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"Better Skies for Africa"

AFRAA ROUTES AND CONNECTIVITY REPORT

Domestic, Intra-African & International Route Performance

H2 2025

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Executive Summary

The African aviation network continues to evolve as airlines expand connectivity, restore suspended services, and explore new markets. This report examines route-level passenger traffic across three market segments—domestic, intra-African, and international—for the period from July to December 2025. The analysis is based on OAG Traffic Analyser data covering the top 100 routes within each segment.

Domestic routes recorded the highest passenger volumes among the three market segments, carrying a combined 13.4 million passengers across the top 100 routes. International routes followed with 9.3 million passengers, while intra-African routes accounted for 4.1 million passengers.

Cairo International Airport (CAI) is the only airport to appear among the leading hubs across all three-market segments. It recorded 8 appearances in the domestic network, 12 within the intra-African network, and 11 in the international network, reinforcing its position as Africa's primary aviation gateway across domestic, regional, and global markets.

Johannesburg (JNB) emerged as the leading hub for intra-African connectivity with 22 appearances, while Paris Orly (ORY) led the international market with 22 appearances. This reflects the strength of the Algeria–Tunisia–Maghreb to France travel corridor, which features prominently throughout the international route rankings.

Passenger traffic remained broadly balanced in both directions across almost all route pairs in the domestic, intra-African, and international markets. Average directional imbalances ranged from 1.7% to 2.9%, indicating that demand was largely evenly distributed between origin and destination airports.

The busiest route overall was Cape Town–Johannesburg (CPT–JNB), which carried 1.99 million passengers during the review period. It was followed by Durban–Johannesburg (DUR–JNB) with 1.39 million passengers, while Algiers–Paris Charles de Gaulle (ALG–CDG) ranked as the busiest international route with 556,000 passengers.

1. Introduction & Objectives

1.1 Purpose

The purpose of this report is to assess route and connectivity performance for the July–December 2025 period, benchmark findings against continental and global connectivity trends, and surface implications for network planning, hub strategy, and Africa's air transport liberalization agenda under the Single African Air Transport Market (SAATM).

1.2 Scope

The analysis covers three route categories:

- Domestic routes: traffic between two airports within the same country
- Intra-African routes: traffic between two African countries
- International routes: traffic between an African airport and a non-African airport

1.3 Reporting Period

July 1 – December 31, 2025 (H2 2025).

2. Data & Methodology

2.1 Data Source

Route-level estimated passenger totals were sourced from OAG's Traffic Analyser tool, reflecting the top 100 ranked routes within each scope for the reporting period. The connectivity index was developed by AFRAA using a methodology adapted to the intra-Africa context.

2.2 Definitions

- Route Pair Total: the combined passenger volume across both directions of a route (e.g. CAI-JED + JED-CAI).
- Hub Appearance Count: the number of times an airport code appears as an origin or destination across the top 100 routes in a given scope. This is used as a proxy for network centrality, not a formal connectivity index.

- Directional Imbalance: the absolute difference between a route's two directional totals, expressed as a percentage of the pair total. Higher values indicate more one-way-skewed demand.

2.3 Limitations

- Figures reflect only the top 100 ranked routes per scope, not the full route network, which indicates that smaller or emerging routes are not captured.
- Hub appearance count measures presence in high-volume routes, not total airport traffic, cargo, or connections to lower-volume routes.
- A small number of route pairs (6 of 53 domestic, 8 of 54 international) appear in the top-100 list for only one direction, indicating that their reverse direction fell outside the top 100 and is not captured. These pairs are excluded from the directional imbalance calculation but included at face value in route pair totals and rankings.

3. Route Classification

3.1 Domestic Network

The domestic route network during the July–December 2025 period was concentrated within a small number of African countries, with South Africa and Nigeria accounting for the largest domestic networks. These markets support extensive internal connectivity due to their large geographic size, multiple commercial centres, and strong demand for domestic air travel.

