

## State of the Industry **Before** COVID-19 Crisis



**20.4%**

Of earth's total land area

**16.72%**

Of total world population (UN estimate)

**3%**

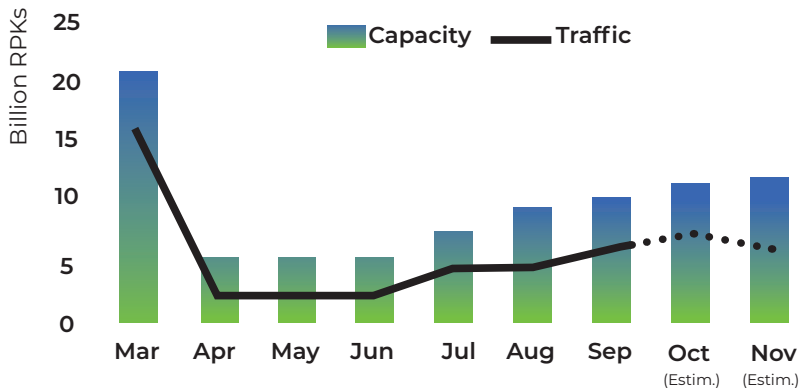
Of world GDP

2018	GLOBAL	AFRICA	AFRICA'S SHARE
Passengers Carried (*)	4.54 Billion	95.64 Million	2.11%
Cargo Lifted (*)	60,965 Thousand Tonnes	1,047 Thousand Tonnes	1.68%
Airlines	1,303	198	15.20%
Airports	3,789	352	9.30%
Fleet (*)	25,900	1015	3.92%
Navigation Service Providers	170	36	21.20%
Jobs	87.7 Million	7.7 Million	8.78%
Contribution to GDP	4.10%	\$63 Billion	2.70%

(\*): 2019

## State of the Industry **Post** COVID-19 Crisis I

### Capacity and Traffic Evolution



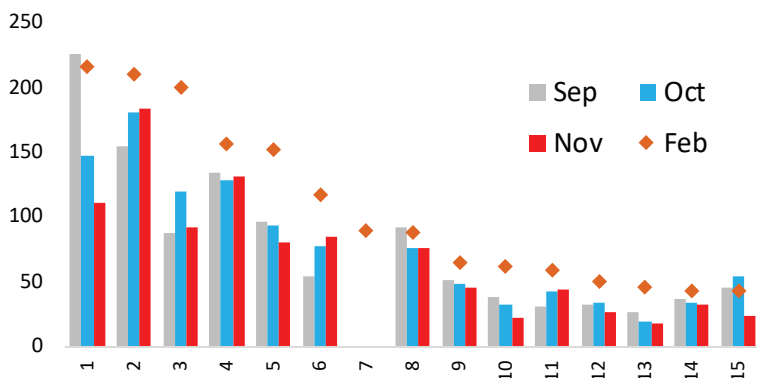
### Capacity Traffic

From January to November 2020, African airlines' capacity dropped by **53.3%** compared to 2019.

### Load Factor

In August 2020 the average load factor was **32.75%**

### International Flights Resumption



### International Flights Resumption, 2020

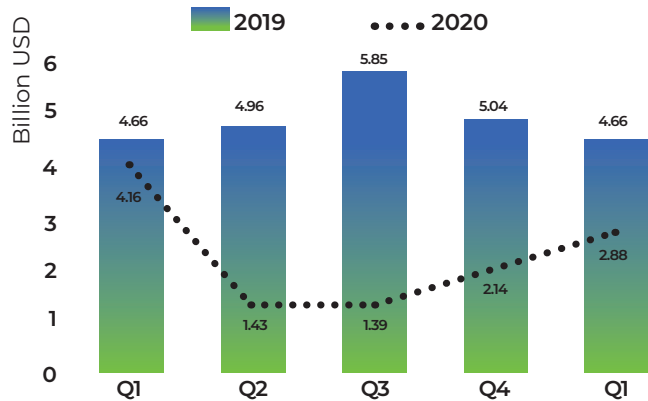
**72.92%** in September  
**70.8%** in October  
**67.8%** in November

### Connectivity

**90%** drop from November 2019 to November 2020

## State of the Industry Post COVID-19 Crisis 2

### Passenger Revenue 2019/2020



From **January** to **November**, African airlines' capacity dropped by **53.3%** compared to **2019**. Thus, the capacity is in constant recovery since **June**.

Traffic recovery is **slower** and **irregular**.

