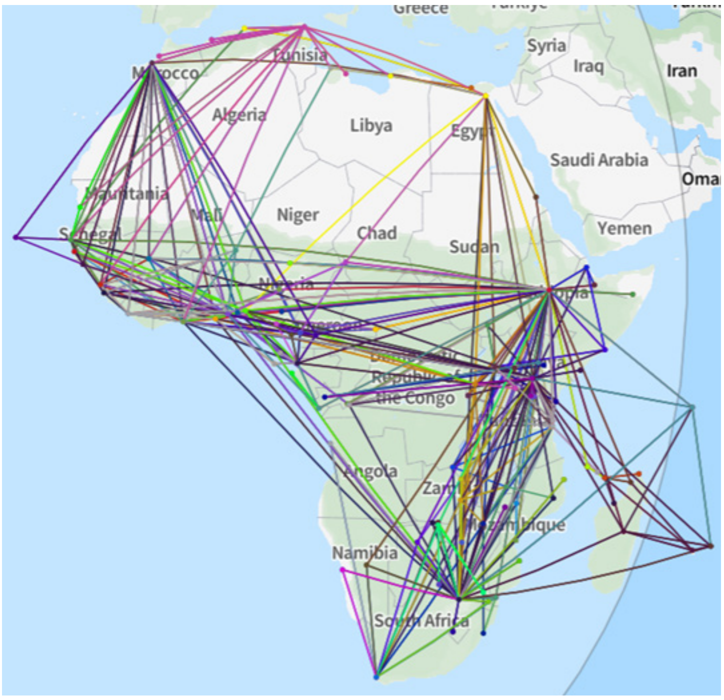
The Missing Links in Africa's Skies: The Routes We Need to Build

AFRAA's latest Routes and Connectivity Report reveals a continent with strong aviation corridors, emerging regional hubs and significant untapped potential between African markets.

Africa's aviation network is evolving. Airlines are expanding connectivity, restoring suspended services and exploring new markets. But beneath the headline of growth lies a more complex picture: Africa is moving more people by air, yet intra-African connectivity remains significantly less developed than domestic and international traffic.

That is one of the central messages emerging from AFRAA's Routes and Connectivity Report, H2 2025, which analyses route-level passenger traffic across domestic, intra-African and international markets using OAG Traffic Analyser data. The findings point to both progress and opportunity — and raise an important strategic question for African aviation: how do we move from a collection of strong aviation corridors to a truly integrated continental network?

Route Map by Origin: Africa Active Routes in 2025



Source: AFRAA, OAG
Africa's aviation network is anchored around a number of major gateways, while significant connectivity gaps remain across several markets.

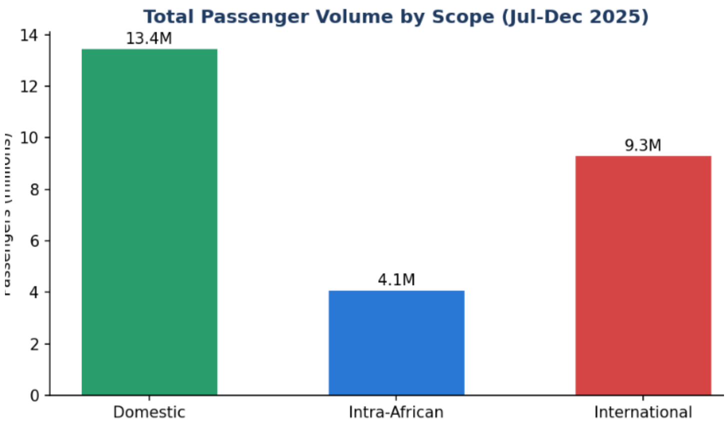
Domestic markets remain the strongest foundation

Domestic aviation continues to provide the largest volumes among the three markets analysed. The top 100 domestic routes carried approximately 13.4 million passengers during the second half of 2025, compared with 9.3 million international passengers and just 4.1 million on intra-African routes.

South Africa and Nigeria remain the strongest domestic aviation markets, supported by their large populations, multiple economic centres and established air transport networks.
The Cape Town–Johannesburg corridor emerged as the busiest route overall, carrying approximately 1.99 million passengers during the review period. Durban–Johannesburg followed with 1.39 million, while Abuja–Lagos ranked third among the leading domestic corridors.

