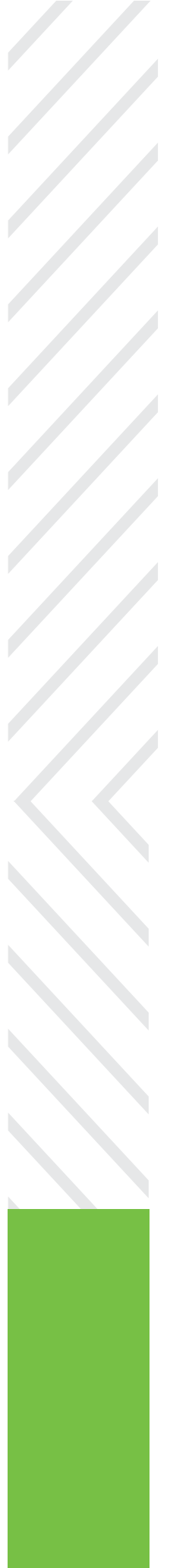




AFRAA AIR TRANSPORT REPORT

QUARTER 4 - 2024



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Global Airline industry performance

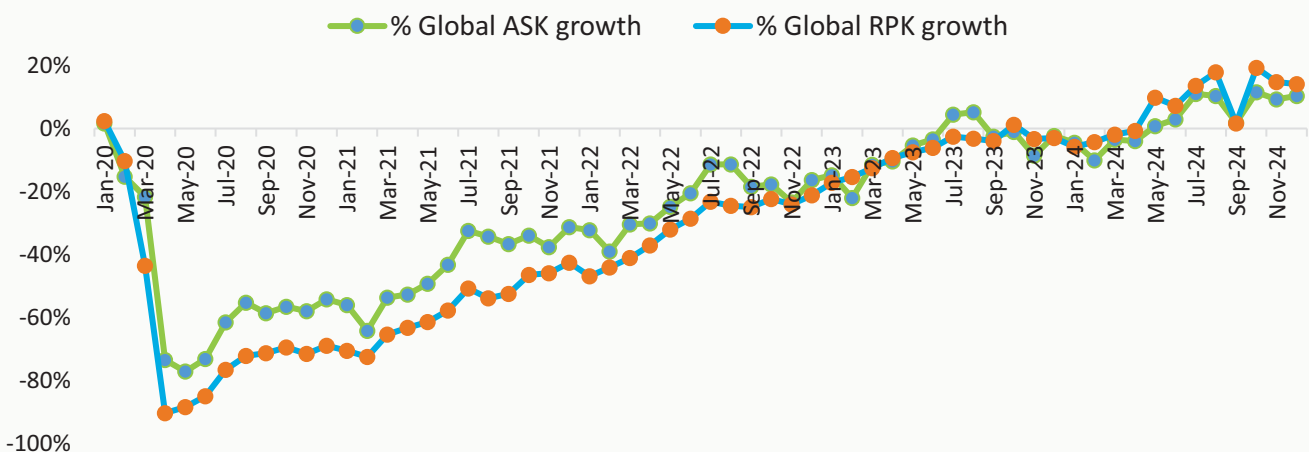
As of Q4 2024, the global airline industry has continued its recovery, marked by growth in passenger demand, profitability, and operational efficiency. However, the industry faces several challenges, including fuel price volatility, labor issues, and geopolitical instability. Below are the key highlights of the global airline industry performance in Q4 2024, referencing OAG's data.

Global airline revenues have increased to approximately \$115 billion in Q4 2024, marking a 5% year-on-year growth compared to Q4 2023. According to OAG data, this growth has been driven primarily by higher ticket prices and robust international travel demand. Airlines globally have seen a consistent recovery in both leisure and business travel, especially in long-haul markets. Notably, North America and Europe have been the strongest-performing regions, with continued recovery in air traffic and capacity utilization.

During the fourth quarter of 2024, ASKs increased by 8.7% compared to the ASKs levels of Q4 2023. RPKs in Q4 2024 increased by 10.4%, compared to the RPKs levels of Q4 2023 also surpassing pre-pandemic levels by 3.8%.

Figure 1 below illustrates MoM and YoY Global industry ASK and RPK from January 2020 To December 2024;