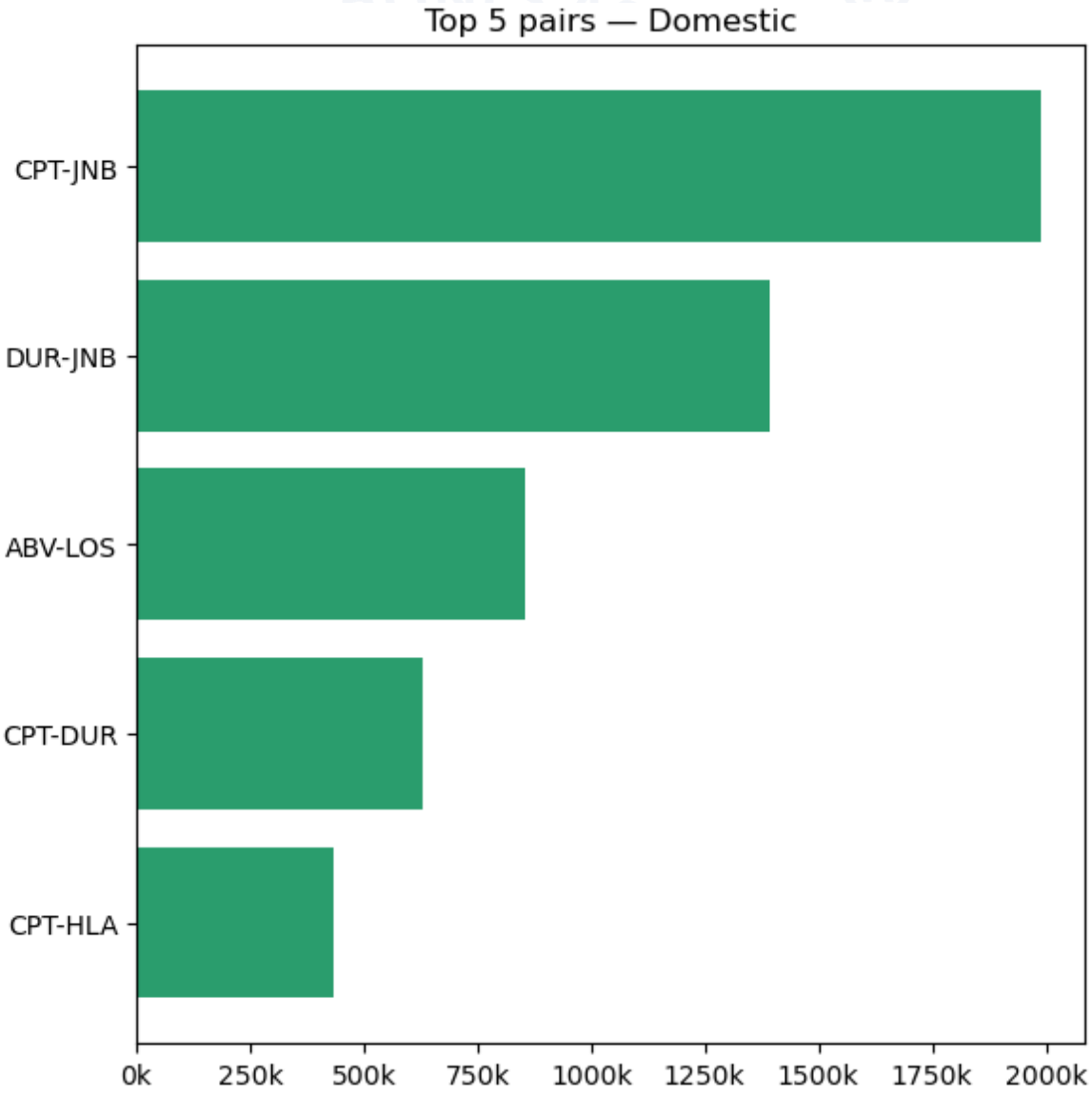
South Africa maintains a mature domestic aviation market supported by several major airports and frequent services between key economic centres. Similarly, Nigeria's extensive domestic network reflects the country's population size and the need for air transport to connect major cities across its regions. Together, these two countries represent the strongest domestic aviation markets within Africa during the reporting period.

Among domestic city pairs, the Cape Town (CPT) – Johannesburg (JNB) route emerged as one of the busiest and most significant. As South Africa's primary economic and tourism corridor, the route supports high passenger demand through frequent daily services operated by multiple airlines. The Abuja (ABV) – Lagos (LOS) route follows as the next most significant domestic corridor, anchoring Nigeria's domestic network in much the same way CPT-JNB anchors South

Africa's; connecting the political and commercial capitals and supporting high-frequency service between the country's two largest economic centers.

The prominence of the CPT–JNB and ABV–LOS routes illustrates the importance of domestic trunk routes in supporting national mobility and economic activity. Similar high-frequency domestic corridors continue to play a vital role in sustaining airline networks and feeding regional and international services. The following figure shows the top 5 domestic route pairs:

Figure 1: Top 5 Domestic Route Pairs by combined two-way passengers



Source:AFRAA,OAG

3.2 Intra-African Connectivity

The intra-African network continued to strengthen during the reporting period, with several regional corridors serving as critical links between African economic centres. The analysis identified Mitiga International Airport in Tripoli (MJI) – Tunis (TUN), Harare (HRE) – Johannesburg (JNB), Mogadishu (MGQ) – Nairobi (NBO), Algiers (ALG) – Tunis (TUN), and Entebbe (EBB) – Nairobi (NBO) among the strongest intra-African city pairs.

