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AFRAA AIR TRANSPORT REPORT

QUARTER 2
2025

CONTENTS

Global Airline industry performance

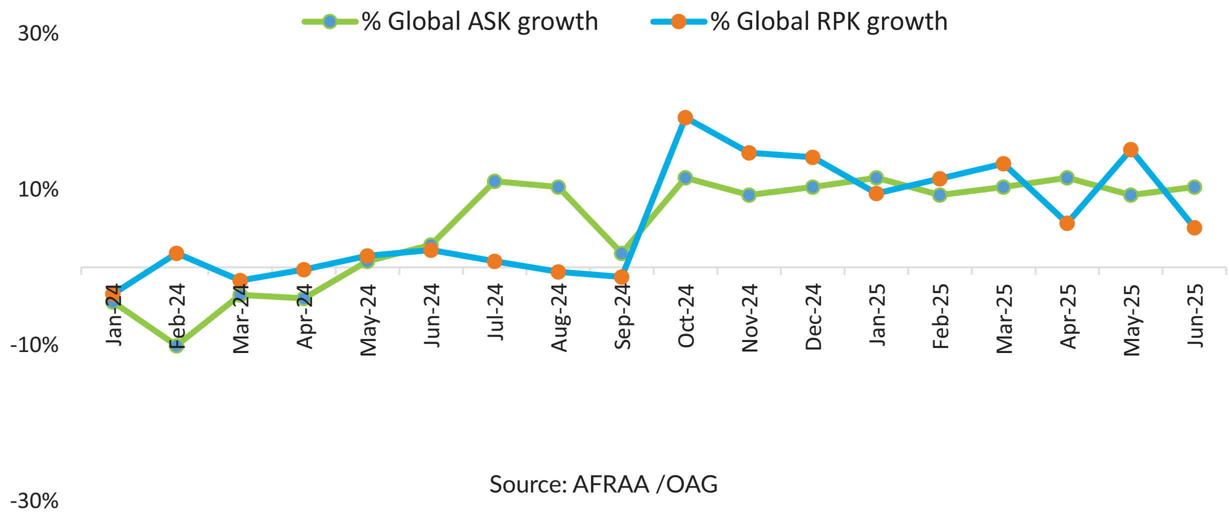
The global airline industry in 2025 is maintaining positive drive, with passenger demand expanding, though growth is moderating compared to 2025. Airlines continue to face risks such as geopolitical instability, regulatory changes, and macro–economic uncertainty, even as they double down on efficiency and strategic growth to capture favorable market conditions.

Global RPKs rose by 5.2% year–on–year in , while ASKs increased by 5.0%, down from the much higher growth in capacity seen in Q1. Load factors remain strong, though there is some slight downward pressure in certain months as supply outpaces demand in parts of the network.

Asia–Pacific continues to be the strongest performing region in terms of growth in demand, while North America and Europe remain broadly resilient but are showing signs of slowdown domestically.

The Global airline industry's revenue growth is expected to continue, but at a more moderate rate than in earlier parts of 2025. Fuel cost pressures, regulatory burdens, and disruptions emain key risks that could dampen margins.

Figure 1: Global Industry ASK and RPK growth,



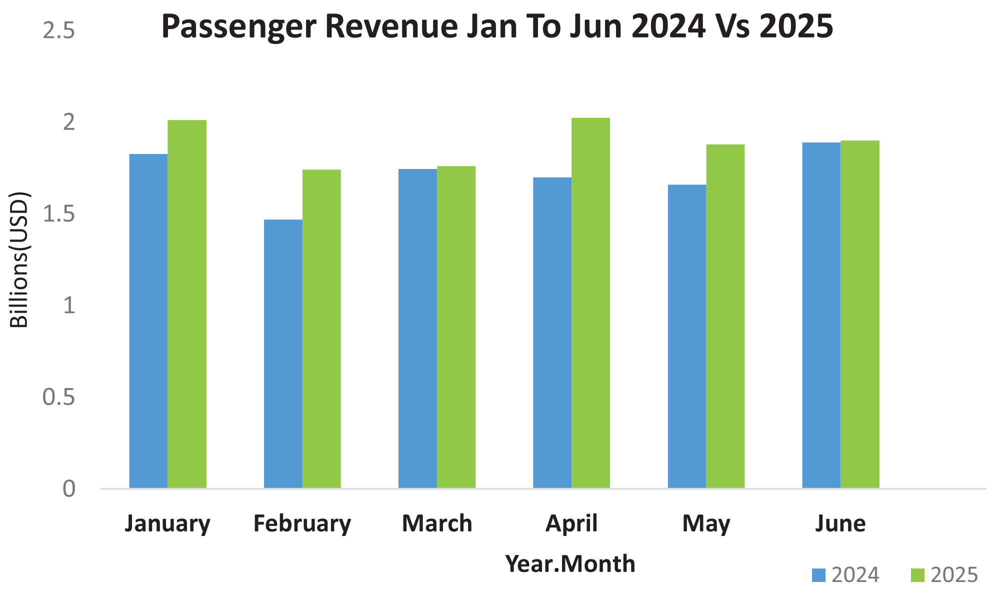
Source: AFRAA /OAG

African airlines performance

Passenger Revenue

Passenger revenue in 2025 increased by 10.6% compared to 2024, showing a continued positive trend for the African airline industry. This growth reflects an ongoing regaining and intensified demand for air travel. Figure 2 provides a graphical comparison of passenger revenue between Year 2024 and Year 2025, the financial performance in April to June 2025 shows an increase compared to April to June 2024.

