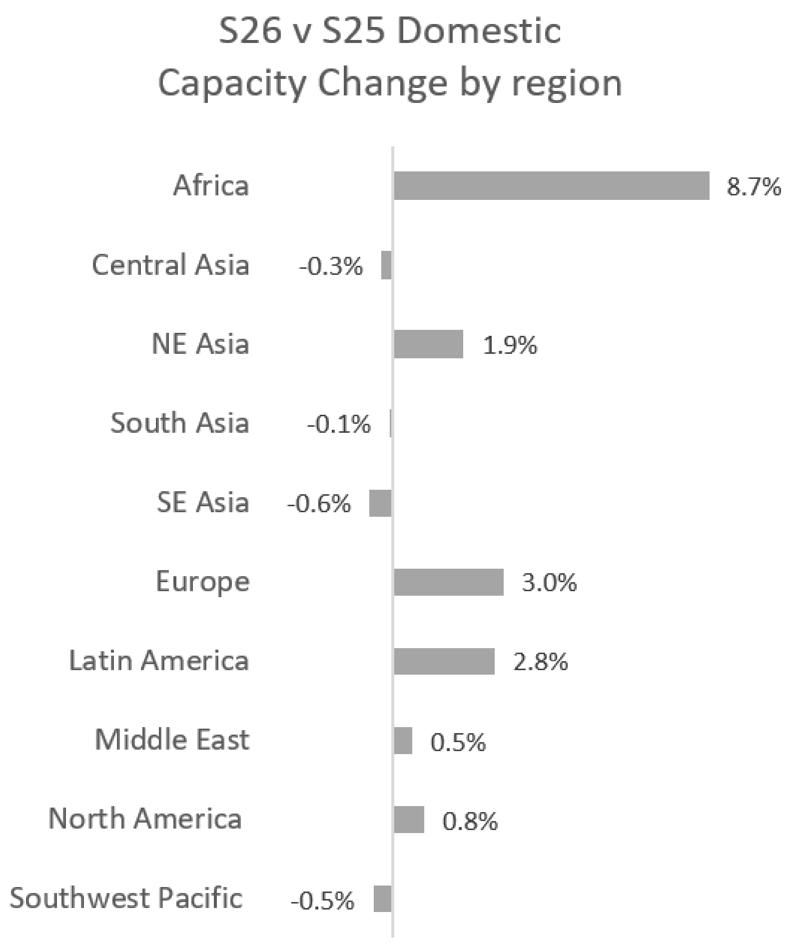
- The state of African connectivity
- Fleet strategy and aircraft availability
- Route development and tourism growth
- The role of policy in unlocking growth

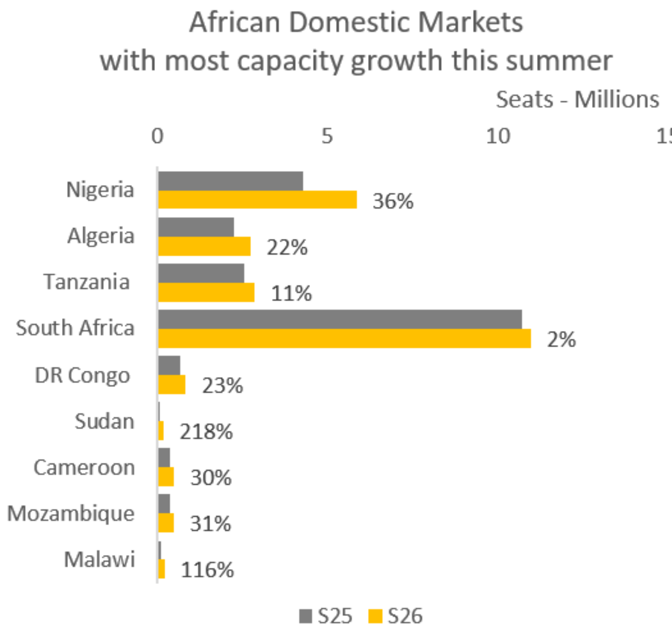
Global capacity position improving

- This summer global capacity is expected to be 0.9% ahead of Summer 25 according to the latest schedules data.
- This latest position shows capacity tracking below the S26 position from March with the period between June – July seeing an improvement. For July, global capacity is 1.4% ahead of S25 and at of now, the rest of the summer season shows positive growth.
- This still may reflect a degree of short-term uncertainty, with more likely position that capacity will remain flat on 2025, at least until the winter season.



