



# ANNUAL REPORT OF THE SECRETARY GENERAL



## WHERE ARE WE COMING FROM? 2022

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Where are we  
coming from? 2022

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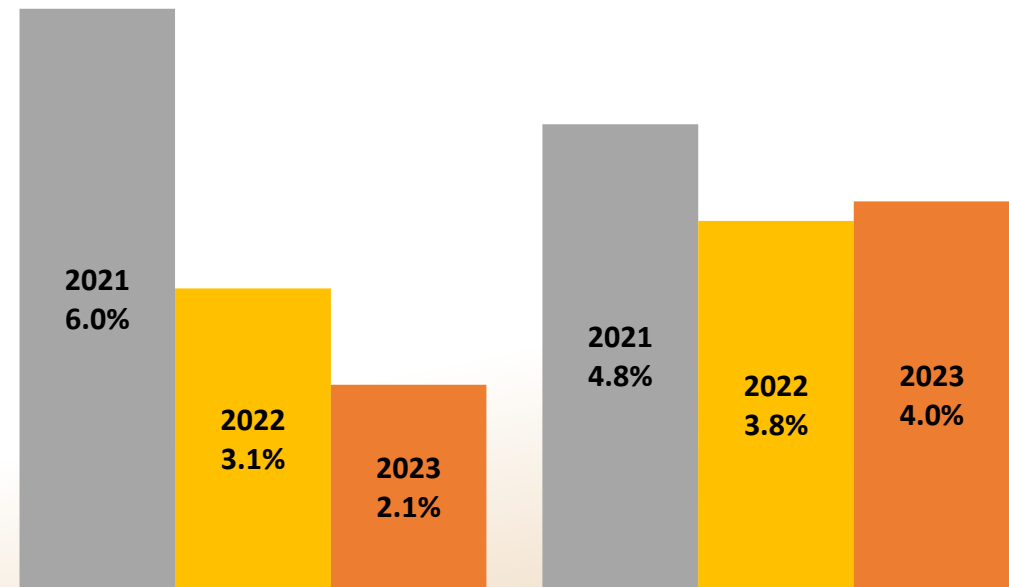
AFRAA Priorities