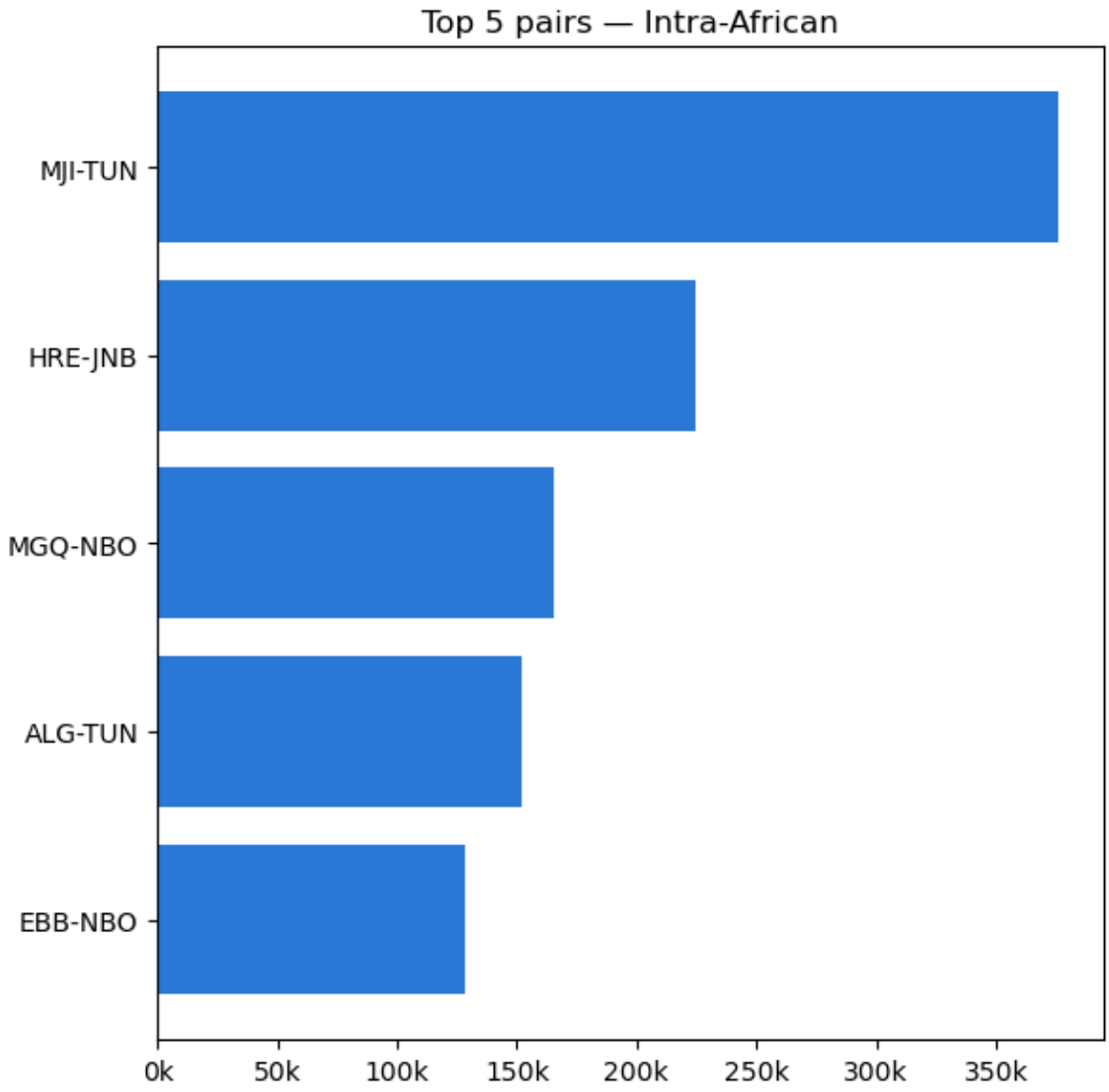
These routes reflect a combination of economic integration, tourism demand, historical ties, and geographic proximity. Many also connect passengers to larger hub airports that provide onward access to destinations across Africa and beyond.

The concentration of traffic along these corridors highlights the strategic role of regional hubs such as Johannesburg, Nairobi, Tunis, and Cairo in facilitating intra-African mobility. These airports serve not only local markets but also function as gateways connecting neighbouring regions.

Overall, the intra-African network remains concentrated around four main hub airports: Johannesburg (Southern Africa), Nairobi (East Africa), Tunis (North Africa/Maghreb), and Cairo, each anchoring at least one of the top city pairs identified above. Most regional connectivity currently flows through this small set of gateways rather than through a broader web of direct point-to-point routes between secondary markets

This finding aligns with the objectives of the Single African Air Transport Market (SAATM), which seeks to expand direct air services, reduce market fragmentation, and promote seamless connectivity across the continent. Continued implementation of SAATM has the potential to stimulate additional city-pair connections and improve accessibility between underserved African markets. The following figure shows the top 5 intra-African route pairs:

Figure 2: Top 5 Intra-African Routes by combined two-way passengers



Source: AFRAA,OAG

3.3 International Connectivity

International connectivity during the July–December 2025 period was concentrated on routes linking North Africa with Western Europe, particularly France. Among the strongest international city pairs were Algiers (ALG) – Paris Charles de Gaulle (CDG), Algiers (ALG) – Paris Orly (ORY), Paris Orly (ORY) – Tunis (TUN), Paris Orly (ORY) – Marrakech (RAK), and Paris Orly (ORY) – Réunion (RUN).

