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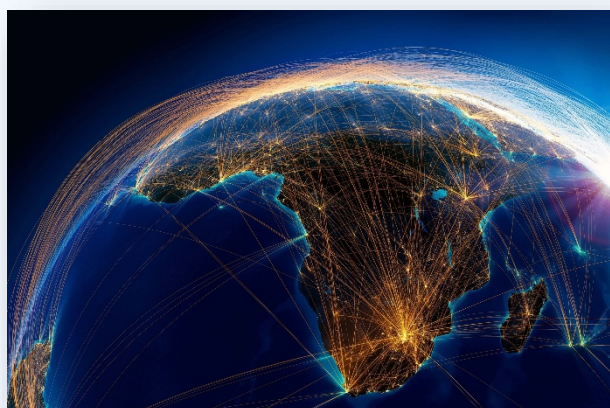
AIR TRAFFIC PERFORMANCE FOR AFRICA 2022



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OVERVIEW

OF AFRICAN GLOBAL TRAFFIC 2022



The COVID-19 pandemic has caused the largest drop in global passenger traffic ever observed from 2020 to 2022. Air travel has definitely seen an uptick in 2022, moving the industry on the path to recovery.

For the purpose of the ensuing analysis, year 2019 has been used as a baseline. Throughout 2022, there has been a slow but steady recovery in air traffic for African airports. Passenger traffic in 2022 has continued to rise compared to 2021 (+56%) but it is still short of the 2019 air

traffic level (-22%).

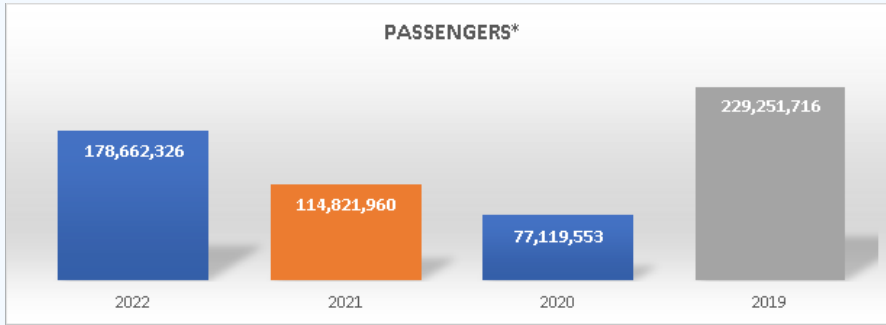
In terms of total passengers and aircraft movements (ATMs), the third quarter of 2022 has witnessed the highest figures at 51,696,274 passengers and 712,518 ATMs respectively. However, in terms of traffic recovery compared to 2019, the fourth quarter of 2022 has witnessed the highest rate of recovery at **85%** for passengers and **82%** for ATMs.

Cargo, on the other hand, is following a different trend. The cargo volume reached for the first time the level closest to that of 2019 in Q4 of 2022 with a recovery of **96%**. However, it has experienced a rollercoaster evolution throughout 2022 compared to 2019. In summary, the cargo transported in Africa in 2022 reached **87%** of the cargo volume handled in 2019.

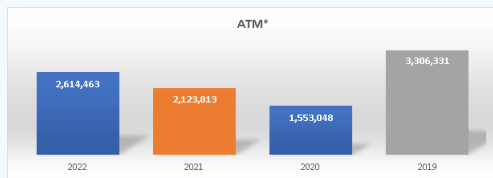
The table and charts below depicts the air traffic figures and evolution in Africa.

AIR TRAFFIC AFRICA for YEAR 2019 vs 2021 vs 2022									
PERIOD	PASSENGERS			AIRCRAFT MOVEMENTS			CARGO (Tons)		
	PASSENGERS 2022	VAR 22/21	VAR 22/19	ACFT MVTS 2022	VAR 22/21	VAR 22/19	CARGO 2022	VAR 22/21	VAR 22/19
Q1	35 501 890	73.5%	-32.0%	580 585	29.6%	-25.2%	494 568	-9.4%	-18.3%
Q2	41 955 767	82.0%	-23.3%	641 222	34.7%	-20.3%	541 289	-5.1%	-12.2%
Q3	51 696 274	55.5%	-19.7%	712 518	22.4%	-20.5%	477 992	-7.1%	-19.8%
Q4	49 508 395	30,1%	-14.6%	680 138	10.2%	-18.0%	658 925	26.8%	-4.4%
YEAR	178 662 326	55.6%	-22.1%	2 614 463	23.1%	-20.9%	2 172 774	1.0%	-13.3%

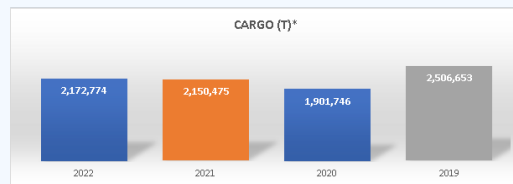
*Total passengers enplaned and deplaned, passengers in transit counted once



