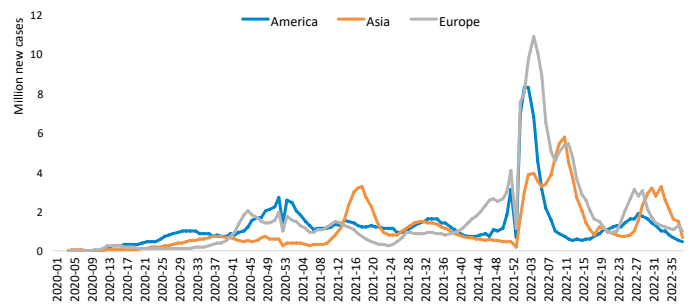
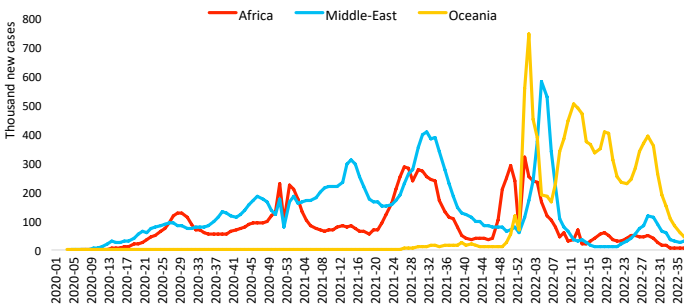


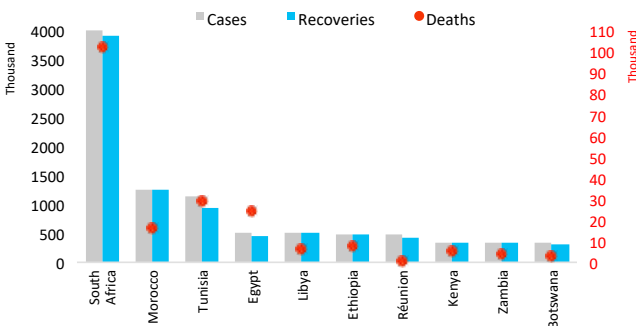
# African Skies section on state of the industry



## Waves of infection worldwide

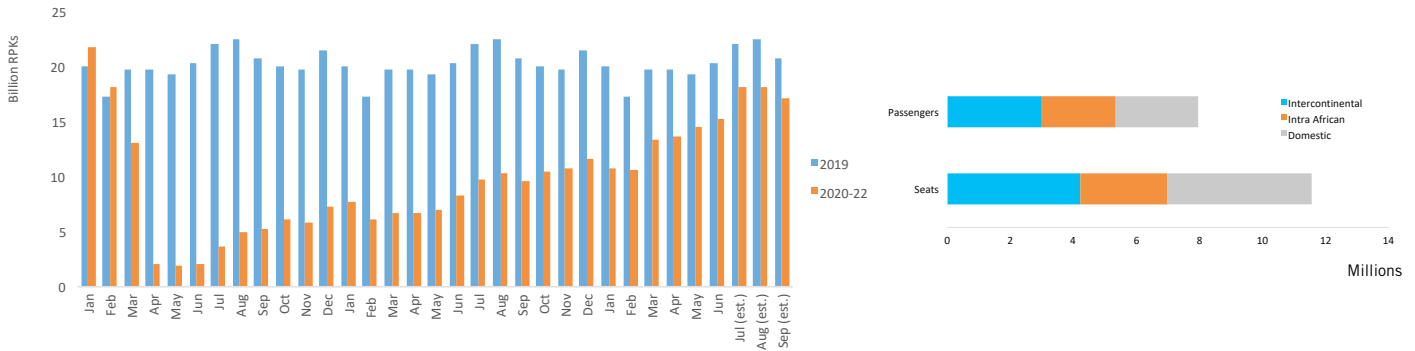


Source: Worldometer



- While Asia is reopening and easing the restrictions linked to COVID-19, Europe fears the occurrence of the 8<sup>th</sup> wave of contamination. UK has reported a rise in contamination, which had not been the case since July. In Africa, the number of new contaminations remains low.
- Worldwide, the number of cases have reached 619 million and 12.6 million in Africa. The recovery rate is 98.9% worldwide compared to 98% in Africa.

