

July - August 2026 Newsletter

Better Skies For Africa



Data-Led Growth, AI Innovation, and Policy Alignment for African Aviation

01 Top Story

The biggest shift in aviation may not be in the sky.

02 Aviation Pulse

Here's what the industry is watching.

03 Policy & Advocacy

Better skies start with better policy.

Elevating Connectivity, Efficiency, and Equity Across African Skies

Dear Valued Members, Partners, and Stakeholders,

With the second half of 2026 underway, let us take a moment to pause and reflect not only on what African aviation has achieved so far this year, but on what the data tells us about the road ahead. Despite persistent global economic pressures, our industry continues to demonstrate remarkable resilience as airlines rebuild networks and passenger demand recovers. During the first half of the year, AFRAA focused on driving competitiveness across our sector.

At our 198th Executive Committee Meeting in Nairobi, we convened AFRAA CEOs to discuss strategic matters of the association and address key operational headwinds, including high cost structures, blocked funds, liberalisation, punitive taxation, and route connectivity. Concurrently, strategic collaborations with partners like Cirium, Amadeus, TPCconnects, and S&P Global equipped our members with actionable insights on market intelligence, digital transformation, and Artificial Intelligence.

Our latest research reveals a crucial truth: while passenger volume continues to grow, cross-border intra-African connectivity still lags significantly behind domestic and international traffic. The challenge facing our continent is not a lack of travel demand, but a network bottleneck. Unlocking our full potential requires expanding direct city-pair connections, reducing regional fragmentation, and accelerating the implementation of the Single African Air Transport Market (SAATM).

As our sector increasingly relies on data-driven decision-making, connectivity intelligence is just as vital as operational efficiency. AFRAA remains dedicated to providing this

foresight and translating data into meaningful policy action. I invite you to explore this mid-year edition as a reflection of our collective mission: building an African aviation ecosystem that is connected, competitive, and positioned for long-term growth.

On behalf of the AFRAA Executive Committee and Secretariat, I thank you for your continued trust, partnership and commitment.

Together, let us continue turning insight into action and ensuring that Africa's skies remain a powerful driver of integration, resilience and shared prosperity.



*Abdérahmane Berthé, Secretary General,
African Airlines Association (AFRAA)*

What's Shaping African Aviation in 2026

Stay informed with a quick snapshot of the developments influencing airlines across the continent.



Fleet Expansion Continues



Several African carriers continue investing in modern, fuel-efficient aircraft to improve connectivity, reduce operating costs, and support long-term network growth. Fleet modernization remains central to improving competitiveness.

Policy Discussions Intensify



Governments and industry stakeholders continue debating aviation taxation, airspace liberalization, and implementation of the Single African Air Transport Market (SAATM), with growing recognition that regulatory reform is critical to unlocking intra-African connectivity.

Digital Transformation Accelerates



Artificial Intelligence, biometrics, predictive maintenance, and modern airline retailing continue to dominate industry conversations as airlines seek greater operational efficiency and improved passenger experiences.

Sustainability Moves Higher on the Agenda



Preparations for CORSIA implementation, discussions around Sustainable Aviation Fuel (SAF), and carbon reduction strategies are increasingly becoming priorities for African airlines.

Why It Matters

These developments reinforce a common reality: the future of African aviation will be shaped by collaboration, innovation, and policies that enable sustainable growth.

Why Intelligence Will Define the Next Era of African Aviation

African aviation is entering a new phase. Passenger demand continues to recover, fleets are expanding, and airlines are exploring new routes across the continent. Yet growth alone is no longer enough.

Rising operating costs, infrastructure constraints, foreign exchange pressures, and evolving passenger expectations mean airlines must find smarter ways to improve efficiency and remain competitive.

This shift formed the central theme of several recent AFRAA engagements, including the AFRAA–Cirium Workshop on Data-Led Insights into Fleet, Capacity and Future Growth and industry discussions with Amadeus on the practical applications of Agentic AI in aviation.

Together, these engagements point to a common conclusion: the future competitiveness of African airlines will increasingly depend on how effectively they use data and digital technologies to support better operational and commercial decisions. **AFRAA–Cirium Joint Workshop on African Aviation**

Rather than viewing Artificial Intelligence as a future concept, airlines are beginning to deploy it in practical ways across their operations.