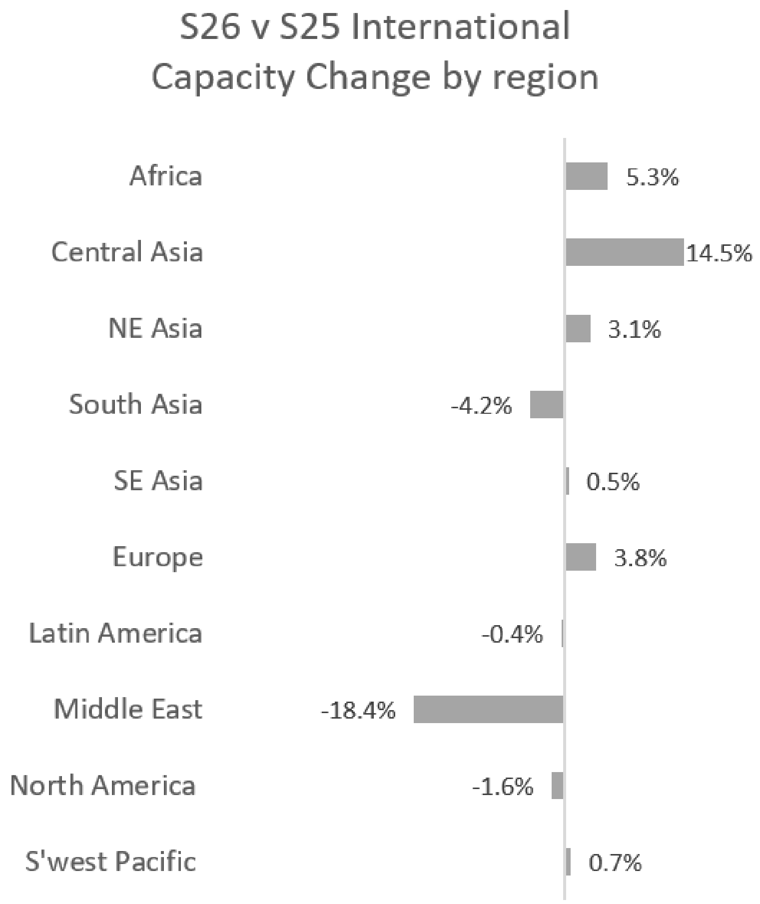
Africa leads on domestic growth

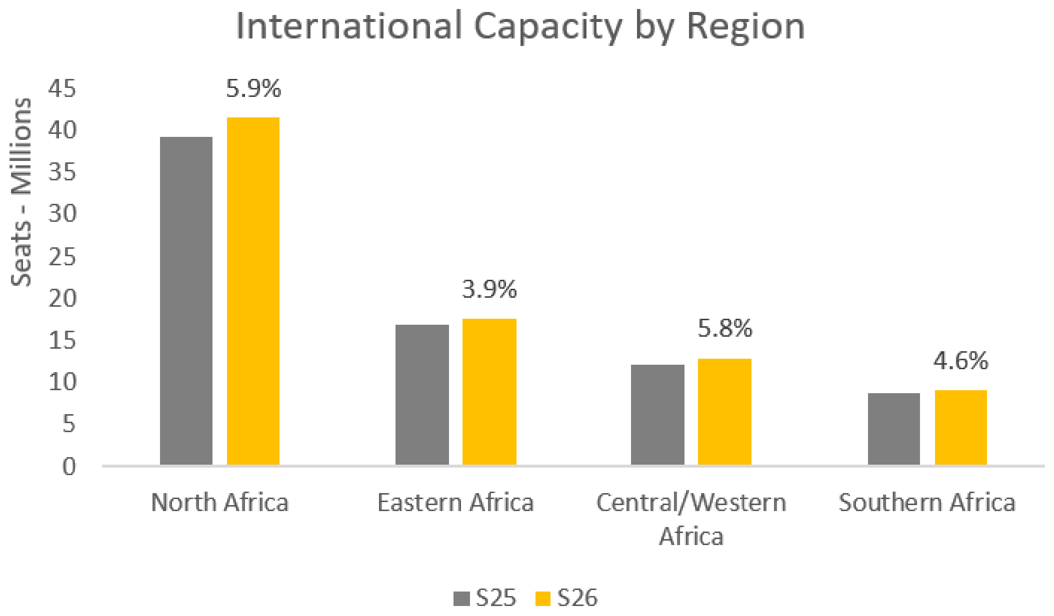




- Africa's domestic growth is higher than any other global market this summer, at 8.7% year on year. A number of factors are driving that, including strong recovery of the domestic market in Nigeria and also strong growth in Algeria, Tanzania and some smaller air markets including Cameroon, Mozambique and Malawi

