AFRAA AIR TRANSPORT REPORT
Quarter 1 & 2 2022
The post-covid traffic growth that began in 2021 continues in 2022, even if the appearance of the omicron variant has slowed it down. The virus affected global airlines’ operations in January and February 2022, when traffic volumes were low. From March 2022, the traffic growth restarted. However, IATA reports that the Chinese domestic market was seriously impacted by the spread of the Covid Omicron variant; the traffic was reduced by 40.8% in April, 49% in May and 48.2% in June compared to 2021.

The Russian-Ukrainian war, which began at the end of February 2022, had a minor impact on traffic. Airlines have adapted their routes to the closure of airspaces due to the war. However, the conflict significantly impacted jet fuel prices, causing an increase of more than 30%.

During this first quarter of 2022, ASKs and RPKs reached 68.1% and 56% of 2019 levels, respectively. For the second quarter, ASKs reached 72.7% of 2019 levels, while RPKs reached 67.3%.
Global Airline industry performance

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According to IATA, a combination of weaker economic drivers and operational disruptions mainly related to the impact of Omicron affected the air cargo traffic growth during the first semester of 2022.

Industry-wide, cargo ton kilometers (CTKs) increased in January 2022 by 2.7% year-on-year (YoY), a slowdown compared to the very good 8.9% growth realized in December 2021. In February, CTKs increased by 2.9% compared to the same month in 2021 and 11.9% compared to 2019. Compared to March, April, May, and June 2021, CTKs reduced by 5.2%, 11.2%, 8.3%, and 6.4%, respectively, mainly due to the Russia – Ukraine conflict and the spread of the Omicron variant in China, that impacted the manufacturing centers in China.
African airlines performance

Financial performance

The financial slowly recovered from the critical phase of the Covid 19 outbreak in 2019. Passenger revenue losses were estimated at USD 10.21 billion in 2020 and USD 8.6 billion in 2021. Losses are expected to reduce to USD 3.5 billion in 2022, representing 20% of 2019 revenues.

Figure 2: Quarterly Passenger Revenue Loss

During the first and second quarters of 2022, the revenue loss was estimated at USD 1.3 billion and USD 1 billion, respectively.
Passenger traffic Evolution

Figure 3: African airlines ASK and RPK growth

In addition to the travel bans imposed on African passengers, the traffic to/from the continents was affected by the low economic performance in the region and the low vaccination rates.

During Q1 2022, African airlines' ASKs and RPKs reached 63.8% and 59% of 2019 levels, respectively. The situation is slowly improving and ASKs reached 71.1% of 2019 levels in Q2, while RPKs reached 69.1%.
Passenger traffic distribution

Figure 4 – 5: African airlines passenger distribution Q1 & 2 - 2022

The domestic market grabbed a few shares during the first quarter of 2022, increasing from 43% in Q4 2021 to 45%. South Africa is the leading country in domestic operations, followed by Nigeria and Kenya. During Q2, the intercontinental traffic increased by 6% approximately, at the expense of domestic traffic, which lost 7% of its market share. The share of intra-African traffic slightly increased by 1% from Q1 to Q2.

Figure 6 – 7: African Airlines international passengers destinations Q1 & 2 - 2022
The non-domestic traffic of African airlines was mainly intra-African during the first and second quarters of 2022 (55% and 49%, respectively). Outside Africa, Europe is the first destination of African carriers, representing 25% over Q1 2022. Its share increased in Q2 to 29%, mainly due to the traffic from Northern Africa. Traffic to the Middle East is also significant, around 16% in Q1 and 17% in Q2, with Saudi Arabia being the first destination country. Asia and America both represent less than 5%.