Figure 2: Quarterly Passenger Revenue

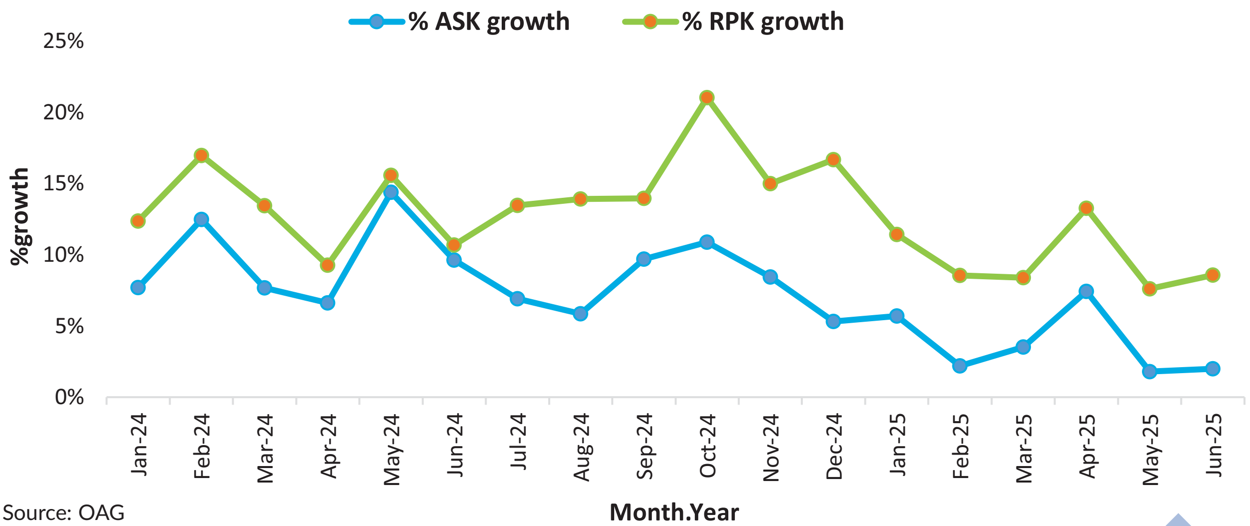


Source: OAG

Passenger traffic Evolution

In 2025, African airlines continued to show strong performance, with Available Seat Kilometers (ASKs) and Revenue Passenger Kilometers (RPKs) maintaining positive growth trends. The increase in both metrics are by 3.7% and 8.7%, respectively, compared to 2024. This growth was strengthened by enhanced connectivity, rising economic activity, and continued recovery in key travel markets, despite persisting challenges in the aviation sector. Figure 3 below provides a detailed view of the Month-on-Month (MoM) and Year-on-Year (YoY) trends in ASK and RPK for African airlines from January 2023 to March 2024

Figure 3: African airlines ASK and RPK growth

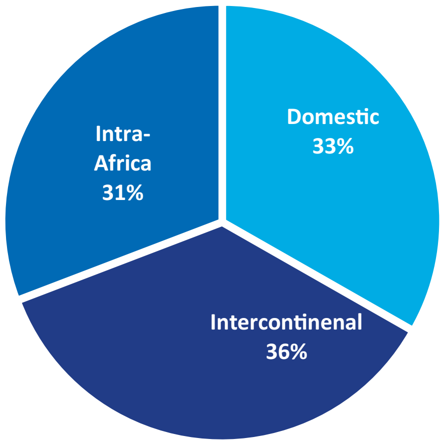


Source: OAG

Passenger traffic distribution

In the second quarter of 2025, Domestic traffic accounted for 33%,of the total traffic, Intra-African flights accounted 31% of the traffic, while intercontinental flights represented 36%. This is illustrated in Figure 4 below;

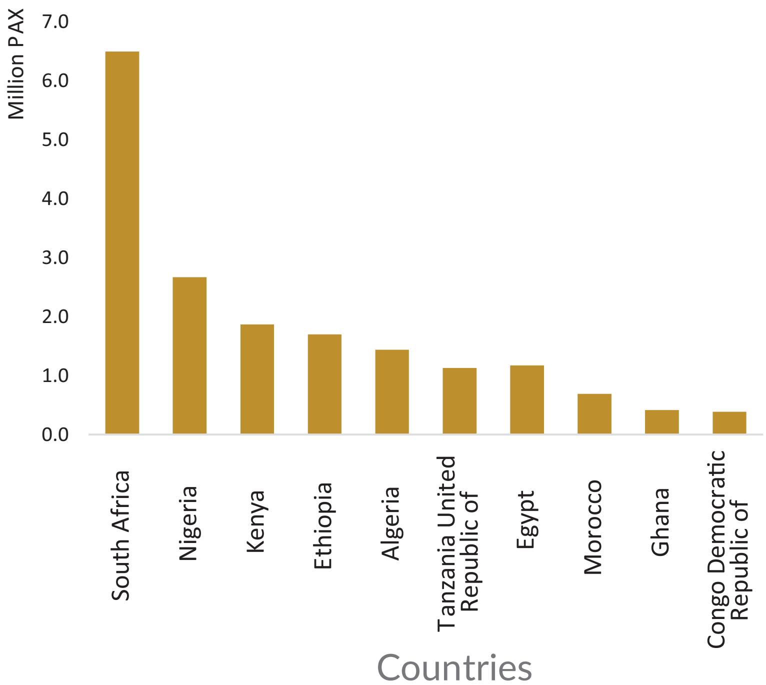
Figure 4: African Airlines passenger distribution - 2025



Source: OAG

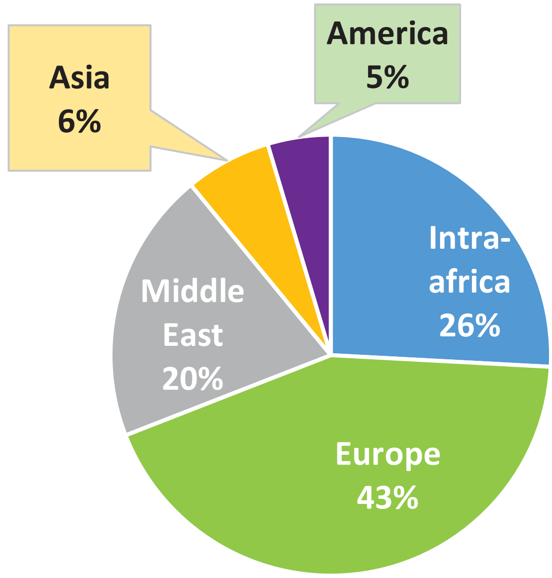
The Top Ten contries contributing to the 36% of domestic are as in Figure 5 below;

Top 10 Ranking by Country on domestic traffic 2025



Source: AFRAA /OAG

Figure 6 : African Airlines international passengers destinations Q1 - 2025



Source: OAG

In 2025, international traffic is primarily driven by intra-African routes and flights to Europe, each accounting for 42% and 26% respectively. Europe remains the top destination region for African airlines Egypt is the leading country of origin, while France is the primary destination.