Figure 1: Global Industry ASK and RPK growth,

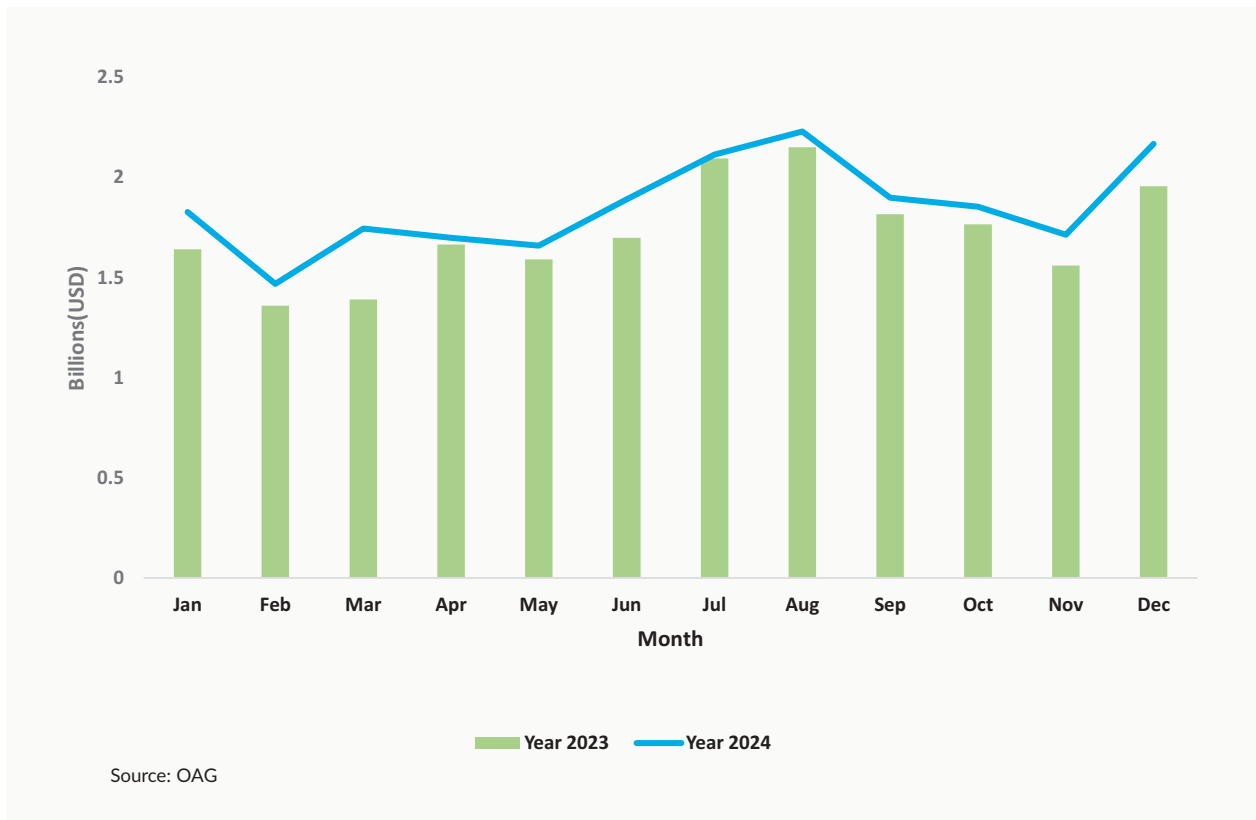


African airlines performance

Financial performance

Passenger revenue in Q4 2024 increased by 8.6% compared to Q4 2023, showing a continued positive trend for the African airline industry. This growth reflects an ongoing regaining and intensified demand for air travel. Figure 2 provides a graphical comparison of passenger revenue between Year 2023 and Year 2024, the financial performance in 2024 shows strong growth compared to 2023, with rising trend in Q4 2024 indicating better results..

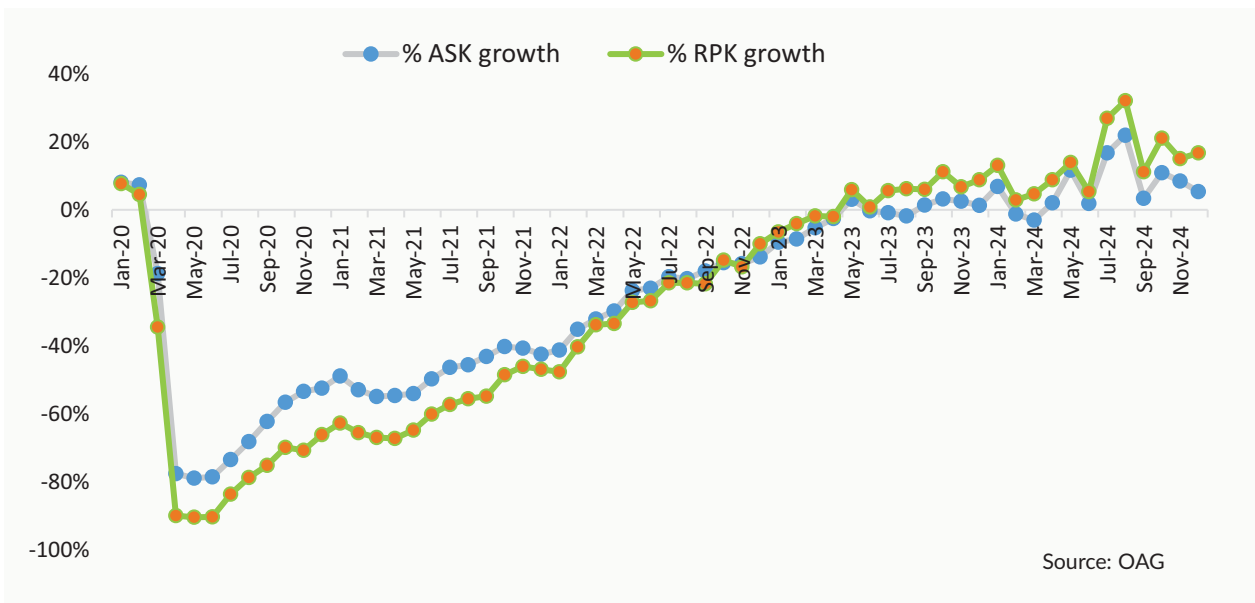
Figure 2: Quarterly Passenger Revenue



Passenger traffic Evolution

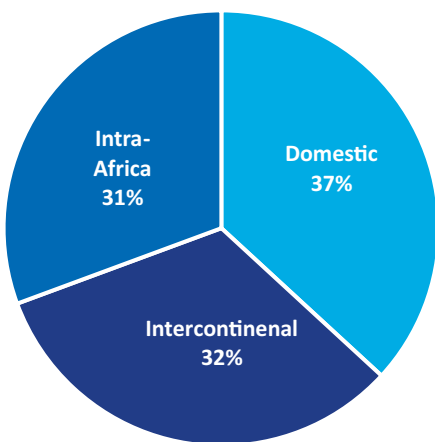
In Q4 2024, African airlines continued to show strong performance, with Available Seat Kilometers (ASKs) and Revenue Passenger Kilometers (RPKs) maintaining positive growth trends. The increase in both metrics are by 8% and 7.4%, respectively, compared to Q4 2023. This growth was strengthened by enhanced connectivity, rising economic activity, and continued recovery in key travel markets, despite persisting challenges in the aviation sector. Figure 3 below provides a detailed view of the Month-on-Month (MoM) and Year-on-Year (YoY) trends in ASK and RPK for African airlines from January 2020 to December 2024.

Figure 3: African airlines ASK and RPK growth



Passenger traffic distribution

Figure 4: African Airlines passenger distribution Q4 - 2024

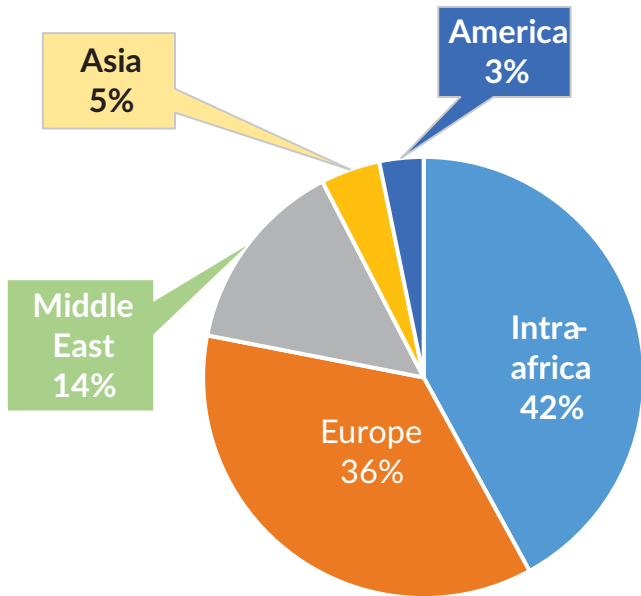


Source: OAG

In the fourth quarter of 2024, African airlines saw an increase in domestic traffic, accounting for approximately 37% of the total traffic.