# Where are we coming from? 2022

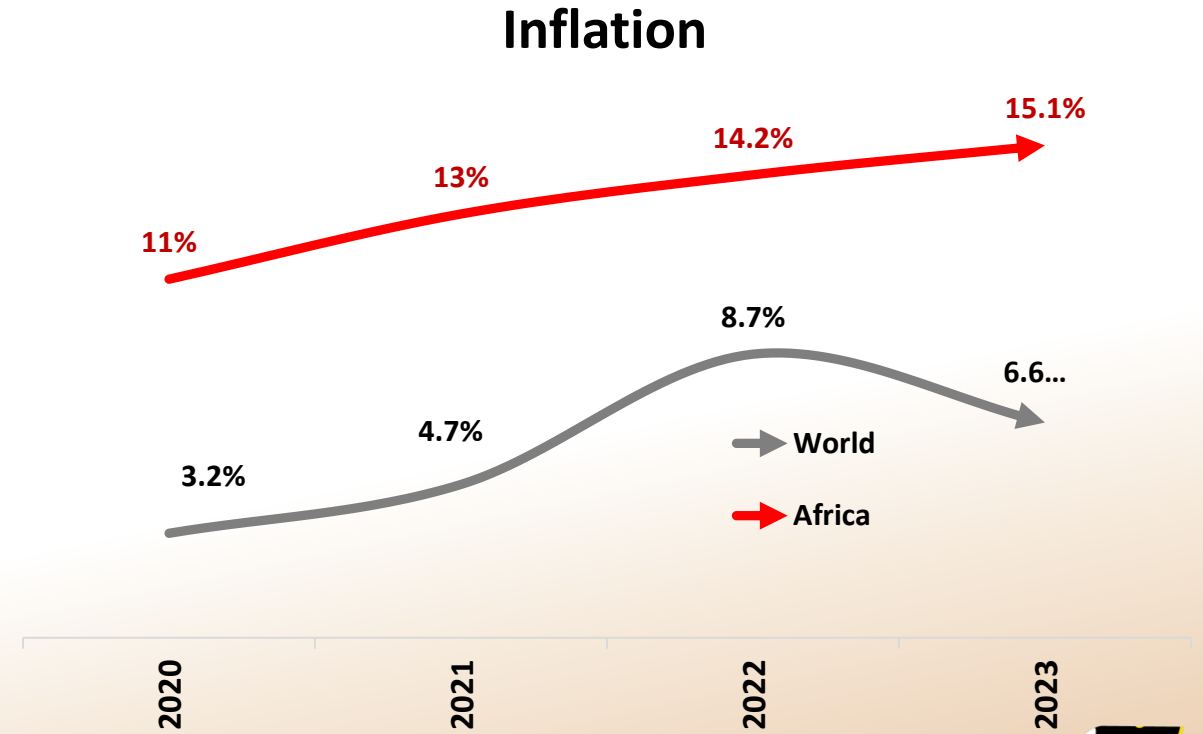


## GDP Growth World vs Africa



Source: WorldBank

**Global GDP Growth 2022 : 3.1%**  
**Africa GDP Growth 2022 : 3.8%**



Source: IMF

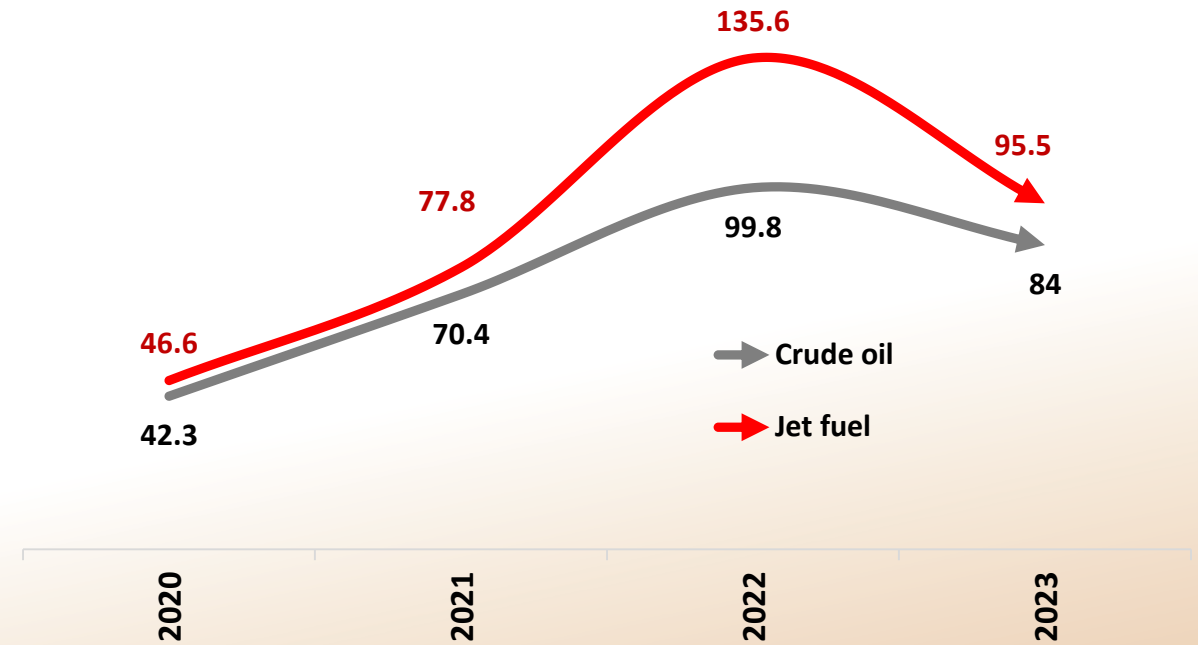
**Global Inflation rate 2022 : 8.7%**  
**Africa Inflation rate 2022 : 14.2%**







## Oil prices (USD per Barrel)



Source: IATA

**Average crude oil price 2022 : USD 135.6**

**Average Jet fuel price 2022 : USD 99.8**

# International Tourists Arrivals



- ✓ **WORLDWIDE : 960 Million tourists in 2022**
- ✓ **AFRICA : 46,6 Million tourists in 2022  
(35.2% drop compared to 2019)**

