# AFRAA AIR TRANSPORT REPORT Quarter 1 – 2026

## Global Airline industry performance

The Middle East conflict presented a multi-dimensional shock to the global airline industry, combining airspace disruption, fuel price escalation, operational inefficiencies, and structural supply constraints. Unlike the demand-driven collapse seen during the COVID pandemic, this crisis is fundamentally a cost and network shock within a more complex and globally interconnected aviation system.

According to IATA, 2026 Global airline net profits for 2026 were revised down to $23 billion  half of the previous $41 billion forecast and down from $45 billion in 2025.

The industry's net profit margin is forecast to compress to 2.0% (down from 4.2% in 2025). Net profit per passenger dropped to just $4.50. Jet fuel is forecast to average $152 per barrel in 2026 (a 69% surge compared to $90/barrel in 2025) directly due to the middle east war and related disruptions .

Accordiing to the data from OAG, Global RPKs increased by 4.0% in Q1 2026 compared to Q1 2025 while Available Seat Kilometers (ASKs/Capacity) increased by 0.8 % in Q1 2026 compared to Q1 2025. Figure 1 below provides a detailed view of the Month-on-Month (MoM) and Year-on-Year (YoY) trends in ASK and RPK for te global airlines from January 2025 to March 2026.

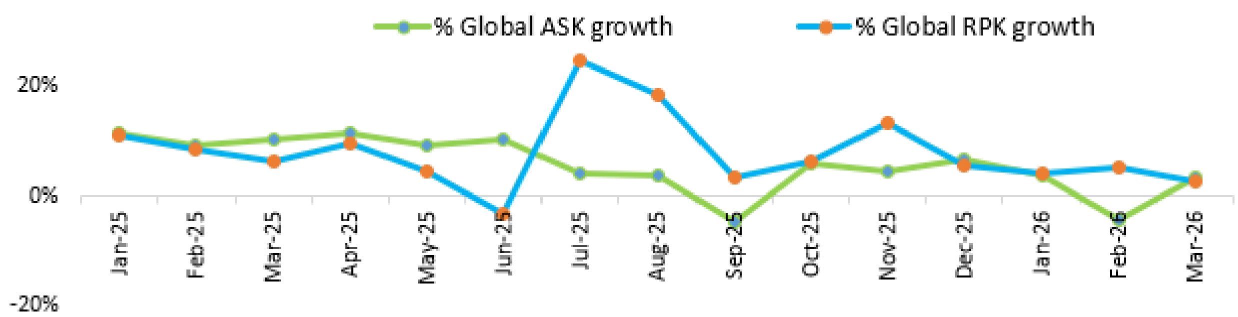



*Figure 1: Global Industry ASK and RPK growth,*

## African airlines performance

### Passenger Revenue

Passenger revenue in Q1 2026 decreased by  1% compared to Q1 2025.Figure 2 provides a graphical comparison of passenger revenue between Year 2026 verses Year 2025.

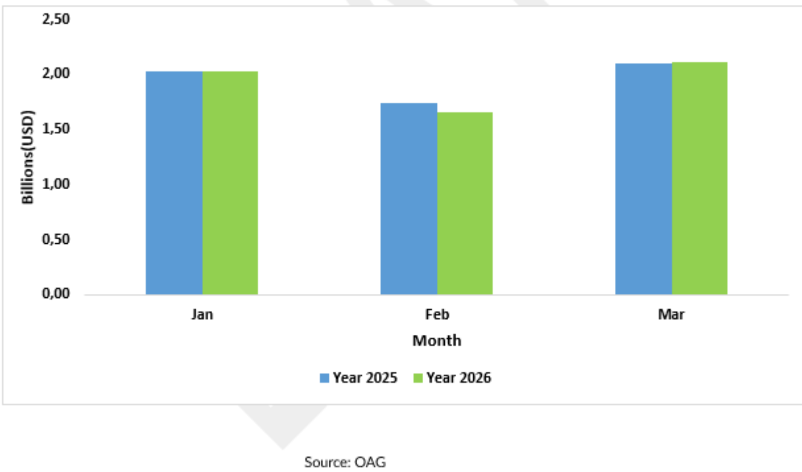



*Figure 2: Quarterly Passenger Revenue*

## Passenger traffic  Evolution

In Q1 2026, African airlines continued to demonstrate resilient performance despite elevated fuel prices stemming from the conflict in the Middle East, with both Available Seat Kilometers (ASKs) and Revenue Passenger Kilometers (RPKs) sustaining the positive growth trends compared to Q1 2025.

The increase in both metrics are by 6.8% and 4.1%, respectively, compared to Q1 2025. 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 2025 to March 2026.

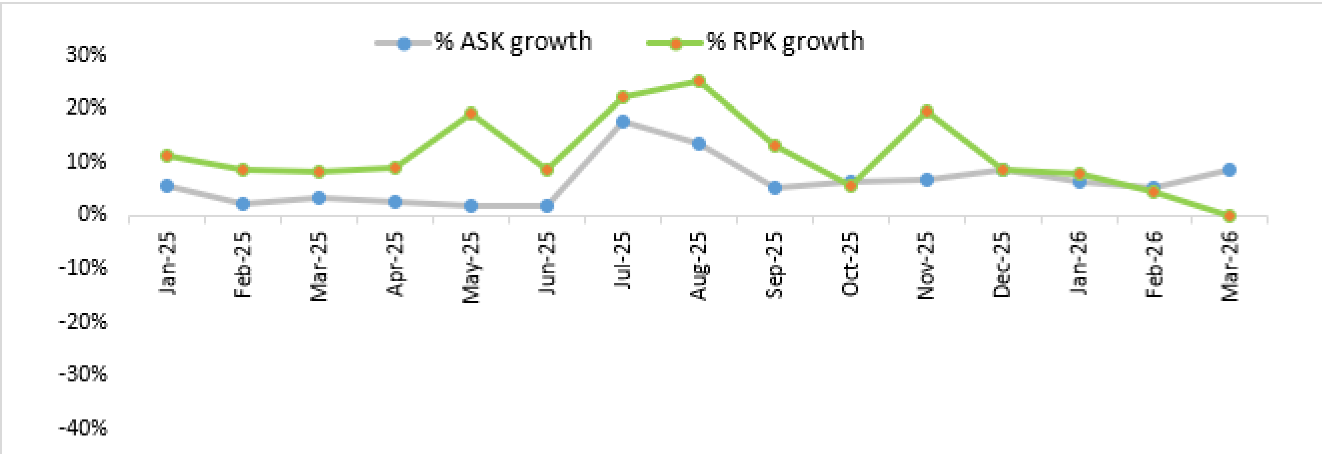



*Figure 3: African airlines ASK and RPK growth*

## Passenger traffic distribution

In the first quarter of 2026, Domestic traffic accounted for 37%,of the total traffic, Intra-African flights accounted 31% of the traffic, while intercontinental flights represented 32%. This is illustrated in Figure 4 below;

