

**Release date: 08 July 2025**

### **African airlines' performance updates by AFRAA, June 2025**

Africa's aviation industry remains resilient, with sustained growth in passenger traffic and enhanced operational efficiency. Key drivers include expanded routes, better connectivity, and rising domestic and international travel demand.

In June 2025, seat capacity across Africa decreased by 3% compared to June 2024. However, intra-African routes recorded a slight increase of 0.1% in seat capacity, owing to new route introductions, network expansion, and aircraft upsizing initiatives.

The top ten African airports by seat capacity for June 2025 were as follows:

1. **Cairo International Airport: 22.6%**
2. **Johannesburg O.R. Tambo International Airport: 14.8%**
3. **Addis Ababa Bole International Airport: 14.7%**
4. **Mohammed V International Airport, Casablanca: 8.9%**
5. **Houari Boumediene Airport, Algiers: 7.4%**
6. **Cape Town International Airport: 7.0%**
7. **Jomo Kenyatta International Airport, Nairobi : 6.7%**
8. **Marrakesh Menara Airport: 6.6%**
9. **Tunis-Carthage International Airport: 5.8%**
10. **Hurghada International Airport: 5.3%**

Regional seat capacity distribution was led by:

- **North Africa: 40.7%**
- **Eastern Africa: 23.0%**
- **Southern Africa: 18.9%**
- **Central and Western Africa: 17.4%**

As of April 2025, African airlines accounted for 52.4% of international capacity (including both regional and intercontinental operations), while non-African carriers represented 47.6%. For intercontinental services, African carriers held a 36.3% capacity share, with non-African operators commanding 63.7%.

African carriers represented 49.0% of total international traffic (regional and intercontinental) in April 2025, while non-African carriers accounted for 51.0%. In terms of intercontinental traffic specifically, African carriers held a 35.3% traffic share, compared to 64.7% for non-African airlines.

AFRAA projects passenger traffic for African airlines to grow to 113 million in 2025, up from 98 million in 2024, representing a 15.3% increase. This increase underscores the industry's resilience and positive trajectory.

A year-on-year comparison of Available Seat Kilometers (ASKs) indicates a 2% increase in May 2025 compared to May 2024. Similarly, Revenue Passenger Kilometers (RPKs) rose by an estimated 6% during the same period.

**TRAFFIC UPDATE**  
*International schedules for African Airlines*

| International | May 2025 | May 2024 | %Change | Jan To<br>May 2025 | Jan To<br>May 2024 | %Change |
|---------------|----------|----------|---------|--------------------|--------------------|---------|
| ASK(Billions) | 29.47    | 28.95    | +2%     | 143.6              | 138.0              | +4.1%   |
| RPK(Billions) | 23.96*   | 22.53    | +6%     | 120.2              | 109.9              | +9.4%   |

\*Estimates of RPK

As of June 2025, intra-African connectivity based on capacity saw the 3<sup>rd</sup> and 4<sup>th</sup> Freedom traffic rights each representing 39% of total capacity, while 5<sup>th</sup> Freedom operations represented 22%.

An analysis of cargo traffic by sub-region as of May 2025 revealed that African exports continued to outpace imports in most regions. However, Southern, Western, and Central Africa recorded higher import volumes than exports. The market share of African airlines in cargo transport also remains an important area of strategic focus. Eastern Africa accounted for 30% of Africa's total cargo market share.

Passenger revenues for African carriers also demonstrated strong growth, with April 2025 recording a 19% increase compared to April 2024.

**Jet Fuel Prices:** As of the week ending 20 June 2025, the global average jet fuel price stood at USD 96.97 per barrel, reflecting a 12.9% increase compared to USD 82.30 per barrel recorded in the same week of the previous month.

