



AFRAA Covid-19 Impact Assessment

Release date : 13 July 2020

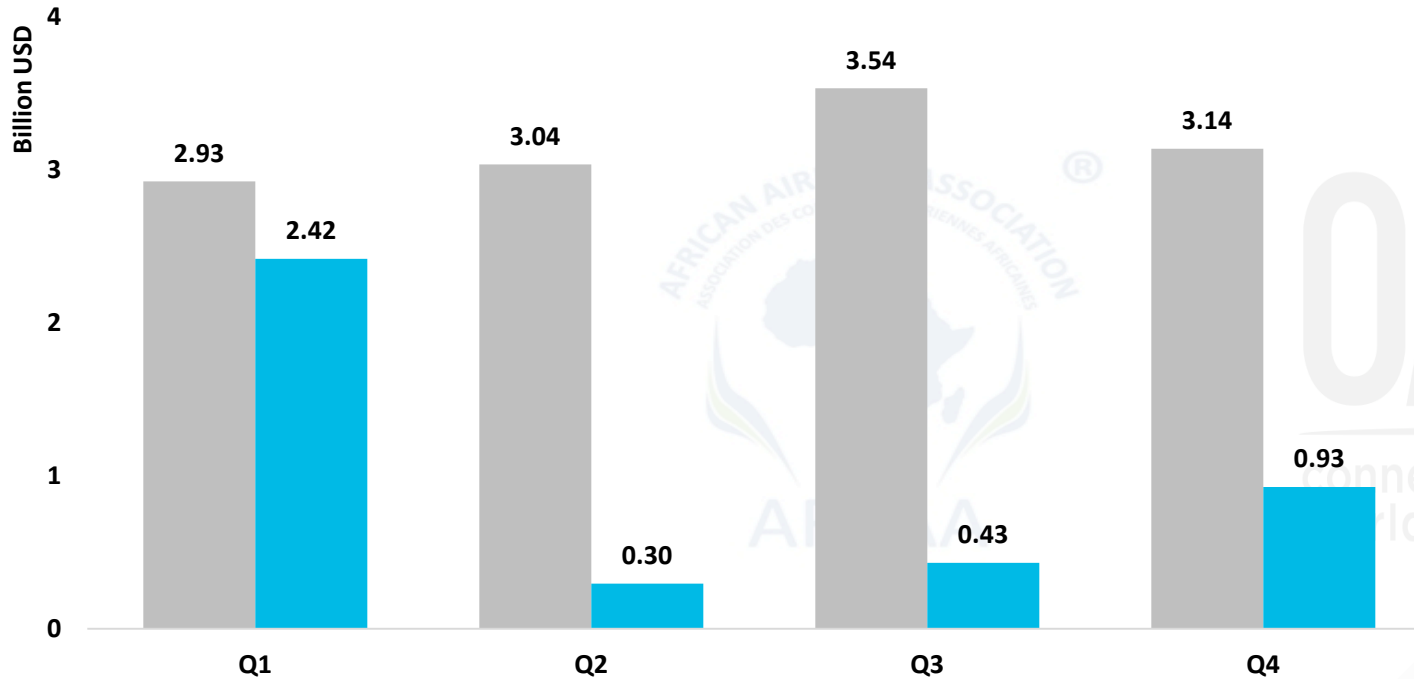
Better Skies for Africa

2020 Revenue loss estimate for African airlines spikes to US\$8.56bn

Recovery expected to start mid Q3 2020