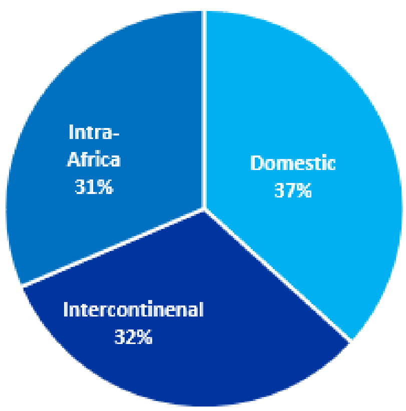
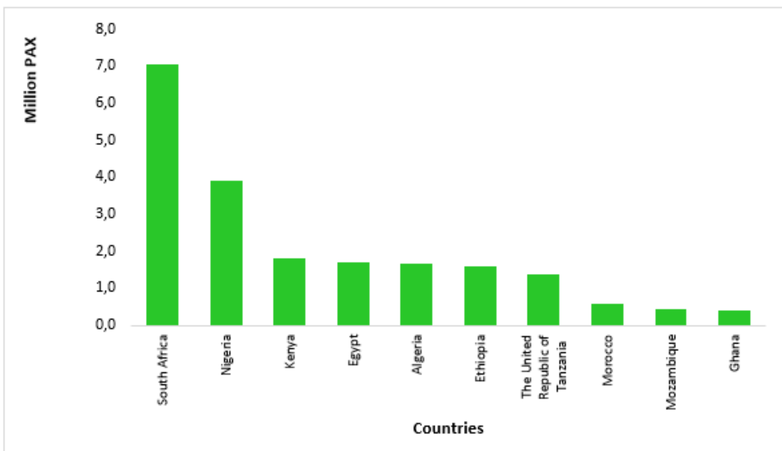



*Figure 4: African Airlines passenger distribution Q1 - 2026*

## The Top Ten countries contributing to the 37% of domestic are as in Figure 5 below;




Source: AFRAA /OAG

*Figure 5: Top 10 Ranking by Country on Domestic Traffic Q1 - 2026*

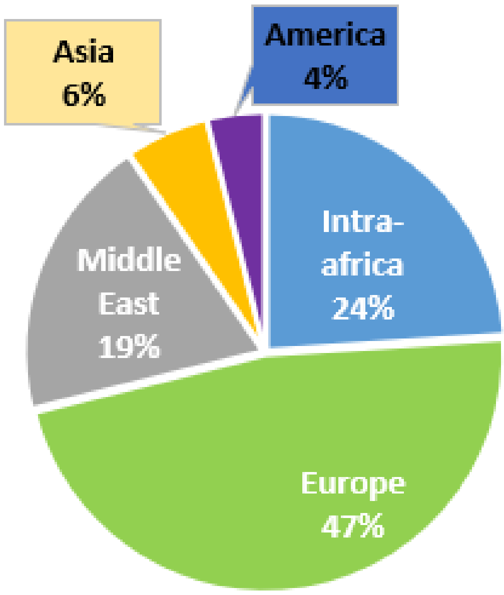



*Figure 6: African Airlines international passengers destinations Q1– 2026*

In Q1 2026, international traffic is primarily driven by flights to Europe and intra-African routes each accounting for 47% and 24% 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 19%, while routes to Asia and the Americas each account 6% and 4% respectively.

## Regional Insights

In the first quarter 2026, Northern Africa led the continent in passenger traffic, accounting for 42.4% of the total. Domestic traffic in this region was relatively low, representing only 15% 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 and Italy being the top destinations. The Middle East is the second most popular destination region, with Egypt as the leading contributor.

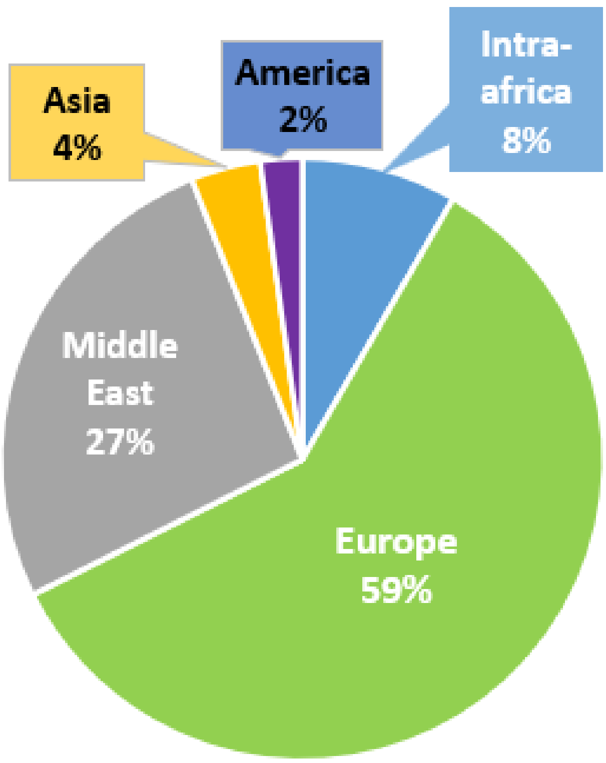



*Figure 7: Traffic repartition - Northern Africa Q1 2026*

In the first quarter of 2026, the Southern African region accounted for 19.4% of the continent's traffic. The domestic market was the largest contributor, making up 63% of the region's traffic. Intra-African travel was above international traffic, with a 51% share.
Regarding destinations outside Africa, Europe and Asia were the leading regions, with 27% and 9% of traffic respectively. America and the Middle East accounted for 7% and 6% respectively during this period.