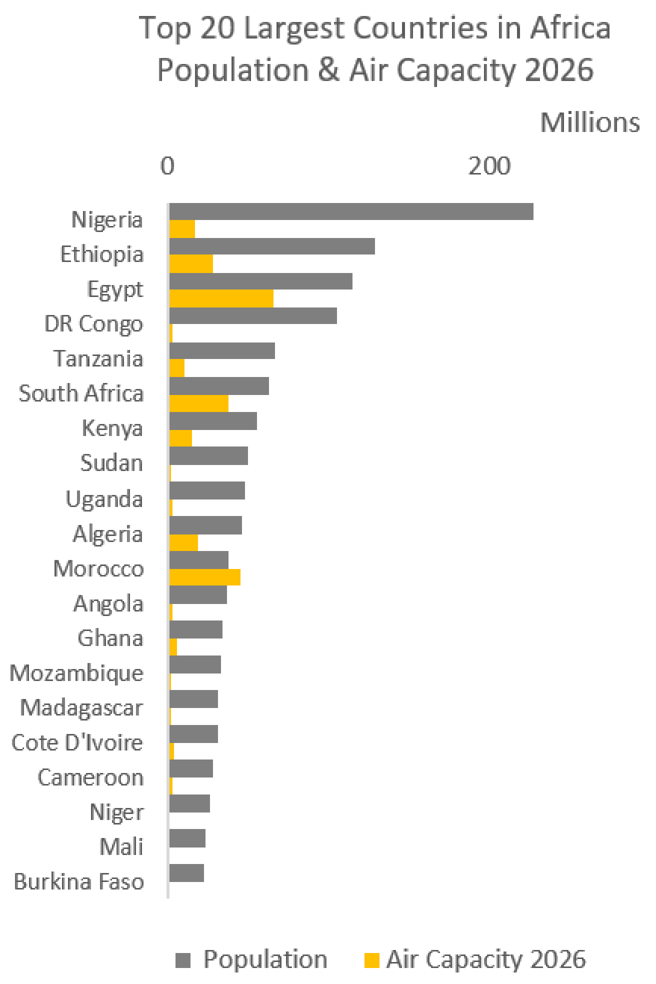
International growth remains resilient

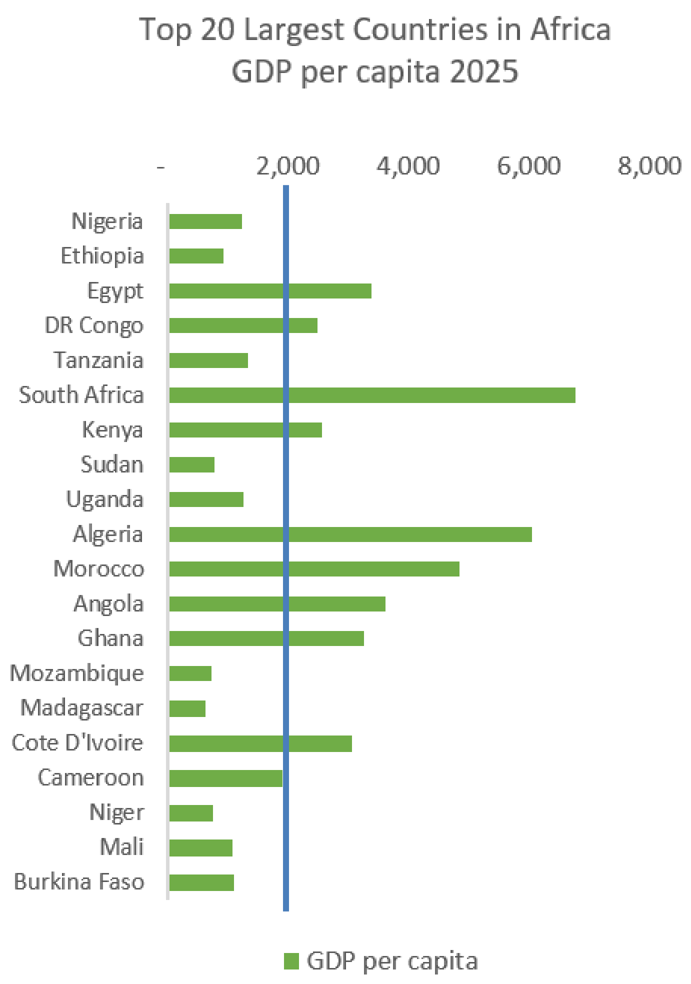




- International capacity growth in Africa is strong this summer, well above the global position where growth is static, at just 0.7% up compared to last summer. Global international capacity is still impacted by the geopolitical situation.
- Across Africa, strongest international capacity growth is taking place in North Africa, as Morocco continues to see strong tourism demand growth, and also in Central/Western Africa. In both of the regions, there is almost 6% growth in international capacity year on year.