According to an Amadeus report featured by AFRAA, AI can already support automated passenger rebooking, turnaround management, personalized offers, intelligent marketing, and customer service thus helping airlines improve efficiency while enhancing the passenger experience. **Amadeus report identifies opportunities for airlines with agentic AI**

Similarly, AFRAA's collaboration with Cirium highlighted the growing importance of market intelligence, predictive analytics, fleet optimization, and maintenance planning as airlines respond to changing market conditions and build more resilient business models.

AFRAA–Cirium Joint Workshop on African Aviation

What This Means for Members

- Build strong data foundations before scaling AI initiatives.
- Focus digital investments on operational efficiency and revenue generation.
- Strengthen collaboration to accelerate innovation across African aviation.

As AFRAA continues convening industry experts and technology partners, members can expect more opportunities to explore practical solutions that improve competitiveness and support sustainable growth.



What African Airlines Learned This Quarter

Instead of merely tracking event calendars, here are the strategic takeaways from AFRAA's recent technical workshops:

Data Trends Shaping Fleet & Capacity (AFRAA–Cirium Workshop)

- **Narrowbody Efficiency:** With regional jet fuel prices volatile, carriers are rebalancing networks around single-aisle fuel-efficient jets (e.g., Boeing 737 MAX series) to optimize frequencies on intra-African trade corridors.
- **Maintenance Intelligence:** Unplanned AOG (Aircraft on Ground) events cost African operators millions annually. Predictive data analytics and joint regional spare parts sharing can cut unscheduled maintenance downtime by over 20%.

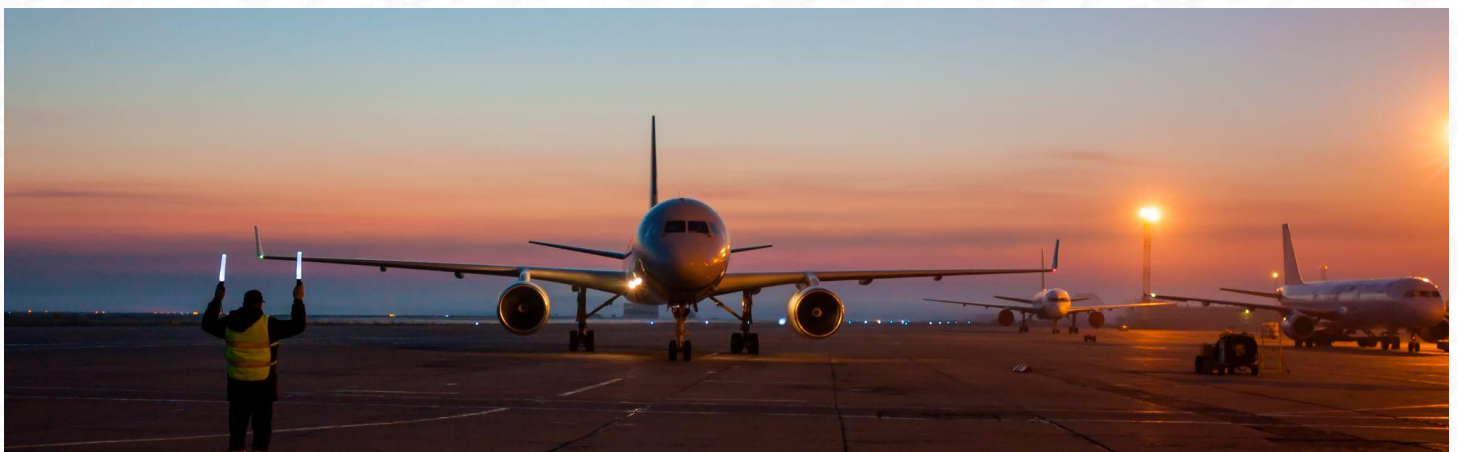
Navigating Geopolitical & Macroeconomic Risk (AFRAA–S&P Global Webinar)

- **Currency Volatility & Hedging:** Foreign exchange exposure and currency devaluations remain acute risks. Airlines are advised to explore multi-currency ticketing structures and local currency settlement mechanisms to safeguard liquidity.