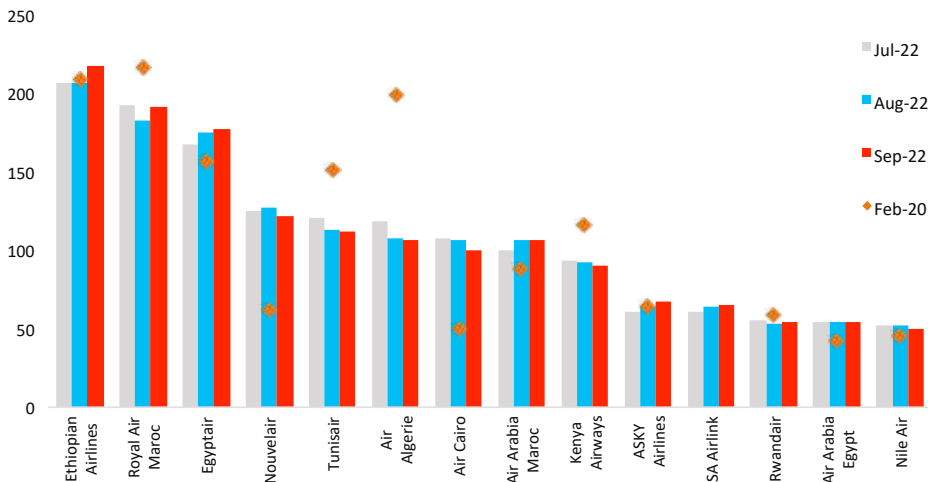
## Capacity and traffic evolution



Source : AFRAA/OAG

- In August 2022, the capacity reached 79.7% of the 2019 level and traffic to 80.7%.
- This is estimated to increase in **September**. Traffic is will reach **82.52%** and capacity **82.1%** of 2019 levels.
- Domestic traffic was dominant in July 2022 with **39.5% of the seats offered** and **32.8% of the passengers carried**.
- Intra-African **passengers carried** represented **29.5%** of the total passengers while **the seats offered** represented **24%**.
- Intercontinental traffic was **37.6% of the passengers carried** and **36.5% of the seats offered**.

## International routes

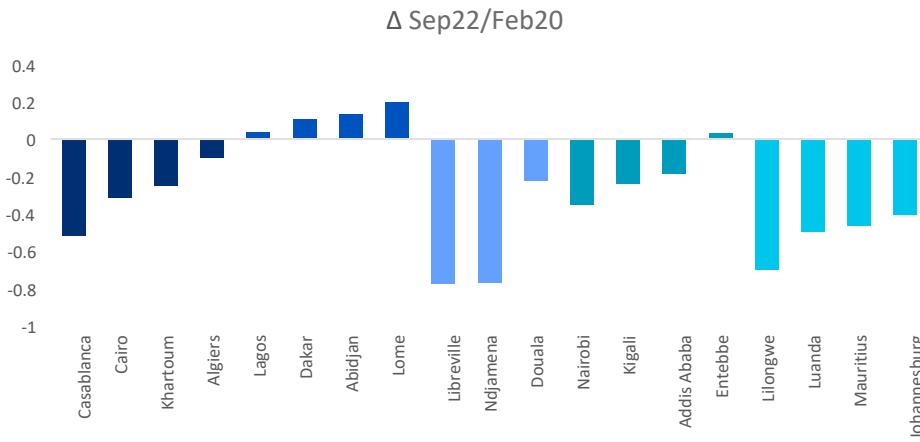


The percentage of international routes operated by African airlines compared to Feb 2020 reached **99.2%** in **September 2022**, compared to 98.7% in August.

Ethiopian airlines have opened new intra-African 5<sup>th</sup> freedom routes. Royal Air Maroc and EgyptAir also reopened some previously closed routes.

8 airlines in this top 15 have reached or exceeded their number of international routes of the pre-COVID period.

## Intra-african connectivity



The Intra-African connectivity reached 81% of the pre-COVID level in August 2022. **It is estimated to increase to 89% in September.**

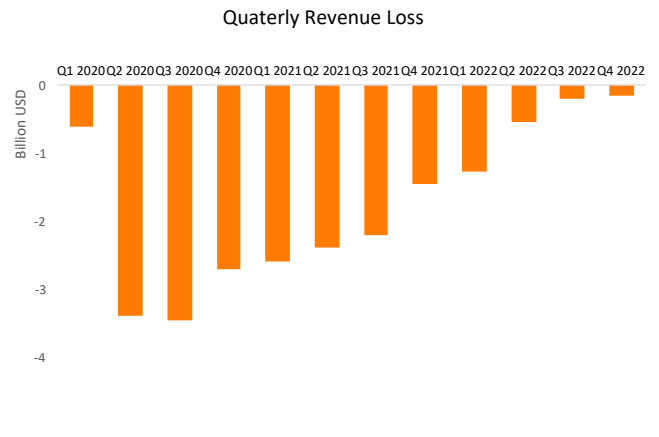
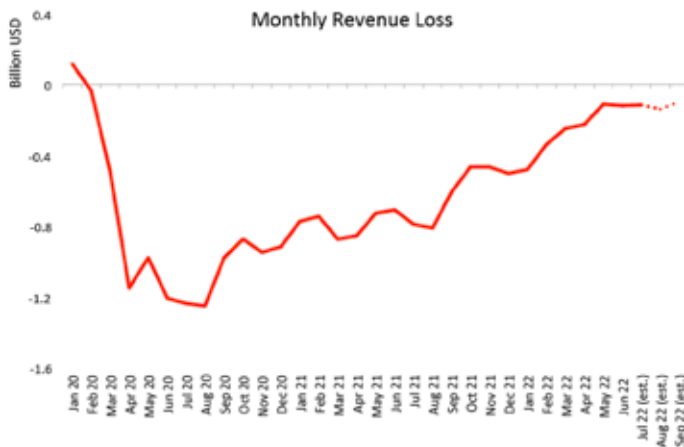
The connectivity improved in west and central African airports.

The connectivity in Mauritius is also improving as the country as reopened routes to Africa, Asia and Europe.

Source : AFRAA/OAG

## Passenger revenue loss estimate due to COVID for African airlines

### Passenger Revenue loss ( compared to 2019 )



Source : AFRAA/OAG

70% traffic recovery in 2022 compared to 2019

- Estimated Revenue loss for **2022 USD 3.5 billion**, representing 20% of 2019 revenues.
- Estimated Revenue loss for **Q3 2022: USD 0.8 billion**