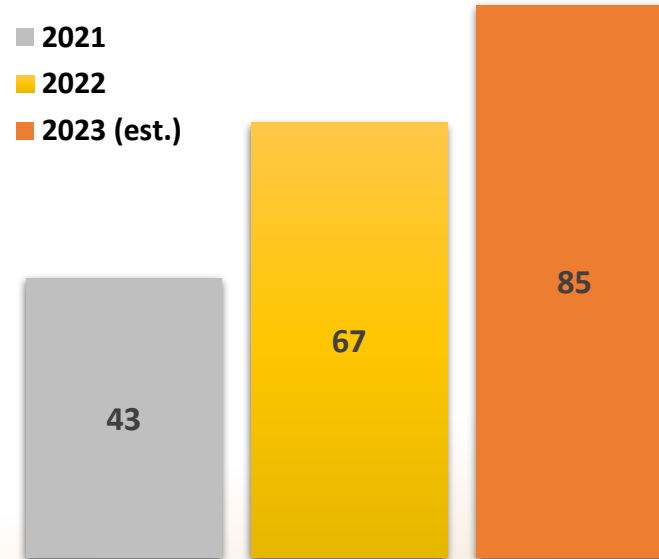
Source: UNWTO



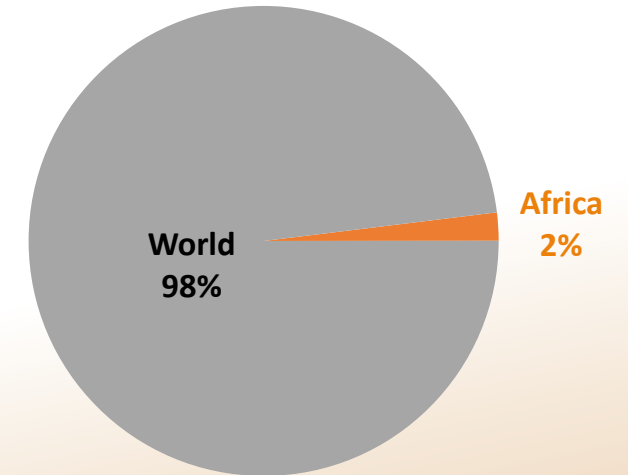
# African Airlines' traffic performance



## Passenger number (million)



## Contribution to global traffic



Source: AFRAA / IATA

**African Airlines Passengers 2022 : 67 million**  
**Contribution to the global traffic : 2%**

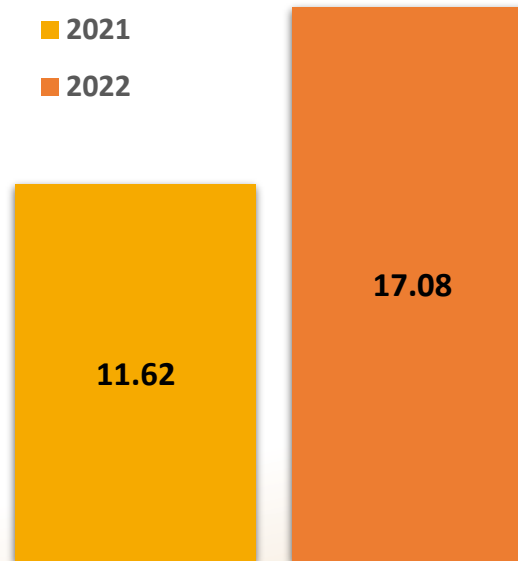




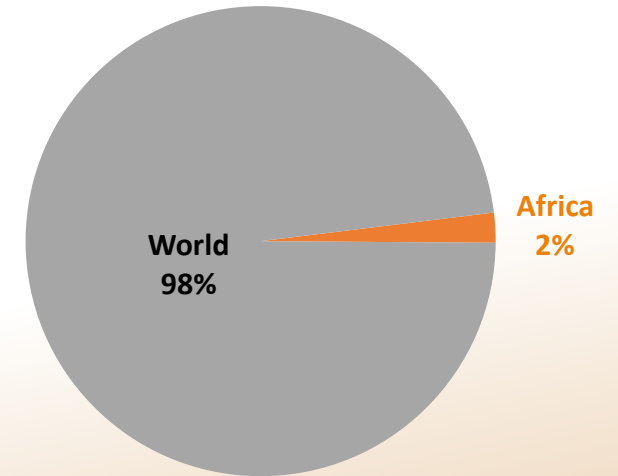
# African Airlines' freight performance



## Cargo Traffic (Million CTKs)



## Contribution to global freight

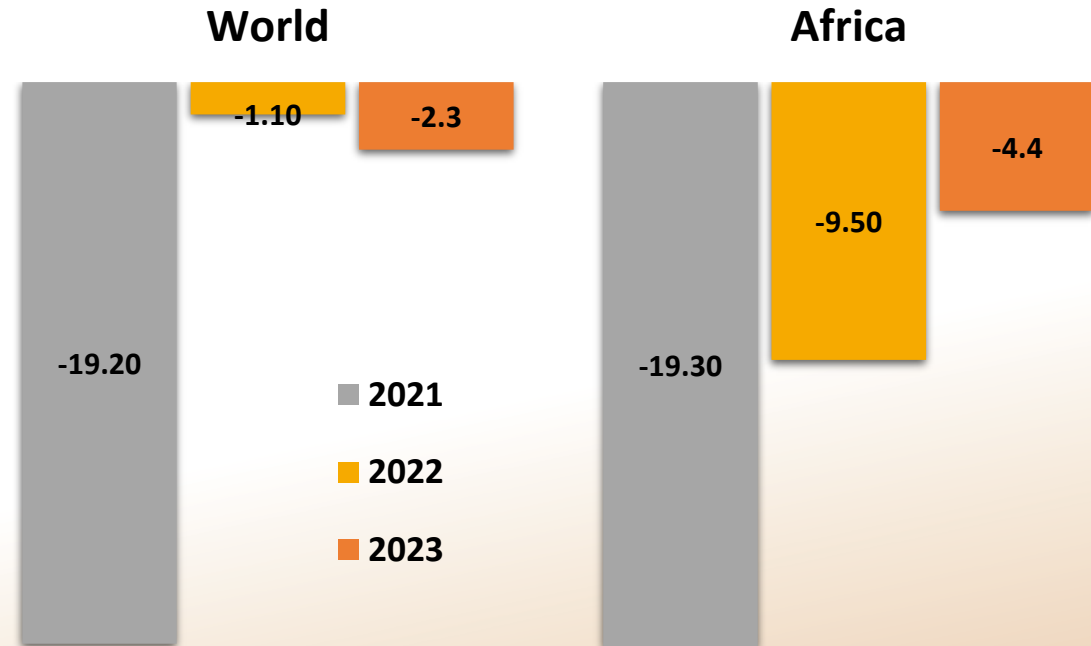


Source: IATA

African Airlines CTKs 2022 : 17.08 million

# African Airlines' financial performance

## Airline profits per passenger by region (USD)



Source: IATA