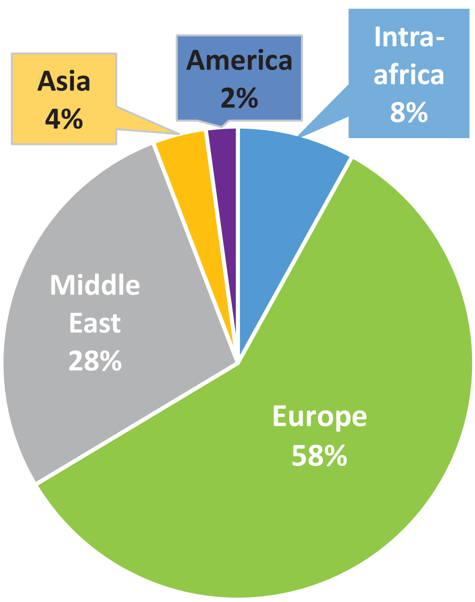
Traffic to the Middle East is also notable, comprising around 20%, while routes to Asia and the Americas each account for approximately 6% and 5% respectively.

Regional Insights

In the second quarter 2025, Northern Africa led the continent in passenger traffic, accounting for 41.5% of the total. Domestic traffic in this region was relatively low, representing only 14% of the total traffic. Intercontinental travel dominated, comprising 92% of the traffic, while intra-African travel made up just 8%.

Egypt and Morocco are the top two primary source of traffic from Northern Africa to Europe, with France,German United Kingdom,Spain and Italy being the top destinations. The Middle East is the second most popular destination region, with Egypt as the leading contributor.

Figure 7: Traffic repartition - Northern Africa 2025

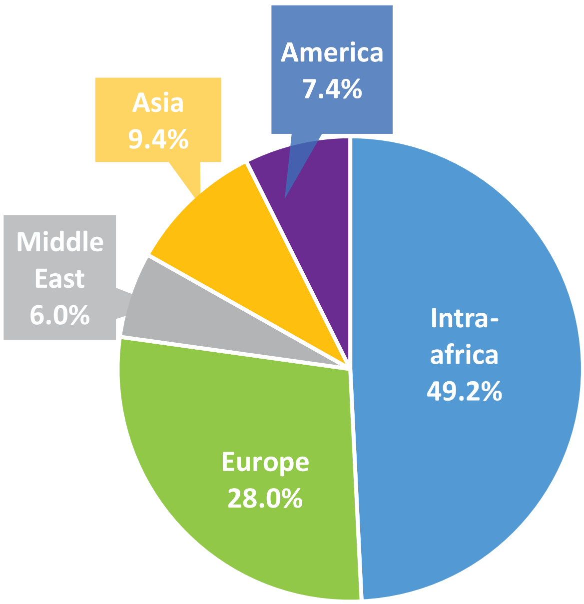


Source: OAG

In the second quarter of 2025, the Southern African region accounted for 20.3% of the continent's traffic. The domestic market was the largest contributor, making up 64% of the region's traffic. Intra-African travel was below international traffic, with a 49.2% share.

Regarding destinations outside Africa, Europe and Asia were the leading regions, with 28% and 9.4% of traffic respectively. The America and the Middle East accounted for 7.4% and 6% respectively during this period.

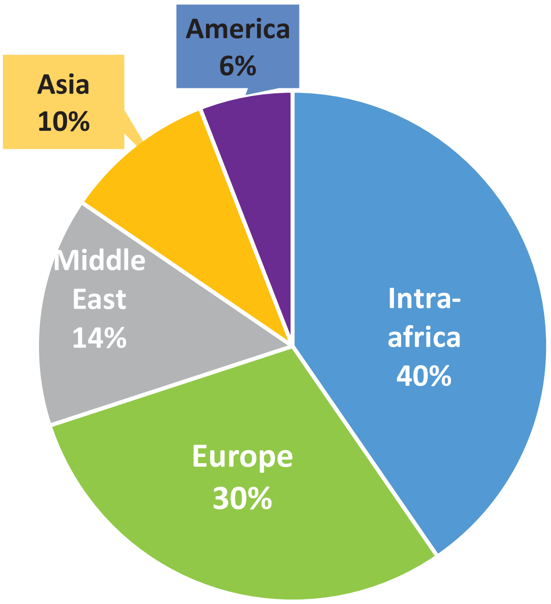
Figure 8: Traffic repartition - Southern Africa 2025



Source: OAG

Eastern Africa represented 19.7% of the continental traffic during the second quarter of 2025. Domestic traffic constituted to 43% in the second quarter 2025. The Top destinations outside Africa are Europe and Middle East with 28% and 9.4%.

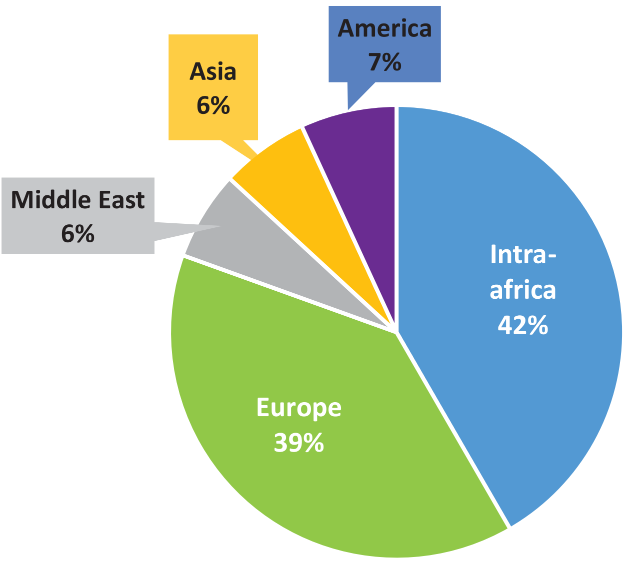
Figure 9: Traffic repartition - Eastern Africa 2025



Source: OAG

Central and Western Africa regions together represented 18.5% of the African traffic during the second quarter 2025.The intra-African traffic accounted for 42% of the non-domestic.