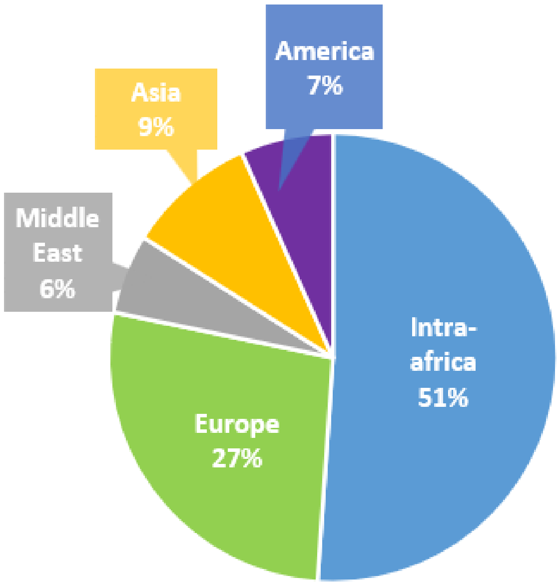



*Figure 8: Traffic repartition - Southern Africa Q1 2026*

Eastern Africa represented 19.6 % of the continental traffic during the first quarter of 2026. Domestic traffic constituted to 42% in the first quarter 2026 The Top destinations outside Africa are Europe and Middle East with 27% and 16%.

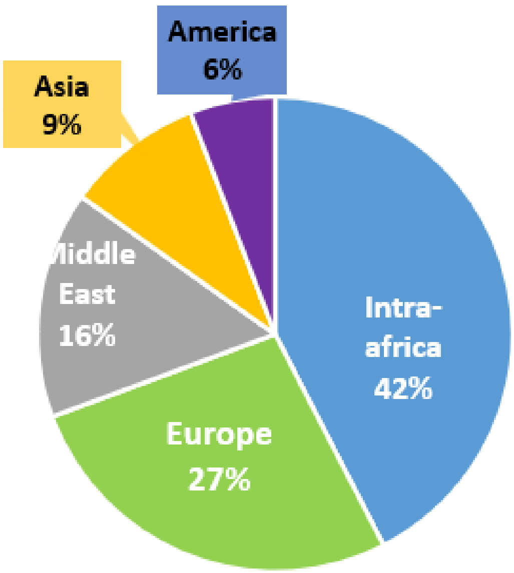



*Figure 9: Traffic repartition - Eastern Africa Q1 2026*

Central and Western Africa regions together represented 18.6% of the African traffic during the first quarter 2026. The intra-African traffic accounted for 41% of the non-domestic.

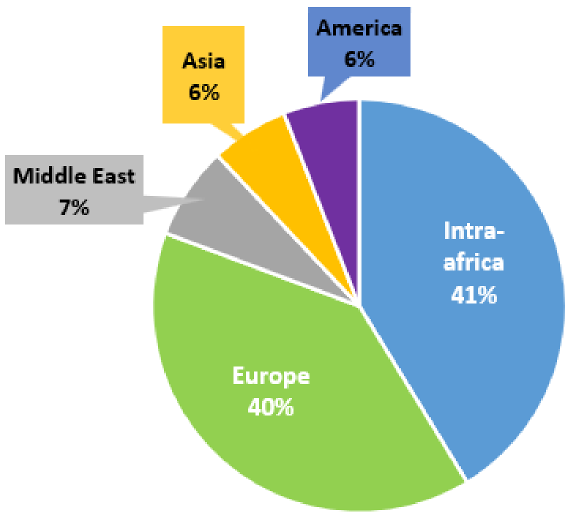



*Figure 10: Traffic repartition - Central and Western Africa Q1 2026*

Outside the continent, Europe is the principal destination, representing 40%. The share of America and Middle East are and Asia is 6%each. The domestic market accounted for 47% of the regional traffic.

## African Airlines Ranking by Traffic (OAG estimations)

Figure 11 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.

