



Middle East Africa Duty Free Association Conference

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Better Skies for Africa



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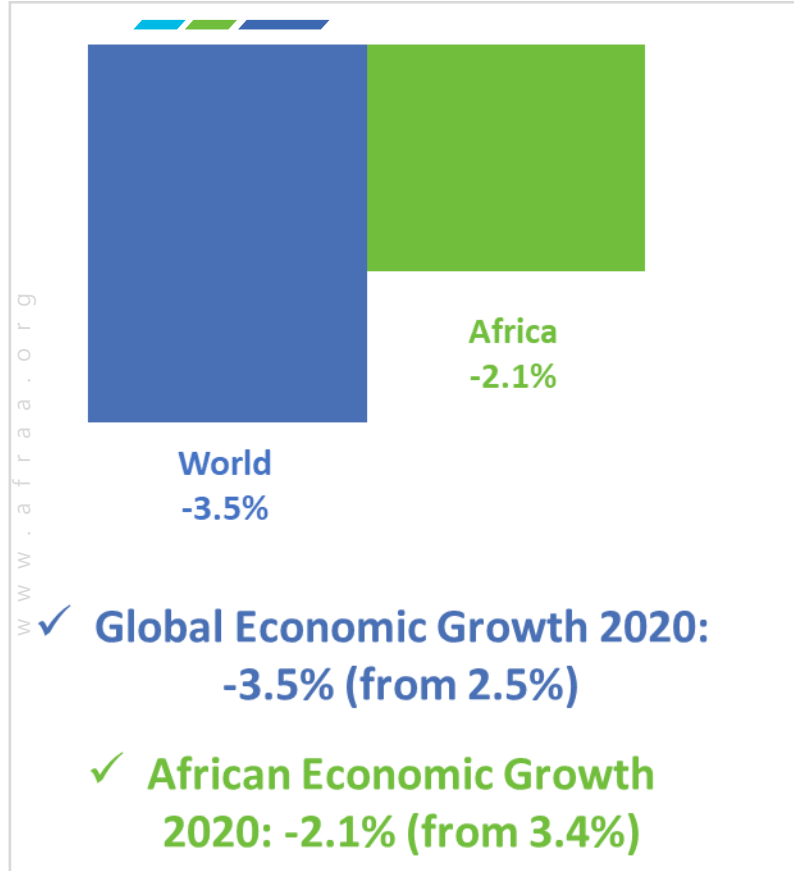
ABOUT AFRAA

The background of the central section is a photograph taken from an airplane window, showing a vast expanse of white, fluffy clouds under a clear blue sky. The window frame is visible on the right side. The text is overlaid on this image.

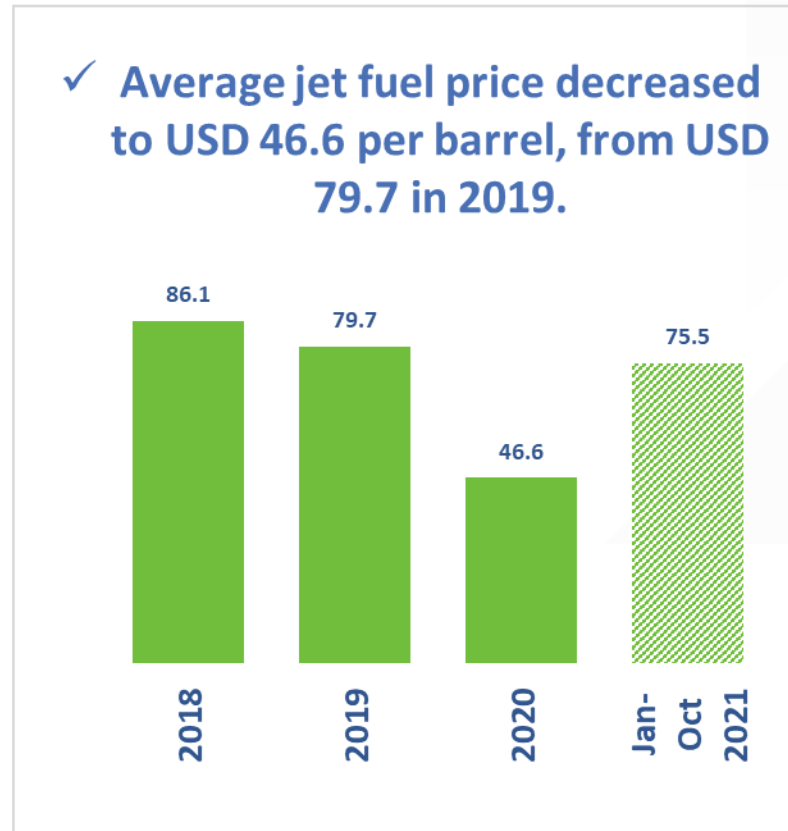
WHERE DO WE COME FROM ? 2020

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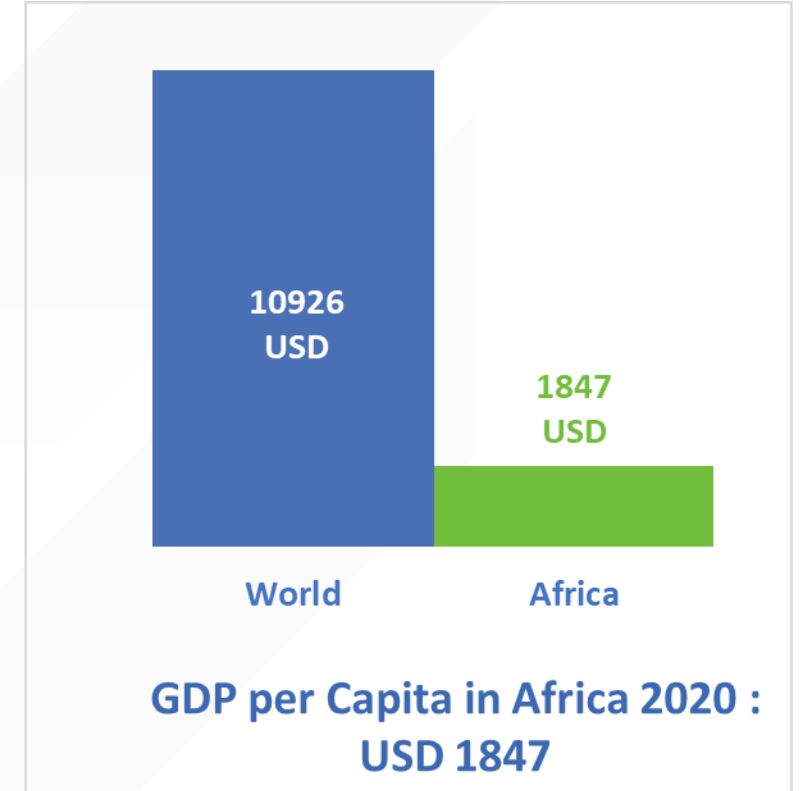
ECONOMY