**Net profit per passenger Africa 2022: USD -9.5**

# AFRAA CONTRIBUTES TO IMPROVING SAFETY

## In the SAATM institutional framework

- AfDB provided a grant to AFCAC.
- AFRAA, in collaboration with IATA, contributed to preparing African airlines in SAATM States for IOSA or ISSA
  - 12 ISSA and 4 IOSA initial candidates
  - 10 ISSA and 4 IOSA respective candidates currently. Negotiations to replace two missing ISSA with one IOSA
  - At this stage, preparation was completed for 4 IOSA and 7 ISSA candidates, and two airlines made it to IOSA.

## Outside the SAATM institutional framework

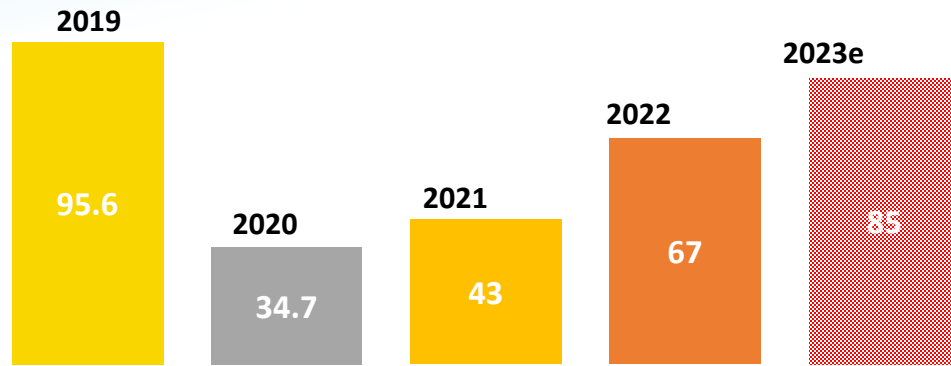
- One AFRAA member airline is being prepared for IOSA.