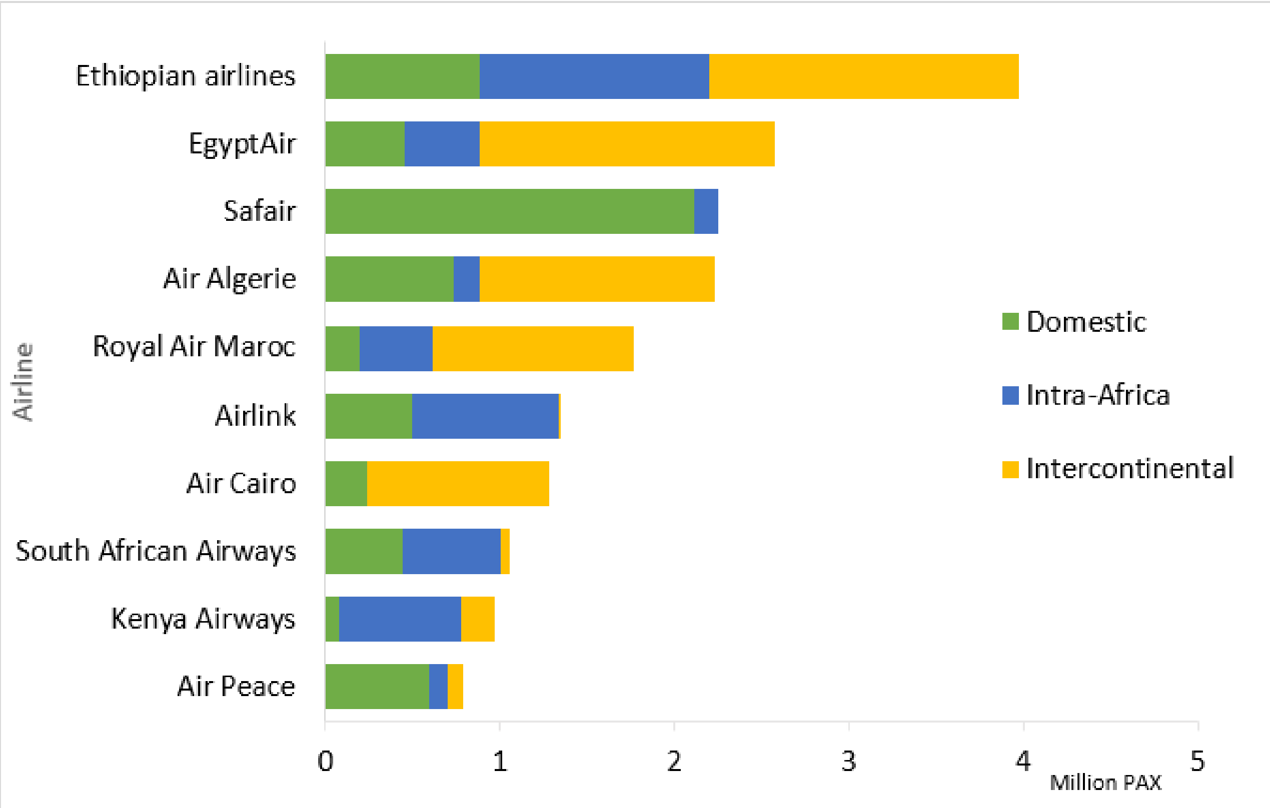



*Figure 11: African Airlines ranking by traffic Q1 2026*

## Routes Ranking by Traffic (OAG estimations)

Top 10 domestic routes by passengers carried Q1 2026(OAG estimations)

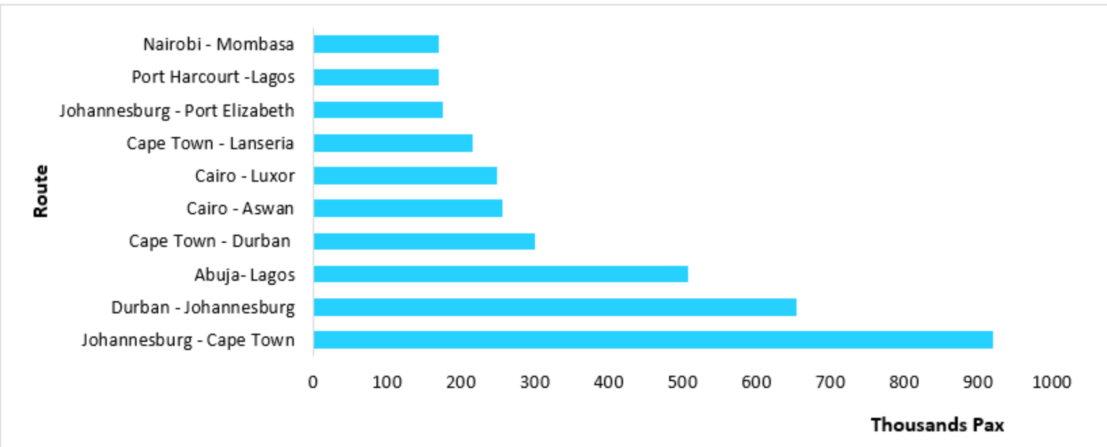



*Figure 12: Domestic routes ranking*

Figure 12 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 first quarter of 2026. This is followed by Egypt with 2 routes. Additionally Nigeria and Kenya each have a domestic route represented in the top ten busiest routes.

**Top 10 Intra - African routes by passengers carried Q1 2026 (OAG estimations)**

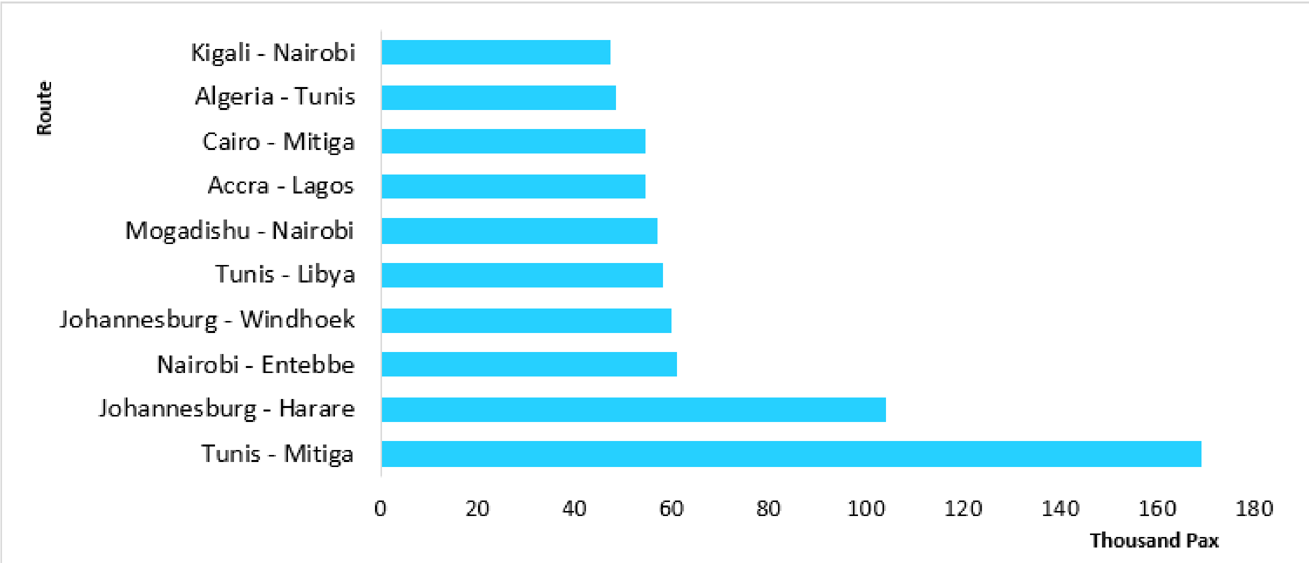



*Figure 13: Intra-African routes ranking*

Figure 13 above shows the top ten intra-African routes by passengers carried in the first quarter of 2026. The busiest intra-African routes are primarily within Northern, Southern and Eastern Africa. However, routes from Western Africa (Accra–Lagos) also ranked among the top ten in the first quarter 2026