Source : IMF / AFDB



AFRAA Training Department 2021



Source : IMF / AFDB

WHERE DO WE COME FROM? 2020

TOURISM



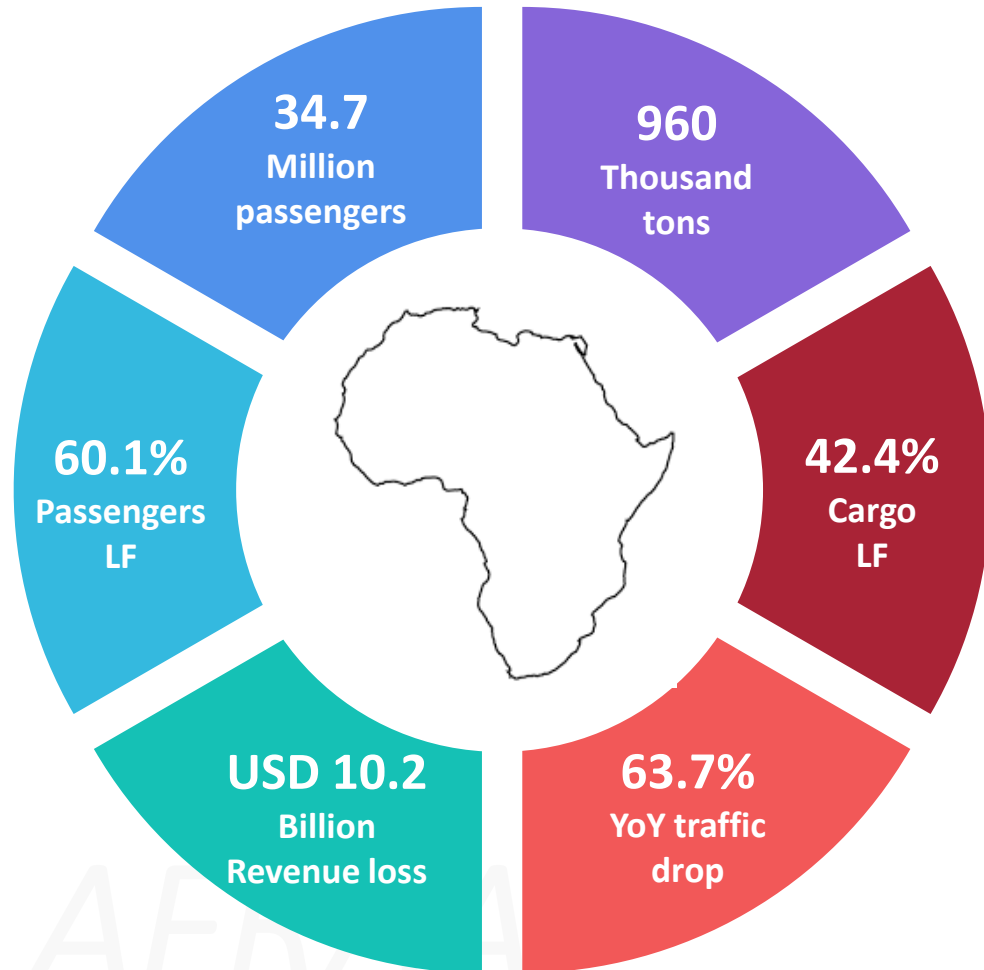
- ✓ AFRICA : 18.1 Million tourists in 2020 (74.2% drop compared to 2019) generating USD 14.02 billion of receipts.
- ✓ 4.5% Of the global number of tourists