Regional Insights

The Northern African region had the highest contribution in the continent in terms of passenger traffic, with a share of 33.9% of the total number of passengers traveling to/from Africa during the first quarter of 2022. This share increase in the second quarter to reach 39.1% Domestic represented 25% of the regional traffic in Q1 but only 16% in Q2. Regarding non-domestic traffic, Europe was the most significant destination, with half of the traffic (50%) in Q1. The traffic to Europe increased by more than 3 million passengers in Q2 and reached 57%, mainly driven by Raynair which traffic from Morocco to Europe more than doubled.

Middle-East is also a preferred destination, with 34% of the traffic in Q1. Intra-African traffic was limited and represented no more than 10% of the traffic to/from Northern Africa during Q1 & 2. Egypt was the leading contributor to international traffic, and the main destinations countries are France and Saudi Arabia.

Figure 8 – 9: Traffic repartition - Northern Africa Q1&2 2022

Source: AFRAA /OAG
Central and Western Africa region had the second highest contribution to the continental traffic, representing 24.2% in Q1 and 22.2% in Q2 2022. The Domestic market was dominant, with 50% during the first quarter and 48% during the second.

Intra-African dominates the non-domestic traffic with a share of 43% and 41% and Q1 and Q2, respectively.

Figure 10 – 11: Traffic repartition - Central and Western Africa Q1&2 2022

Europe is the principal destination outside the continent, representing 39% in Q1. The main destinations in this continent are France and UK. The Middle East, America, and Asia share are all 10% and below.

The share of the Eastern African region in the continental traffic was 20.6% during Q1 and reduced to 18.7% in Q2. The Domestic is dominant in this region, representing 48% during the first quarter and 45% during the second.
Southern Africa represented 21.3% and 19.9% of the continental traffic during the first and second quarters of 2022, respectively. Domestic traffic represents more than 60% of the regional traffic (68% during Q1 and 63% during Q2).

Intra-African travel dominates the international traffic, with a percentage of 53.3% in Q1 and 51.6% in Q2. The traffic to Europe is also significant. The main destinations are UK, Germany, and Portugal.
Southern Africa represented 21.3% and 19.9% of the continental traffic during the first and second quarters of 2022, respectively. Domestic traffic represents more than 60% of the regional traffic (68% during Q1 and 63% during Q2).

IntrAfrican travel dominates the international traffic, with a percentage of 53.3% in Q1 and 51.6% in Q2. The traffic to Europe is also significant. The main destinations are France, the UK, and Germany. IntrAfrican traffic is dominated by Ethiopia, Kenya, and Tanzania, as the origin country and destination.

The non-domestic traffic is dominated by European and intrAfrican traffic. Mauritius, Reunion, and Kenya lead the traffic to Europe, and the main

African airlines ranking by traffic (AFRAA estimations)

Figure 16 – 17: African airlines ranking by traffic Q1 & Q2 2022

(*) The data here are estimations and have not been confirmed by airlines

Source: AFRAA/OAG
During the first semester of 2022, South Africa had five routes in the top 10 domestic routes in Africa, while Nigeria had two. Kenya and Egypt also have domestic routes among the ten busiest.

### Figure 18 – 19: Domestic routes ranking

<table>
<thead>
<tr>
<th>Route</th>
<th>Passengers Carried</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johannesburg - Cape town</td>
<td>0.8</td>
</tr>
<tr>
<td>Durban - Johannesburg</td>
<td>0.5</td>
</tr>
<tr>
<td>Abuja - Lagos</td>
<td>0.4</td>
</tr>
<tr>
<td>Port Elizabeth - Johannesburg</td>
<td>0.3</td>
</tr>
<tr>
<td>Cairo - Aswan</td>
<td>0.2</td>
</tr>
<tr>
<td>Cape town - Durban</td>
<td>0.1</td>
</tr>
<tr>
<td>Nairobi - Mombasa</td>
<td>0.1</td>
</tr>
<tr>
<td>Lisbon - Port Elizabeth</td>
<td>0.1</td>
</tr>
<tr>
<td>Cairo - Luxor</td>
<td>0.1</td>
</tr>
</tbody>
</table>