**Top 10 Intercontinental routes by passengers carried Q1 2026 (OAG estimations).**

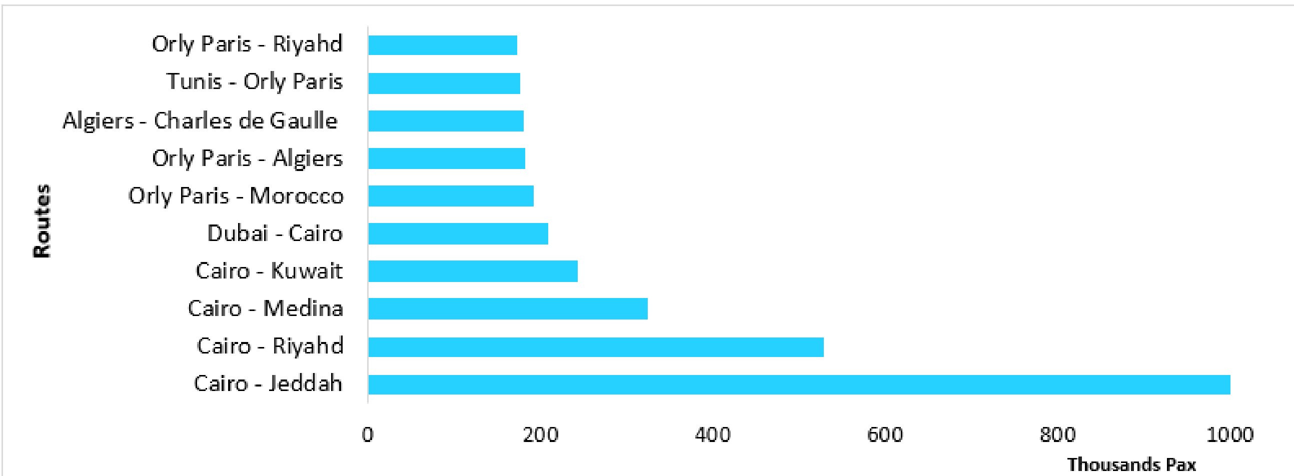



*Figure 14: Intercontinental routes ranking*

Figure 14 show the intercontinental routes ranking and EgyptAir is the leading carrier on these routes, achieving the highest passenger volume during the first quarter 2026.

## Airport Ranking by Passengers

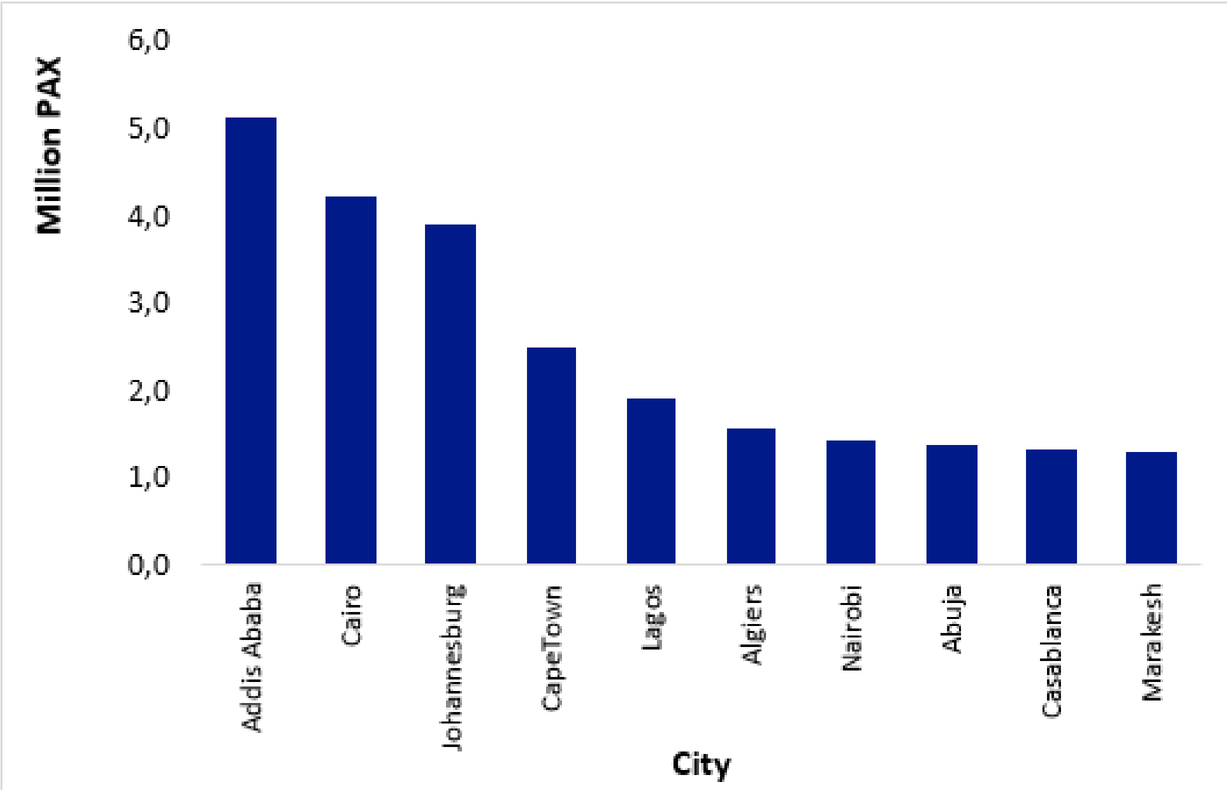



*Figure 15: African airports ranking by passengers Q1 2026 (OAG estimations)*

Northern African airports featured prominently among the top 10 hubs in the first quarter 2026. The Top four leading Airports were Addis Ababa , Cairo, Johannesburg and CapeTown