Source : UNWTO

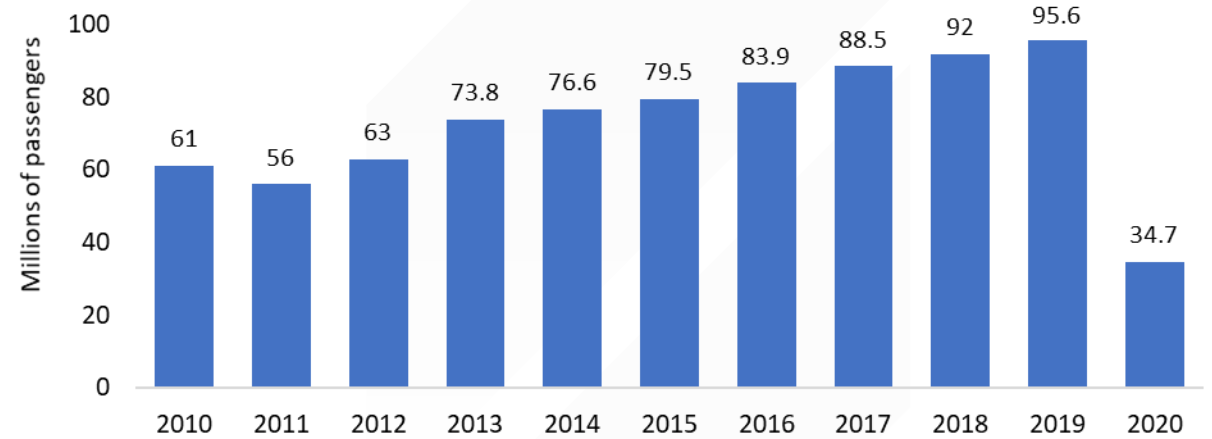
WHERE DO WE COME FROM? 2020

AFRICAN AIRLINES PERFORMANCE

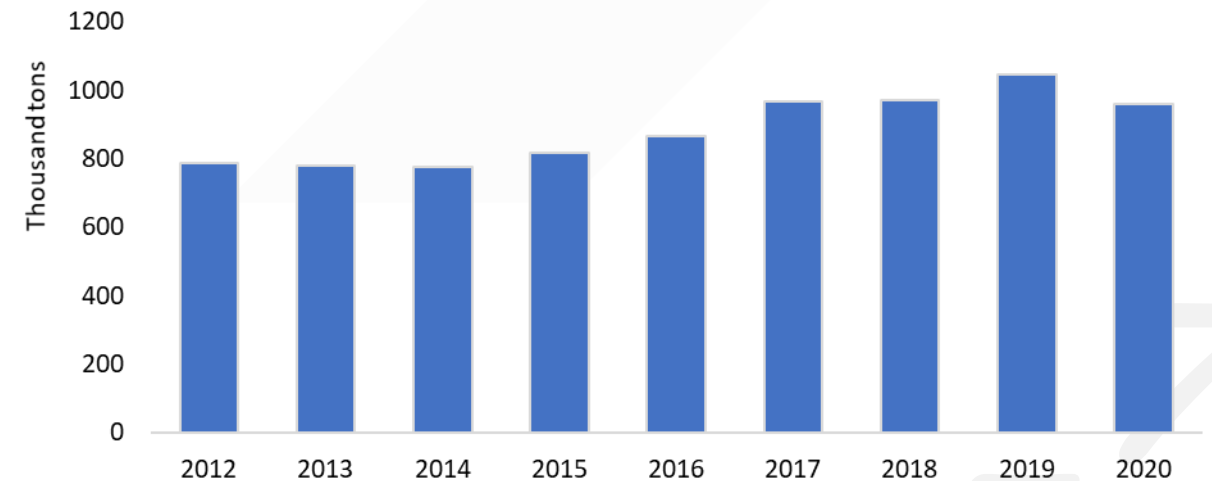
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Passengers carried by African airlines 2010 – 2020

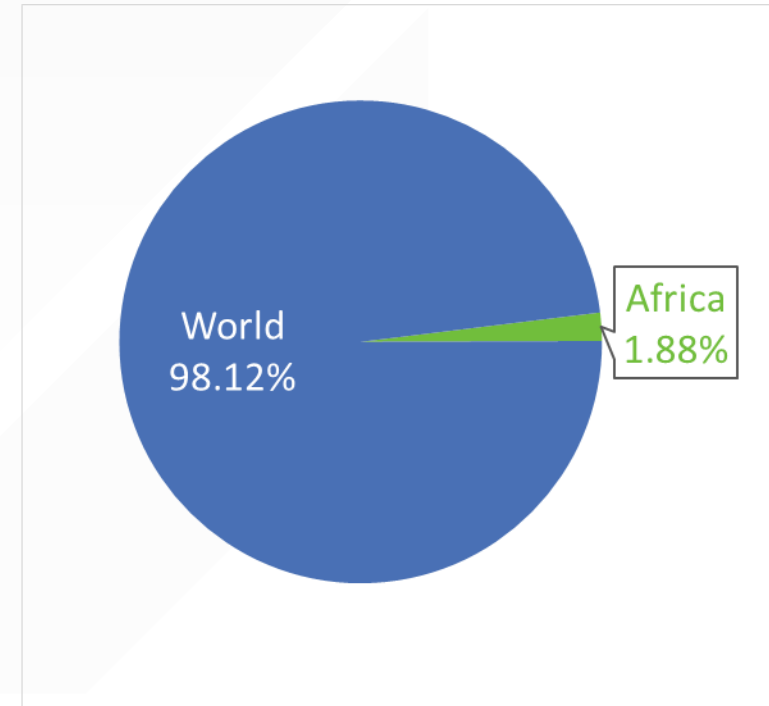
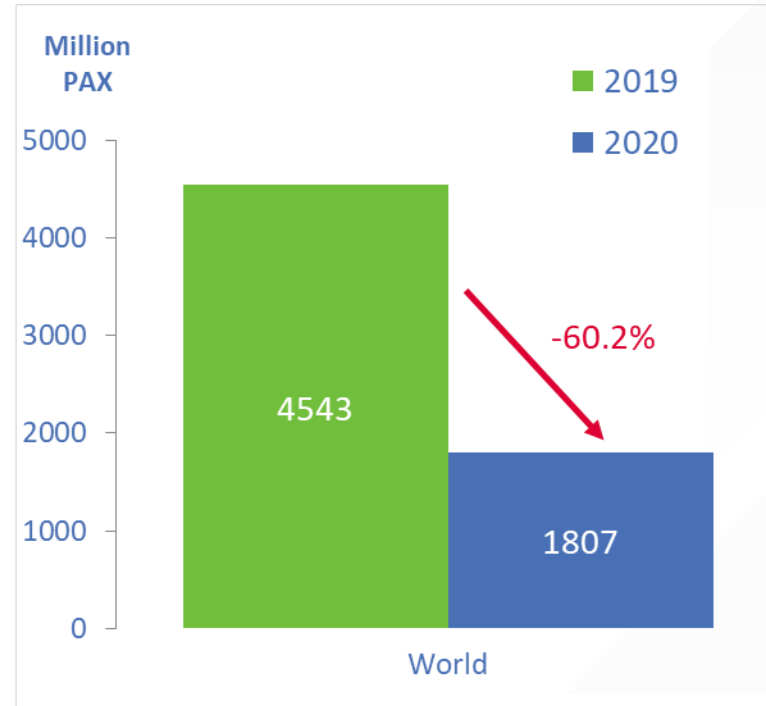
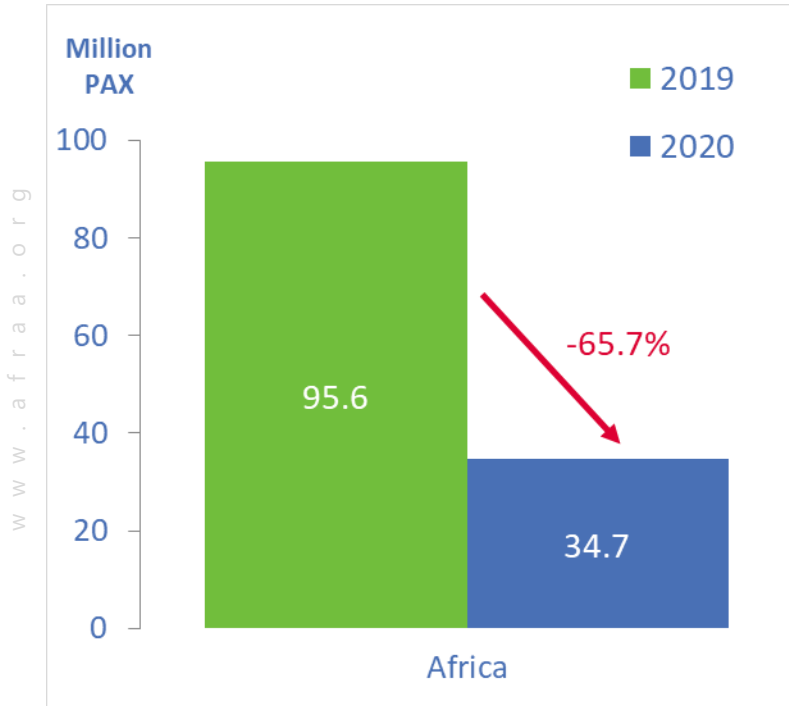