# State of the industry 2023

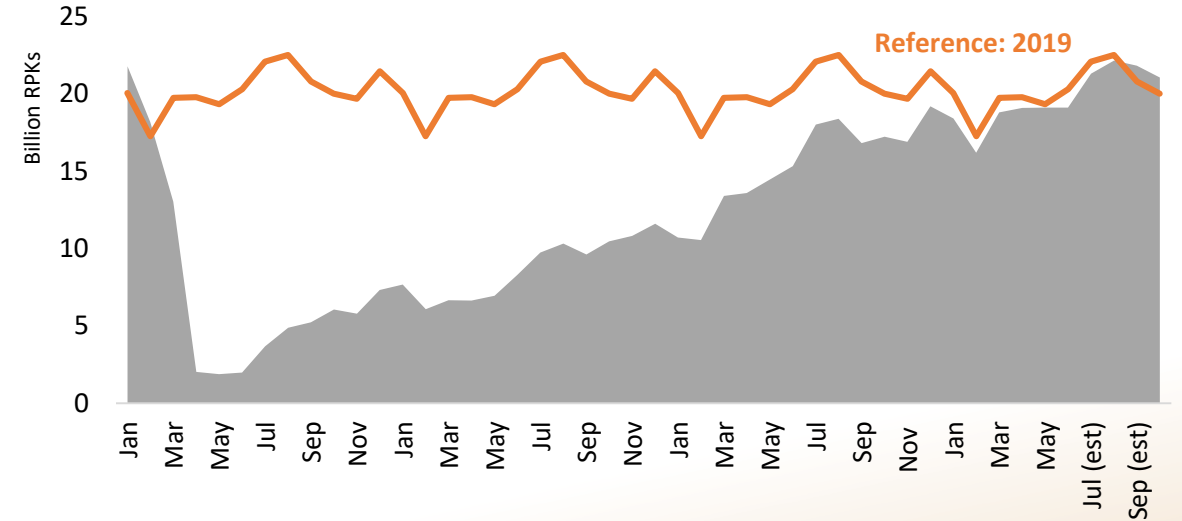


# State of the industry 2023 – Passengers

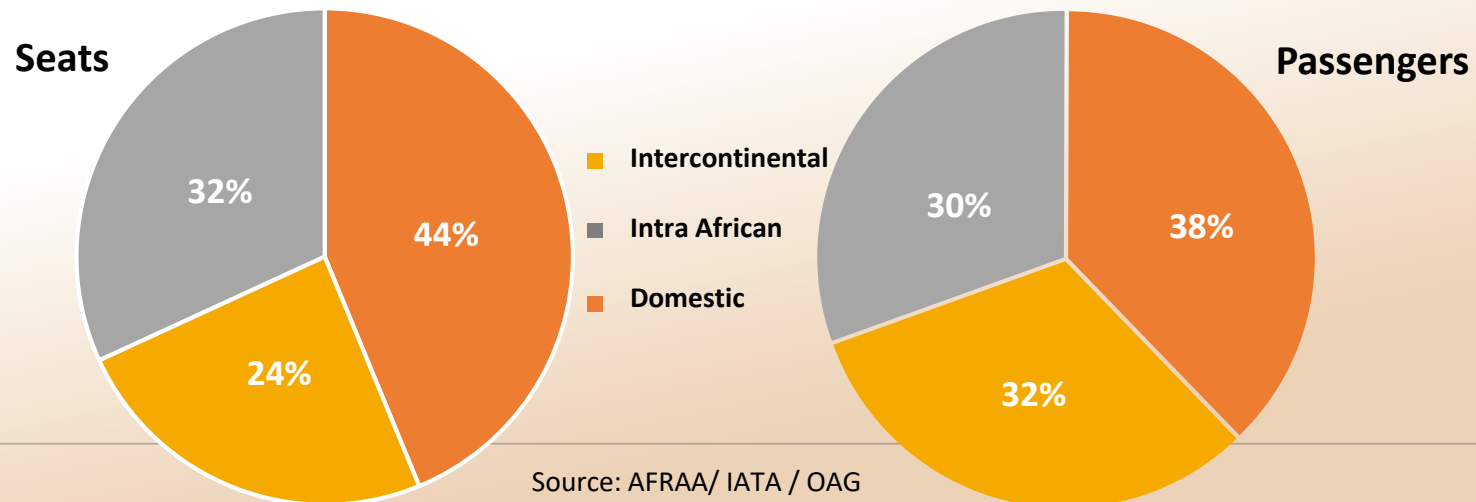
African Airlines Passengers carried (million)



African Airlines' RPKs Evolution



Seats and Passengers distribution



Source: AFRAA/ IATA / OAG



# State of the industry 2023 - Passengers

## Northern Africa

- 39.5% of the total African traffic
- 57 % of the traffic directed to Europe



## Eastern Africa

- 19.3% of the total African traffic
- 41 % of Intra-African traffic

## Central and Western Africa

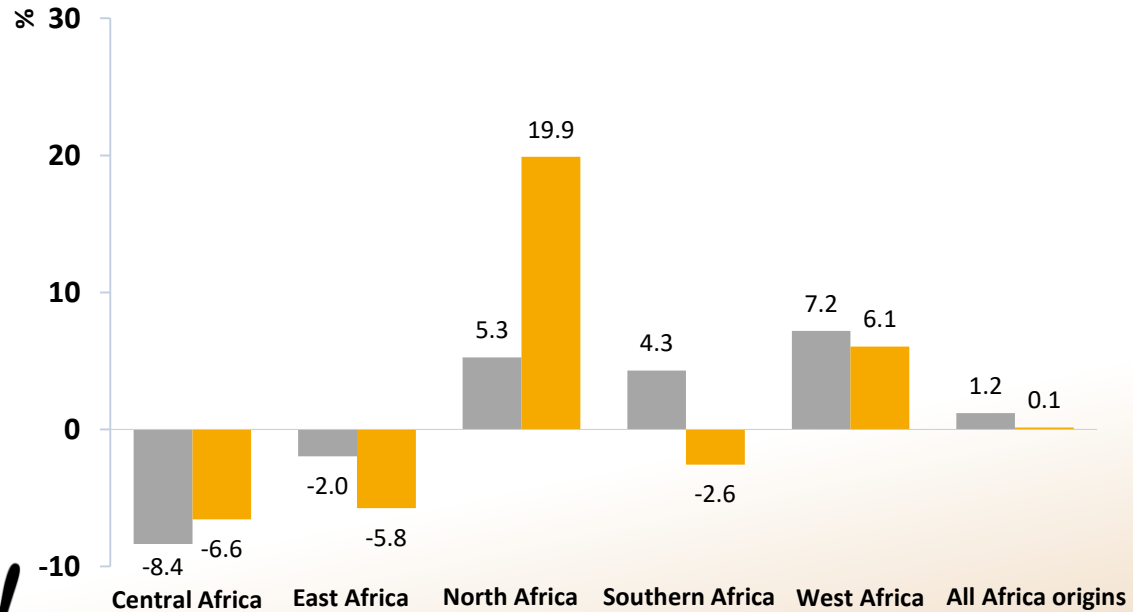
- 21.7% of the total African traffic
- 42 % of Intra-African traffic