## Air Cargo Market Trends in Africa

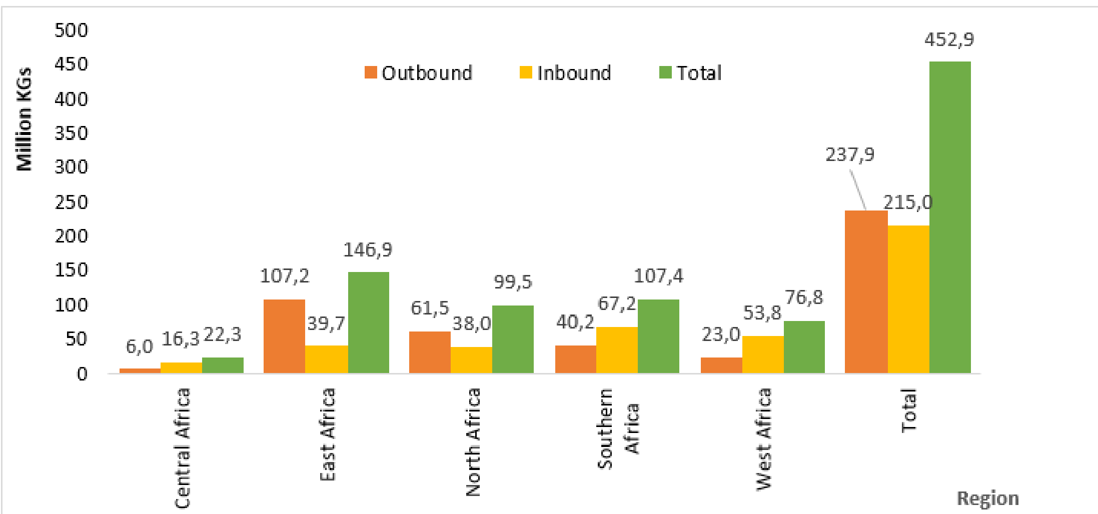



*Figure 16: Cargo Traffic Q1 2026 (World ACD estimations)*

## Airport charges

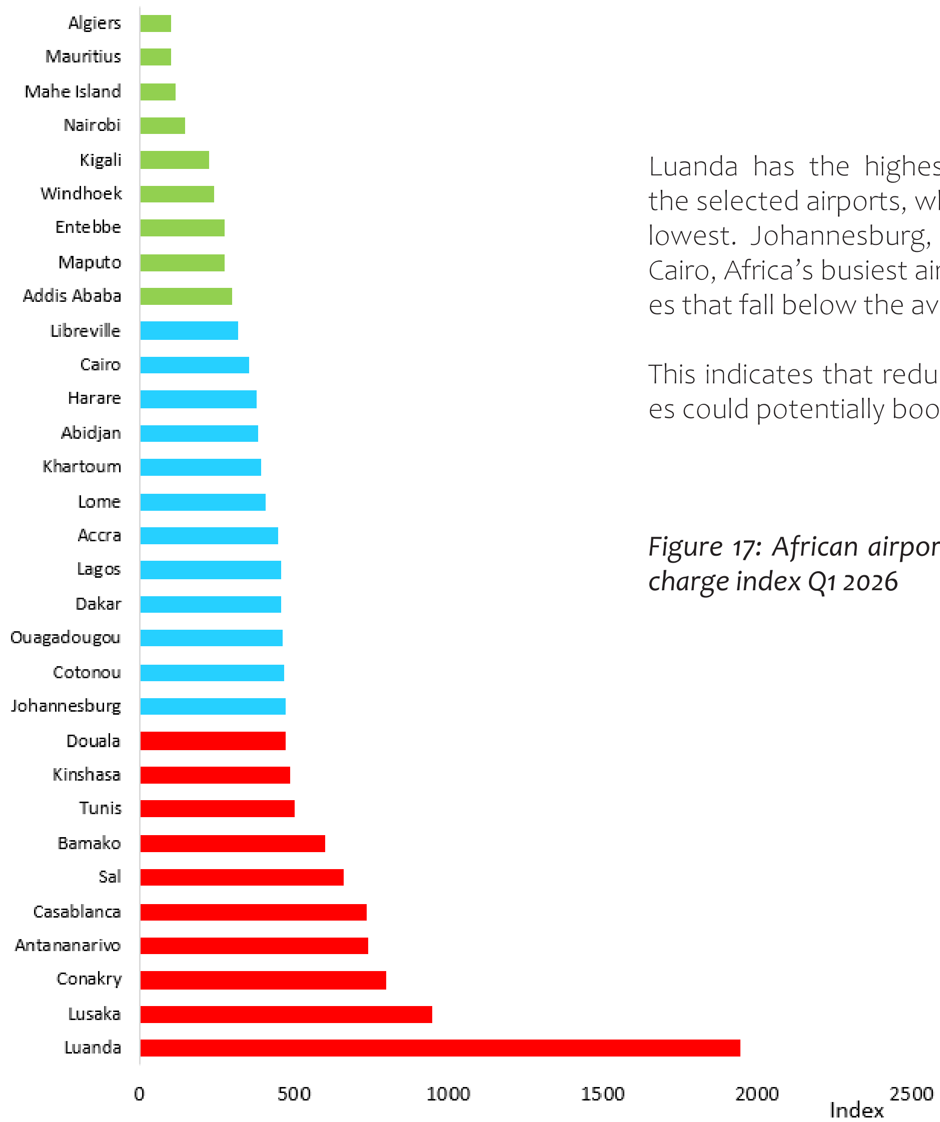
### Methodology:

A comparative study based on a single aircraft type applies to all airports with more than 300 thousand passengers in Q1 2026.

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** |




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.

*Figure 17: African airports ranking by charge index Q1 2026*

# 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 Q1 2026.

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 Q1 2026 showcasing a significant expansion in air travel links within the Africa continent.

