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African Airlines' performance updates by AFRAA – August 2023

Airline Performance: In August 2023, traffic carried by African airlines reached 98.4% of the 2019 level. Domestic market share was estimated at 34%, intra-Africa at 29%, and intercontinental at 37%.

The total number of intercontinental routes operated by African airlines exceeded pre-COVID levels since October 2022. In some major airports (Johannesburg, Nairobi, Addis Ababa, Lusaka, Cairo, Casablanca, Abidjan, and Lomé) intra-Africa connectivity has reached or exceeded pre-Covid level since December 2022.

2023 is witnessing a narrowing of the airline revenue gap attributed to Covid-19 compared to 2022. In the first 3 months of the year, African airlines missed the levels attained in a similar period in 2019 by US\$0.3 billion. This is expected to further narrow in the second quarter to US\$0.2 billion, according to AFRAA data. Though full-year estimated revenue gap is yet to be computed, it appears 2023 would be a better year compared to the prior year. The 2022 full-year cumulative airlines revenue gap was US\$3.5 billion for all African airlines compared to 2019.

The Jet A1 price continues the upward trend, going up by over \$22 in one month. The global weekly average jet fuel price during the week ending 25 August 2023 was up 2.9% at \$126.37/bbl. In July, the average weekly price was \$103.64/bbl.

Blocked Funds

The industry's blocked funds reduced marginally in July to \$2.200 billion compared to \$2.274 billion in June. Some 22 countries account for the blocked funds globally. 14 of the blocked funds countries are in Africa, accounting for about 70% of total blocked funds. AFRAA has requested meetings with some central bank Governors and will soon meet them to agree on a solution to this recurrent problem as part of engagements to have the funds released.

Regulatory/Industry Affairs

Canada's Air Passenger Protection Regulations Update: Canada passed amendments to strengthen Air Passenger Protection Regulations, with the Canadian Transportation Agency (CTA) proposing changes for more stringent passenger compensation and complaints resolution processes. AFRAA urges airlines operating in Canada to familiarize themselves with the details of the passenger protection regulations to avoid failing victims.

Amendment 29 to ICAO Annex 9 on travel facilitation: The amendments to ICAO Annex 9 became necessary following the disruption to the aviation business during the Covid period. To avoid a repeat of the facilitation lapses that occurred at the time, Amendment 29 sought to introduce new guidelines on passenger name record (PNR)

handling and health protocols while reinforcing the requirements for handling passengers, especially those with reduced mobility, hearing and visual disabilities.

The new public health standards updated requirements relating to aircraft and facility disinsection and disinfection. Details are available here: [WHO disinfection Procedures](#). On facilitation, the New Standards for transport of persons with disabilities outlines special assistance to persons with reduced mobility, hearing- and vision-impairment to enable them obtain flight service-related information in accessible formats. The amendment also required that designated pick-up, drop-off points for PWDs and access routes be clear with no obstacles and adequate provision of parking facilities for PWD closer to the terminal building.

Other amendments include:

- Advance notice of assistance required for persons with reduced mobility.
- Ensure that airport facilities and services are adapted to the needs of PWDs.
- Establish measures to ensure that procedures are in place to combat trafficking in persons.

About AFRAA

The African Airlines Association, also known by its acronym AFRAA, is a trade association of airlines from the member states of the African Union (AU). Founded in Accra, Ghana, in April 1968, and headquartered in Nairobi, Kenya, AFRAA's mission is to promote, serve African Airlines and champion Africa's aviation industry. The Association envisions a sustainable, interconnected and affordable Air Transport industry in Africa where African Airlines become key players and drivers to African economic development. AFRAA membership of 51 airlines cuts across the entire continent and includes all the major intercontinental African operators. The Association members represent over 85% of total international traffic carried by African airlines. Follow us on [Facebook](#), [LinkedIn](#), [Twitter](#) and [YouTube](#).