African Airlines Year-on-Year Freight Carried 2012 – 2020



WHERE DO WE COME FROM? 2020

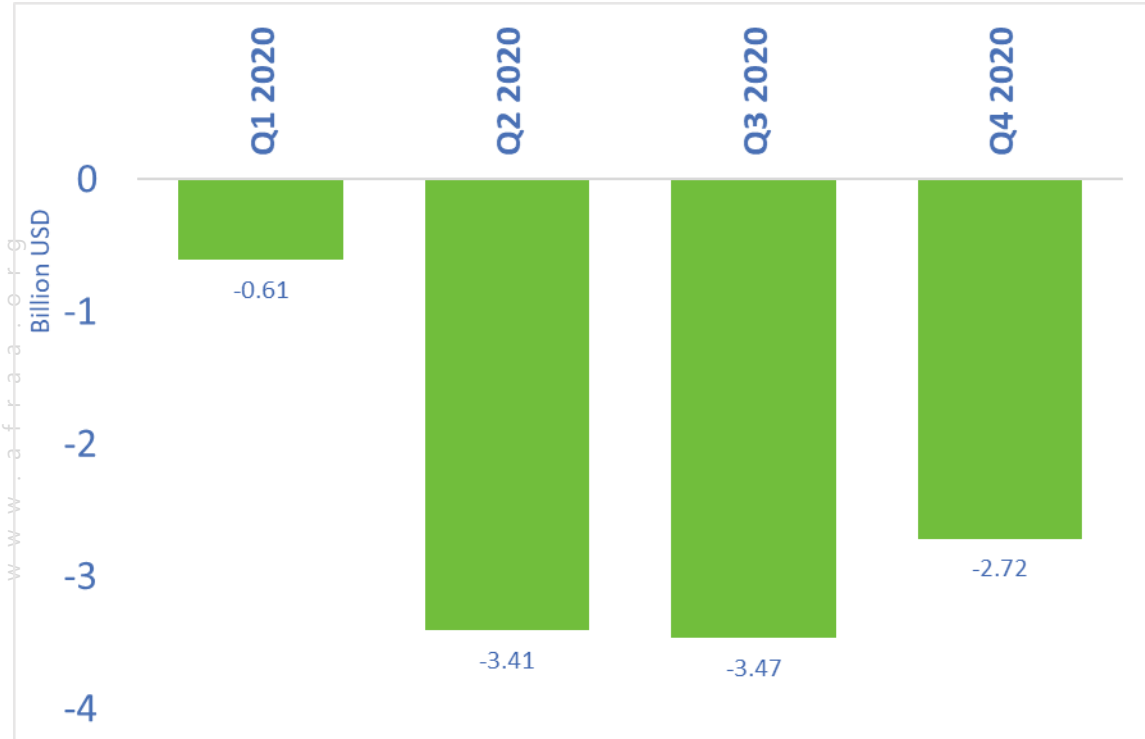
AFRICAN AIRLINES PASSENGERS PERFORMANCES



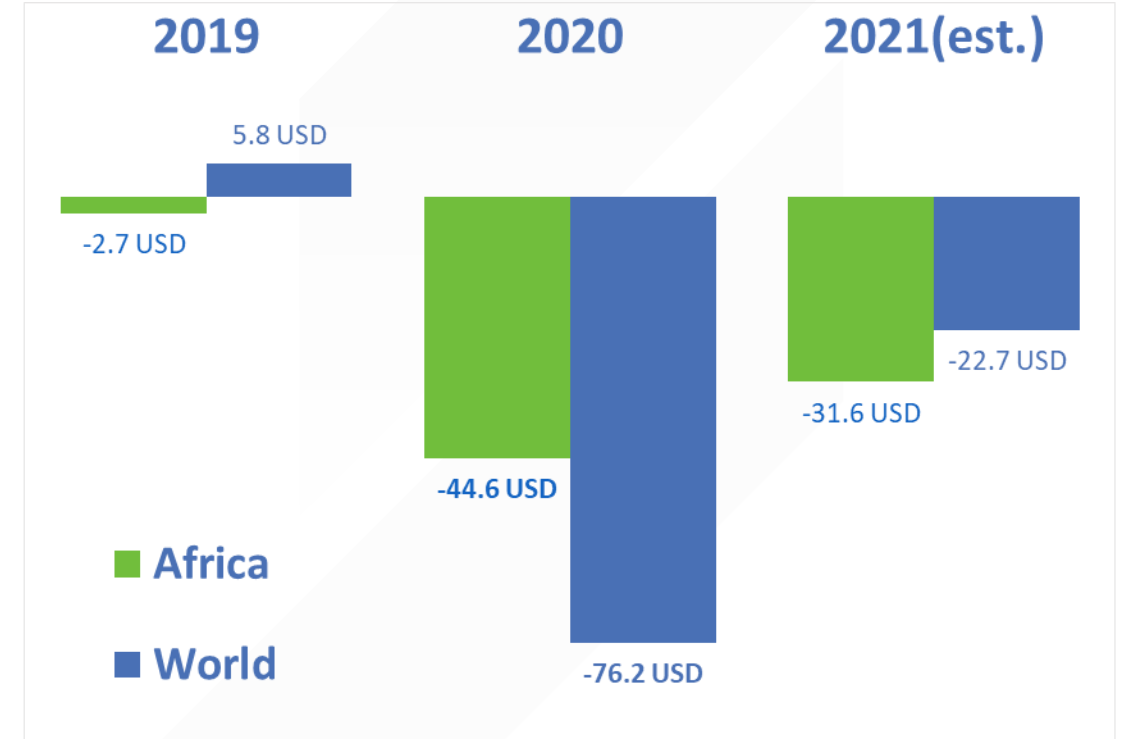
Source : IATA

WHERE DO WE COME FROM? 2020

AFRICAN AIRLINES FINANCIAL PERFORMANCES



Source : AFRAA



Source : IATA