These trunk routes demonstrate the power of concentrated demand. They connect major economic centres at high frequency and provide the traffic foundation from which broader airline networks can develop. For Africa, the challenge is to replicate this connectivity effect across borders.

Total Passenger Volume by Scope



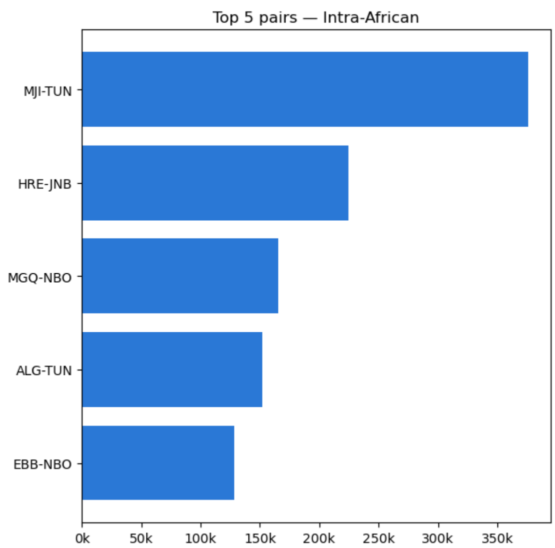
Source: AFRAA, OAG
Domestic routes carried 13.4 million passengers across the top 100 routes in H2 2025, compared with 9.3 million international and 4.1 million intra-African passengers.

The intra-African opportunity

The report identifies several important intra-African corridors, including Tripoli–Tunis, Harare–Johannesburg, Mogadishu–Nairobi, Algiers–Tunis and Entebbe–Nairobi. These routes connect important commercial, political and tourism centres. They also demonstrate the strategic importance of hubs such as Johannesburg, Nairobi, Tunis and Cairo in facilitating movement between African markets. Yet the overall numbers tell a compelling story.

With only 4.1 million passengers across the top 100 intra-African routes, intra-African traffic remains considerably smaller than both domestic and international traffic. Moreover, much of the continent's regional connectivity flows through a relatively small group of gateways rather than through a broad network of direct links between secondary markets. This is precisely where the Single African Air Transport Market (SAATM) becomes strategically important. SAATM seeks to reduce market fragmentation, expand direct air services and create more seamless connectivity across the continent. The report's findings reinforce the need to move from policy commitment to practical implementation — particularly where liberalisation and fifth-freedom rights can unlock new city-pair opportunities.

Top 5 Intra-African Routes



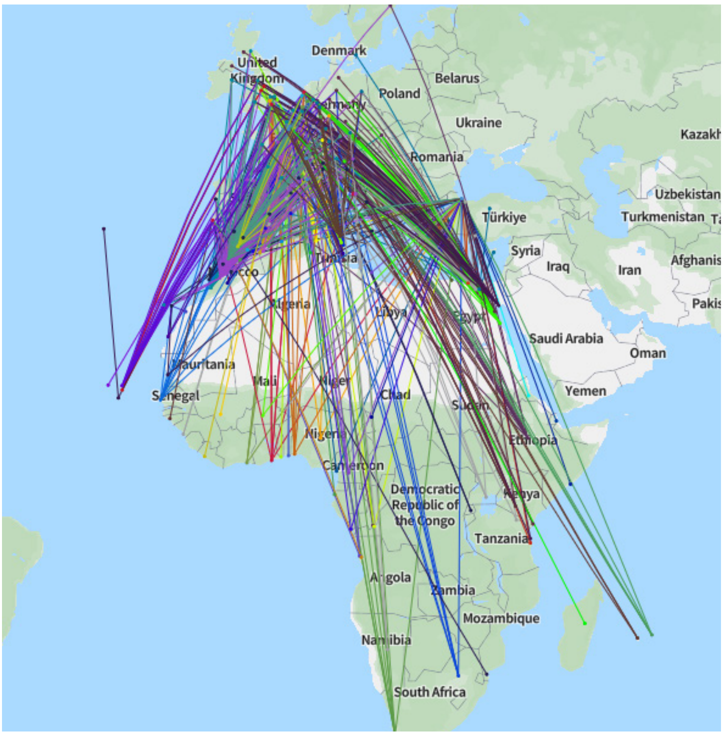
Source: AFRAA,OAG
Five corridors illustrate where regional demand is already strong — and where stronger network integration could create wider connectivity effects.