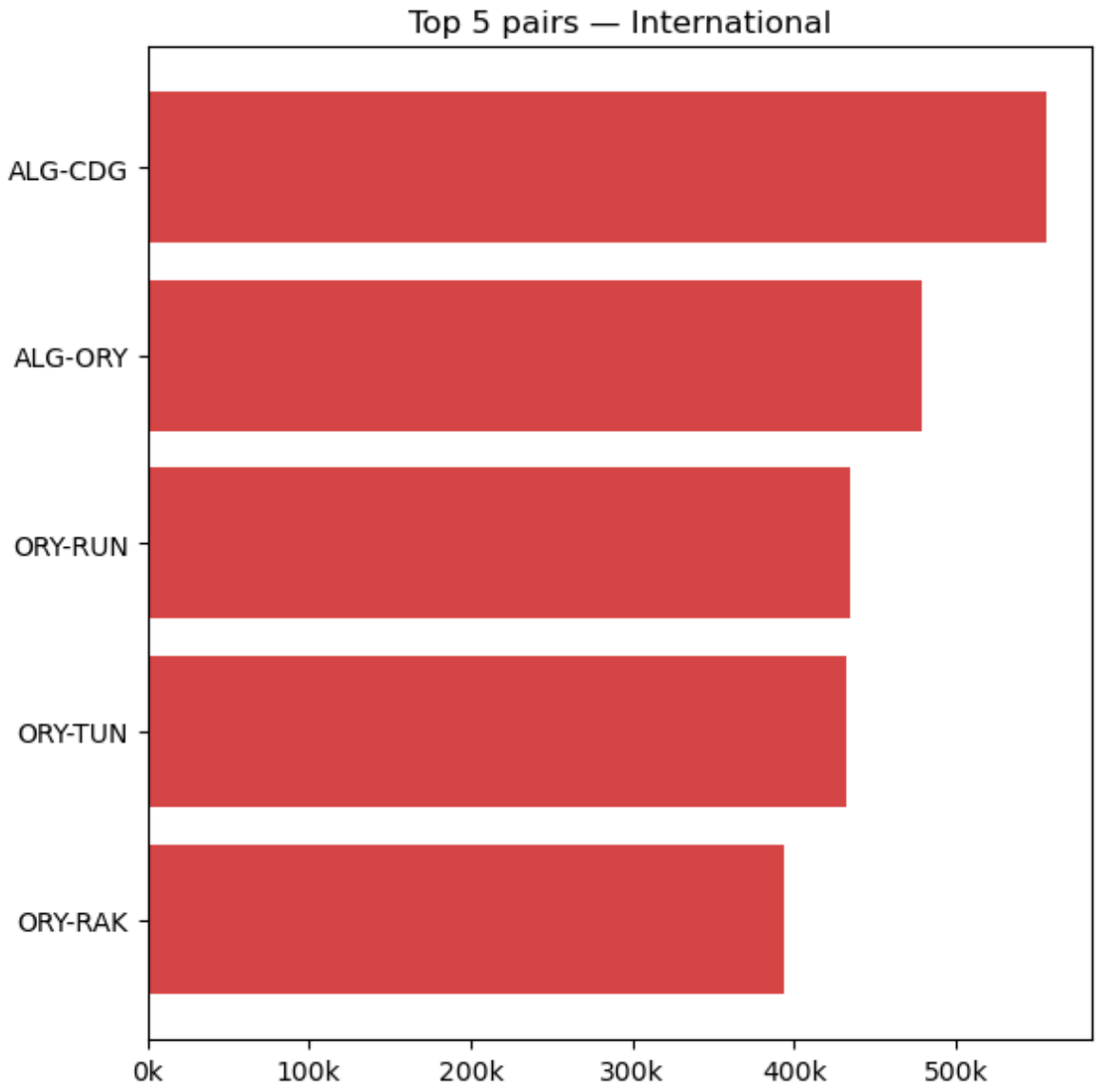
These routes reflect the continued importance of diaspora travel, tourism, and long-standing economic and colonial-era ties between the Maghreb region and France. The Algiers–Paris corridors (split across both Charles de Gaulle and Orly airports) remain among Africa's most

established links with Europe, while routes to Marrakech and Djerba, point to strong leisure and family-visit travel demand between France and North/Indian Ocean Africa.

The prominence of Paris as an endpoint by appearing in both the top hub position and across multiple top-5 route pairs; demonstrates the continued importance of France as Africa's principal European aviation partner in this dataset. Cairo and Algiers also feature prominently among African-side gateways, reflecting Egypt's and Algeria's roles as major international departure points.

The findings also indicate that international connectivity remains concentrated around a relatively small number of city pairs and a narrow geographic corridor (North Africa–France). Strengthening direct long-haul connectivity from additional African cities and toward more diverse international destinations could improve network resilience and support broader economic integration with global markets beyond this dominant corridor. The following figure shows the top 5 international route pairs:

