EDITORIAL

From Fragmentation to Scale: Building the African Aviation We Need

Africa's aviation story is entering a decisive phase.

Demand is growing. Markets are opening. Airlines are investing, partnerships are expanding, and technology is transforming how passengers buy and airlines operate. Yet growth alone is not enough.

The real question is whether African aviation can convert this growing demand into sustainable, competitive and resilient airlines.
Across this issue of African-Skies, one message emerges clearly: Africa's aviation challenge cannot be solved by individual airlines acting alone.

We must build scale, strengthen cooperation and change the way we approach the economics of air transport.
Fuel provides a powerful example. Fuel remains one of the largest cost items for African airlines, while fragmented supply chains and external market exposure continue to put pressure on margins. AFRAA's Joint Fuel Programme demonstrates what is possible when airlines move from fragmented purchasing to collective commercial power.

Fifteen participating carriers are already combining approximately 2.1 billion litres of demand, creating negotiating leverage that individual airlines cannot achieve as effectively alone.
But this is about more than securing a better price. It is about scale, transparency, quality assurance and collaboration across the supply chain.

The same principle applies to distribution and technology. AFRAA and TPConnects' work highlights a significant gap: many African airlines have yet to develop NDC capability, even though reducing distribution costs is a strategic priority across the industry.

At the same time, a growing number are planning or implementing NDC. The message is clear:

the constraint is not vision, it is capacity.
Modern airline distribution must therefore be viewed not simply as a technology project, but as a commercial competitiveness agenda. African airlines need greater control over their products, fares, customer relationships and distribution economics. We need solutions that make African itineraries easier to discover and book, strengthen interline and codeshare opportunities, support local payment realities and enable airlines to capture more of the value they create.

Technology must serve connectivity. This brings us to one of the strongest messages from the airline leaders featured in this issue: we must stop operating in silos. Kenya Airways' outgoing Ag. CEO George Kamal makes the case for stronger commercial, operational and technical cooperation. ASKY's experience similarly demonstrates the importance of cost discipline, governance and cooperation in building sustainable airline businesses.

The principle is simple: cooperate and compete. African airlines will continue to compete, but competition does not require us to duplicate infrastructure, fragment networks or allow valuable African traffic to be captured elsewhere.

We can compete while cooperating to build stronger networks. We can compete commercially while sharing capabilities, coordinating where appropriate and developing deeper interline, codeshare and strategic partnerships.

Governments and regulators also have a critical role to play. Aviation should not be treated primarily as a source of taxation and charges. It is an economic multiplier — enabling trade, tourism, investment, employment and continental integration.
When taxes, charges and restrictive market policies make air travel unaffordable or prevent airlines from scaling, Africa loses far more than airline revenue. It loses connectivity and economic opportunity.

At AFRAA, our responsibility is to help translate collective ambition into practical results.

Through advocacy, market intelligence, partnerships and programmes such as joint fuel procurement and distribution transformation, we are working to strengthen the commercial foundations of African aviation.

The opportunity is immense. But opportunity does not automatically become growth, and growth does not automatically become profitability.

We must make deliberate choices:

scale over fragmentation, cooperation over isolation, implementation over declarations, efficiency over unnecessary cost, and long-term sustainability over short-term expediency.

Africa's aviation future will not be built by one airline, one government or one institution.

It will be built collectively.

Let us therefore focus on ensuring that African aviation captures, sustains and owns that growth. The future of African aviation must be more connected, more competitive and more collaborative.

And the time to build it is now.

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