Passenger Revenue decrease

■ 2019 ■ 2020



- Estimated Revenue loss for 2020 : **USD 8.560 billion (14 June assessment)**

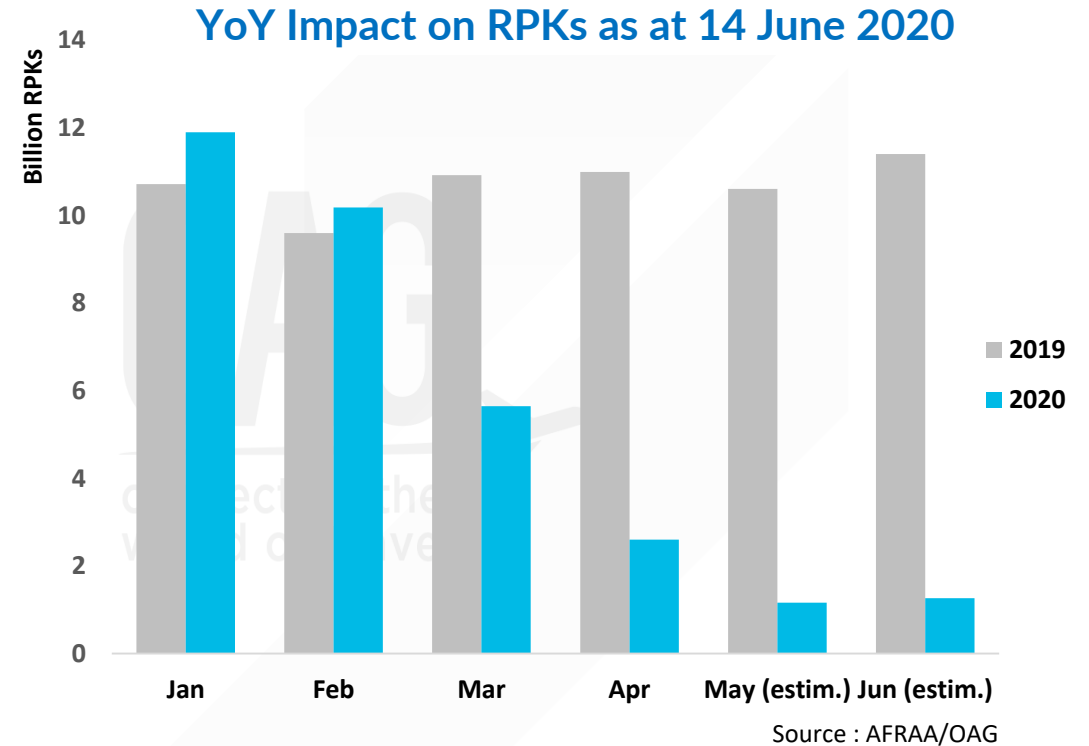
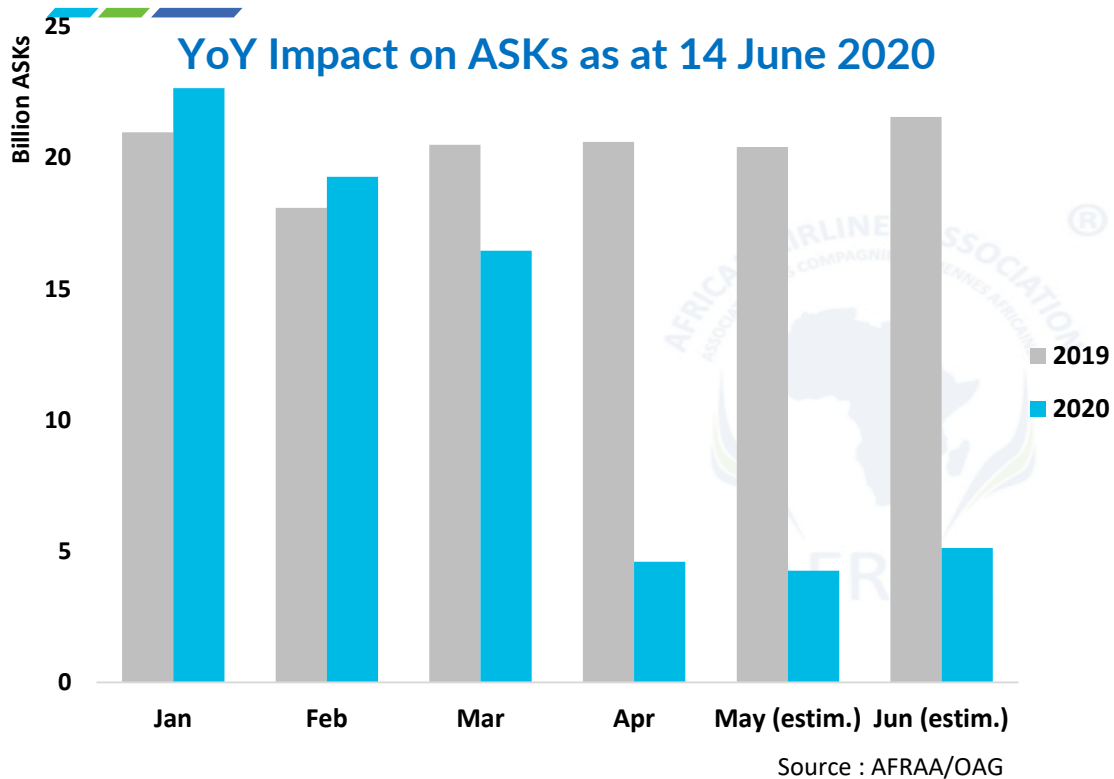
Assumptions :