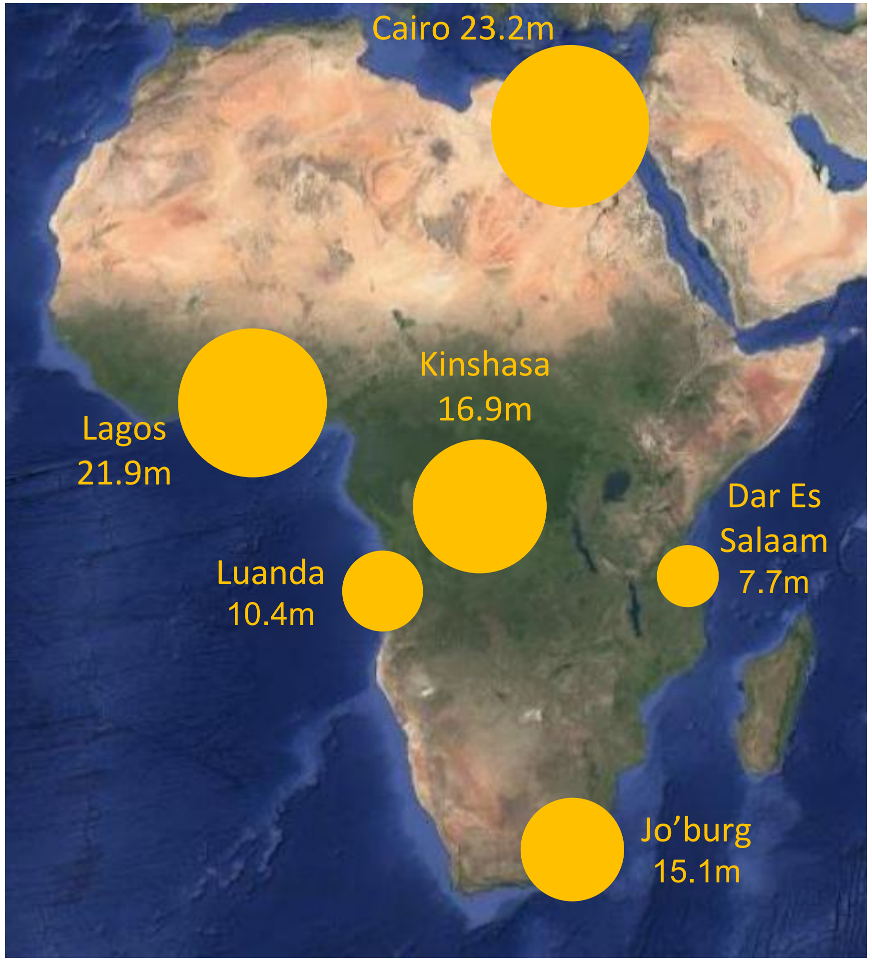
Aviation lags population growth across Africa