Intra-African flights accounted 31% of the traffic, while intercontinental flights represented 32%. These figures are illustrated in Figure 4.

Figure 5: African Airlines international passengers destinations Q4- 2024



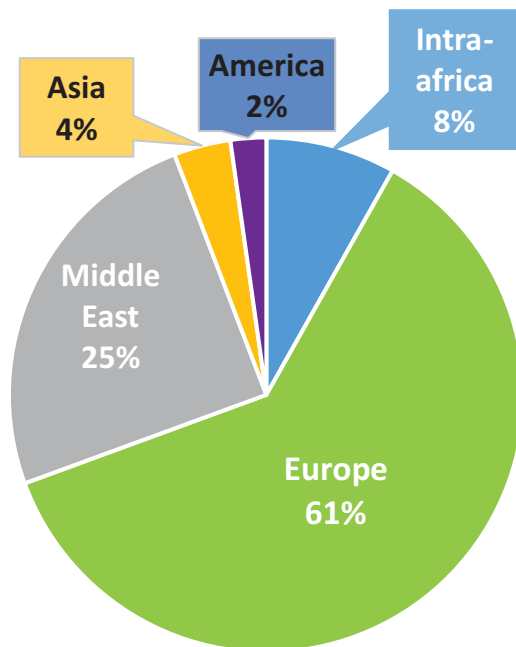
Source: OAG

In Q4 2024, international traffic is primarily driven by intra-African routes and flights to Europe, each accounting for 42% and 36% respectively. Europe remains the top destination region for African airlines, with traffic to Europe representing 36% of the total. Egypt is the leading country of origin, while France is the primary destination. Traffic to the Middle East is also notable, comprising around 16%, while routes to Asia and the Americas each account for approximately 4% and 3% respectively.

Regional Insights

In the fourth quarter of 2024, Northern Africa led the continent in passenger traffic, accounting for 37.7% of the total. Domestic traffic in this region was relatively low, representing only 14% of the total traffic. Intercontinental travel dominated, comprising 92% of the traffic, while intra-African travel made up just 8%. Morocco is the primary source of traffic from Northern Africa to Europe, with France, United Kingdom and Spain being the top destinations. The Middle East is the third most popular destination region, with Egypt as the leading contributor. Key destinations from Egypt include Germany, United Kingdom and Italy.

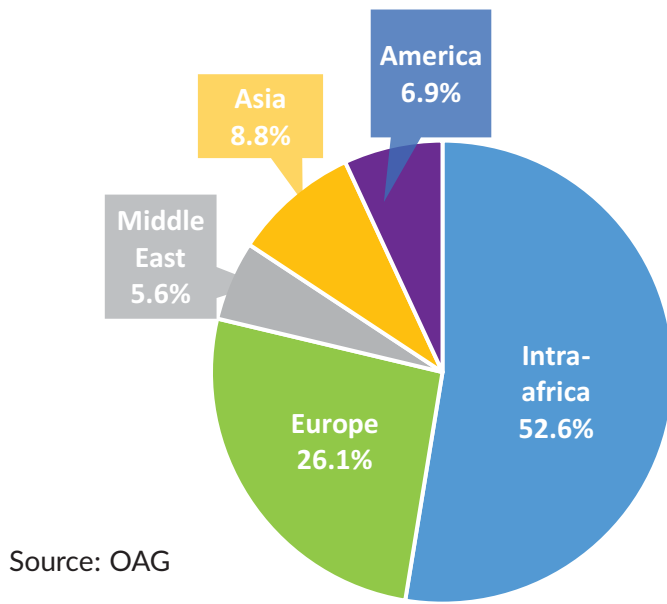
Figure 6: Traffic repartition - Northern Africa Q4 2024



Source: OAG

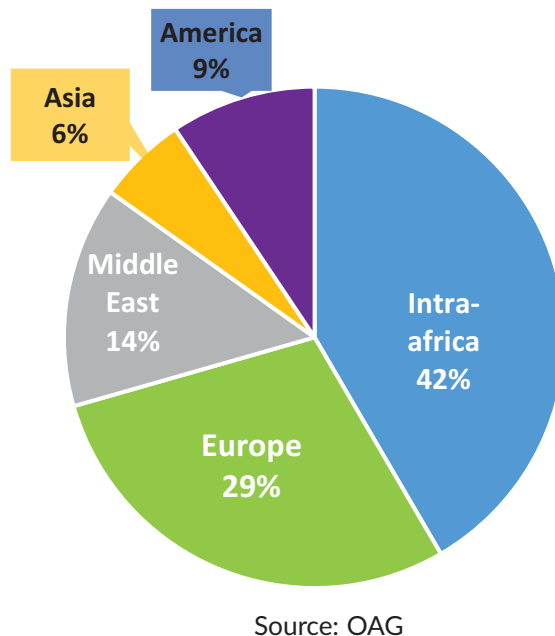
In the fourth quarter of 2024, the Southern African region accounted for 21.6% of the continent's traffic. The domestic market was the largest contributor, making up 63% of the region's traffic. Intra-African travel was above international traffic, with a 52.6% share. Regarding destinations outside Africa, Europe and Asia were the leading regions, with 26.1% and 8.8% of traffic respectively. The Middle East and the Asia accounted for 5% and 4% respectively during this period.

Figure 7: Traffic repartition - Southern Africa Q4 2024



Eastern Africa represented 20.8% of the continental traffic during the fourth quarter of 2024. Domestic traffic constituted to 42% in the fourth quarter 2024. Traffic to Europe is also significant representing 29% then Middle East at 14% during this quarter.