Estimated Revenue loss for 2020 : **USD 10.21 billion**
representing **58.8%** of 2019 revenues

- ✓ GLOBAL loss per passenger 2020: USD 76.2
- ✓ AFRICA loss per passenger 2020 : USD 44.6

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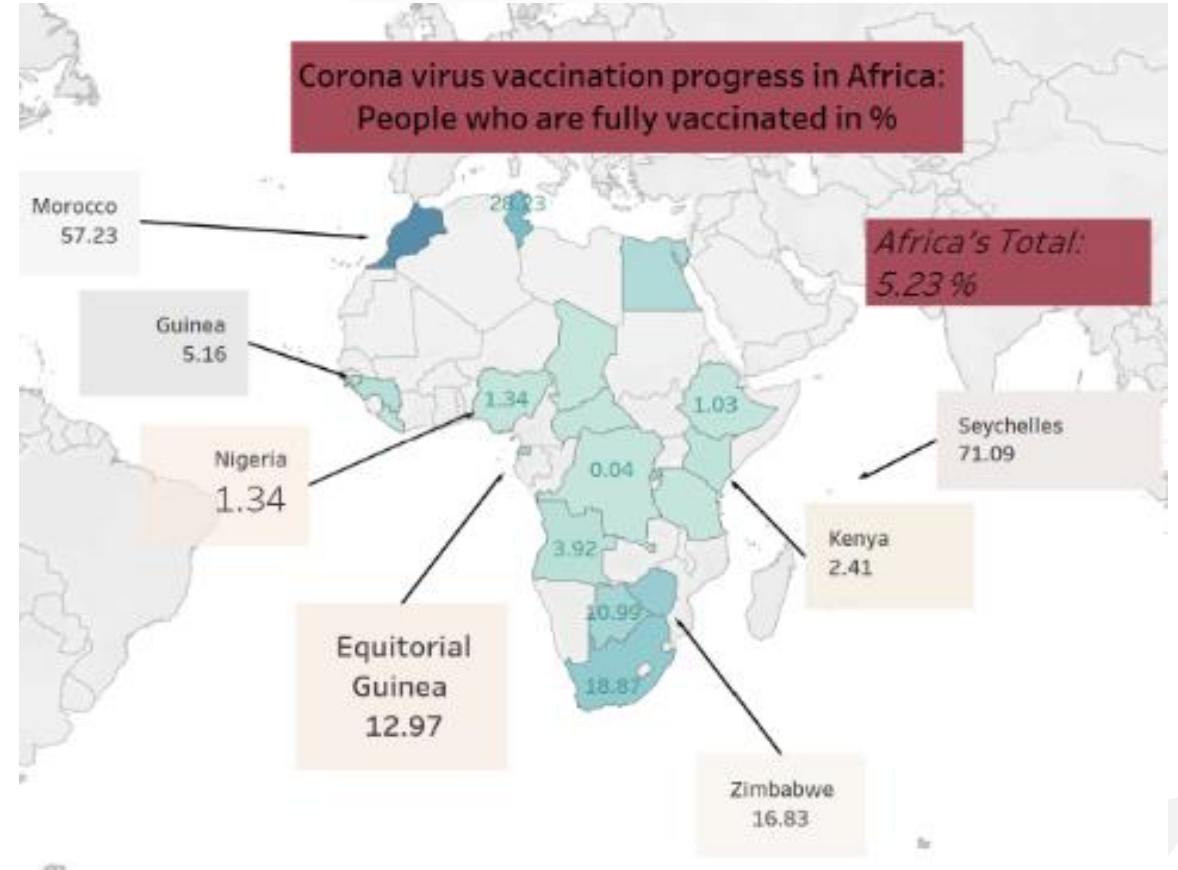
STATE OF THE INDUSTRY. 2021

STATE OF THE INDUSTRY? 2021

THE COVID19 VACCINATION (OCT 2021)