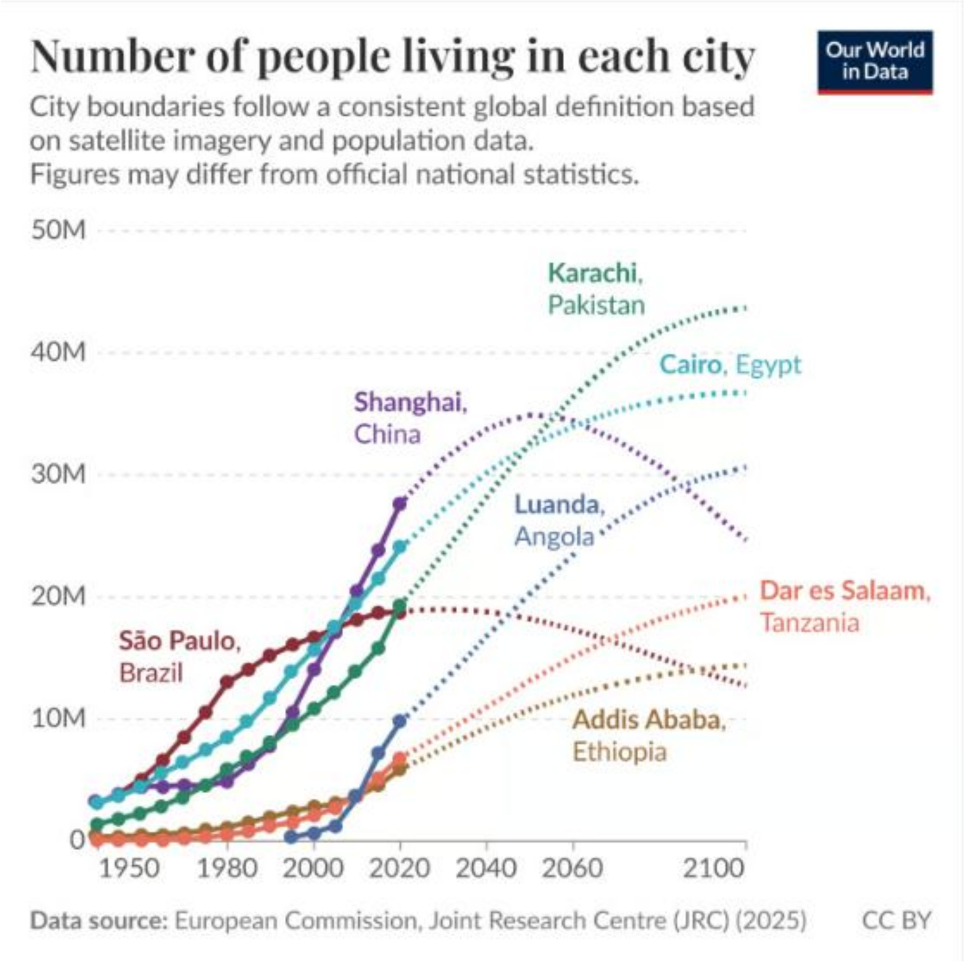


- Typically, GDP per capita of USD 2,000 is the threshold above which air travel becomes accessible to a population
- The African average is USD 2,949
- This a level above what many African countries currently achieve, which is why aviation growth is lagging
- Once GDP per capita reaches over USD 2,000, air travel tends to grow at 2 x GDP growth
- Twenty African countries achieved GDP growth of above 5% in 2025, including Ethiopia, Senegal and Rwanda.

Several cities in Africa will become megacities by 2030



Current major city populations



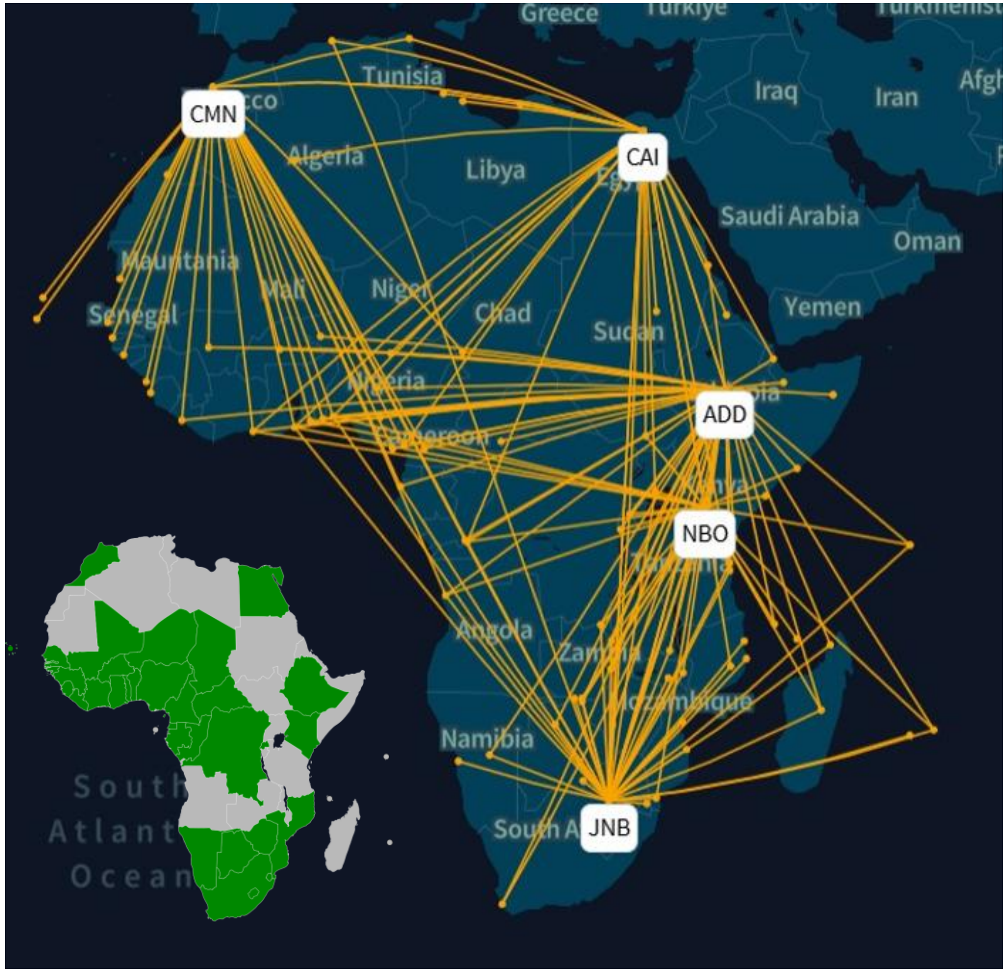
Still plenty of scope for greater connectivity within Africa

- Africa’s most connected airport is Addis Ababa with services to 38 African countries, considerably ahead of Casablanca with services to 27 other African countries.