Figure 8: Traffic repartition - Eastern Africa Q4 2024

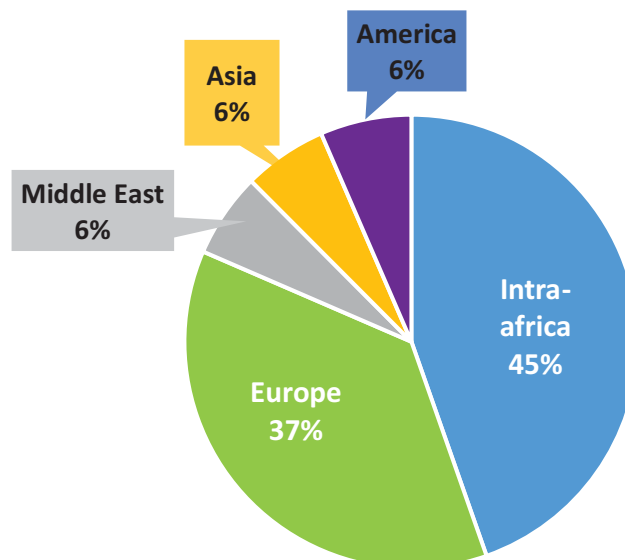




Central and Western Africa regions together represented 19.9% of the African traffic during the fourth quarter 2024. The intra-African traffic accounted for 45% of the non-domestic.

Outside the continent, Europe is the principal destination, representing 37%. The share of Middle East, America, and Asia are 6% each. The domestic market accounted for 45% of the regional traffic.

Figure 9: Traffic repartition - Central and Western Africa Q4 2024



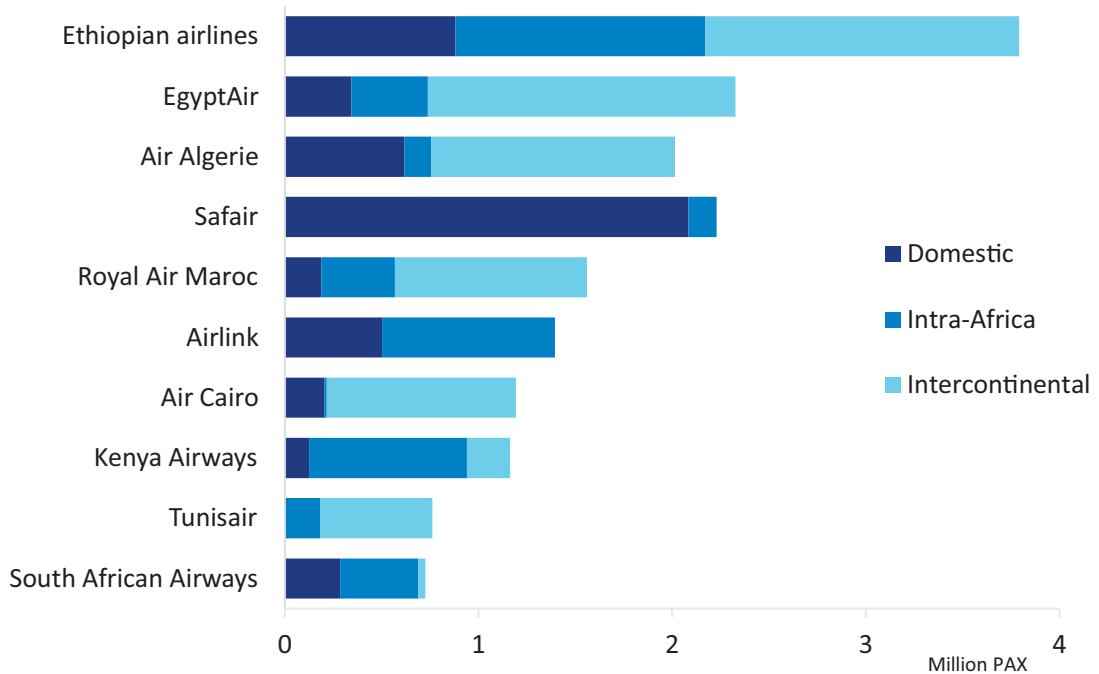
Source: OAG

African Airlines ranking by traffic (OAG estimations)

Figure 10 below ranks African airlines, with Ethiopian Airlines taking the lead, closely followed by EgyptAir. This dominance is attributed to its extensive network, reliable service, and strategic hub in Addis Ababa, which connects various international routes. EgyptAir's strong position as a close contender reflects its historical significance and operational reach across the continent and beyond. These rankings emphasize the growing importance of these airlines in enhancing regional connectivity and fostering economic development within Africa.

Figure 10: African Airlines ranking by traffic Q4 2024

(*The data here are estimations and have not been confirmed by airlines)

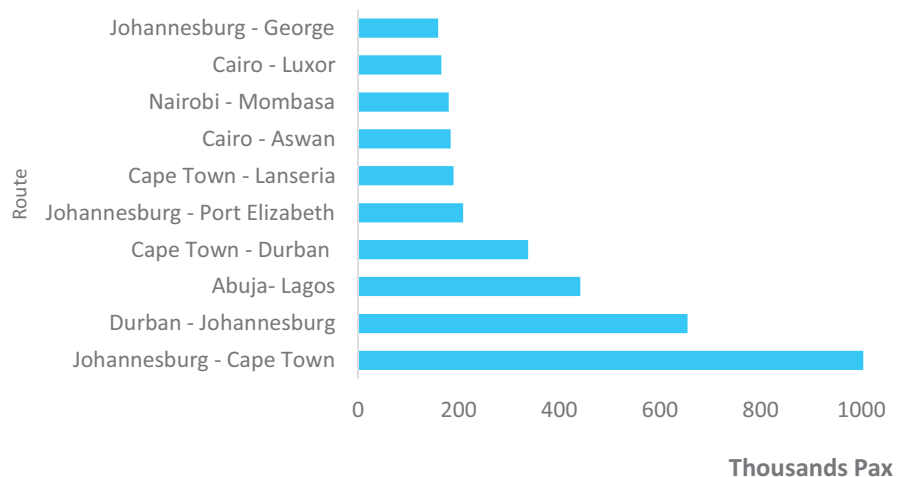


Source: OAG

Routes ranking by traffic (OAG estimations)

Top 10 domestic routes by passengers carried Q4 2024 (AFRAA estimations)

Figure 11: Domestic routes ranking



Source: OAG

Figure 11 above shows the top ten domestic routes in Africa. South Africa dominates the African market in domestic traffic, with six of its routes ranked among the top ten in the fourth quarter of 2024. Additionally, Egypt, Nigeria, and Kenya each have a domestic route represented in the top ten busiest routes.