Figure 7: Traffic repartition - Central and Western Africa 2025



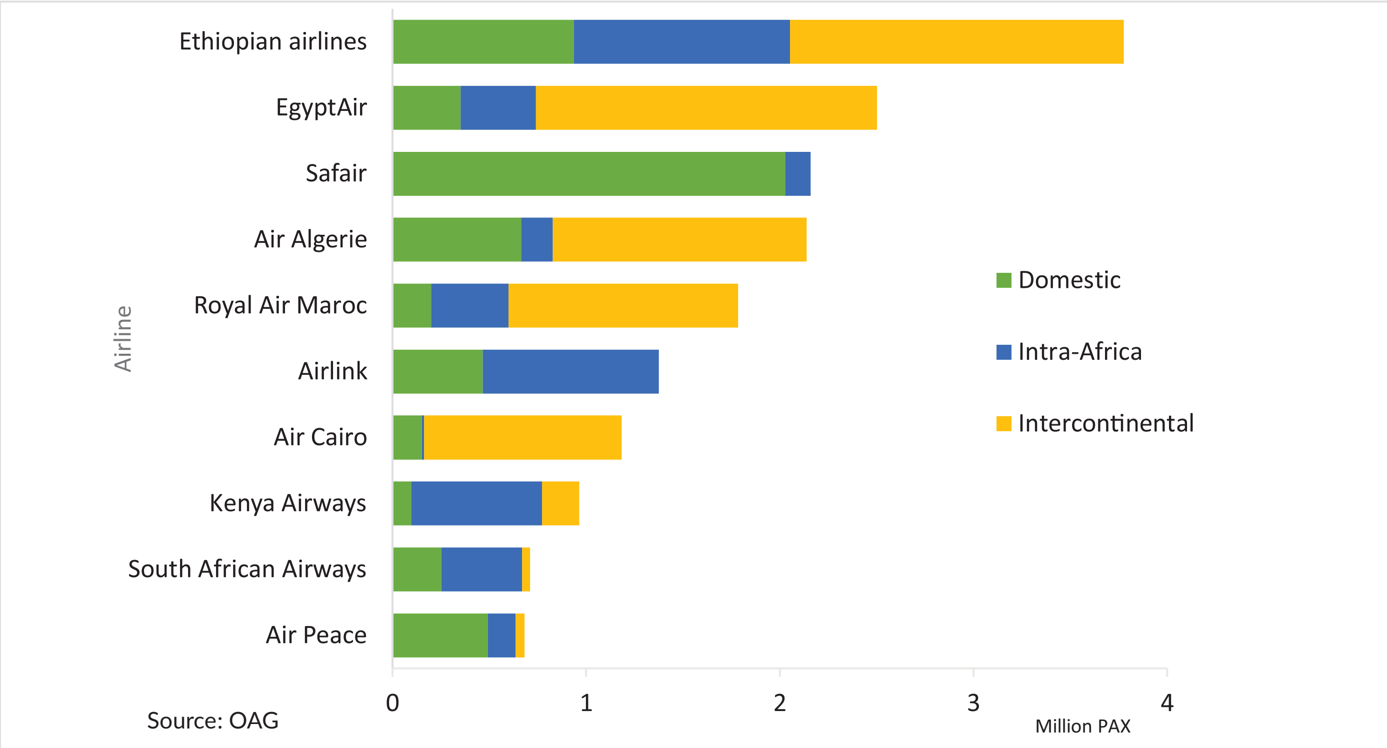
Outside the continent, Europe is the principal destination, representing 39%. The share of America is 6%, Middle East, and Asia are 6% each.The domestic market accounted for 46% of the regional traffic.

African Airlines ranking by traffic (OAG estimations)

Figure 10 below presents a ranking of African airlines, with Ethiopian Airlines leading, followed closely by EgyptAir. Ethiopian Airlines dominance is attributed to its extensive network, reliable service, and strategic hub in Addis Ababa, which facilitates broad international connectivity. EgyptAir's strong perfomance underscores its historical significance and extensive operational reach across the continent and beyond. These rankings emphasize the growing importance of these airlines in enhancing regional connectivity and fostering economic development within Africa.

Figure 10: African Airlines ranking by traffic 2025

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



Routes ranking by traffic (OAG estimations)

- Top 10 domestic routes by passengers carried 2025(OAG estimations)

Figure 11: Domestic routes ranking

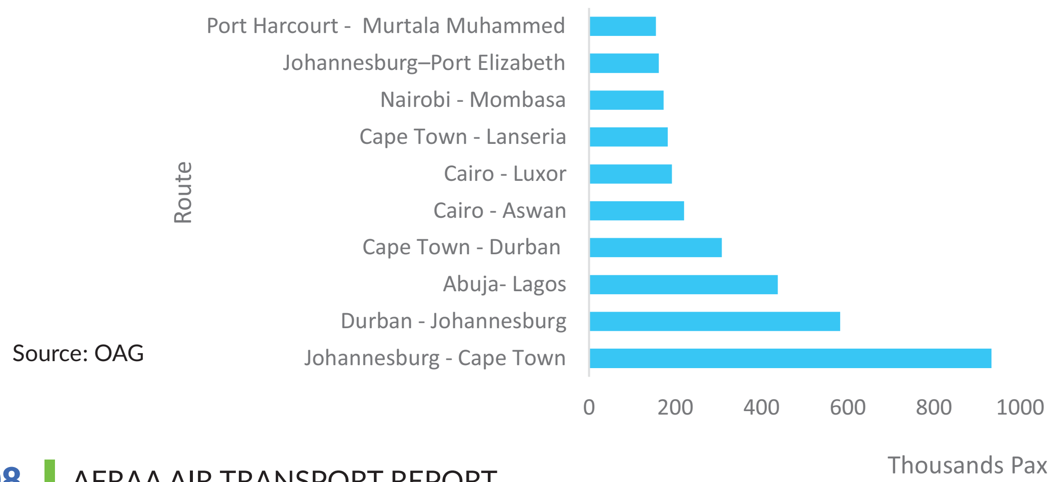
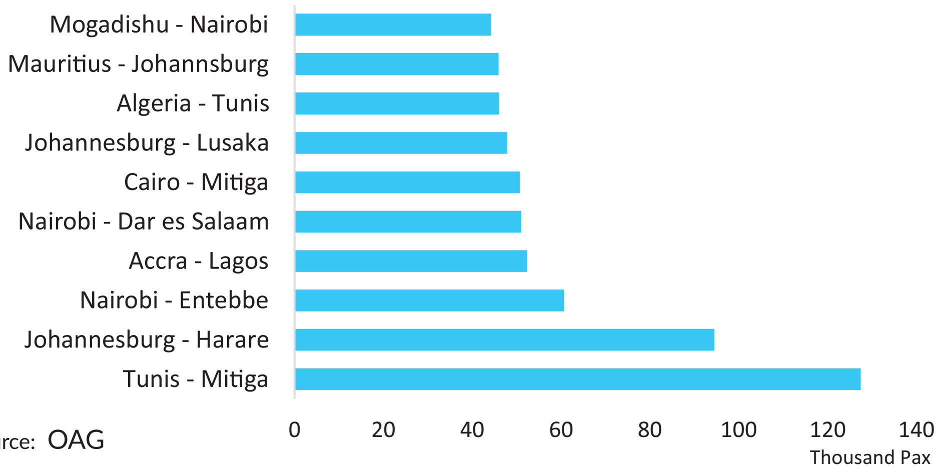


Figure 11 above shows the top ten domestic routes in Africa. South Africa dominates the African market in domestic traffic, with 5 of its routes ranked among the top ten in the second quarter of 2025. Additionally, Egypt, Nigeria, and Kenya each have a domestic route represented in the top ten busiest routes.