Figure 3: Top 5 International Route Pairs by combined two-way passengers



Source:AFRAA,OAG

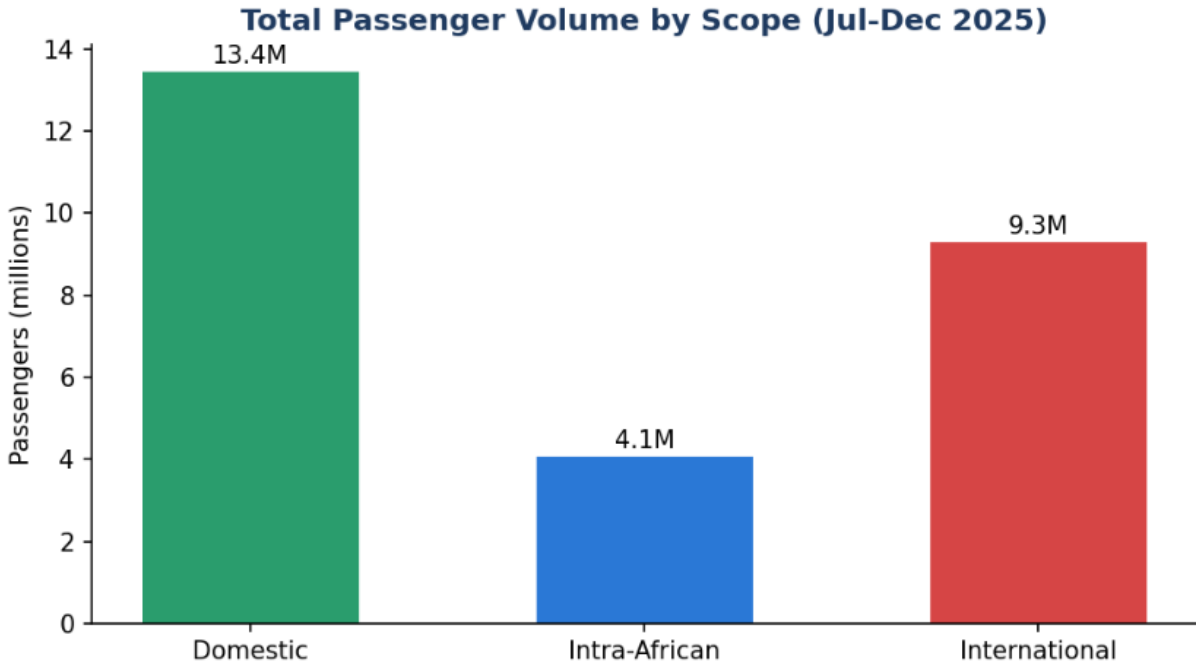
4. Findings

4.1 Traffic Volume by Scope

Combined passenger volume across the top 100 routes reviewed in each scope:

Scope	Total Passengers (Top 100 Routes)	Unique Route Pairs	Avg. Directional Imbalance
Domestic	13,435,310	53	2.6%
Intra-African	4,080,119	48	2.9%
International	9,298,185	53	1.7%

Figure 4: Total Passenger Volume by Scope



Source: AFRAA, OAG

4.2 Top Route Pairs by Scope

a.Domestic

Rank	Route Pair	Definition
1	CPT-JNB	Cape Town - Johannesburg
2	DUR-JNB	Durban - Johannesburg
3	ABV-LOS	Abuja - Lagos
4	CPT-DUR	Cape Town - Durban
5	CPT-HLA	Cape Town - Lanseria

b.Intra-African

Rank	Route Pair	Definition
1	MJI-TUN	Tripoli - Tunis
2	HRE-JNB	Harare - Johannesburg
3	MGQ-NBO	Mogadishu - Nairobi
4	ALG-TUN	Algiers - Tunis
5	EBB - NBO	Entebbe - Nairobi

c. International

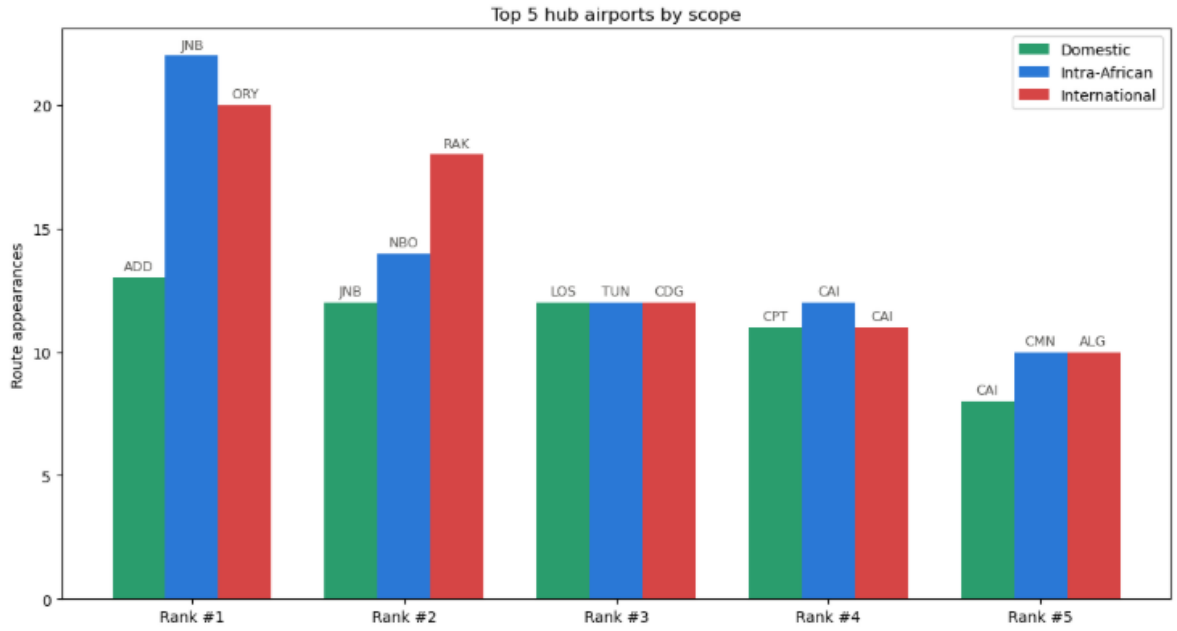
Rank	Route Pair	Definition
1	ALG-CDG	Algiers – Paris
2	ALG - ORY	Algiers – Paris
3	ORY – RUN	Paris - Reunion

4	ORY – TUN	Paris - Tunis
5	ORY – RAK	Paris – Marrakech

4.3 Hub Concentration by Scope

The following diagram shows the top 5 airports by number of appearances across the top 100 routes in each scope:

Figure 5: Top 5 hub airports by Scope



Source: AFRAA, OAG

Rank	Domestic	Intra-African	International
1	ADD - Addis Ababa (13)	JNB - Johannesburg(22)	ORY - Paris (20)
2	JNB - Johannesburg (12)	NBO - Nairobi (14)	RAK – Marrakech (18)
3	LOS - Lagos (12)	TUN - Tunis (12)	CDG – Paris Charles de Gaulle(12)
4	CPT - Cape Town (11)	CAI - Cairo (12)	CAI – Cairo (11)
5	CAI - Cairo (8)	CMN - Casablanca (10)	ALG – Algiers (10)

Cairo (CAI) is the only airport appearing in the top 5 of all three scopes: domestic, intra-African, and international; reflecting its central role as Africa's principal aviation gateway across every network type. No single airport dominates any one scope heavily: the busiest hub in each scope (ADD domestically, JNB intra-Africa, ORY internationally) accounts for a comparatively modest share of total route appearances, indicating a more distributed hub structure than a single-gateway model.