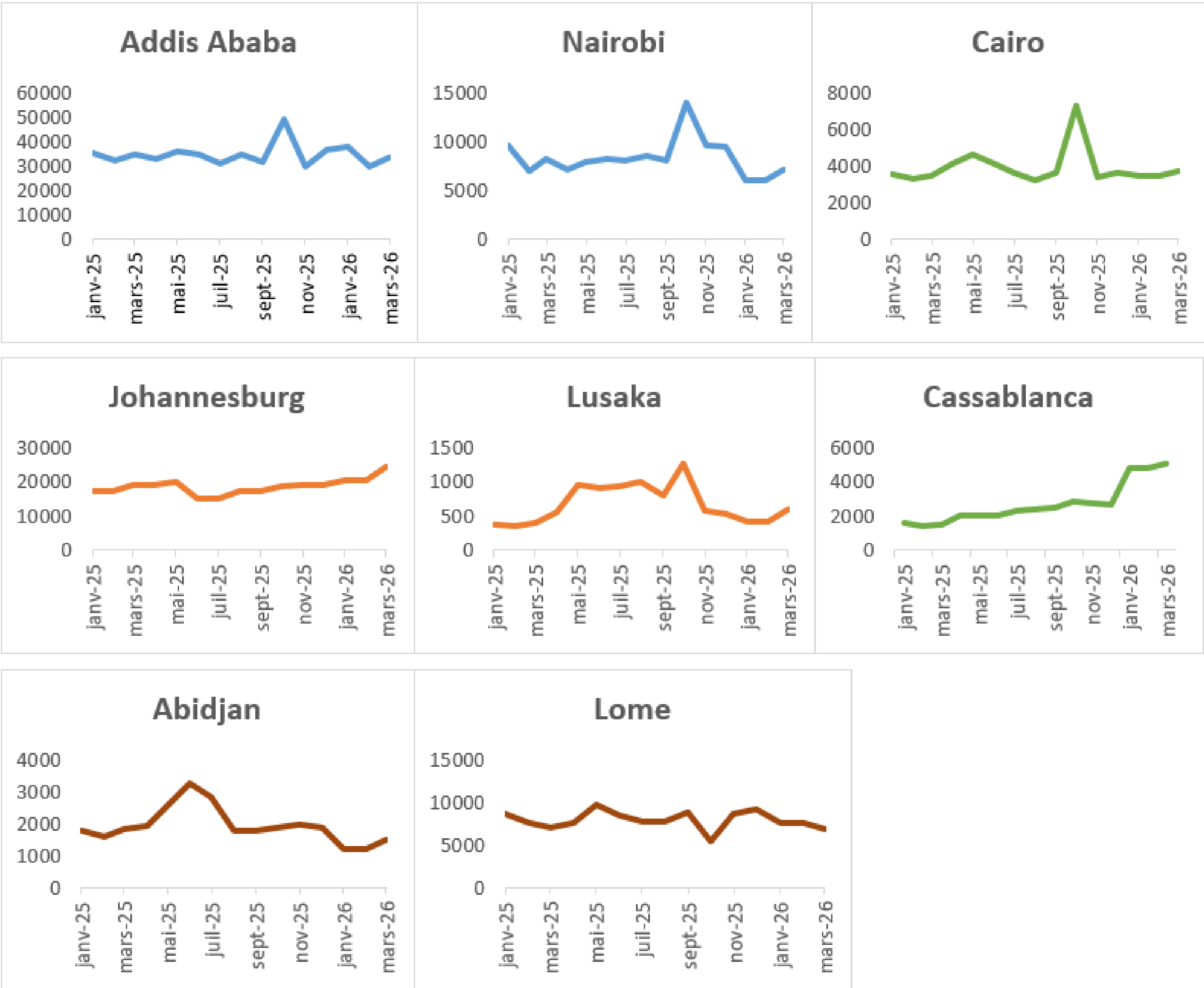
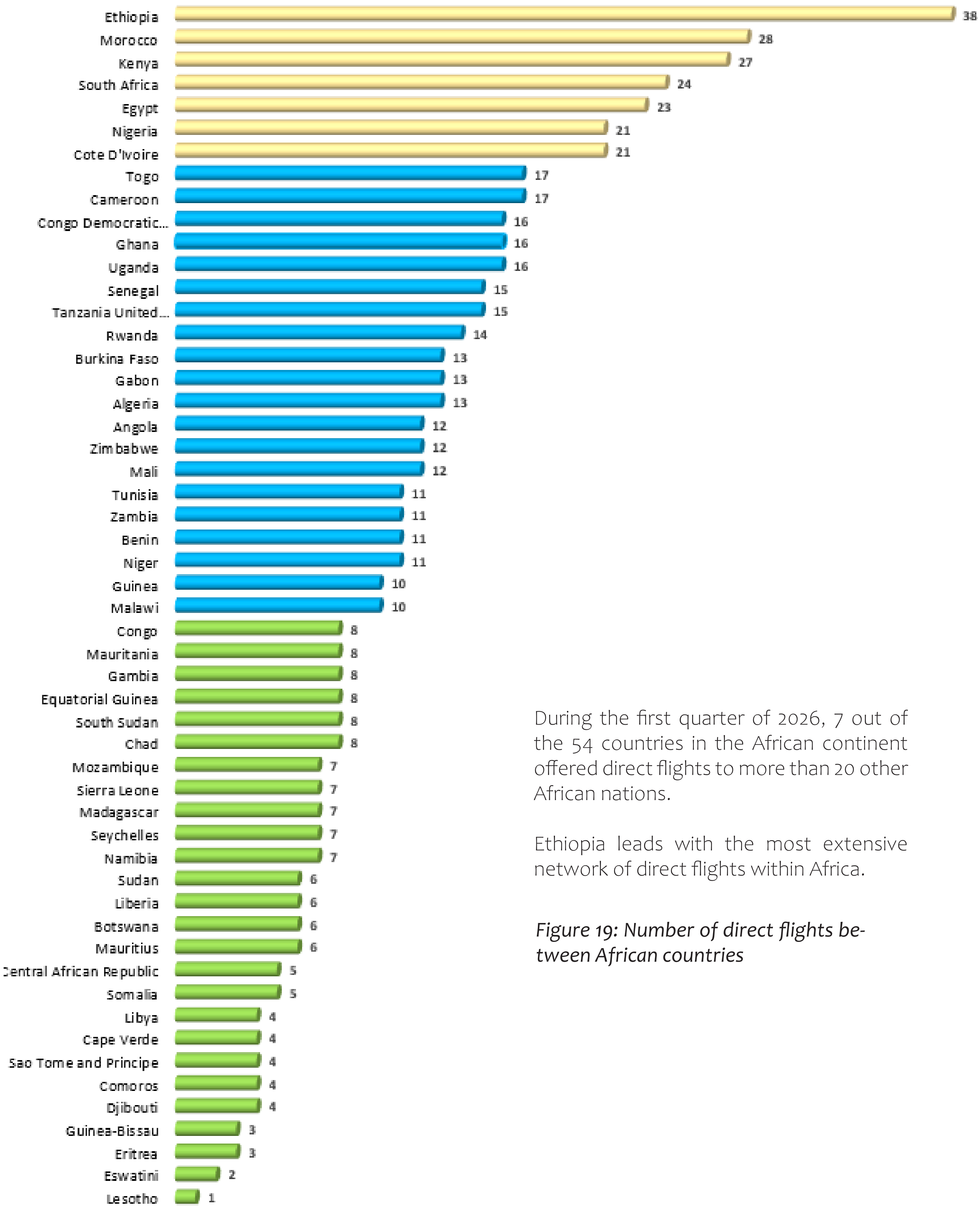



*Figure 18: Intra-African connectivity index per Regional hubs in Q1 2026*

# Direct flights between African countries




During the first quarter of 2026, 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 19: Number of direct flights between African countries*

In Q1 2026, the overall connectivity index is relatively high, particularly in Northern Africa, which reported a connectivity rate of 90%.