Top 10 Intra - African routes by passengers carried Q4 2024 (OAG estimations)

Figure 12: Intra-African routes ranking

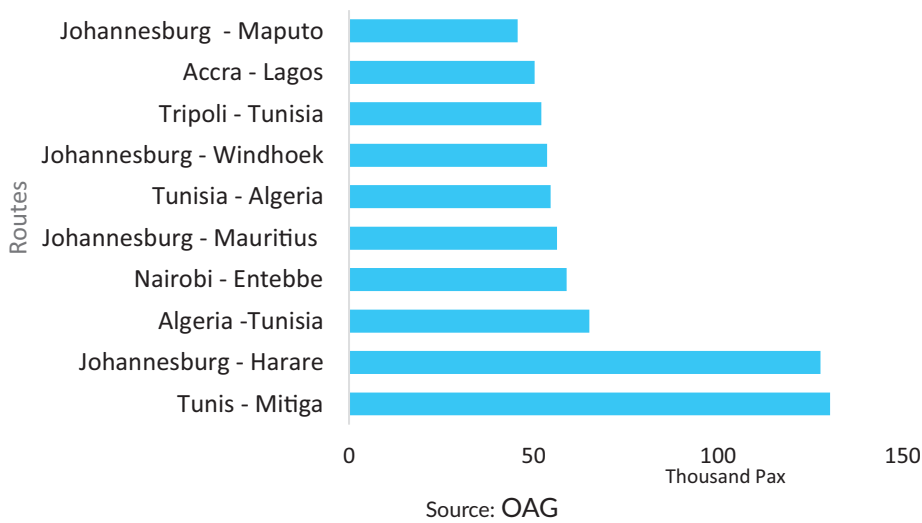


Figure 12 above shows the top ten intra-African routes by passengers carried in the fourth quarter of 2024. The busiest intra-African routes are primarily within Southern and Northern Africa. However, routes from Eastern Africa (Nairobi-Entebbe) and Western Africa (Accra-Lagos) also ranked among the top ten in the fourth quarter of 2024.

Top 10 Intercontinental routes by passengers carried Q2 2024 (OAG estimations)

Figure 13: Intercontinental routes ranking

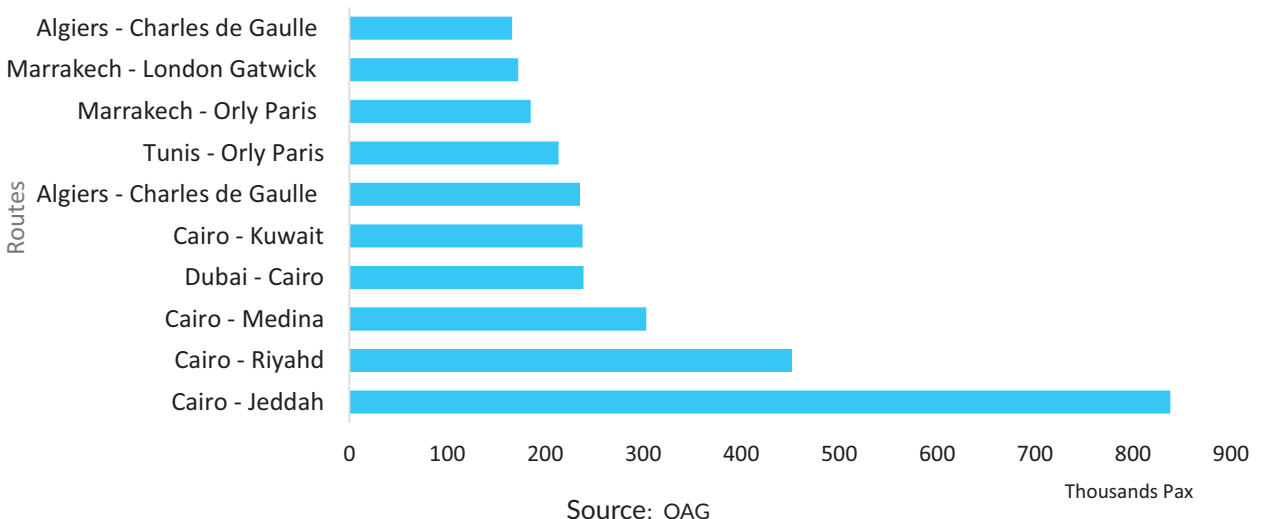
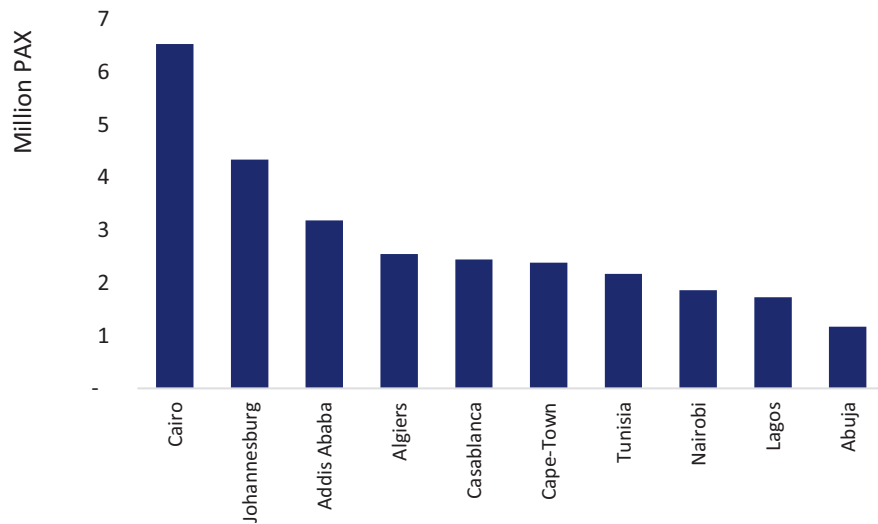


Figure 13 show the intercontinental routes ranking and EgyptAir is the leading carrier on these routes, achieving the highest passenger volume during the last quarter 2024.