#	WORLD	AFRICA
Total of supply Administered	6.78 Billion	176.6 Million
Vaccine Administered (1 Dose/ % of Population)	48.19%	7.95%
Vaccination Completed (% of Population)	36.63%	5.23%

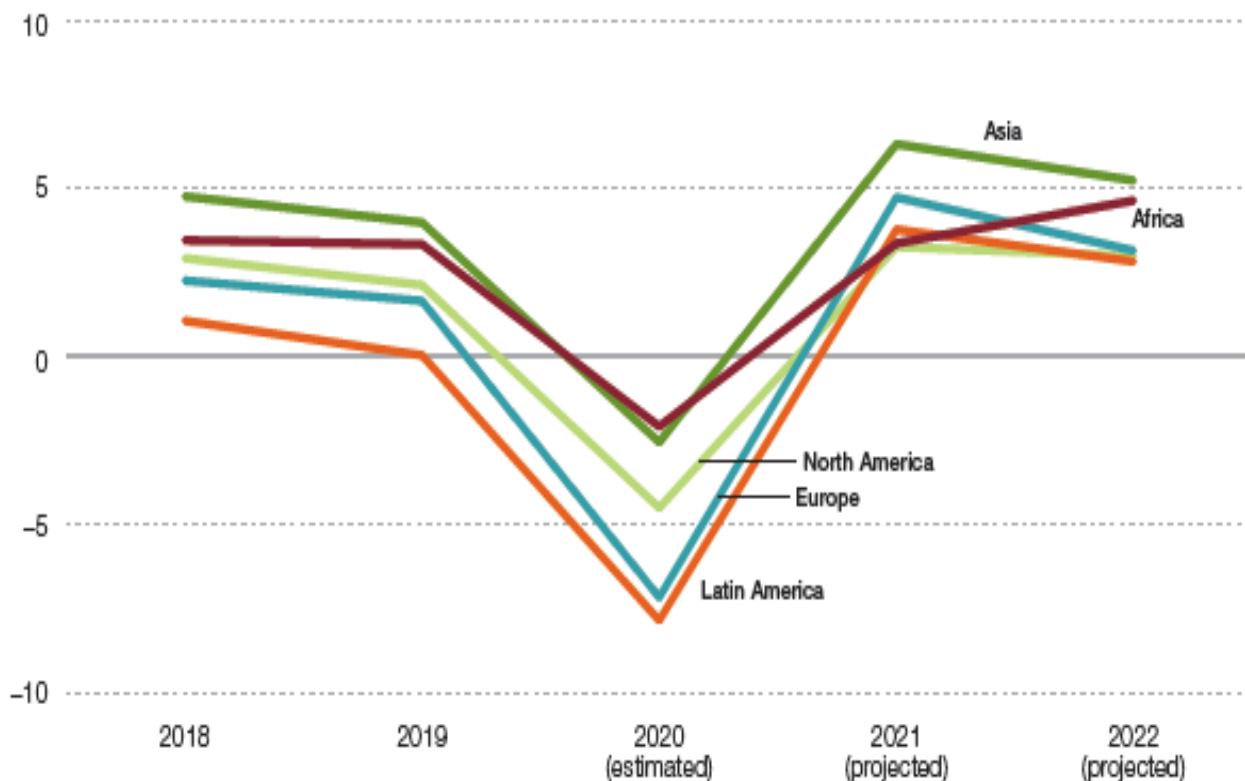
Source : ourworldindata.com / CDC AFRICA



STATE OF THE INDUSTRY? 2021

COVID19 IMPACT ON AFRICAN ECONOMY

Real GDP growth rate



Source : AfDB

- ✓ GDP of Africa contracted by 2.1% in 2020, the first recession in the continent over the last 50 years.
- ✓ The continental economy is expected to resume and grow by 3.4% in 2021, supported by a resumption of tourism, a rebound in commodity prices and the gradual lifting of restrictions related to the pandemic.

STATE OF THE INDUSTRY? 2021

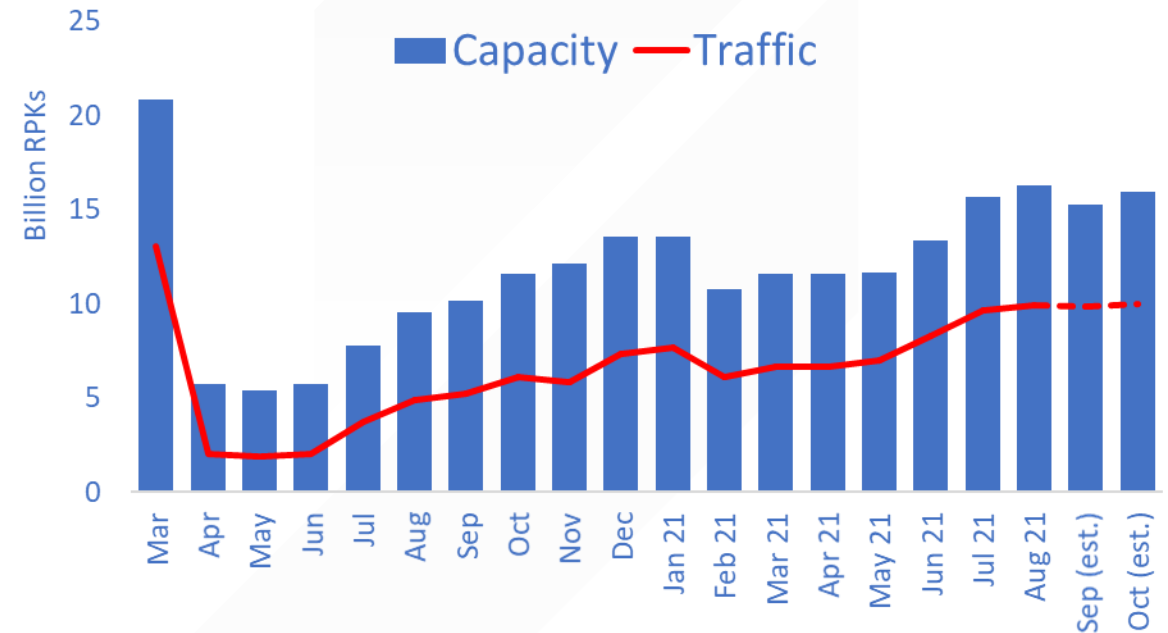
COVID19 IMPACT ON AFRICAN AIRLINES

Passengers Revenue losses compared to 2019



✓ Estimated Revenue loss for 2021 : **USD 8.5 billion**, representing **49% of 2019 revenues**. (27 Oct. assessment)