- Top 10 Intra - African routes by passengers carried 2025 (OAG estimations)

Figure 12: Intra-African routes ranking

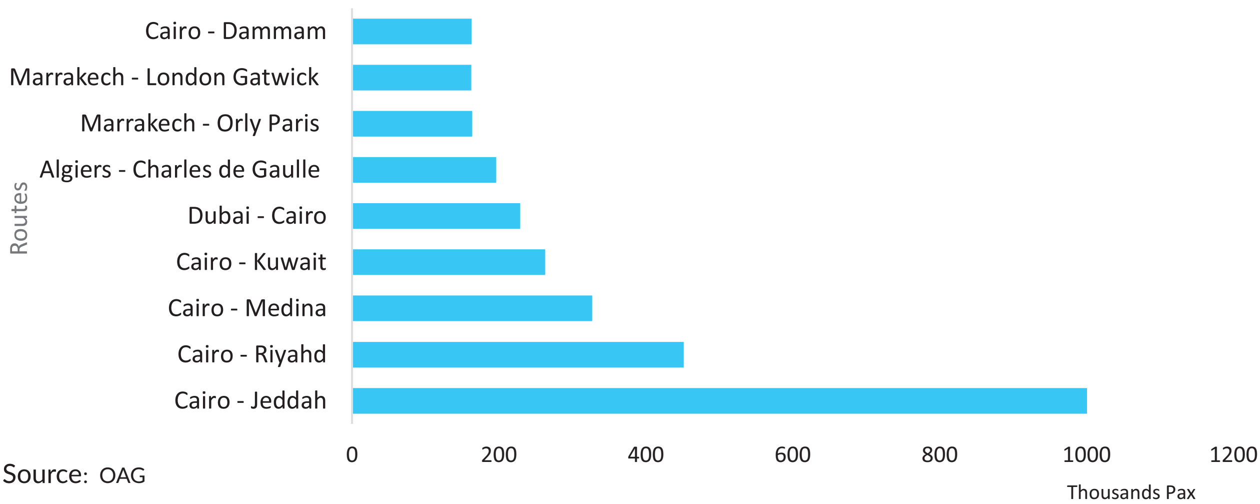


Source: OAG

Figure 12 above shows the top ten intra-African routes by passengers carried in the second quarter of 2025. The busiest intra-African routes are primarily within Southern, Eastern and Northern Africa. However, routes from Western Africa (Accra–Lagos) also ranked among the top ten in the second quarter 2025.

- Top 10 Intercontinental routes by passengers carried Q12025 (OAG estimations).

Figure 13: Intercontinental routes ranking

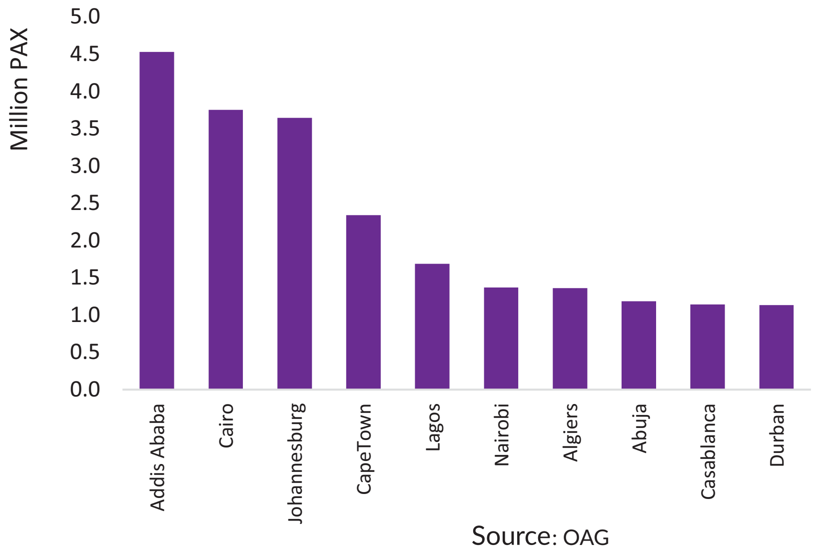


Source: OAG

Figure 13 show the intercontinental routes ranking and EgyptAir is the leading carrier on these routes, achieving the highest passenger volume during the second quarter 2025.

Airport Ranking by Passengers

Figure 14: African airports ranking by passengers 2025 (OAG estimations)

