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African airlines' performance updates by AFRAA – March 2022

In recent weeks, the Covid19 infection rate picked up again in Asia and parts of Europe: China is battling a renewed surge in infections, fueled by the Omicron BA.2 sub-variants and is facing its worst epidemic outbreak since 2020. In Hong Kong, hospitals are on the verge of collapse, and Belgium and Germany continue to record new cases of infections. Worldwide, the number of cases has reached 476 million and 11.7 million in Africa. The recovery rate is 98.5% worldwide compared to 97.7 in Africa.

Despite the surge in new infections, countries are lifting travel restrictions - apart from China where some cities are under lockdown. The WHO has criticized the so called "brutal" lifting of anti-Covid-19 restrictions in Europe.

On a different note, the conflict between Russia and Ukraine has triggered jet fuel price increases globally. In Africa, the jet fuel price hike is worrying and has the potential to slow down the travel recovery. Platts estimates that the total impact of the price increases on the overall jet fuel bill will reach \$86.3 billion based on an estimated average price of \$115 per barrel.

In the month of March 2022, AFRAA estimates that African airlines' capacity reached 67.3% compared to same month in 2019. Similarly, traffic is estimated at 56%.

Domestic market remained bullish with the biggest share for both capacity and actual passenger carried. Domestic demand at 46.5% outperformed intra-Africa and intercontinental which remained subdued at 31.3% and 22.3% for intra-Africa and intercontinental respectively.

Five African airlines continued their international routes expansion drive and had surpassed the number of international routes operated pre-Covid. 10 other African airlines either re-opened suspended routes or launched new international routes. As of February 2022, African airlines had reinstated approximately 79.9% of their pre-Covid international routes.

The Intra-African connectivity reached 72% of the pre-covid level in February. It is estimated to increase to 75% in March because of easing of anti-covid19 restrictions in several African countries. In Algeria, connectivity increased due to the reopening of many destinations particularly to West Africa. Ethiopian airlines, Royal Air Maroc and EgyptAir are among airlines that opened new routes to African destinations in the reporting period.

Across Africa in general, passenger traffic volumes remain depressed. However, with the relaxation of lockdown and Covid-19 restrictions in many countries, traffic is set to rise.

Airline revenues remained low with many operators battling with cash-flow issues. Full year revenue loss for 2022 is estimated at US\$4.7b, equivalent to 27.3% of the 2019 revenues. In 2021, African airlines cumulatively lost \$8.6b in revenues due to the impact of the pandemic, representing 49.8% of 2019 revenues.

Other government regulatory Developments:

- Effective 18 March 2022, all travelers coming to Kenya who are fully vaccinated shall be exempt from the requirement of a PCR test. All eligible unvaccinated travelers arriving at any port of entry must be in possession of a valid COVID-19 negative PCR test certificate conducted within 72 hours before departure regardless of the route of entry. And they shall be subjected to rapid antigen test at their own cost of 30 USD. Any person who test positive on antigen RDT will be subjected to PCR test at their own cost of 50 USD and self-isolate. Travelers below the age of five (5) years are exempt from these testing requirements.
- In-bound fully vaccinated passengers arriving in Nigeria will no longer be required to take a pre-departure PCR COVID-19 Test. Moreover, they will not be charged for arrival rapid antigen tests at the airport. Rules that apply to fully vaccinated adults also apply to children aged 10 – 18 years. Passengers who are unvaccinated or partially vaccinated shall take a COVID-19 PCR test 48 hours before departure, or do a day 2 and day 7 test on arrival. Such passengers will be expected to pay for their PCR tests through the travel platform. The revised Travel Protocols take effect from 4th April 2022.
- Travellers entering South Africa will need to show proof of vaccination or a negative PCR test not older than 72 hours. All unvaccinated travellers arriving in South Africa who want to be vaccinated will be offered a vaccination
- Other African Countries that have lifted travel restrictions include Senegal, Tanzania and Togo.
- Finally, the European Council adopted an updated recommendation on the temporary restriction of non-essential travel into the EU. Under this recommendation, Member States should allow non-essential travel for persons vaccinated with an EU- or WHO-approved vaccine, recovered persons, and all persons travelling from a country on the EU list. This recommendation started to apply on 1 March 2022.

In spite of encouraging vaccination, the position of AFRAA remains that States should not impose mandatory vaccination as a pre-entry and exit requirement for travel, until satisfactory access to vaccines and reasonable vaccination coverage is attained. AFRAA urges governments to remove the PCR test requirements for fully vaccinated passengers.



Better Skies for Africa

The African Airlines Association, also known by its acronym AFRAA, is a trade association of airlines from the member states of the African Union (AU). Founded in Accra, Ghana, in April 1968, and headquartered in Nairobi, Kenya, AFRAA's mission is to promote, serve African Airlines and champion Africa's aviation industry. The Association envisions a sustainable, interconnected and affordable Air Transport industry in Africa where African Airlines become key players and drivers to African economic development. AFRAA membership of 44 airlines cuts across the entire continent and includes all the major intercontinental African operators. The Association members represent over 85% of total international traffic carried by African airlines. Follow us on [Facebook](#), [LinkedIn](#), [Twitter](#) and [YouTube](#).