**Regulatory/Industry Affairs**

African airlines are urged to remain attentive to ongoing developments and to take appropriate action as necessary. AFRAA further welcomes updates from African airlines on any relevant developments in the following highlighted regulatory areas:

**US Travel Restrictions**

On 4 June 2025, President Trump issued a proclamation entitled [“Restricting the Entry of Foreign Nationals to Protect the United States from Foreign Terrorists and Other National Security and Public Safety Threats.”](#)

The proclamation which took effect on 9 June 2025, suspended the entry of nationals from 12 countries (7 African) into the United States. The countries are: Afghanistan, Burma, Chad, the Republic of the Congo, Equatorial Guinea, Eritrea, Haiti, Iran, Libya, Somalia, Sudan, and Yemen. In addition, nationals from 7 other countries (3 African) are partially restricted from traveling to the US (depending on visa type): Burundi, Cuba, Laos, Sierra Leone, Togo, Turkmenistan, and Venezuela.

Citizens of another 25 countries may face similar restrictions if their governments fail to meet set conditions outlined by the US.

**Amendment to EC Regulation EC261/2004 & EC2027/1997**

On 5 June, the Council of the European Union reached a political agreement (a formal consensus among Member States ahead of negotiations with the European Parliament) on the proposal for a regulation amending [Regulation \(EC\) 261/2004](#) (EC261) on compensation and

assistance to passengers in the event of denied boarding and of cancellation or long delay of flights and Regulation (EC) No 2027/97 on air carrier liability in respect of the carriage of passengers and their baggage by air.

The political agreement includes *inter alia* the following elements:

#### Regulation (EC261/2004)

- Thresholds at which delay compensation becomes payable increased from 3 hours to 4 hours for flights of less than 3500km in distance and 6 hours for flights longer than 3500km.
- Compensation amounts amended to EUR300 for flights of less than 3500km and EUR500 for flights longer than 3500km.
- A [non-exhaustive list](#) of circumstances considered as extraordinary and circumstances to be considered as not extraordinary.
- A partial prohibition on no-show policies such that a passenger not showing up on a previous flight should not be denied boarding on the return flight.
- A provision for extended tarmac delays, with disembarkation required after 3 hours and a requirement for basic needs to be covered during the delay including drinking water.
- Rerouting on the flights of any carrier is to be required after delays over 3 hours, subject to availability and ability to transfer bags. Passengers are to be able to arrange their own rerouting if not rerouted by the carrier within 3 hours, with the carrier to reimburse expenses up to 400% of the full cost of the original ticket.
- A 6-month time limit for consumers to submit file claims with compensation to be payable within 14 days.
- A requirement for airlines to send out a form automatically in scenarios where compensation may be payable.

#### Regulation (EC2027/1997)

- A requirement for airlines to inform passengers at the time of booking about the maximum dimensions and weight of the baggage they can bring into the cabin as well as any charges applicable.
- A right for passengers to take a personal item on board at no extra cost as long as it fits under the seat. A 'personal item' is defined as a piece of unchecked baggage that is necessary for the passenger's journey, complies with security and safety requirements, and has maximum dimensions of 40x30x15cm or fits under the front seat.

#### Final rule on Assistive Devices: Important for all airlines that fly to, from, and within the United States

The US DOT issued a [final rule](#) on passengers who use wheelchairs while traveling by air on 17 Dec 2024. The rule came into effect on 16 January 2025. However, certain provisions had varying implementation times, ranging from 16 January 2025 to 17 June 2026. The amendments considers the mishandling of wheelchairs, scooters, and assistive devices, as well as unsafe, undignified, and untimely wheelchair assistance, to constitute discrimination on the basis of disability.

[End]

#### About AFRAA

The African Airlines Association, also known by its acronym AFRAA, is the leading trade association of airlines from the member states of the African Union (AU). Founded in Accra, Ghana, in April 1968, and headquartered



AFRAA

**Better Skies for Africa**

*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 cuts across the entire continent, representing over 85% of total international traffic carried by African airlines. Follow us on [Facebook](#), [LinkedIn](#), [Twitter](#) and [YouTube](#).*