Aviation Access Across Africa

CAPA QATAR AVIATION AEROPOLITICAL AND REGULATORY SUMMIT 2020

DOHA, QATAR
INTRODUCTION

RESEARCH DONE

Google : “African Access Across Africa”

Aviation Infrastructure for Africa Gap Analysis -2019 by ICAO
AFRICA’S SIZE - 30.2M KM²
WHAT CAN FIT WITHIN AFRICA'S 30.2M KM²

Source: The true size of Africa-Kai Krause
AFRICAN COUNTRIES, POPULATION AND GDP

55 Countries

1.3 bn. People, 2018

Average GDP growth of 3.7% in 2017 up from

BUT

the combined GDP of 53 African countries is $2.74 trillion = France’s GDP (2018 it was $2.78 trillion)

Average GDP/capita = $ 1702

ww.afdb.org/en/news –and-event/africas
AIRLINES, AIRPORTS AND PASSENGERS

83m
Passengers transported accounting for 2.1% of the world's 3.8 billion passengers in 2016

57 full service carriers

828 paved airports

$24bn Worth of airport constructions currently ongoing

Source: AFRAA Annual Report 2017, CAPA Reports, CIA Fact book 2018
PASSENGER DISTRIBUTION ACROSS MAJOR HUBS-2016

Source: AFRAA, CAPA Reports

- Cairo International Airport
  Cairo, Egypt
  15.8M

- Addis Ababa Bole International Airport
  Addis Ababa, Ethiopia
  8.7M

- Murtala Muhammad International Airport
  Lagos, Nigeria
  6.2M

- Aeroport d’Alger Houari Boumediene
  Algiers, Algeria
  7.5M

- Aeroport Mohammed V
  Casablanca, Morocco
  8.6M

- Jomo Kenyatta International Airport
  Nairobi, Kenya
  5.8M

- OR Tambo International Airport
  Johannesburg, South Africa
  20.7M

7 of Africa's largest airports hubs accounted for 73m or 88% of the total 83m total passengers in 2016.
DEFINITION OF CONNECTIVITY IN AIR TRANSPORT

Movement of passengers, mail and cargo involving the **minimum of transit points:**
– which makes trip as **short** as possible;
– with **optimal** user satisfaction;
– at the **minimum** price possible;

**BUT**
- Passenger traffic growth of African carriers has been volatile and consistently lower than the world average growth;
- Top 10 States in Africa accounted for the majority of the international passenger traffic carried by African carriers;
- Top international destination region from Africa is to Europe (41%), followed by Intra Africa (27%) and to the Middle East (19%);
- Currently in Africa, **19 States have no international airlines**, 22 States have only 1 international airlines, and 4 States have more than 3 international airlines.
So...Questions are:

- Is there demand? Does the GDP/capita allow to create connectivity in Africa between largest cities?
- Is the forecast of 300M in 2035 passengers enough to justify more investments and more airlines?
- Would it be smart to have only one or two African hubs to compete with Paris, Istanbul & Doha? 😊
- Can we compare the evolution African skies to the European ones?
- Is it only about regulations?