### Figure 20 – 21: Intra-African routes ranking

<table>
<thead>
<tr>
<th>Route</th>
<th>Passengers Carried</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johannesburg - Harare</td>
<td>0.5</td>
</tr>
<tr>
<td>Miga - Tunis</td>
<td>0.4</td>
</tr>
<tr>
<td>Cairo - Khartoum</td>
<td>0.4</td>
</tr>
<tr>
<td>Nairobi - Entebbe</td>
<td>0.3</td>
</tr>
<tr>
<td>Johannesburg - Mauritius</td>
<td>0.3</td>
</tr>
<tr>
<td>Accra - Lagos</td>
<td>0.3</td>
</tr>
<tr>
<td>Johannesburg - Lusaka</td>
<td>0.3</td>
</tr>
<tr>
<td>Dar es Salaam - Nairobi</td>
<td>0.3</td>
</tr>
<tr>
<td>Bengazi - Tunis</td>
<td>0.2</td>
</tr>
</tbody>
</table>

(*) The data here are estimations and have not been confirmed by airlines.

Source: AFRAA /OAG
During the first semester of 2022, South Africa had five routes in the top 10 domestic routes in Africa, while Nigeria had two. Kenya and Egypt also have domestic routes among the ten busiest.

**Top 10 Intra-African routes by passengers carried Q1 & Q2 2022 (AFRAA estimations)**

**Figure 20 – 21: Intra-African routes ranking**
The ten busiest Intra-African routes are generally within Southern, Eastern, and Northern. Only one Western African route (Accra – Lagos) appeared in the top 10 during Q1.

**Top 10 Intercontinental routes by passengers carried Q1 & Q2 2022**
(AFRAA estimations)

**Figure 22 -23: Intra-African routes ranking**
This top 10 shows the strength of the traffic between North Africa and the Middle East, particularly from Cairo. Egyptair is the leading carrier on these routes.

**Airport Ranking by Passengers**

**Figure 24 – 25:** African airports ranking by passengers Q1 & Q2 2022
(AFRAA estimations)

**Source:** AFRAA / OAG
More than 170 thousand tons of freight were handled at Nairobi Jomo Kenyaa airport during Q1 and Q2 2022. Johannesburg and Cairo followed with 148 thousand and 142 thousand tons, respectively. Three West African airports are part of the top 10: Lagos, Accra, and Dakar.

**Methodology:**
A comparative study based on a single aircraft type applies to all airports with more than 300 thousand passengers in 2021. The aircraft type chosen is the B737, the most popular aircraft type in the region. Following the applied criteria:

- International Flight Type
- Origin & Destination
- Total Departing Pax
- Parking Time
- Boarding bridge time
- Arrival Time
- Cargo

Cairo, Johannesburg, and Cape Town were the busiest airports in Africa according to our data. Egypt had three airports in the top 10 during Q1, but the number reduced to two in Q2. South Africa and Nigeria had 2 airports each.

**Airport Ranking by Freight Traffic**

**Figure 26 – 27:** African airports ranking by passengers Q1 & Q2 2022 (AFRAA estimations)
More than 170 thousand tons of freight were handled at Nairobi Jomo Kenyatta airport during Q1 and Q2 2022. Johannesburg and Cairo followed with 148 thousand and 142 thousand tons, respectively. Three West African airports are part of the top 10: Lagos, Accra, and Dakar.