- 30% traffic recovery on Q3 2020
- 65% traffic recovery on Q4 2020

Source : AFRAA/OAG

- Passenger revenue drop of **USD 0.506 billion** for Q1 2020, that is 17.3% YoY
- Higher-impact in Q2 2020: **USD 2.740 billion**, 90.2% YoY drop
- Recovery is expected to start from Mid Q3

Sharp YoY Traffic Drop for African Airlines in June 2020

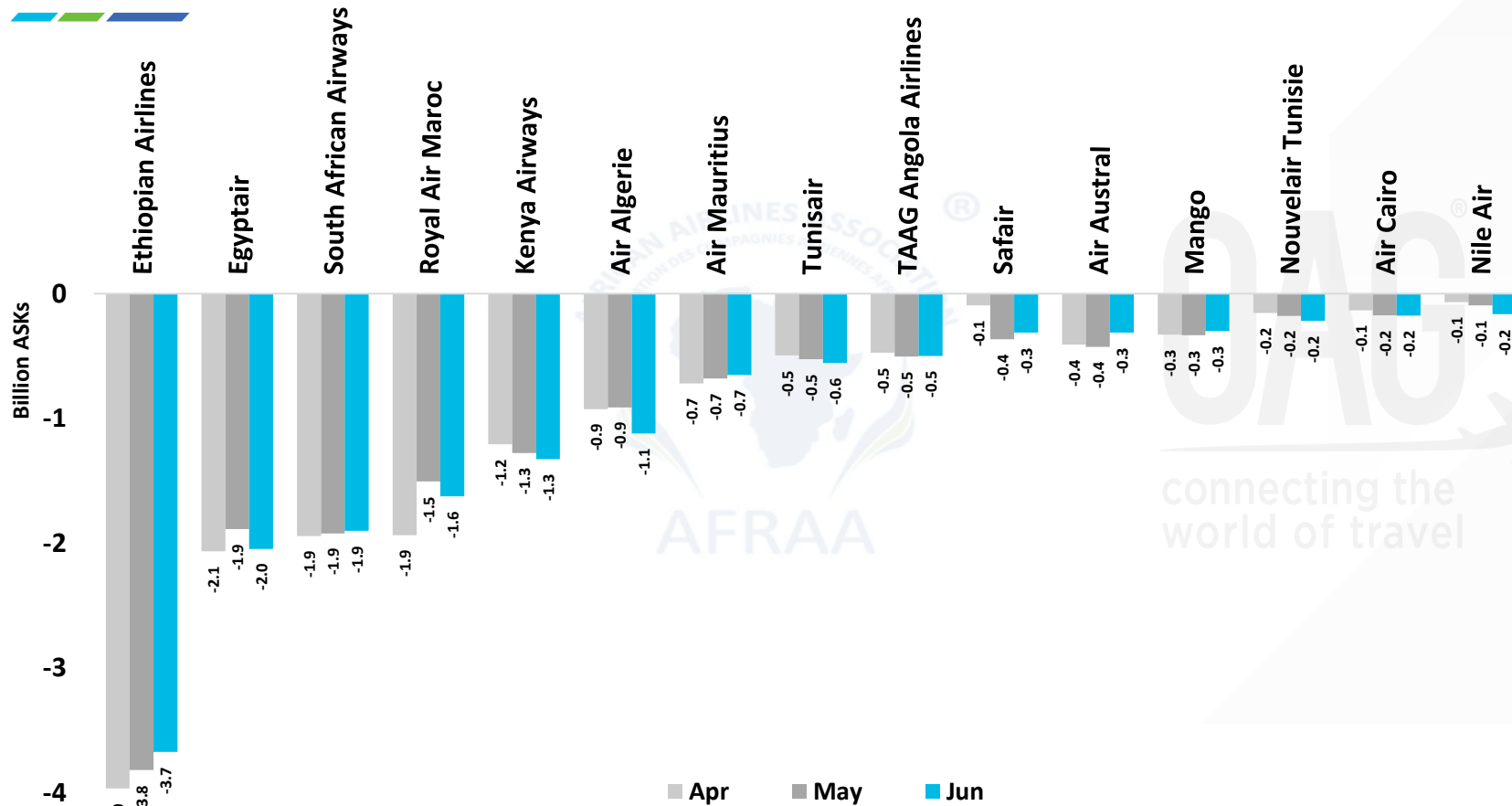


- Minor impact in January and February.
- YoY Capacity reduction by 19.7% in March, by 77.7% in April, by 79.2% in May and by 76.2 in June

- YoY Traffic reduced by 48.3% in March, by 76.3% in April, by 89% in May and by 88.9% in June

Sharp YoY Capacity Drop for African Airlines in June 2020

YoY total ASK drop in April May and June 2020 for top 15 African Airlines



- Capacity dropped by 16.436 billion ASKs in June, that is 76.24% of reduction YoY

Cargo capacity drop of 39.4% YoY in May 2020

According to TIACA, Covid-19 crisis has affected cargo capacity :

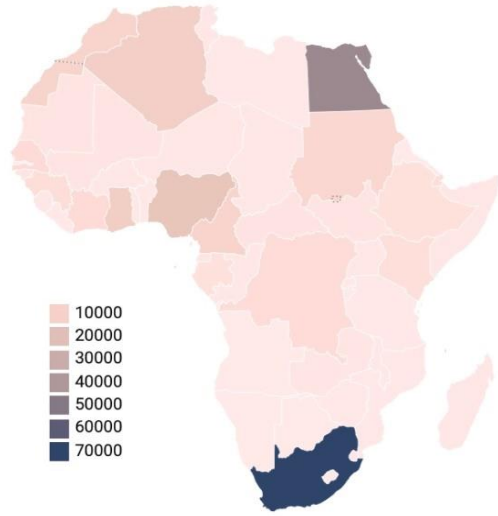
- Global air cargo capacity is down by 35 per cent
- Only 20 per cent of belly cargo is still flying
- Freighters capacity has been stable for the last four weeks.

In Africa, a rise on demand derived from the COVID-19 crisis led to an improvement of Cargo load factors by 21.10% YoY in May 2020 (IATA)