Modern Airline Distribution (AFRAA–TPConnects Workshop)

- **From Legacy GDS to Offers & Orders:** Transitioning to NDC frameworks enables African carriers to bypass costly intermediary fees, regain control over product bundling, and offer seamless interline itineraries.

Access workshop summaries, presentation slides, and technical papers on the [**AFRAA Technical & Industry Affairs Hub**](#).



Highlights from Recent AFRAA Masterclasses

Masterclass 1: Loyalty as a Strategic Growth Lever for African Airlines by Lufthansa Consulting

Delegates explored how loyalty programmes, when designed as profit centres rather than cost centres, can become one of the most powerful tools in an African airlines commercial arsenal. The session covered B2C and B2B loyalty design, data-driven customer lifetime value strategies, and how Loyalty 2.0 innovations and ecosystem partnerships can anchor loyalty at the heart of airline strategy.

Masterclass 2: From Aircraft Selection to Profitable Operations: Prepare, Deliver, Certify, Stabilize, Optimize, Grow by Aviapro & Jetcraft Commercial

This masterclass guided delegates through the full aircraft lifecycle from network-aligned fleet selection and transaction structuring, through delivery, certification and entry into service, to long-term operational stabilization and performance optimization. Real-world transactions and emerging market case studies illustrated how African airlines can mitigate risk, accelerate revenue, and unlock sustained profitability.

Masterclass 3: Balancing Aircraft Height Keeping Performance and the Risk of Collision in RVSM Airspace by ATNS

This session raised awareness of RVSM compliance obligations and the consequences of noncompliance for airlines and air navigation service providers across AFI States. The session examined how to preserve the capacity and safety benefits of RVSM airspace, avoid FIR suspensions, and prepare for the expansion of RVSM operations as newer, high-altitude aircraft enter African fleets.



KAAO SkyConnect Leadership Dialogue: 5 Key Takeaways



Discussion Focus

Kenya's aviation landscape, the Finance Act 2026, aviation policy implementation, and strengthening Africa's aviation competitiveness.

Guest: Ms. Liz Aluvanze, CEO, Kenya Association of Air Operators (KAAO)

Key Message

"Collaboration, collaboration, collaboration." Liz Aluvanze emphasized that meaningful progress depends on governments, regulators, airlines, and industry associations working together.

Biggest Challenge

The Finance Act 2026 introduces new taxes on certain aircraft categories and aviation inputs, raising concerns about investment, aircraft registration, maintenance activity, and the overall cost of doing business in Kenya.

Core Recommendation

Accelerate implementation of Kenya's National Aviation Policy to ensure fiscal measures support, rather than undermine, aviation, tourism, and economic growth.

Actionable Insight

Industry advocacy is most effective when backed by robust economic data, measurable impact assessments, and coordinated engagement with policymakers before annual finance bills are enacted.

What Happens Next

KAAO, AFRAA, and IATA will continue engaging the National Treasury and other stakeholders to clarify implementation of the Finance Act and advocate for a more predictable, investment-friendly tax environment for aviation.

Watch the full video recording and transcript of this dialogue on the [**AFRAA SkyConnect Media Hub**](#).

ECOWAS/ ASKY SkyConnect Leadership Dialogue: 5 Key Takeaways

Guest: Mr. Chris Appiah, Director of Transport, ECOWAS Commission



Guest: Mr. Esayas Hailu, Chief Executive Officer, ASKY Airlines

Key Message

"Affordability, competitiveness, and regional alignment." Both leaders emphasized that unlocking the economic potential of West Africa requires transforming regional aviation into an affordable, seamless, and integrated market rather than treating it as a high-cost luxury service.

Biggest Challenge

Airlines in the sub-region continue to battle severe structural headwinds beyond fiscal policy, most notably elevated jet fuel costs, persistent hard currency illiquidity, and market fragmentation that restricts operational scale.

Core Recommendation

Pair tax relief initiatives with robust infrastructure reform. Governments must advance both hard infrastructure (terminals, runways, regional MRO facilities) and soft infrastructure (central bank currency clearing, standardized regulations, and visa-free passenger movement) to make SAATM fully functional.