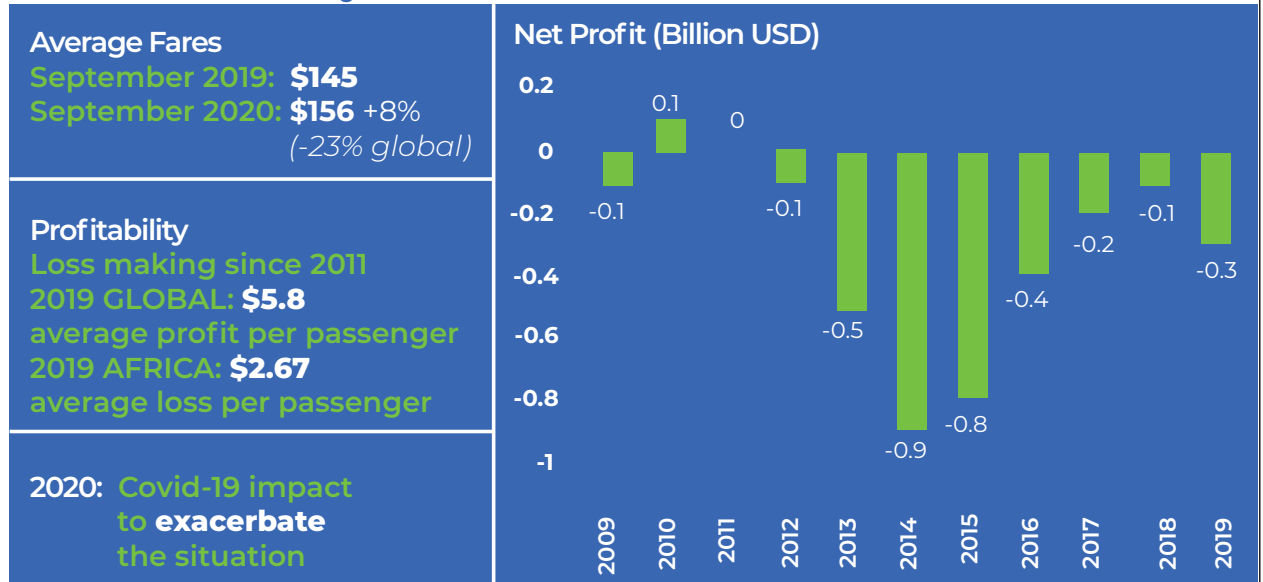
### Assumptions

**-25%** traffic recovery on **Q3 2020**

**-45%** traffic recovery on **Q4 2020**

**Estimated Revenue loss for 2020: USD 10.88 billion** (24 Nov. assessment)

## State of the Industry Post COVID-19 Crisis 3

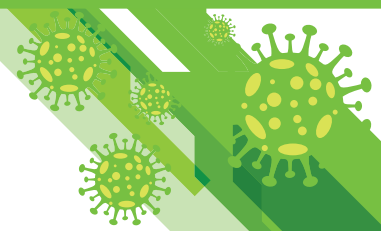


## Financial Support to Airlines

**2.456 Billion USD Government Support**

- Burkina Faso
- Cabo Verde
- Cote D'Ivoire
- Egypt
- Morocco
- Nigeria
- Rwanda
- Senegal
- South Africa





## Entry Restrictions and Borders

Countries	Status	
	Previous	Current
Algeria, Eswatini, Eritrea, Libya, and Morocco. <b>Total: 5 Countries</b>	14 Restricted	5 Restricted
Cameroon, Comoros, Congo, Gabon, Madagascar, Mozambique, Seychelles, Sudan and Tunisia. <b>Total: 9 Countries</b>	6 Partially restricted	9 Partially restricted
Angola, Benin, Botswana, Burkina Faso, Burundi, Cabo Verde, Central African Republic, Chad, Cote d'Ivoire, Djibouti, DRC, Egypt, Equatorial Guinea, Ethiopia, Gambia, Ghana, Guinee Conakry, Guinee Bissau, Kenya, Lesotho, Liberia, Malawi, Mali, Mauritania, Mauritius, Niger, Nigeria, Namibia, Rwanda, Sao Tome & Principe, Senegal, Sierra Leone, Somalia, South Africa, South Sudan, Togo, Tanzania, Uganda, Zambia and Zimbabwe. <b>Total: 40 Countries</b>	34 Open	34 Open

## PCR Test fees in Africa

Countries	PCR Test Cost
Angola, Benin, Burkina Faso, Ghana, Nigeria, Seychelles and Sudan	> 100 USD
Ethiopia, Guinea, Ivory Coast, Kenya, Mali, Mauritius, Namibia, Rwanda, Senegal, Togo and Uganda	50 – 100 USD
Chad, Congo Kinshasa, Congo Brazzaville, Djibouti, Egypt, Gabon, Mozambique, Sierra Leone, and South Africa	< 50 USD
Cameroon*, Liberia, Madagascar, Tunisia*	FREE