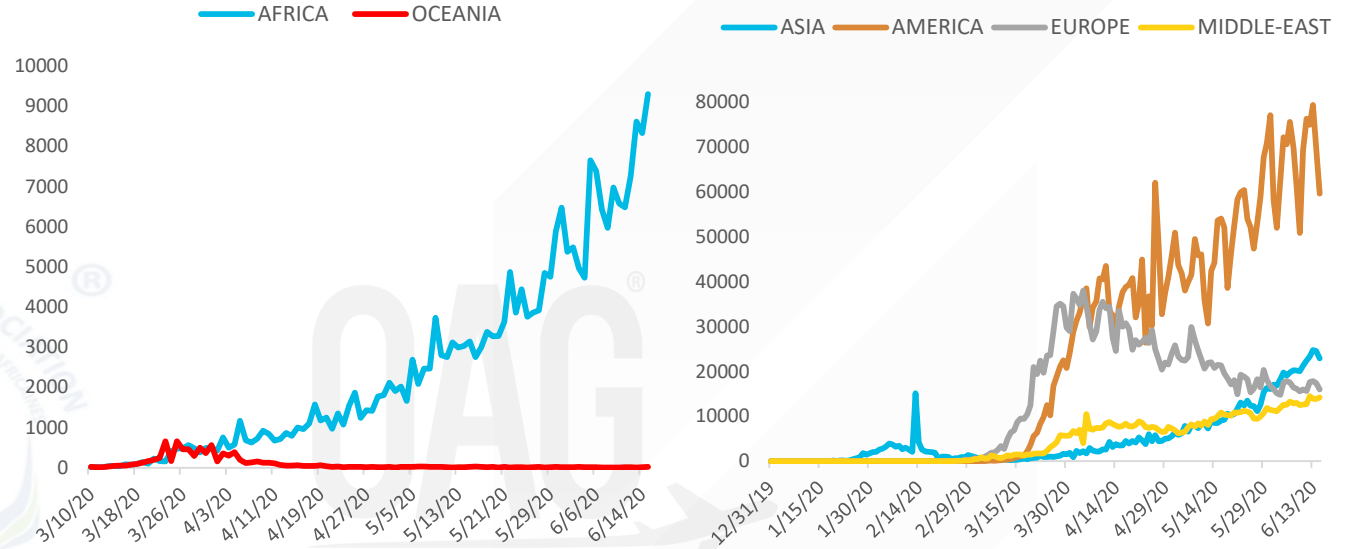
Infection Rates in Africa on the Rise



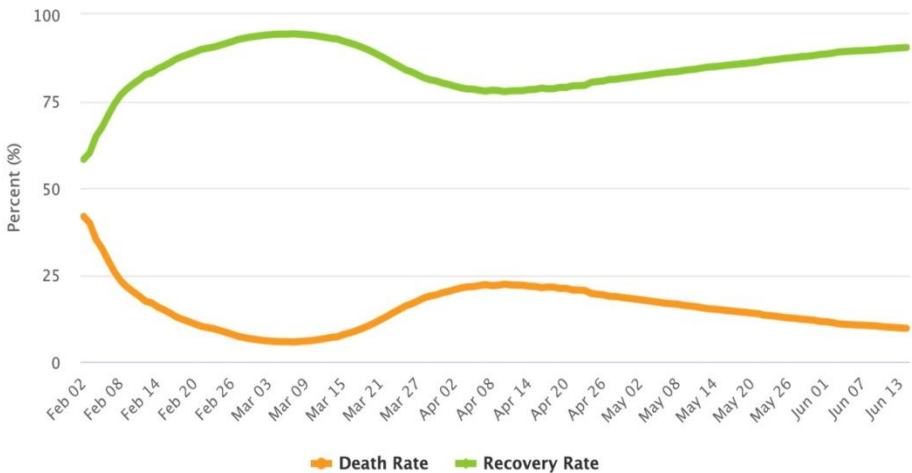
Infections cases as at 14 June 2020



Evolution of infections cases per region as at 14 June 2020



Global Death vs recovery rate Feb – June 2020



- The number of cases rose from 72700 on May 14th to 243400 on June 14th, that is more than triple.
- The most impacted African countries as at 14 June are South Africa, Egypt, Nigeria, Ghana and Algeria with more than 10000 cases registered, followed by Cameroon, Morocco, Sudan, Senegal and Côte d'Ivoire, all above 5000 cases. South Africa Stands at 70000 cases
- The recovery rate is improving, from 84.86% on May, 14th to 90.36% on 14th June, globally. In Africa the recovery rate is around 95%



For a seamless and effective restart from mid-Q3 2020, we must move to implementation of ICAO CART guidelines for Air Travel

ICAO and its industry partners have provided a harmonized set of recommendations and measures to be applied for the resumption of air transport from the Covid-19 pandemic.

Generally applicable risk mitigation measures



Public Information



Face Covering & Mask



Health Screening



Health Declarations



Physical Distancing



Routine Sanitization



Contact Tracing



Testing

NB on Physical Distancing:

Where this distancing is not feasible (for example in aircraft cabins), adequate risk-based measures should be used.

Specific measures for operators

Passenger and Crew – General

Adjust the boarding process, Seat assignment processes, Limit interaction on board, Limit or suspend food and beverage service, Restrict lavatory access, Crew protection measures, Sick Passenger Positioning.

Aircraft Disinfection

The cabin should be cleaned and disinfected at an appropriate frequency. The cargo compartment touch surfaces should be cleaned and disinfected at an appropriate frequency. Regular maintenance to both air systems and water systems to ensure they continue to protect the passenger and crew from viruses.

Crew Members

Crew members should: - Monitor themselves for fever, cough, shortness of breath, or other symptoms of COVID-19. - Take their temperature at least twice per day during duty periods and at any time they feel unwell. - Stay at home or in their hotel room, notify their employers' occupational health program, and not report for work if they develop a fever, shortness of breath, or other symptoms of COVID-19. - Stop working as soon as practical, if they develop symptoms during flight, put on a surgical mask, notify the pilot in charge, and maintain the recommended physical distance from others. Upon landing, individuals should follow up with airline medical and public health officials.

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