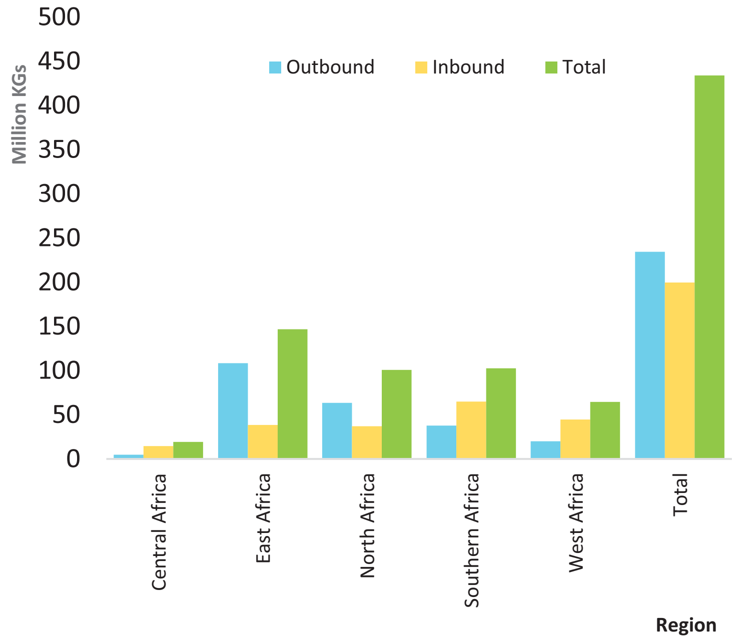


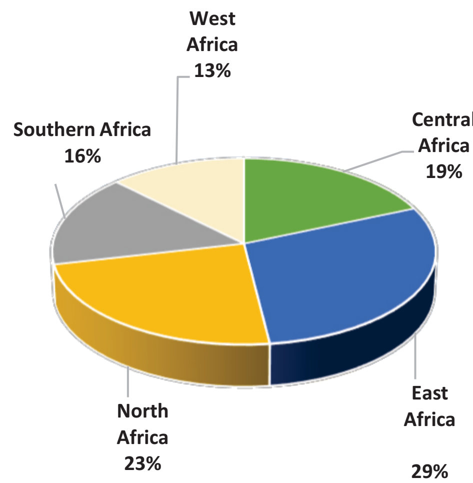
Source: OAG

Northern African airports featured prominently among the top 10 hubs in the second quarter 2025 with Addis Ababa, Cairo and Johannesburg, ranking as the three leading airports.

Air Cargo Market Trends in Africa

Figure 15: African Air Cargo Trends 2025 (World ACD estimations)





Source: World ACD

Airport charges

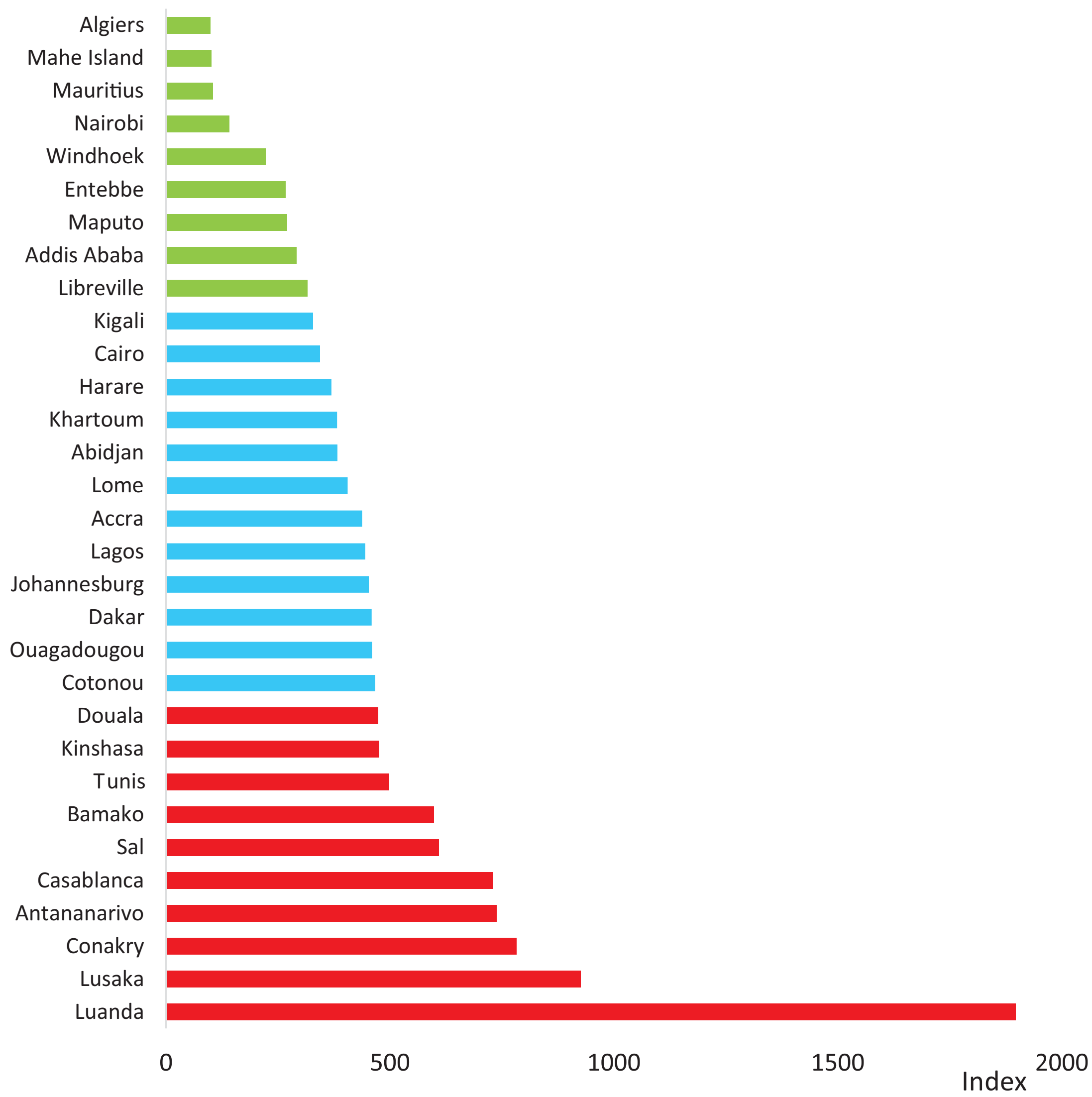
Methodology:

A comparative study based on a single aircraft type applies to all airports with more than 300 thousand passengers in 2025. The aircraft type chosen is the B737, the most popular aircraft type in the region.

Following the applied criteria:

Aircraft Type	B737
MTOW	70.08 Metric Ton
Flight Type	International
Origin & Destination Pax	100
Total Departing Pax	100
Parking Time	2 Hour
Boarding bridge time	1 Hour
Arrival Time	12:00
Cargo	0 Kilograms

Figure 28: African airports ranking by charge index 2025



Source: IATA ACIC

Luanda has the highest charges among the selected airports, while Algiers has the lowest. Johannesburg, Addis Ababa and Cairo, Africa's busiest airports, have charges that fall below the average. This indicates that reducing airport charges could potentially boost traffic levels.