Actionable Insight

The ECOWAS policy directive mandating a **25% reduction in regional aviation taxes and passenger charges (effective 1 January 2026)** serves as a vital benchmark for lowering travel costs and stimulating passenger demand across member states.

What Happens Next

ECOWAS will continue collaborating with regional Civil Aviation Authorities to roll out a harmonized regional safety oversight mechanism that enhances safety standards without replacing national regulatory bodies, while airlines leverage reduced tax structures to expand intra-regional frequencies.

Watch the full video recording and transcript of this dialogue on the [**AFRAA SkyConnect Media Hub**](#).

Driving Structural Reforms for African Skies

AFRAA's advocacy team continues to champion policies that remove operational friction for member carriers:



Tackling High Taxes (ECOWAS Directive): Following sustained advocacy by AFRAA, ECOWAS directed civil aviation authorities in West Africa to review passenger charges. Standardized lower tax and fee structures are being prepared for member state implementation.



Free Route Airspace (FRA) Expansion: Building on the success of West and Central Africa's FRA (which saves over **1,300 flight hours and 16,000 tonnes of CO₂** annually), technical work is underway with ANSPs to expand FRA corridors to East and Southern Africa.



Blocked Funds Progress: Continued engagement with central banks has yielded progress in releasing trapped airline revenues, notably in Nigeria, helping stabilize operator cash flows.



Accelerating SAATM: AFRAA is lobbying state regulators to convert political commitments into actual operational traffic rights under the Single African Air Transport Market.

Track advocacy progress, policy briefs, and regulatory updates on the [**AFRAA Advocacy & Policy Portal**](#).

Free Route Airspace (FRA)

From a 2019 Resolution to an Operational Reality Across Africa's Skies

A Free Route Airspace (FRA) allows airlines to plan a direct route between a defined entry and exit point, using published or unpublished waypoints, without being tied to the fixed Air Traffic Service (ATS) route network all while remaining under air traffic control. For African carriers, it is one of the clearest levers available for cutting flight time, fuel burn, and emissions.

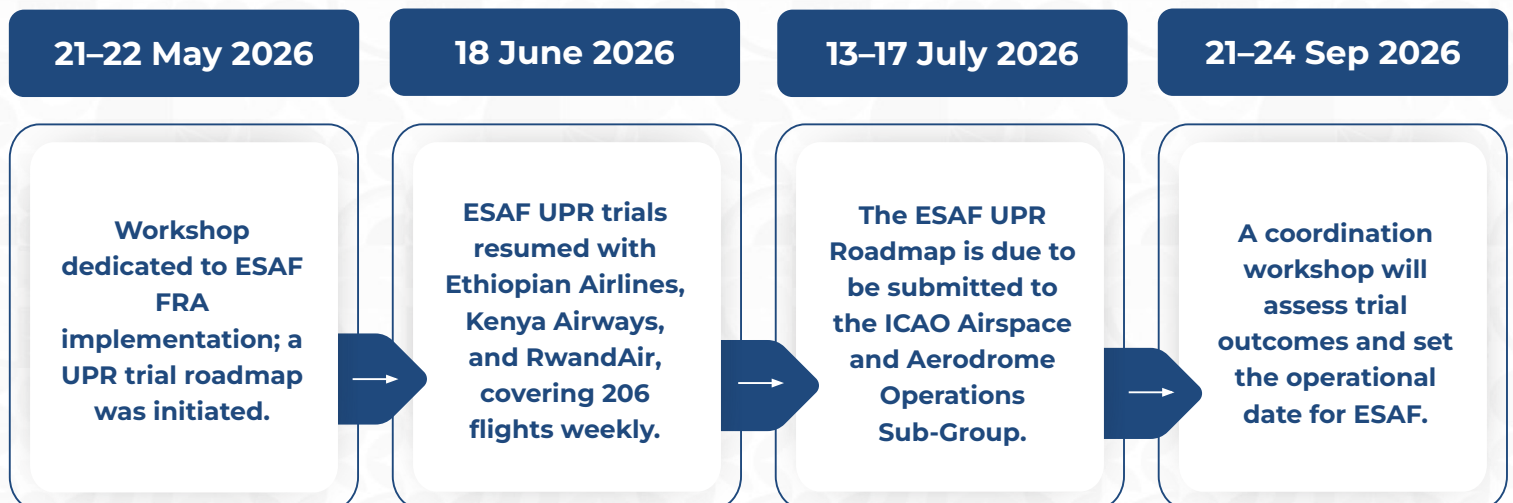
“Implementing the Free Route Airspace (FRA) will annually bring significant cost savings to airlines, shorter travel times to passengers, and less CO2 emissions into the environment. Through the sponsorship of AFREXIMBANK, the trials along User Preferred Routes, which started in November 2023, will continue to provide critical data to accelerate the FRA implementation in the entire African Airspace, improving air navigation efficiency.”