African Countries Served

African Airport	Jul-16	Jul-26
Addis Ababa	31	38
Casablanca	28	27
Nairobi	32	25
Johannesburg	25	24
Cairo	15	20

- 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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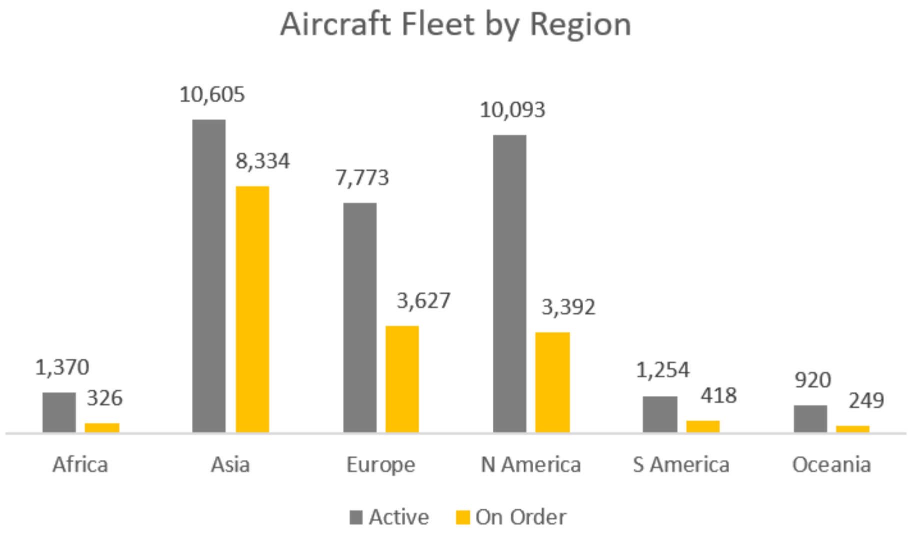
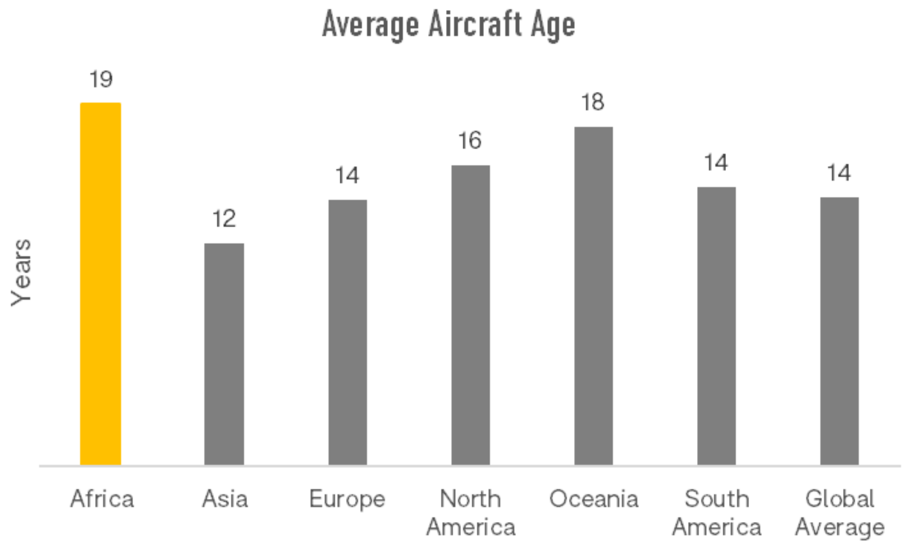
Fleet: constraint or opportunity?

- With the exception of the Oceania region (which has the smallest population) Africa has the smallest aircraft fleet, at just 1,370 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 and comes at a premium
- 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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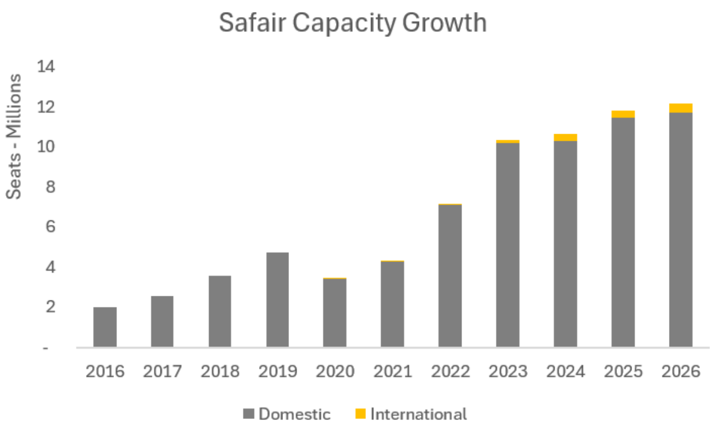
Home grown airlines securing their positions

- In the last 10 years, Ethiopian has moved up to become Africa’s largest carrier, with 12% of African capacity from just 8% ten years ago.
- Safair, another African success story, has seen a similar trajectory, growing from just 1% of capacity to 6%. In the last decade, Safair has grown on average each year at 16.5%
- The number of African domiciled carriers has also grown in the last decade, from 96 to 115, and African carriers have added a greater share of seats in the last decade, up by 57%.