Airport Ranking by Passengers

Figure 14: African airports ranking by passengers Q4 2024 (OAG estimations)

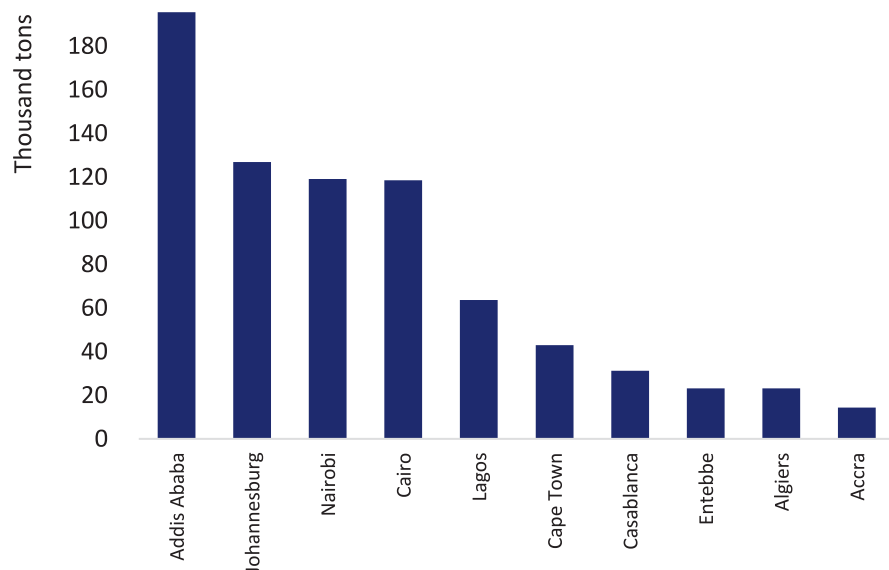


Source: OAG

Northern African airports are well represented in the top 10 hubs during the Third Quarter of 2024. The top 3 leading airports are Cairo, Johannesburg, and Addis Ababa.

Airport Ranking by Freight Traffic

Figure 15: African airports ranking by freight Q4 2024 (ACI AFRICA estimations)



Source: ACI AFRICA

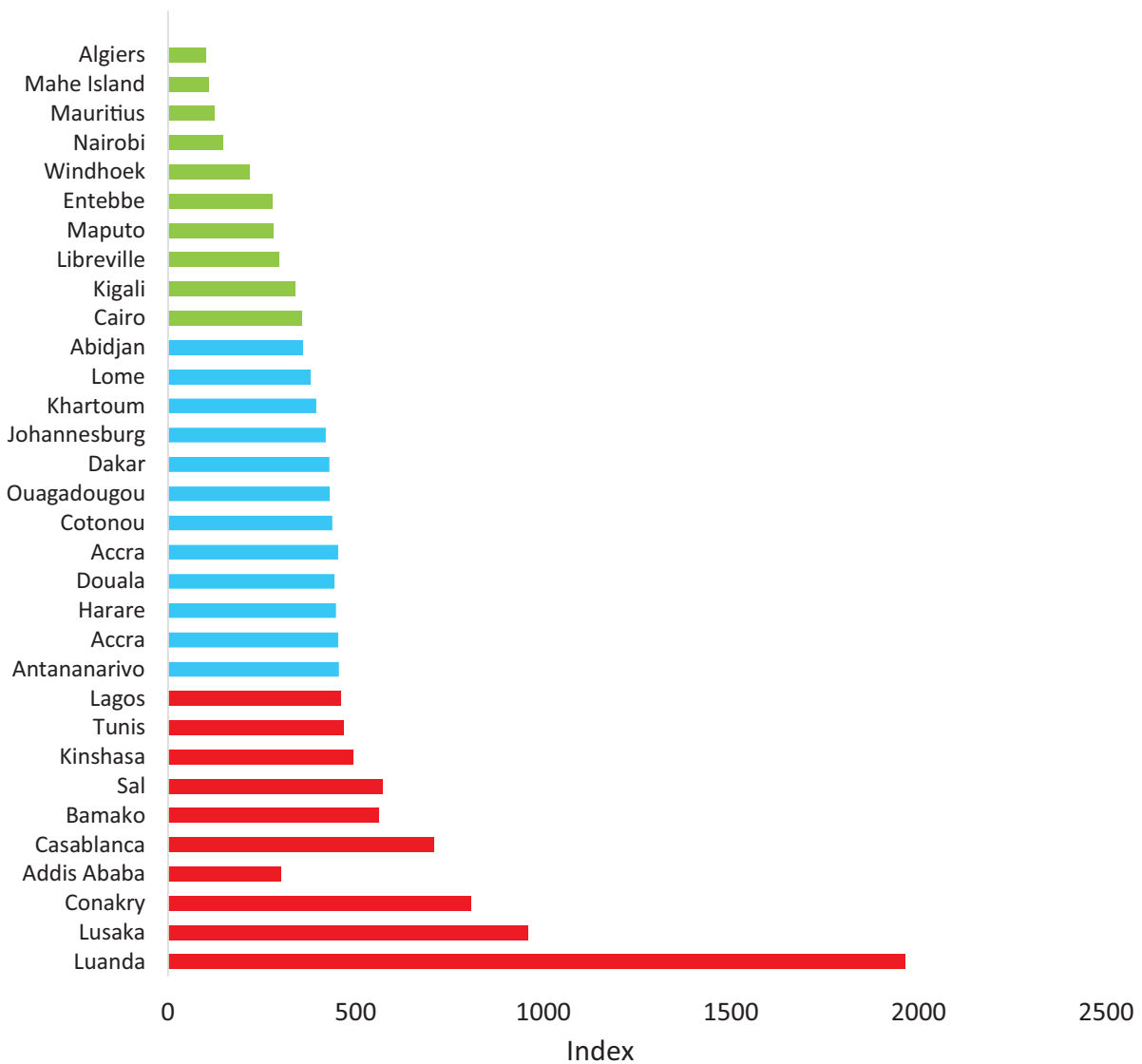
Airport charges

Methodology:

A comparative study based on a single aircraft type applies to all airports with more than 300 thousand passengers in Q4 2024. The aircraft type chosen is the B737, the most popular aircraft type in the region. Following the applied criteria:

Aircraft Type	B737
MTOW	70.08 Metric Ton
Flight Type	International
Origin & Destination Pax	100
Total Departing Pax	100
Parking Time	2 Hour
Boarding bridge time	1 Hour
Arrival Time	12:00
Cargo	0 Kilograms

Figure 28: African airports ranking by charge index Q4 2024



Source: IATA ACIC



Luanda has the highest charges among the selected airports, while Algiers has the lowest. Johannesburg and Cairo, two of Africa's busiest airports, have charges that fall below the average. This indicates that reducing airport charges could potentially boost traffic levels.