4.4 Directional Balance

Across all three scopes, the majority of route pairs show balanced two-way traffic (average imbalance under 3%). The most imbalanced pairs identified were:

Scope	Route Pair	Definition	Imbalance
Domestic	DAR-ZNZ	Dar es Slaam - Zanzibar	20.5%
Intra-African	NBO-ZNZ	Nairobi - Zanzibar	12.2%
International	HRG-ZRH	Hurghada - Zurich	7.3%

Zanzibar (ZNZ) appears as an endpoint in the most imbalanced pair in both the domestic and intra-African scopes, suggesting a directional demand pattern worth further investigation e.g. seasonal tourism inflow/outflow effects. Hurghada (HRG), an Egyptian Red Sea resort, anchors the most imbalanced international pair, pointing to a similar seasonal leisure-travel dynamic.

4.5 Regional Connectivity

In H2 2025, the overall connectivity index is relatively high, particularly in Northern Africa, which reported a connectivity rate of 74%. However, inter-regional connectivity remains constrained, with the highest connectivity rate observed between Northern and Western Africa, at only 34%.

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 Sub Region	Central Africa	Eastern Africa	North Africa	Southern Africa	Western Africa
Central Africa	45%	13%	21%	10%	15%
Eastern Africa		48%	17%	22%	7%
North Africa			74%	5%	34%
Southern Africa				49%	3%
Western Africa					44%

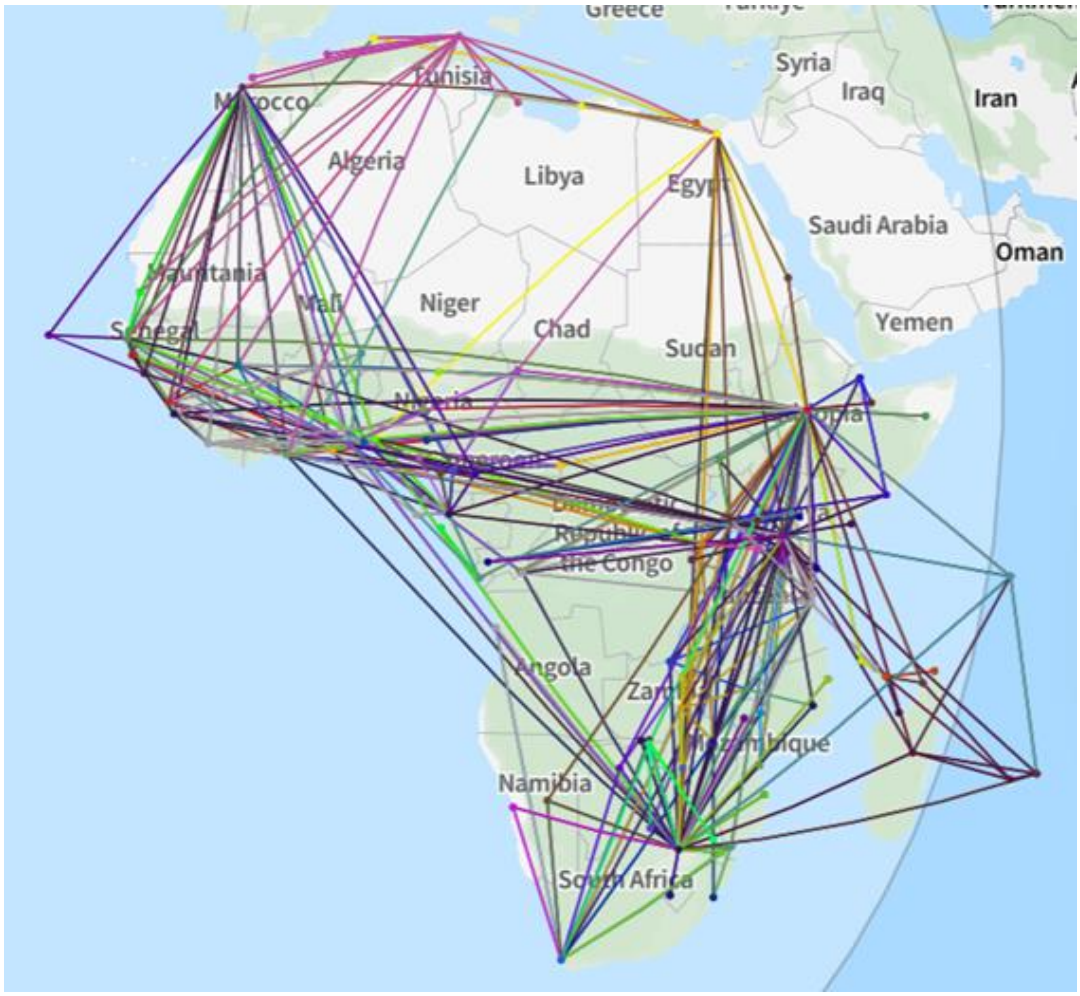
Source: AFRAA, OAG

4.6 Visual Network Analysis

To complement the route-level findings above, OAG route maps of the international and intra-African networks were reviewed to assess the geographic structure of connectivity beyond what ranked route-pair data alone can show.