Mr. Abdérahmane Berthé, AFRAA Secretary General.

The Journey So Far

- 2019 – The Resolution:** The AFI Planning and Implementation Regional Group (APIRG) agreed in Accra, Ghana, to plan and implement FRA across Africa. Progress was slow, by Q1 2024, only 20 States had declared FRA airspace.
- 2022 – The Lab:** AFRAA's first African Aviation Sustainability Laboratory (Nairobi) selected the FRA trial as one of five priority projects and formed Task Group 3 to drive it.
- 2023 – First Trial Flights:** Following a CANSO/AFRAA/IATA/ICAO kick-off workshop sponsored by AFREXIMBANK, Ethiopian Airlines flight ET935 and Kenya Airways flight KQ 508 flew Africa's first free-routed flights on 2 November 2023.
- 2024 – Scaling the Trials:** Ethiopian Airlines and Kenya Airways ran 40 trial flights, avoiding 1,258 kg of fuel and 3,975 kg of CO₂ per day; a projected 459 tonnes of fuel, 1,450 tonnes of CO₂, and USD 856,290 saved annually on the retained city pairs.
- 2025 – FRA Goes Live in WACAF:** UPR trials concluded across West and Central Africa, with 37 routes approved for six airlines (Ethiopian, Kenya Airways, EgyptAir, Royal Air Maroc, RwandAir, Asky). FRA became operational across WACAF on 30 October 2025, delivering an annualized saving of over 1,390 flight hours, ~5,000 tonnes of fuel, and ~16,000 tonnes of CO₂ avoided.

Next Steps: Toward FRA Operationalization in Eastern and Southern Africa (EASAF)



Follow FRA rollout progress and technical updates on the [AFRAA Technical & Industry Affairs Hub](#).

Member Spotlight



United Nigeria Airline Joins AFRAA as Full Member, expanding AFRAA's presence in Nigeria. Headquartered in Enugu, the airline operates across 14 domestic destinations (including Lagos, Abuja, and Port Harcourt) and regional routes like Accra, with long-haul designations to the US, UK, UAE, and Canada.



Enugu Air has joined AFRAA as its 50th member. The airline, which has its headquarters in Enugu and operates from the Akanu Ibiam International Airport, currently serves nine domestic destinations including Enugu, Abuja, Lagos, Port Harcourt, Kano and Benin City.



Partner Spotlight

Partnering with AFRAA: Redesigned Partnership Programme Connecting Business to Africa's Aviation Opportunity

Africa's aviation industry continues to present significant opportunities for innovation, investment and collaboration. AFRAA's Partnership Programme is designed to help organisations connect meaningfully with this growing ecosystem. The redesigned 2026 programme goes beyond traditional affiliation, offering partners year-round opportunities to engage with African airline CEOs and decision-makers, participate in AFRAA conferences and industry platforms, share expertise, and build visibility across the continent's aviation community.

From structured airline meetings at the Annual General Assembly to thought-leadership opportunities, industry affairs platforms, data intelligence and digital visibility, the programme creates a practical bridge between industry expertise and commercial opportunity. We invite organisations with a business interest in African aviation to explore how partnership with AFRAA can support their objectives while contributing to the development of a stronger, more connected and sustainable African air transport industry. The [AFRAA Partnership Brochure 2026](#) provides a detailed overview of the programme, partnership categories and benefits, including the year-round Partner Brand Calendar and post-AGA Partner Outcomes Report designed to demonstrate the value and impact of engagement.