Intra-African Connectivity

Methodology:

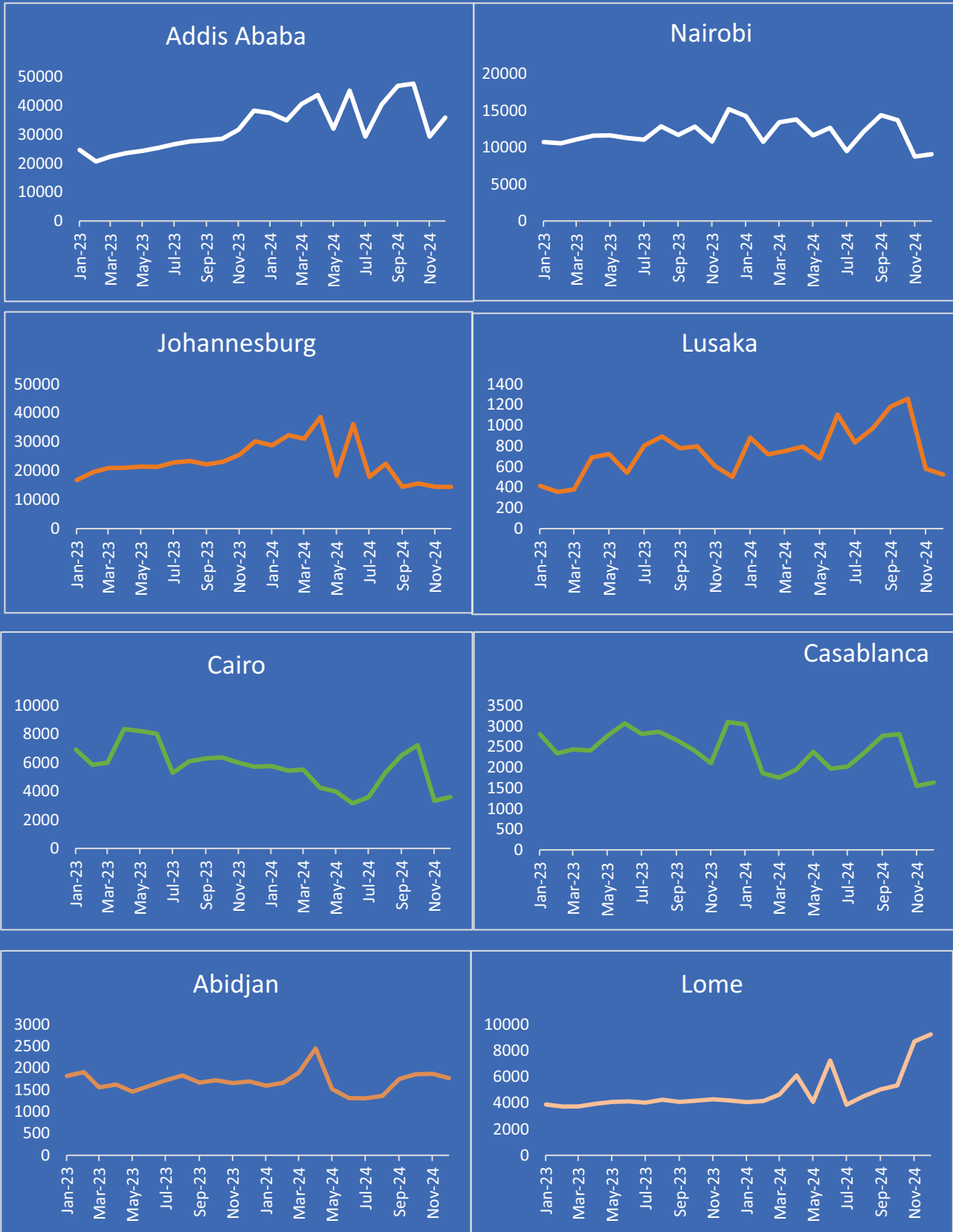
We calculate the total number of possible Intra-African connections between inbound and outbound flights on 20 important African hubs in Q4 2024.

The rules selected for the computation are as follows:

- Single connections only to/from the chosen airports,
- Minimum Connection Time from OAG table,
- Maximum Connection Window of 6 hours

The intra-African connectivity reached new heights in Q4 2024 showcasing a significant expansion in air travel links within the Africa continent, Q4 2024 achieved 89% as compared to what was recorded in the same period Q3 2023. This highlights Africa's commitment to enhancing regional integration, facilitating the easier movement of people and goods, driving economic development, and fostering closer ties among African nations

Table 1: Intra-African connectivity index per Regional hubs in Q4 2024

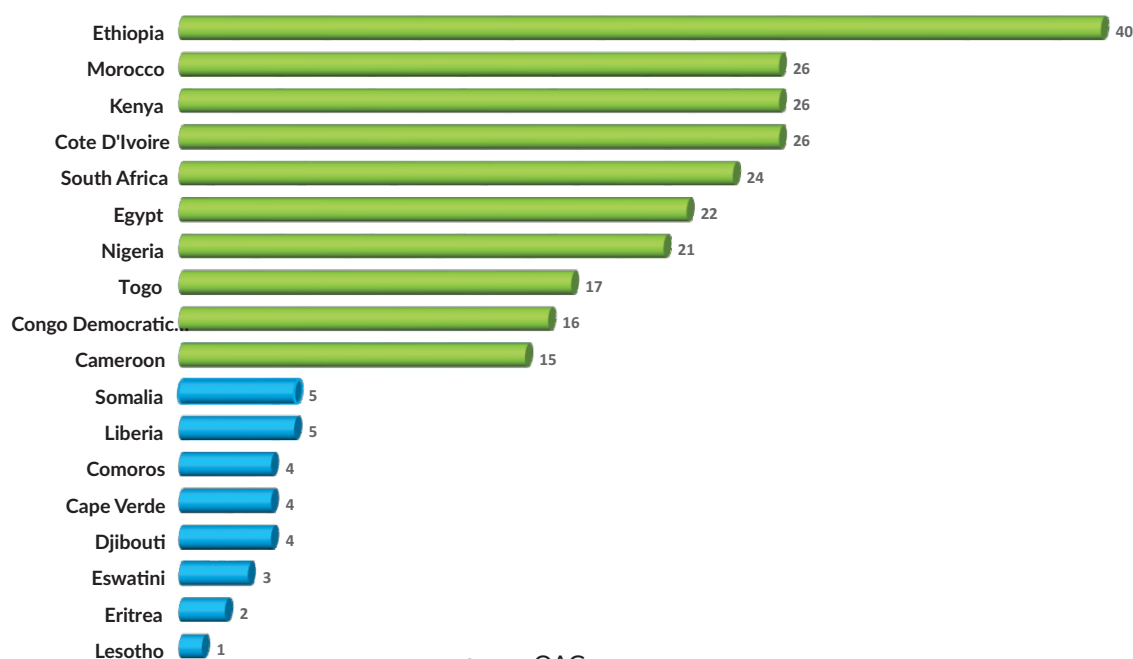


Source: OAG

Direct flights between African countries

During the fourth quarter of 2024, 7 out of the 54 countries in the African continent offered direct flights to more than 20 other African nations. Ethiopia leads with the most extensive network of direct flights within Africa.