## Southern Africa

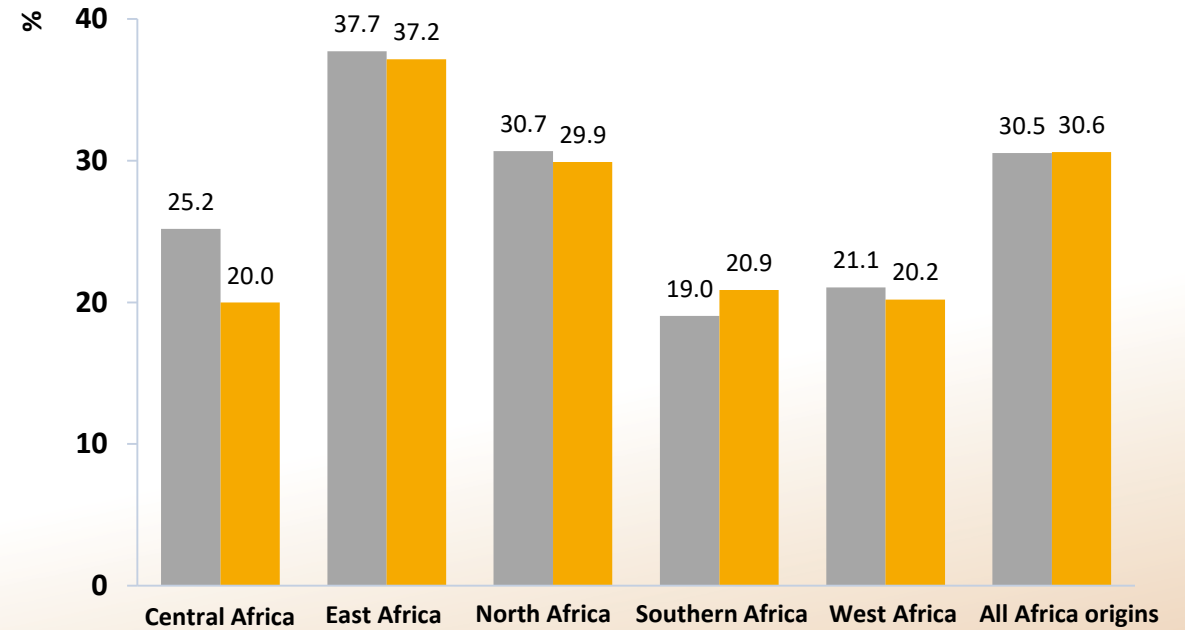
- 19.4% of the total African traffic
- 50 % of the traffic is within the region

# State of the industry 2023 – Cargo

Year-on-year cargo traffic growth per origin (%)



Market shares of African Airlines per cargo origin subregions (%)