Intra-African Connectivity

Methodology:

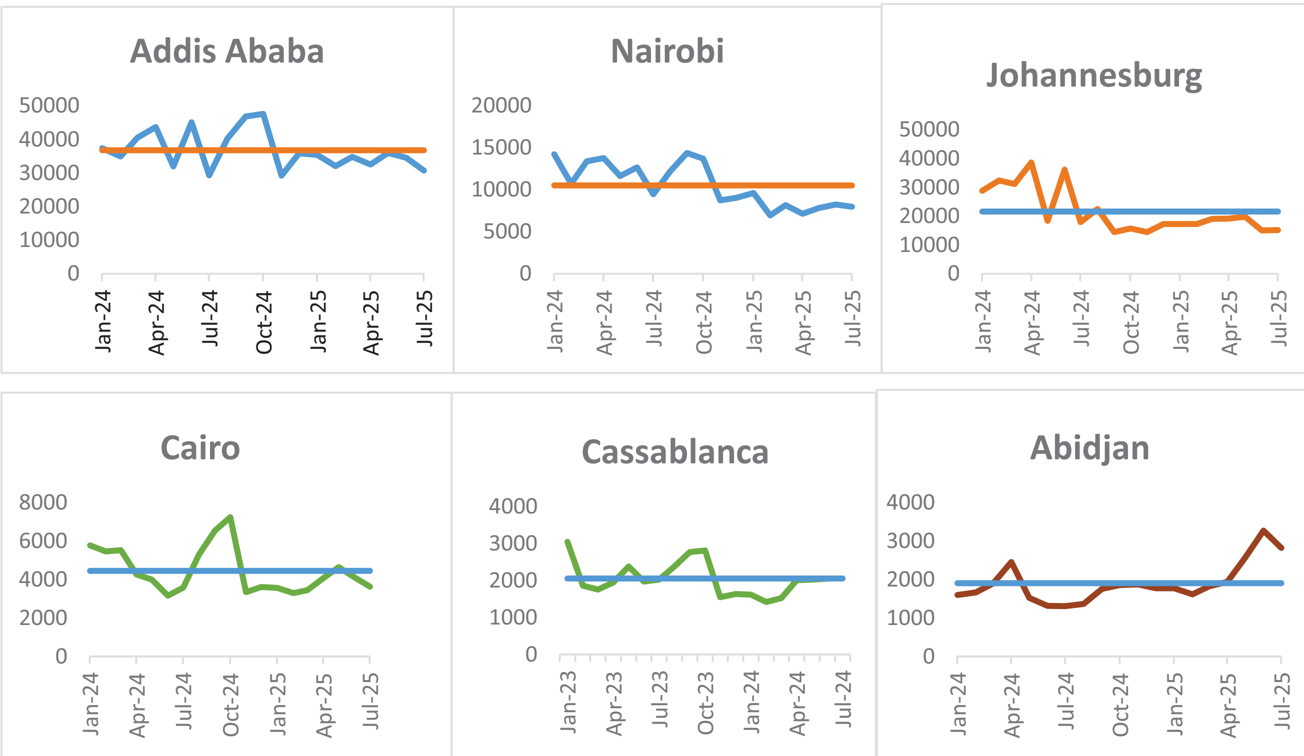
We calculate the total number of possible Intra-African connections between inbound and outbound flights on 20 important African hubs in 2025.

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 intra-African connectivity reached new heights in 2025 showcasing a significant expansion in air travel links within the Africa continent.

Table 1: Intra-African connectivity index per Regional hubs in 2025

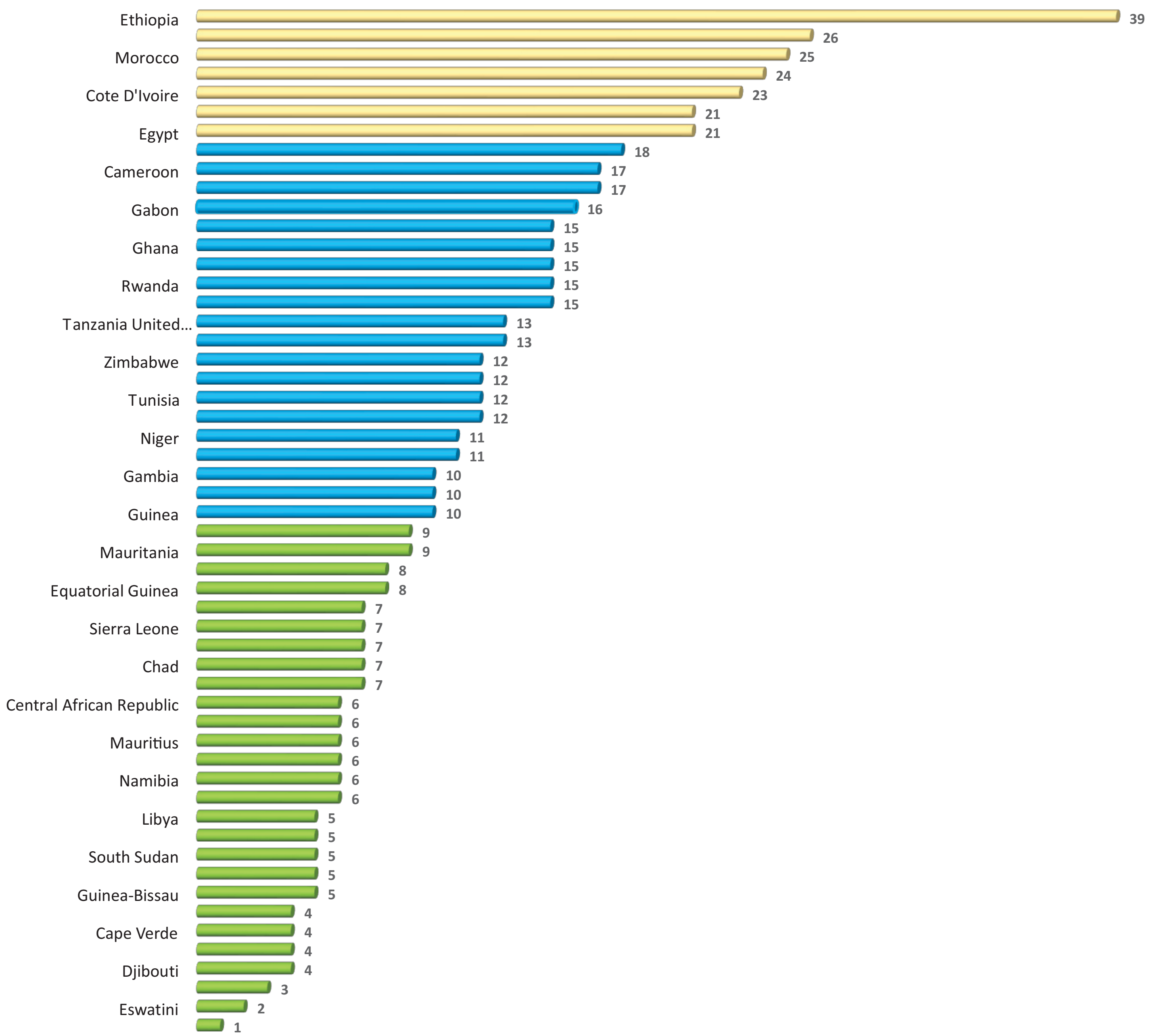


Source: OAG

Direct flights between African countries

During the second quarter of 2025, 7 out of the 54 countries in the African continent offered direct flights to more than 20 other African nations. Ethiopia leads with the most extensive network of direct flights within Africa.