Carrier Name	2016-07	2026-07	% Growth	African Domiciled
Ethiopian Airlines	999,159	2,147,162	115%	Yes
Safair	140,752	1,009,638	617%	Yes
Royal Air Maroc	746,327	835,140	12%	Yes
Egyptair	765,117	794,966	4%	Yes
Air Algerie	620,538	769,308	24%	Yes
Airlink		556,168		Yes
Ryanair	134,757	505,698	275%	No
Emirates	356,566	423,610	19%	No
Transavia	81,081	392,427	384%	No
Kenya Airways	481,734	357,868	-26%	Yes
Air Peace		346,501		Yes
Air Cairo	78,636	340,090	332%	Yes
Turkish Airlines	257,563	339,366	32%	No
South African Airways	1,086,406	331,028	-70%	Yes
Air France	306,024	330,869	8%	No
Qatar Airways	184,686	323,983	75%	No
Easyjet	30,792	280,781	812%	No
Saudi Arabian Airlines	201,078	268,710	34%	No
ASKY Airlines	96,997	262,341	170%	Yes
Air Tanzania	12,300	256,177	1983%	Yes

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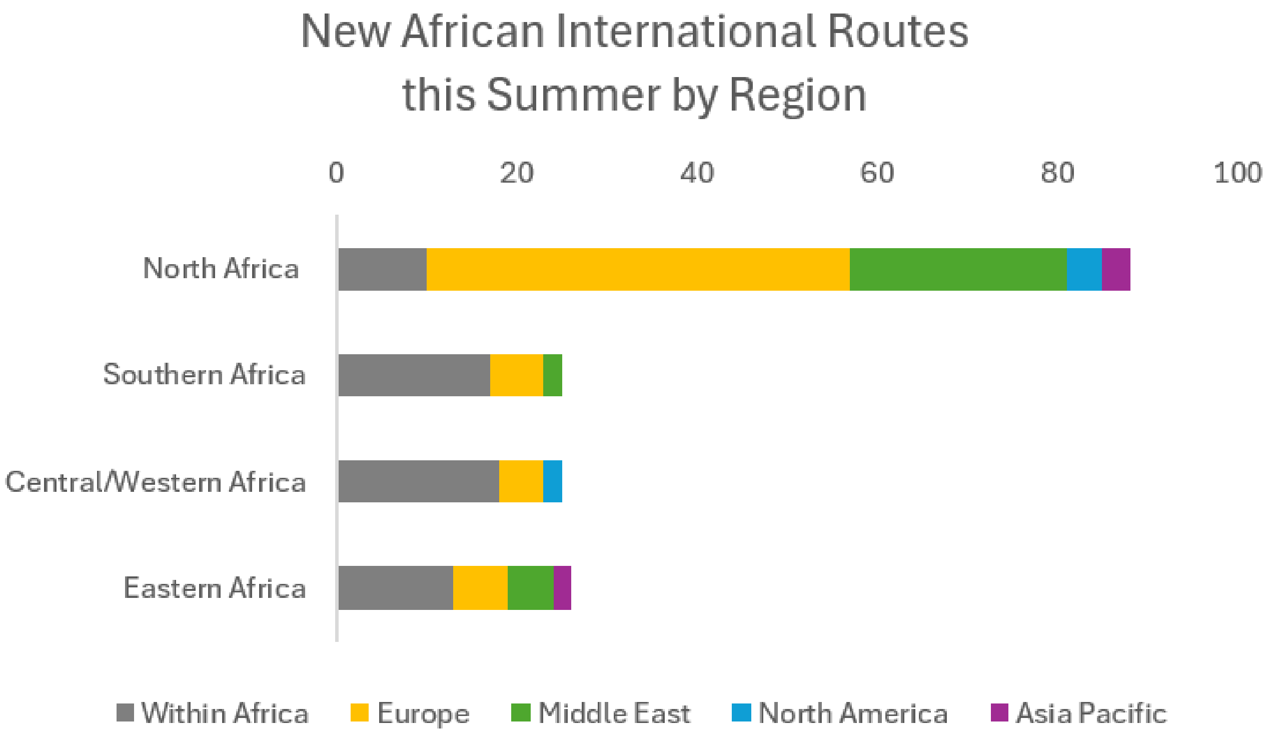
New international services growing Africa's connectivity

- Strong year on year growth continues in North Africa with LCCs driving growth from Europe into Morocco.
- Some notable new international routes this summer include two new US services to Morocco from Atlanta to Marrakesh (Delta Air Lines), and from Los Angeles to Casablanca (Royal Air Maroc); and two new services to Egypt, from Los Angeles and Chicago to Cairo, both operated by Egyptair.
- There are also three new North African services to Asia, with services from Algiers to Kuala Lumpur and Guangzhou, operated by Air Algerie , and a new services from Samarkand in Uzbekistan to Sharm El Sheikh with Air Samarkand.
- There are also two new North American services from Central/Western Africa, from Providence to Cape Verde, operated by TACV, and from Montreal to Dakar, operated by Air Transat.