Figure 30: Number of direct flights between African countries



Source: OAG

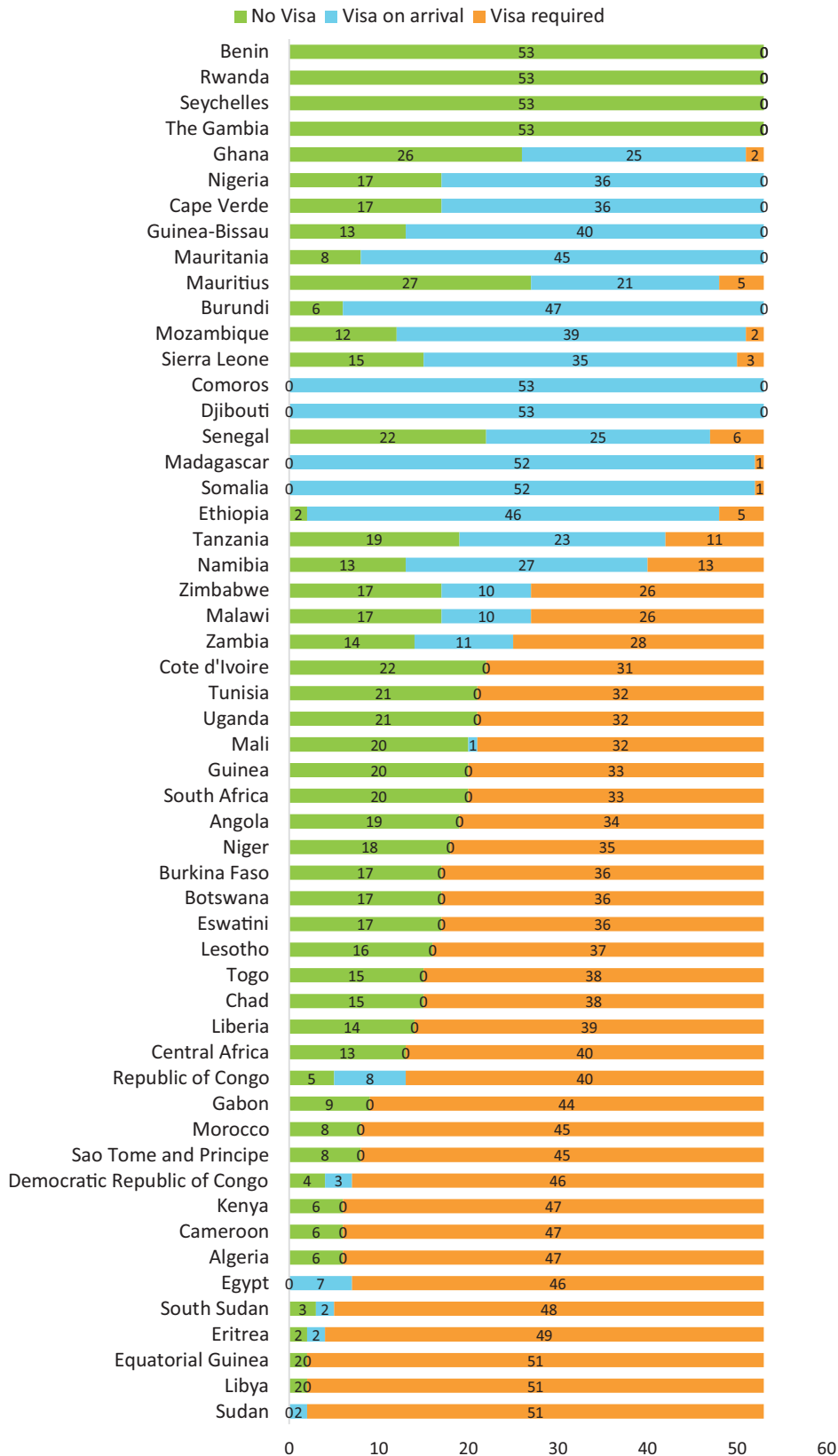
Table 1 below presents the proportion of direct connections within countries of the same region and between different African regions, expressed as a percentage of the total number of possible connections. In Q4 2024, the overall connectivity index is relatively high, particularly in Northern Africa, which reported a connectivity rate of 67%. However, inter-regional connectivity remains constrained, with the highest connectivity rate observed between Northern and Western Africa, at only 35%.

The low levels of connectivity between subregions indicate significant opportunities for improvement. Enhancing these transport links could potentially improve economic integration and regional cooperation. Addressing these connectivity deficits may stimulate trade, tourism, and overall economic growth across the continent.

Africa Regions	Central Africa	Eastern Africa	North Africa	Southern Africa	Western Africa
Central Africa	45%	15%	21%	11%	16%
Eastern Africa		42%	13%	19%	8%
North Africa			67%	5%	35%
Southern Africa				54%	3%
Western Africa				4%	48%

Visa Openness within Africa

Figure 20: Visa openness in African countries



Source: visaopenness.com as at 17th February 2025

ANNEX: Reference

- Q4 2024 Global Airline Industry Performance with OAG (Official Aviation Guide) as the primary source of data
- International Air Transport Association (IATA) Aviation Industry Outlook 2024
- Financial Reports of major airlines like United Airlines, Delta Air Lines, and Ryanair
- FlightGlobal and CAPA Centre for Aviation Reports on Q4 2024 Global Aviation Performance
- Airlines for America (A4A) and Eurocontrol for Regional Aviation Insights

ANNEX: Glossary

AFRAA:	African Airlines Association
ACIC:	Aviation Charges Intelligence Center
ASK:	Average Seats Kilometres
FMTK:	Freight and Mail Tons Kilometers
ICAO:	International Civil Aviation Organization
IATA:	International Air Transport Association
MoM:	Month on month
RPK:	Revenue Passenger Kilometers
WCAF:	West and Central Africa
YoY:	Year on Year





Better Skies for Africa