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.This is represented as per Table 1 below.

| Africa Sub Region | Central Africa | Eastern Africa | North Africa | Southern Africa | Western Africa |
|---|---|---|---|---|---|
| Central Africa | 48% | 13% | 17% | 9% | 11% |
| Eastern Africa | | 50% | 15% | 21% | 11% |
| North Africa | | | 90% | 3% | 34% |
| Southern Africa | | | | 52% | 3% |
| Western Africa | | | | | 44% |

*Table 1: Connectivity between African regions*

## Visa Openness within Africa

According to the Visa Openess Index, the Gambia and Rwanda offer visa-free access to all Africans.11 countries improved their score since last year: one is in the top 10, another is in the top 20.In 28% of country-to-country travel scenarios within Africa, African citizens do not need a visa to cross the border, a marked improvement over 20% in 2016.

In 2025, 31 African countries representing 57% of the continent offered an e-Visa for Africans, up from nine African countries representin 17% of the continent in 2016.39 countries have improved their score since 2016. Of the 10 that have most progressed, five are in West Africa, three are in East Africa, and two are in Southern Africa. Nine top-20 ranked performers are lower-income countries; four of them are landlocked.

Another ten top-20 ranked performers are lower-middle-income countries. Lower-income countries continue to make progress.

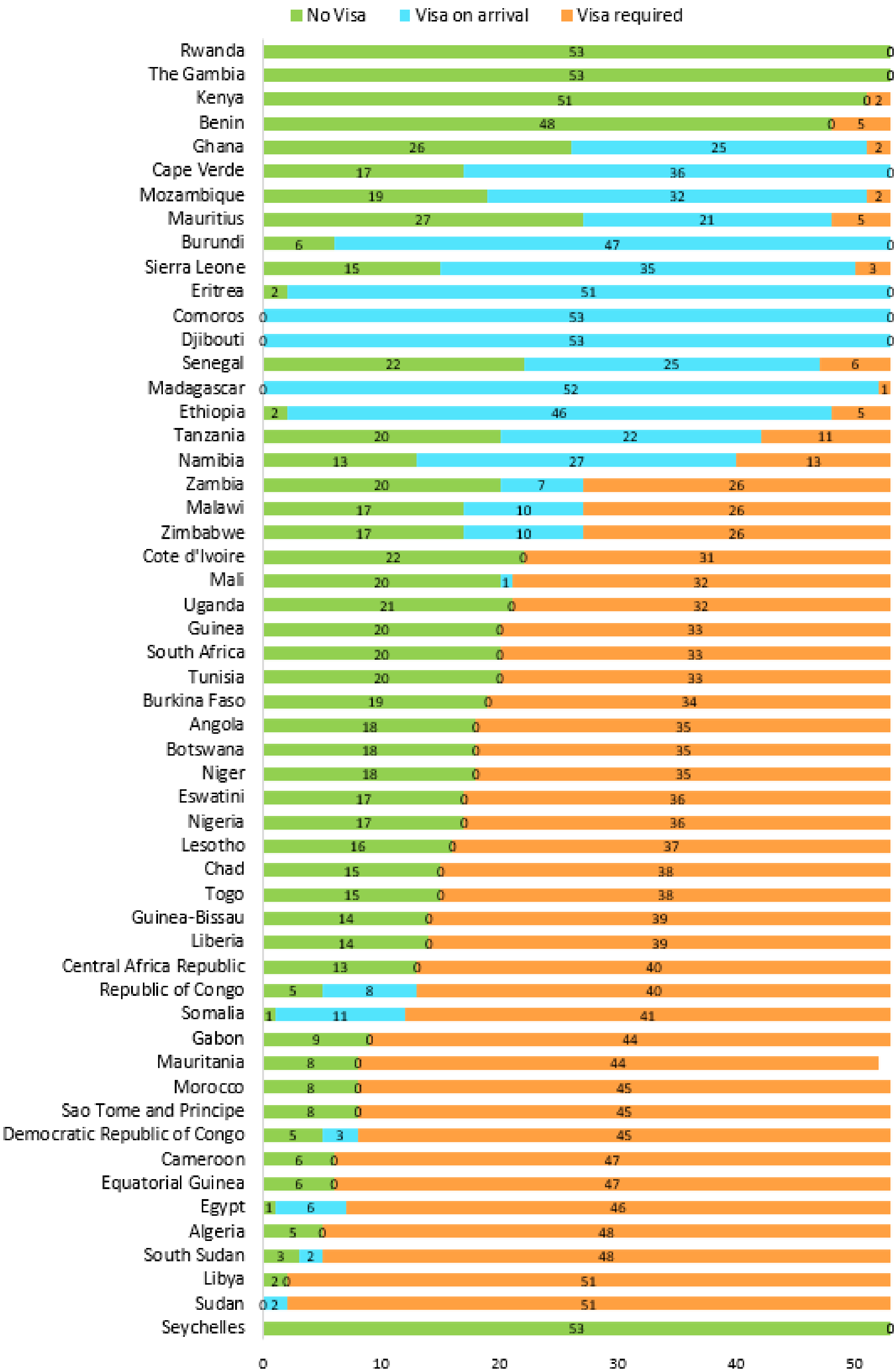



*Figure 20: Visa openness in African countries* *Source: AfDB,AU,visaopenness.com (2025)*