The following diagram shows the 2025 African route network and the distribution of corridors, gateway cities and thinner markets:

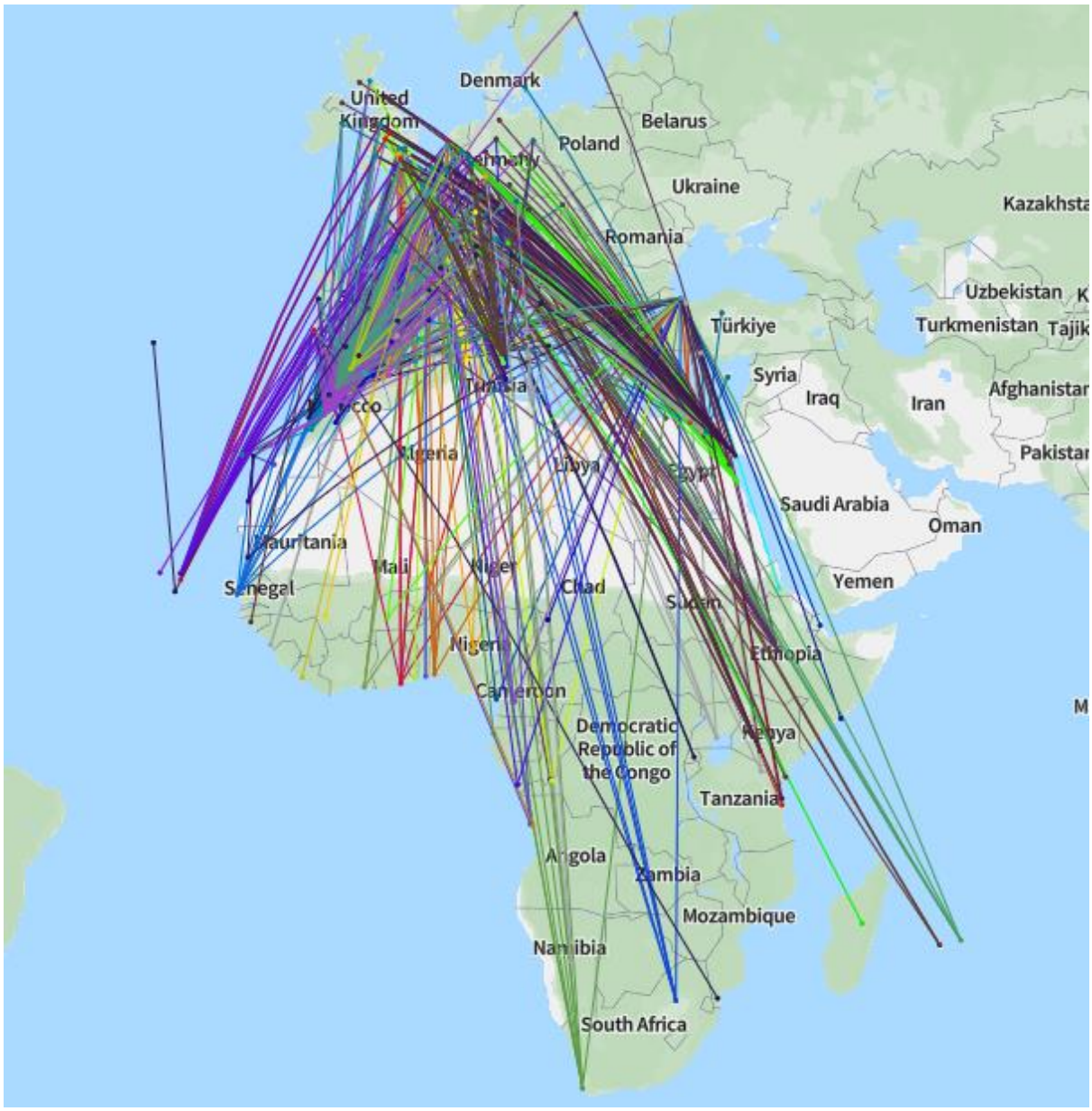
Figure 6: Route Map by Origin - Africa Active Routes in 2025



Source: AFRAA, OAG

The following diagram shows the active route map by origin from Africa to Western Europe in H2 2025:

Figure 7: Route Map by Origin - Africa to Western Europe Active Routes H2 2025



Source: AFRAA, OAG

The two maps suggest that African connectivity was still anchored around a limited number of gateway and hub cities. Stronger route density appeared in selected North, East, Southern and

West African corridors, while several Central African and cross-regional markets remained relatively thin.

North Africa–Europe corridor depth. The international route map shows a markedly dense concentration of overlapping routes across Morocco, Tunisia, and Algeria connecting into France and wider Western Europe, which is visibly denser than any other corridor on the map. This pattern corroborates the route-pair findings in Section 4.3.

The volume of crisscrossing lines suggests multiple carriers serve this corridor across multiple routes, indicating genuine market depth rather than a single dominant operator.

A visible connectivity gap in Central Africa. Both maps show Chad, Niger and the Central African Republic with minimal to no route lines crossing them, despite their considerable geographic size. The top-100 route-pair tables cannot surface this finding directly, since an absent route simply does not appear in a ranked list.