**Airport charges**

**Methodology:** A comparative study based on a single aircraft type applies to all airports with more than 300 thousand passengers in 2021. The aircraft type chosen is the B737, the most popular aircraft type in the region. Following the applied criteria:

<table>
<thead>
<tr>
<th>Aircraft Type</th>
<th>B737</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTOW</td>
<td>70.08 Metric</td>
</tr>
<tr>
<td>Flight Type</td>
<td>International</td>
</tr>
<tr>
<td>Origin &amp; Destination</td>
<td>100</td>
</tr>
<tr>
<td>Total Departing Pax</td>
<td>100</td>
</tr>
<tr>
<td>Parking Time</td>
<td>2 Hour</td>
</tr>
<tr>
<td>Boarding bridge time</td>
<td>1 Hour</td>
</tr>
<tr>
<td>Arrival Time</td>
<td>12:00</td>
</tr>
<tr>
<td>Cargo</td>
<td>0 Kilograms</td>
</tr>
</tbody>
</table>
Methodology:

We calculate the total number of possible Intra-African connections between inbound and outbound flights on 20 important African hubs in Q1 & Q2 2022.

The rules selected for the computation are as follows:

- Single connections only to/from the chosen airports,
- Minimum Connection Time from OAG table,
- Maximum Connection Window of 6 hours

The Covid-19 situation dramatically affected connectivity within Africa, with a sharp drop of 97% during the second quarter. The situation gradually improved, and the intra-African connectivity reached 65% of the pre-Covid level during Q1 2022 and 70% during Q2.

Kinshasa has the highest level of charges among the selected airports, and Algiers has the lowest level. Addis, Johannesburg, Casablanca and Nairobi, among the busiest airports in Africa, charge less than the average. This indicates that lowering airport charges can have a positive effect on traffic.

Figure 28: African airports ranking by charge index Q1&2 2022

Source: AFRAA / IATA ACIC
**African airlines performance**

**Methodology:**

We calculate the total number of possible Intra-African connections between inbound and outbound flights on 20 important African hubs in Q1&2 2022.

The rules selected for the computation are as follows:

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**Figure 29:** Intra-African connectivity growth by quarter
During the first semester of 2022, the regional traffic represented around 30% of African carriers’ operations. It is essential to facilitate travel within Africa by removing barriers that hinder intra-African traffic.

Direct flights between African countries

Figure 29: Number of direct flights between African countries

Among the 54 countries in the African continent, only 5 have direct flights to more than 20 African countries, a decline compared to 2020 (13 countries used to have direct flights toward other countries). Ethiopia is leading with 35 direct flights to other countries. Ethiopia

Source: AFRAA / AfDB

The connectivity at the Johannesburg hub improved and it regained its place as the most intra-African connected airport. Airports like Lome and Abidjan are close to their pre-Covid situation, benefiting from less strict restrictions.
Direct flights between African countries

During the first semester of 2022, the regional traffic represented around 30% of African carriers’ operations. It is essential to facilitate travel within Africa by removing barriers that hinder intra-African traffic.

Figure 29: Number of direct flights between African countries

![Top 10 best and worst connected countries in Africa](image)

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Source: AFRAA / AfDB
In terms of Visa openness within, more and more countries are opening their borders to other African countries. In 2020, The Gambia joined Seychelles and Benin in the group of totally Visa-free countries. Thirty-two countries now accept visas on arrival across Africa. Unfortunately, in 2021 51% of Africans still needed a visa to travel to another African country compared to 46% in 2020, which is a decline that needs to be addressed.

Source: AFRAA / OAG

The table above represents the percentage of direct connections between all the countries within a region or toward another African region in relation to the total number of possible connections.

While intra-connectivity is relatively high within Western Africa (52%), we can see that connectivity across regions remains poor.

The highest rate is between Northern and western Africa, with only 27% (this is a decline, as this percentage used to be 41%). Southern Africa is the least connected with other regions, particularly with the Northern (only 1%).
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ANNEX: GLOSSARY

ACIC: Aviation Charges Intelligence Center
AFDB: African Development Bank
AFRAA: African Airlines Association
FMTK: Freight and Mail Tons Kilometers
ICAO: International Civil Aviation Organization
IATA: International Air Transport Association
MoM: Month on month
RPK: Revenue Passenger Kilometers
WCAF: West and Central Africa
YoY: Year on Year
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