Capacity and traffic evolution



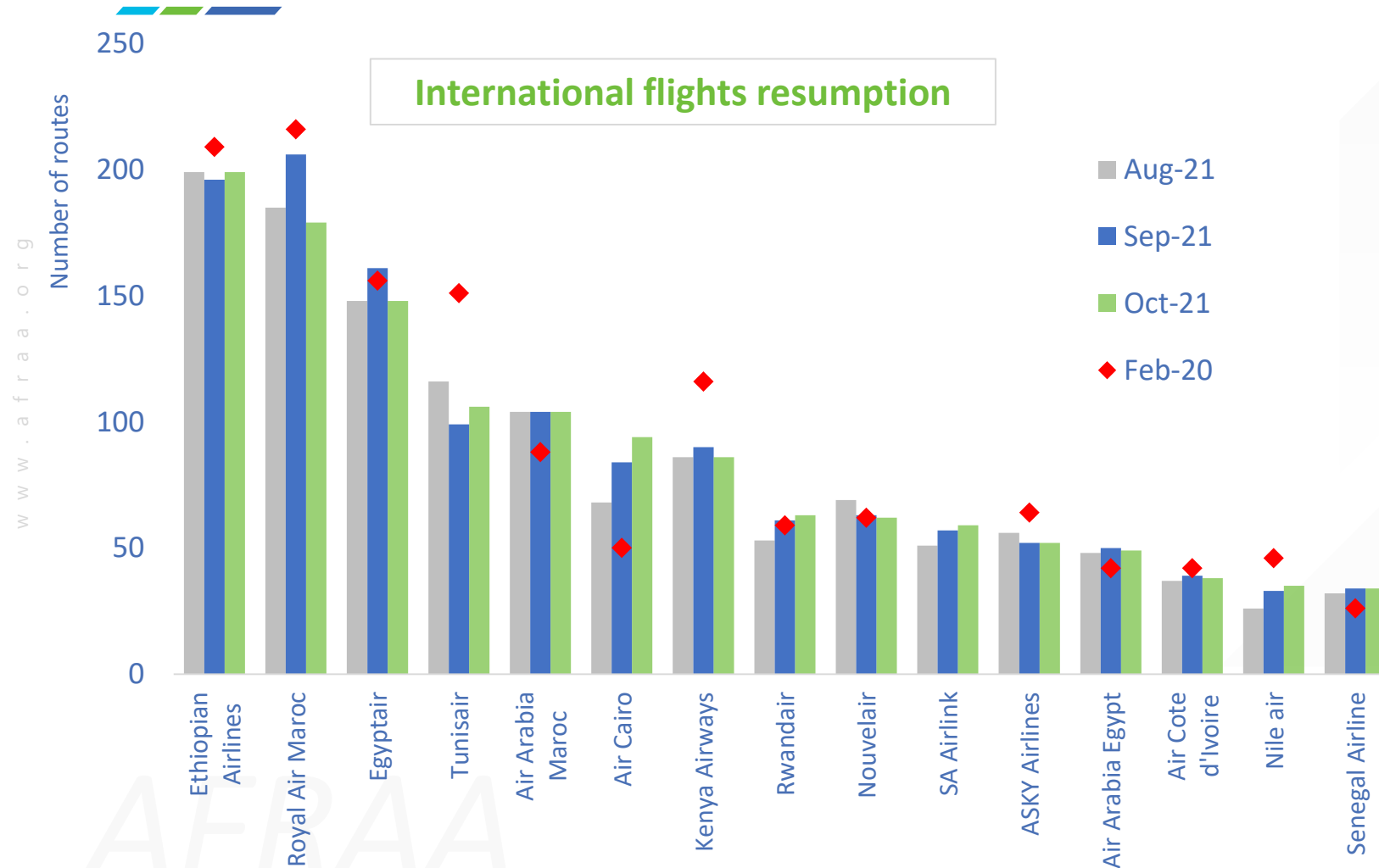
From **January to October 2021**:

- ✓ The **capacity (ASKs)** reached **51.2%** of same period 2019,
- ✓ while the **traffic (RPKs)** reached **40.78%**.
- ✓ The **average load factor** was **60.73%**.