Structural difference in long-haul route density. Long-haul connections from Europe to Southern and East Africa (South Africa, Zambia, Mozambique) appear on the international map as largely solitary lines rather than a dense web, in contrast to the heavily overlapping North Africa–Europe corridor. This suggests a smaller number of routes and carriers, offering less network redundancy that can be a resilience consideration should any single route be disrupted, serves these markets.

Secondary hub clusters confirm the quantitative findings. Distinct visual clusters are evident around Johannesburg and around Nairobi/Addis Ababa, aligning with their #1 and #2 rankings in the intra-African hub concentration table (Section 4.3). These clusters, along with the Tunis/Cairo North African node, represent the primary gateways through which most intra-African connectivity currently flows.

5. Key Insights

- Cairo's presence across all three top-5 hub lists rather than dominance of any single one indicates its role is as a consistent, multi-scope connector rather than a single point of extreme concentration. This is a more resilient hub pattern than one dominant mega-hub, though it still concentrates risk in one city.
- International connectivity in this dataset is heavily weighted toward a single corridor, North Africa (Algeria, Tunisia, Morocco, Egypt) to France, rather than the broader Middle East/Gulf pattern seen in other periods or datasets. This concentration around one bilateral relationship, rather than a diversified set of international partners, is itself a connectivity risk worth monitoring alongside SAATM's broader liberalisation goals.
- Intra-African volumes (4.1M) remain small relative to domestic (13.4M) and international (9.3M) scopes, mirroring the continental narrative that intra-African connectivity lags behind both domestic demand and international linkages, a gap SAATM implementation is intended to help close.
- Directional balance across the board suggests the underlying demand in these top routes is not one-way (e.g. not purely inbound tourism or purely outbound labour migration); imbalance is generally a secondary factor compared to overall route volume, with the exception of a handful of leisure/seasonal-driven routes (ZNZ, HRG).

6. Recommendations

- Evaluate right-sized aircraft deployment on lower-volume, high-imbalance, or currently underserved intra-African routes identified in this report.
- Monitor SAATM implementation progress on routes/hubs featured prominently in this report's findings, particularly where fifth-freedom rights could unlock additional intra-African connectivity beyond the current JNB/NBO/TUN/CAI-centred pattern.
- Investigate seasonal or event-driven drivers behind the DAR-ZNZ, NBO-ZNZ, and HRG-ZRH directional imbalances to inform capacity planning.
- Assess whether the concentration of international connectivity around the North Africa–France corridor reflects a genuine market gap or a data-period effect, and consider a follow-up analysis of a different reporting period to test consistency before drawing longer-term network-planning conclusions.

Appendix A: Data Notes

Data source: OAG Traffic Analyser, version 2.0, data load date 01 Feb 2026, reporting July–December 2025.

All figures reflect estimated passenger totals for the top 100 routes ranked by volume within each scope (domestic, intra-African, international). Route pair totals combine both directions of travel.

Appendix B: Reference Reports

- Single African Air Transport Market (SAATM) — AFCAC / African Union progress statements, 2026

Appendix C: Glossary

Airport Codes

CODE	AIRPORT
ABV	Abuja, Nigeria
ADD	Addis Ababa, Ethiopia
ALG	Algiers, Algeria
CAI	Cairo, Egypt
CDG	Paris Charles de Gaulle, France
CMN	Casablanca, Morocco
CPT	Cape Town, South Africa
DAR	Dar es Salaam, Tanzania
DJE	Djerba, Tunisia
DUR	Durban, South Africa
EBB	Entebbe, Uganda
HRE	Harare, Zimbabwe
HRG	Hurghada, Egypt
JNB	Johannesburg, South Africa
LOS	Lagos, Nigeria
MGQ	Mogadishu, Somalia
MJI	Mitiga International Airport, Tripoli, Libya

NBO	Nairobi, Kenya
ORY	Paris Orly, France
RAK	Marrakech, Morocco
RUN	Réunion
TUN	Tunis, Tunisia
ZNZ	Zanzibar, Tanzania
ZRH	Zurich, Switzerland

Industry & Technical Terms

Directional Imbalance - The absolute difference between a route's two directional passenger totals, expressed as a percentage of the combined pair total. Higher values indicate more one-way-skewed demand.

Fifth Freedom Rights - The right for an airline to carry passengers between two foreign countries on a route that begins or ends in its home country.

Hub Appearance Count - The number of times an airport code appears as an origin or destination across the top 100 routes in a given scope; used as a proxy for network centrality rather than a formal connectivity index.

Route Pair Total - The combined passenger volume across both directions of a route (e.g. ALG-CDG + CDG-ALG).

Trunk Route - A high-volume, high-frequency route connecting two major traffic centers, typically operated multiple times daily and serving as a core revenue backbone for an airline's network.

Organizations & Initiatives

ACI (Airports Council International) - A global trade association representing airport authorities, responsible for airport traffic forecasting and industry connectivity reporting.

AFCAC (African Civil Aviation Commission) - The specialized agency of the African Union responsible for administering and coordinating implementation of SAATM.

OAG (Official Airline Guide) - The aviation data provider whose Traffic Analyser tool supplied the passenger and route data underlying this report.

SAATM (Single African Air Transport Market) - The African Union's flagship aviation liberalization initiative under Agenda 2063, aimed at creating a single, unified air transport market across the continent.

Route Scope Definitions

Domestic Routes - Traffic between two airports within the same country.

Intra-African Routes - Traffic between two African countries.

International Routes - Traffic between an African airport and a non-African airport.

AFRAA

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