Our appreciation to our partners

AFRAA extends its sincere appreciation to all our partners for their continued trust, collaboration and commitment to African aviation. Your expertise, solutions and active engagement strengthen the work we do with African airlines and contribute to our shared vision of **better skies for Africa**. We look forward to deepening these partnerships and welcoming new organisations into the AFRAA network as we work together to unlock greater opportunities across the continent. Current partners: [Click Here](#)

New Partners



Global Airtech is an aviation asset specialist that has delivered component support solutions since 1989, spanning new-generation equipment supply, critical material support, exchange and loan programs, repair management, surplus inventory, consignment and base kit solutions, asset trading, and strategic partnerships.



Sonangol is Angola's state-owned oil and gas company. It manages the exploration, production, refining, and marketing of Angola's vast petroleum reserves. Beyond oil, Sonangol also invests in regional logistics, infrastructure, and alternative energy to power Southern Africa.

Aviation by the Numbers

Metric	Benchmark Figure	Strategic Impact
2026 Traffic Growth	+21.5%	Projected passenger volume growth for African carriers
Airport Charge Premium in Africa	15% Higher	Average African airport fees vs. global average
AFRAA Joint Fuel Volume	2.1 Billion Liters	Fuel volume collectively negotiated by 14 member carriers
Intercontinental Market Share	35%	Share of international African traffic carried by local operators
Departure Tax Burden in Africa	\$68 Average	Average tax per international ticket in Africa (vs \$30 global avg)
Africa Domestic Traffic	13.4M	Largest passenger market
Africa International Traffic	9.3M	Strong global connectivity
Intra-African Traffic	4.1M	Greatest growth opportunity

Explore more industry statistics and operational reports on the [**AFRAA Aviation Data & Statistics Center**](#).



Upcoming Webinar and Events

AFRAA – VISA Webinar: B2B Payments in Aviation | 24 September 2026 (Virtual)

Why Attend? Gain insights into modern B2B payment structures designed to increase liquidity and access to working capital for African carriers.

AFRAA-EnVisa, ICAO, & AFCAC Virtual Execution Workshop | 5 October 2026 (Virtual)

Why Attend? Learn actionable strategies for incorporating decarbonization pathways into long-term airline operational planning.

AFRAA – VISA Webinar: From Latent Demand to Launched Routes | 13 October 2026 (Virtual)

Why Attend? Utilize data analytics and payment intelligence to identify hidden route demand and successfully launch viable new corridors.

AFRAA – Hitit Workshop: Modern Airline Retailing | 19 October 2026 (Virtual)

Why Attend? Explore how to harness the commercial benefits of IATA's Offers & Orders framework to transform airline distribution.

AFRAA – Hitit Workshop: Unlocking Digital Payment Growth | 22 October 2026 (Virtual)

Why Attend? Discover how payment orchestration can optimize direct digital distribution, lower transaction friction, and boost airline revenue.

58th AFRAA Annual General Assembly & Summit | 29 Nov – 1 Dec 2026 | Libreville, Gabon

Why Attend? The flagship gathering of African aviation leadership, hosted alongside Fly Gabon, focusing on resilience, integration, and market expansion.

View full event agendas and register your delegates on the [**AFRAA Upcoming Events Calendar**](#).

Catch up on key reports, webinar recordings, and press releases from recent weeks:

- **Webinar Replay:** [Data-Led Insights into Fleet, Capacity and Future Growth \(AFRAA-Cirium Joint Workshop\)](#)
- **Press Release:** [Aviation Industry Urges African Governments to Align API and PNR Programs with Global Standards](#)
- **Press Release:** [AFRAA Welcomes United Nigeria Airlines as Full Member](#)
- **Strategic Guidance:** [AFRAA Strategic Priorities & Five-Pillar Framework](#)
- **Event Announcement:** [Updated Dates & Details for the 58th AFRAA AGA & Summit in Gabon](#)
- [AFRAA – En-visa Net Zero Roadmap Workshop | August 2026 \(Virtual\)](#)
- [AFRAA SkyConnect Leadership Dialogue: Safe Skies During Public Health Emergencies | 19 Aug 2026 \(Virtual\)](#)
- [AFRAA – VISA Webinar: Generative and Agentic AI in Aviation | 27 August 2026 \(Virtual\)](#)



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