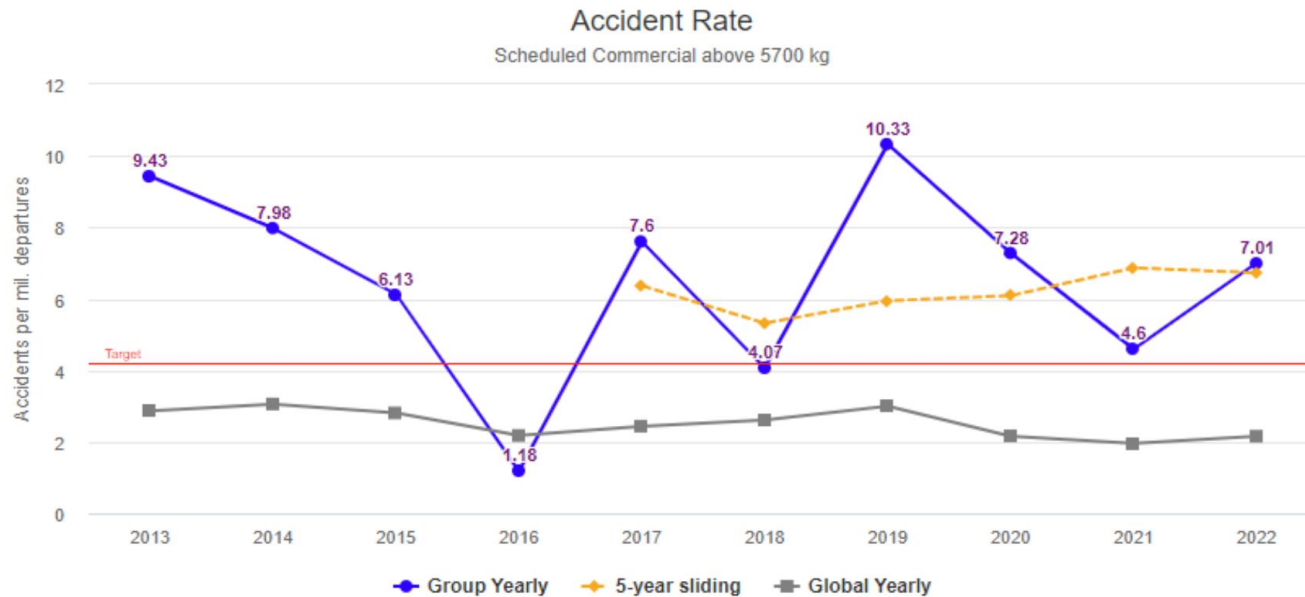


Source: World ACD Market Data

# AFRAA Initiatives 2023 and beyond – Priorities for 2024



## RASG-AFI Monitors AFI Safety Performance from Abuja Safety Targets (2015)



Source: ICAO iSTARS

The downtrend from 2013, and a better result than the world in 2016

The five-year sliding average records an uptrend of safety; fluctuating annual results above the world average.

Stakeholders must work together to reverse the trend.



## Africa Safety and Operation Summit 2024

As AFRAA, one of our priorities is to ensure Africa's highest aviation safety standards.

As airline operations increase across the continent, it is more crucial than ever that we address the unique safety challenges and opportunities presented to us.

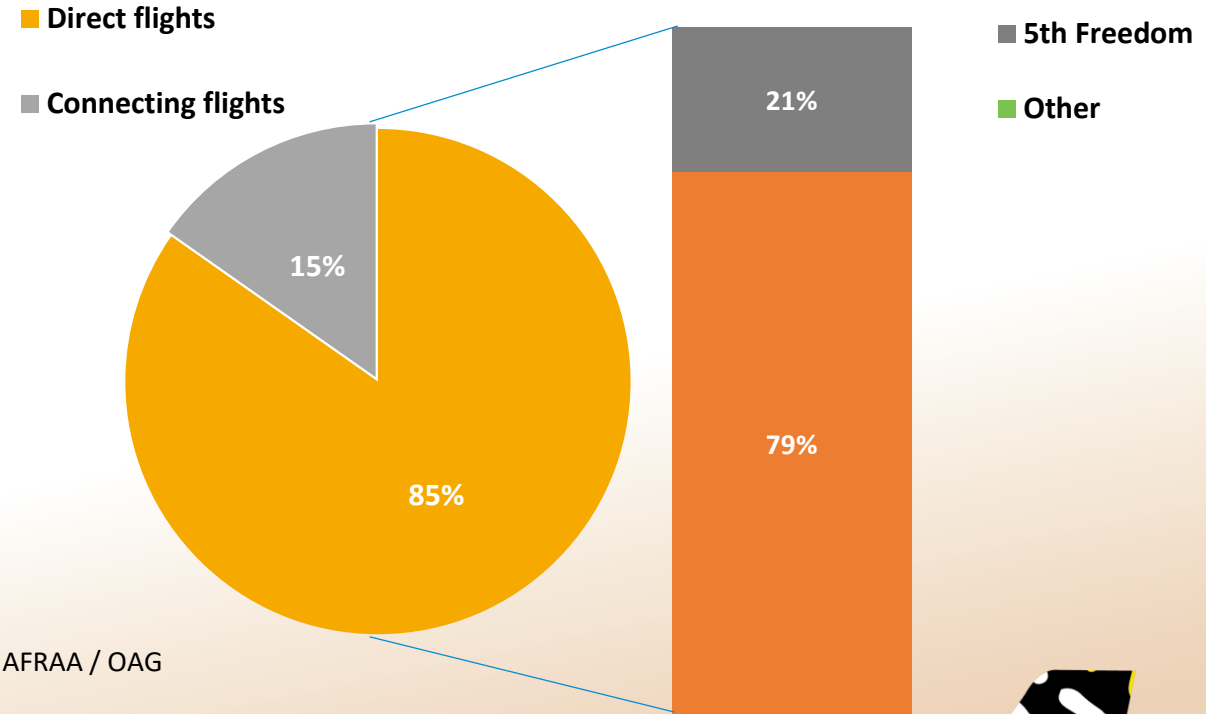
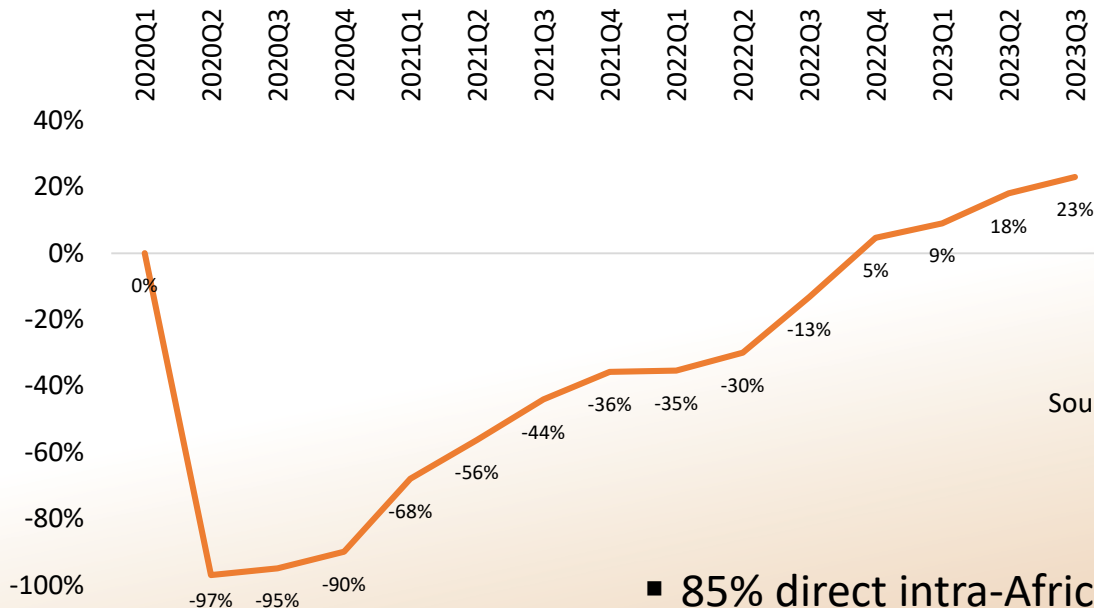
With this in mind, we are excited to announce that AFRAA and Flight Safety Foundation have partnered to organize a landmark Aviation Safety Summit in Addis Ababa, Ethiopia in conjunction with the AFRAA Annual Convention in May of 2024. This summit seeks to bring together the stakeholders in the industry to discuss, strategize, and collaborate on shaping a safer future for African aviation.