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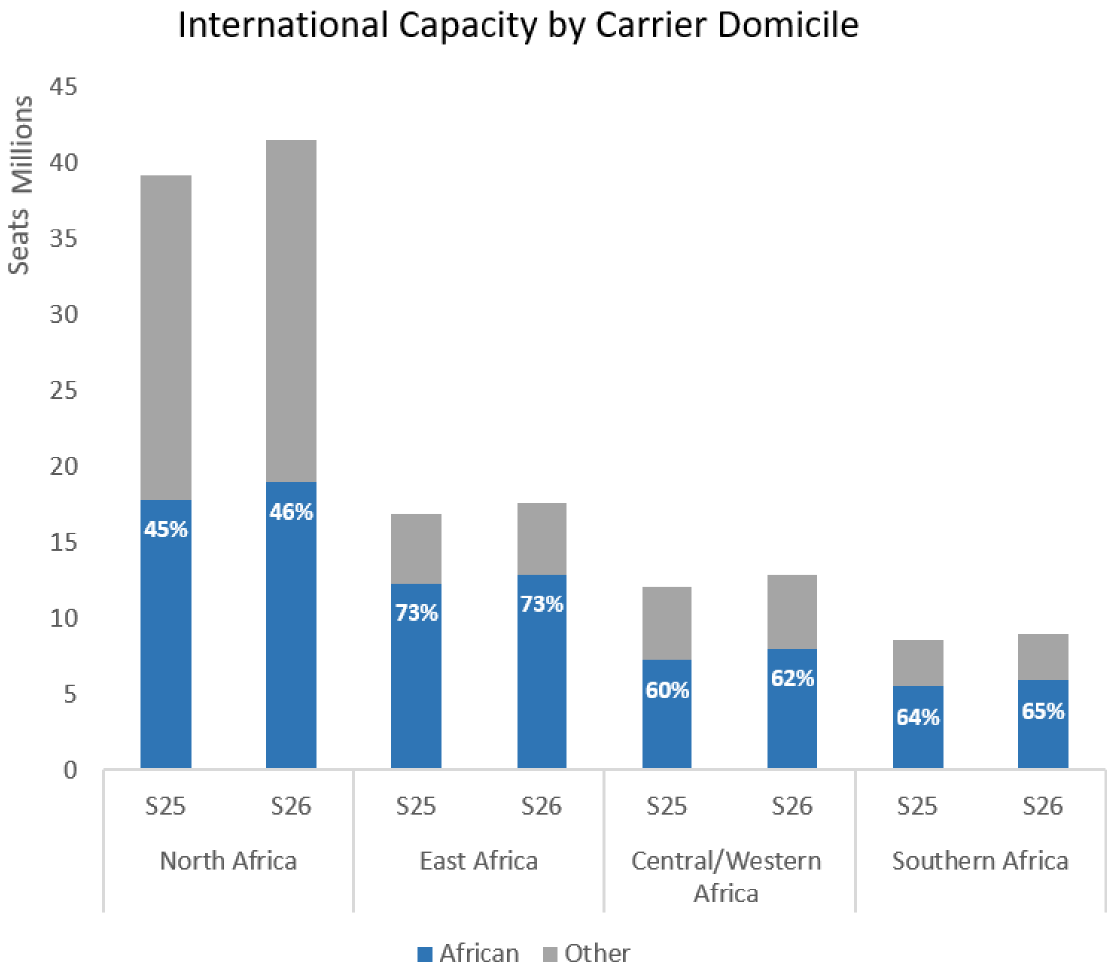
Geography influences how markets have evolved



- In North Africa, where geography offers easier access from key source markets, such as Europe and the Middle East, the share of non-African domiciled carriers is much higher, at 54% this summer.
- In other markets, African based carriers operate the dominant share of capacity, ranging from 73% in East Africa, undoubtedly as a result of the presence of Ethiopian Airlines, to 65% in Southern Africa, and 62% in Central/Western Africa.
- In both Southern Africa and Central/Western Africa, African based carriers are growing their share year on year.

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Who has capacity to grow?

- Who are the airlines to watch for growth in Africa in the next 3-5 years?
- Which markets will drive growth?
- And what will be the drivers of growth in those markets?

  Population growth?
  Trade?
  Inbound growth?

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