Source : AFRAA

STATE OF THE INDUSTRY? 2021

COVID19 IMPACT ON AFRICAN AIRLINES



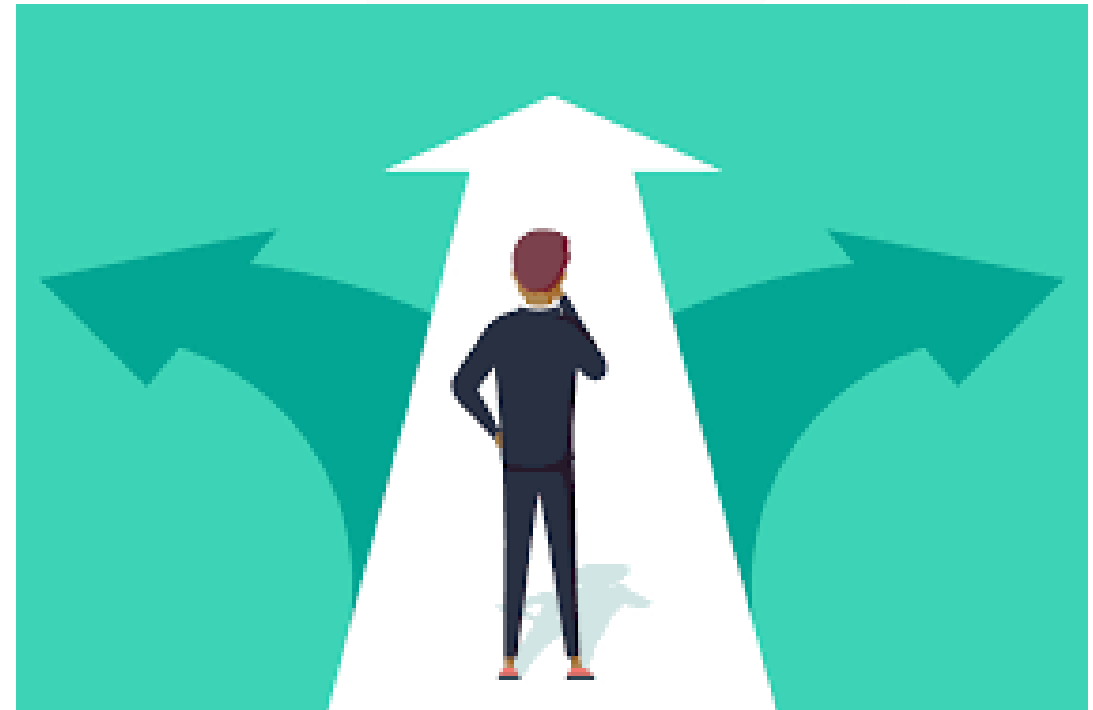
✓ Compared to February 2020, African airlines reopened **81.3%** of their international routes in October 2021.

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Future outlook 2022 and Beyond

Future outlook 2021 and Beyond

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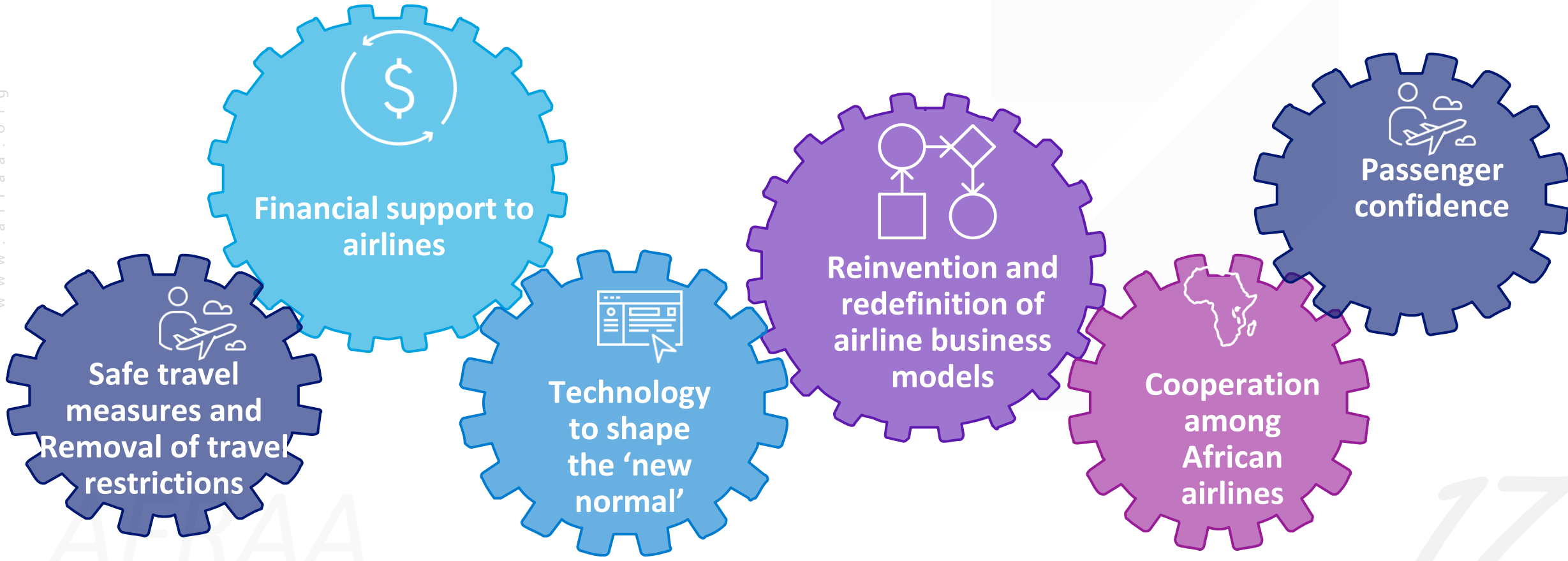
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Future outlook 2021 and Beyond

Looking at Recovery: Ingredients for success

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Future outlook 2021 and Beyond

WHAT WE NEED TO DO

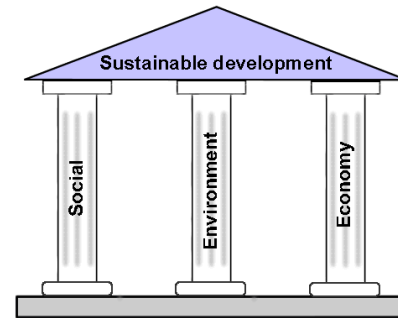
1. Safe reopening of borders



2. Financial relief



3. Airlines sustainability



AFRAA



ABOUT AFRAA

ABOUT AFRAA

- The African Airlines Association, also known by its acronym AFRAA, is a trade association of airlines which hail from the nations of the African Union.
- Founded in Accra, Ghana, in 1968, and today headquartered in Nairobi, Kenya, the primary purposes of AFRAA are to foster commercial and technical co-operation among African airlines. Our mission is to promote and serve African airlines and to Champion Africa's aviation industry.
- AFRAA membership is spread across the entire continent and includes all the major intercontinental African operators .
- The Association members represent over 85% of total international traffic carried by all African airlines



CONCLUSION



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