## Direct flight and 5<sup>th</sup> Freedom flights

### Evolution of Intra-African connectivity post Covid



Source: AFRAA / OAG

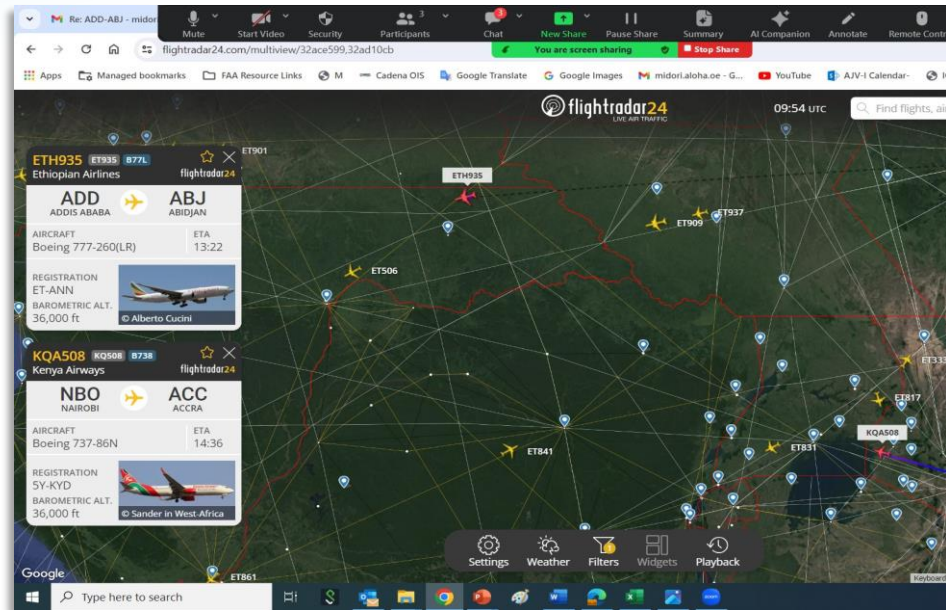
- 85% direct intra-African flights vs 15% connecting.
- Among those direct flights, 5th freedom represent only 21%

## AFRAA Priorities 2024 – 2 – Routes Development

In order to contribute to the improvement of Intra-African connectivity, AFRAA, ACI Africa and AFCAC plan to join effort to:

- Bring together airlines, airports and aviation stakeholders from across the African continent to engage to build air services within Africa and economic growth.
- Enhance intra-Africa connectivity and affordability of air travel in Africa.





**The Air Transport Sustainability LAB Roadmap implementation**

**The Free Routing Airspace (FRA) trials**

**Advocacy for Blocked Funds**

**Advocacy Taxes and Charges**

**Environmental sustainability**

**Youth and Gender diversity in aviation**



## Five (5) Strategic Objectives:

1. Safe, secure, and reliable air transport:
2. Enhance the visibility, reputation, and influence of African Airlines in the global aviation industry.
3. Sustainable air transport:
4. Cooperation:
5. Data Intelligence



## CONCLUSION

- **COOPERATION**
- **COLLABORATION**
- **JOINT INITIATIVES**

**"Better Skies for Africa"**







**Thank You!**