A continent connected outward — but not always across

Africa's international connectivity tells another story. The strongest international corridors in the H2 2025 dataset were concentrated between North Africa and France, with Algiers–Paris Charles de Gaulle, Algiers–Paris Orly, Paris–Réunion, Paris–Tunis and Paris–Marrakech among the leading routes. The strength of this corridor reflects established economic, tourism, diaspora and historical links. But its dominance also highlights a potential vulnerability: Africa's international connectivity remains concentrated around a relatively narrow set of corridors and markets.

The report therefore points to the need for greater diversification — including stronger direct long-haul connectivity from additional African cities to a broader range of international destinations. This matters not only for passengers. Connectivity determines where tourism flows, where businesses invest, how easily goods and services move and how effectively African cities participate in global value chains.

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



Source: AFRAA, OAG

North Africa–Western Europe remains one of Africa's densest international aviation corridors, illustrating both market depth and the concentration of international connectivity.

The geography of the gap

Perhaps the most striking finding comes from the regional connectivity analysis. Northern Africa recorded the highest connectivity rate at 74%. Yet connectivity between African subregions remains considerably weaker. The strongest inter-regional connectivity identified in the report — between Northern and Western Africa — stood at only 34%.

Dense networks are visible around selected North, East, Southern and West African corridors. By contrast, several Central African markets remain comparatively thin. The report specifically identifies Chad, Niger and the Central African Republic as showing minimal to no route lines on the network maps. This is more than an aviation statistic. A connectivity gap can become an economic gap.

Where direct air links are absent, passengers may have to travel through distant hubs, increasing journey times and costs. Businesses face less efficient access to markets. Tourism opportunities become harder to capture. And African airlines lose potential traffic to connections outside the continent.

From hubs to networks

The report does not suggest that Africa is dependent on one dominant mega-hub. Instead, the data reveal a relatively distributed hub structure.

Cairo is particularly significant, appearing among the leading hubs across domestic, intra-African and international markets. Johannesburg leads the intra-African hub rankings, while Nairobi, Tunis and Cairo also play important regional roles. This presents an opportunity. Rather than viewing African hubs purely as competitors, airlines and policymakers can increasingly consider them as complementary nodes in a continental network.

That means developing stronger interline and codeshare arrangements, coordinating schedules where commercially viable, improving passenger transfer processes and using liberalisation tools such as fifth-freedom rights to connect markets that currently lack viable direct services. The objective should be connectivity that works for the passenger and for the African airline.

Turning demand into connectivity

The report also offers an encouraging signal: traffic across most major route pairs is broadly balanced in both directions. Average directional imbalances were below 3% across all three market segments. This suggests that, on the continent's strongest routes, demand is not fundamentally one-directional. The opportunity therefore lies in identifying where sufficient demand exists but connectivity remains constrained.

That requires more sophisticated network planning. Airlines need to match aircraft size and frequency to market realities, particularly on lower-volume or highly seasonal routes. Regulators need to facilitate market access. Airports need to support efficient connections. And policymakers need reliable data to distinguish genuine market gaps from temporary or seasonal effects.

AFRAA's report recommends, among other measures, right-sized aircraft deployment, closer monitoring of SAATM implementation, greater use of fifth-freedom opportunities and deeper analysis of seasonal demand patterns.

The bigger picture

Africa's aviation challenge is no longer simply about opening more routes. It is about building a smarter network. The continent already has strong domestic markets, powerful regional hubs and established international gateways. What remains unfinished is the connective tissue between them.

The opportunity presented by SAATM is therefore not merely to liberalise markets, but to reshape the geography of African mobility — making it easier for a passenger in Nairobi to reach West Africa, for a business in Lagos to access Southern Africa, or for a tourist arriving through Cairo to continue seamlessly to another African destination.

Africa has the demand. It has the airports. It has airlines capable of building regional networks. What it needs now is greater connectivity between the pieces. The next phase of African aviation should therefore be measured not only by how many passengers fly, but by how efficiently Africa connects its own people, cities and economies.

That is where the real promise of a single African air transport market lies. Better connectivity is not simply an aviation objective. It is a continental economic imperative.

The full report can be accessed via the AFRAA website:

https://www.afraa.org/wp-content/uploads/2026/07/Routes-and-Connectivity-Report_20_07_26_FJR.pdf