Figure 30: Number of direct flights between African countries



Source: OAG

Table 1 below presents the proportion of direct connections within countries of the same region and between different African regions, expressed as a percentage of the total number of possible connections. In 2025, the overall connectivity index is relatively high, particularly in Northern Africa, which reported a connectivity rate of 70%. However, inter-regional connectivity remains constrained, with the highest connectivity rate observed between Northern and Western Africa, at only 33%.

The low levels of connectivity between subregions indicate significant opportunities for improvement. Enhancing these transport links could potentially improve economic integration and regional cooperation. Addressing these connectivity deficits may stimulate trade, tourism, and overall economic growth across the continent.

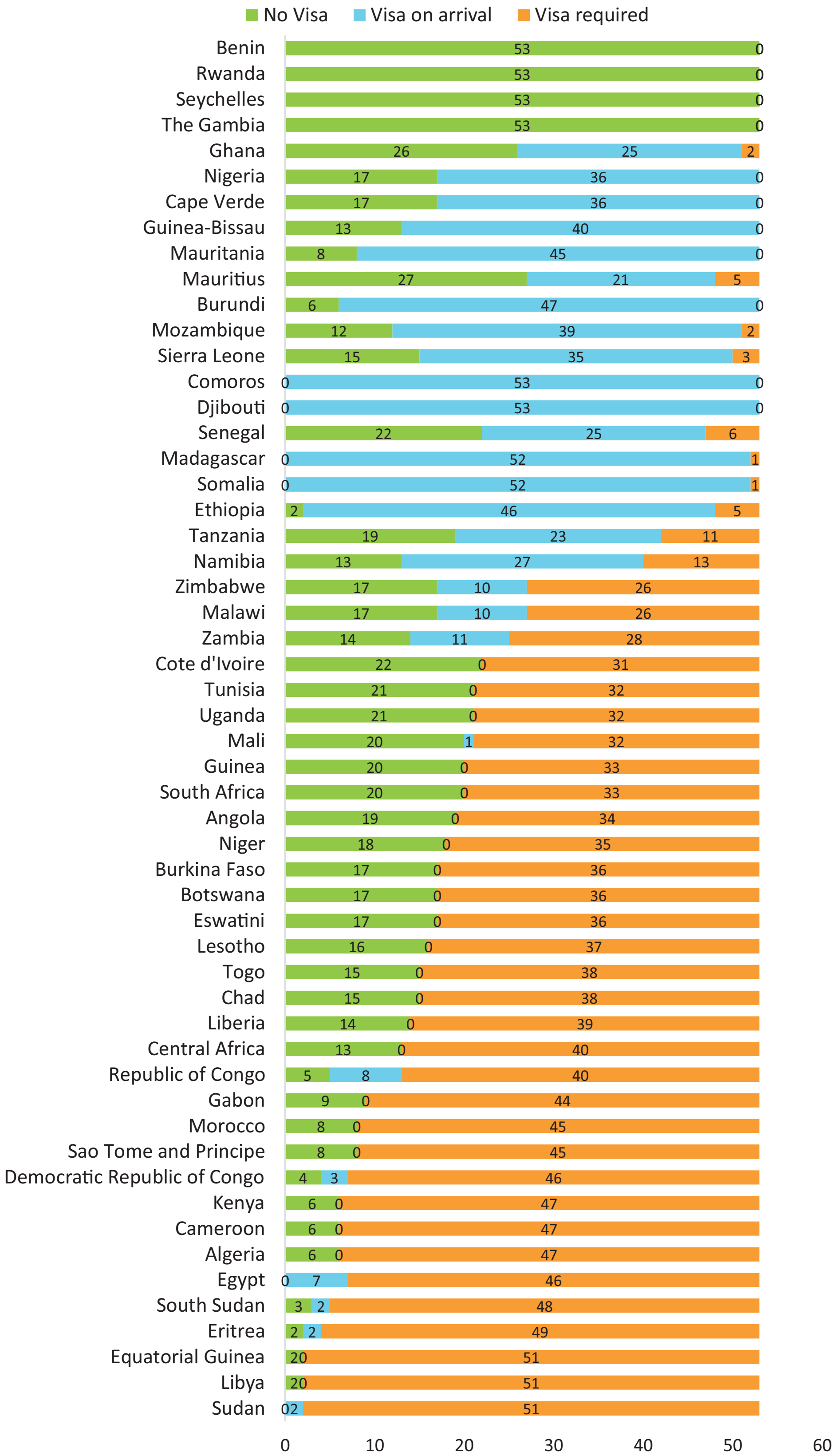
Table 1: Connectivity between African regions

Africa Regions	Central Africa	Eastern Africa	North Africa	Southern Africa	Western Africa
Central Africa	48%	15%	21%	11%	16%
Eastern Africa		42%	13%	19%	7%
North Africa			70%	3%	33%
Southern Africa				49%	3%
Western Africa					46%

Source: OAG

Visa Openness within Africa

Figure 20: Visa openness in African countries



Source: visaopenness.com

ANNEX: Reference

- 2025 Global Airline Industry Performance with OAG (Official Aviation Guide) as the primary source of data
- International Air Transport Association (IATA) Aviation Industry Outlook 2025
- Financial Reports of major airlines like United Airlines, Delta Air Lines, and Ryanair
- FlightGlobal and CAPA Centre for Aviation Reports on 2025 Global Aviation Performance
- Airlines for America (A4A) and Eurocontrol for Regional Aviation Insights

ANNEX: Glossary

AFRAA: African Airlines Association

ACIC: Aviation Charges Intelligence Center

ASK:Average Seats Kilometres

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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