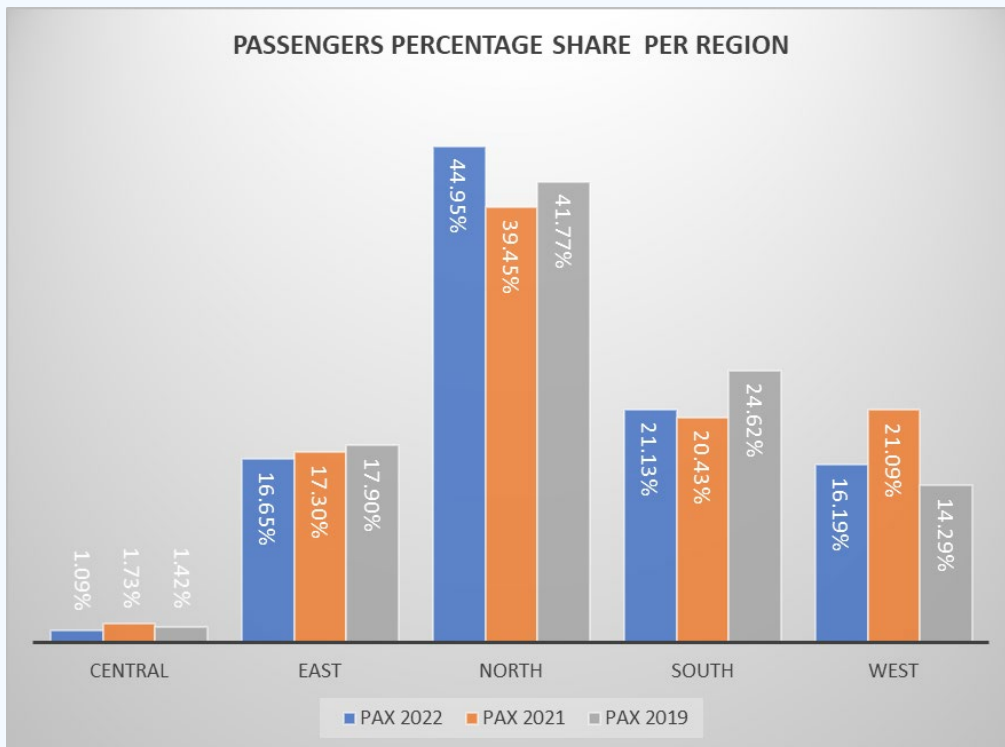
*Total passengers enplaned and deplaned, passengers in transit counted once



*Air Traffic Movements: landings and takeoffs



*Cargo loaded and unloaded in Tons



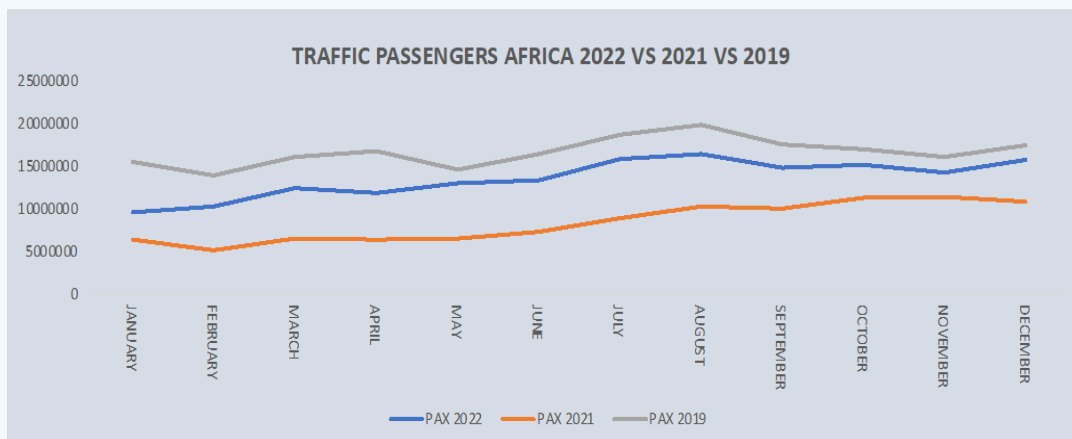
PASSENGER TRAFFIC



The evolution of passenger traffic in 2022 has shown a clear improvement compared to 2021 and a tendency to approach the level of 2019.

In the top ten airports ranking in Africa for total passenger traffic, Cairo International Airport in Egypt has been the only airport

which has fully recovered and even exceeded its 2019 passenger traffic. It has been in first place for the past two years, taking over from OR Tambo International Airport of South Africa, which was first in 2019 and was then in second place in 2021 and 2022.



The rest of the positions are distributed among airports in the North, East and South regions. In tenth position, Nnamdi Azikiwe International Airport of Nigeria has witnessed a strong recovery and performance, being the second airport in the top ten list having exceeded its 2019 passenger traffic.

The table below summarises the total passenger traffic performance for the top ten airports in Africa.

TOP 10 AFRICAN AIRPORTS IN TERMS OF PASSENGER TRAFFIC 2022

<i>2022 RANK</i>	<i>2021 RANK</i>	<i>2019 RANK</i>	<i>AIRPORTS</i>	<i>COUNTRY</i>	<i>PAX 2022</i>	<i>% change vs 2021</i>	<i>% change vs 2019</i>
1	1	2	Cairo International Airport	Egypt	20 009 336	76.3%	5.4%
2	2	1	OR Tambo International Airport	South Africa	14 789 508	80.3%	-31.4%
3	6	4	Cape Town International Airport	South Africa	7 875 425	65.5%	-28.3%
4	9	5	Mohammed V Airport	Morocco	7 559 854	82.6%	-27.7%
5	5	8	Hurghada International Airport	Egypt	7 164 088	46.0%	-4.5%
6	7	3	Addis Ababa Bole International Airport	Ethiopia	6 656 516	45.2%	-44.5%
7	10	6	Jomo Kenyatta International Airport	Kenya	6 556 569	65.0%	-21.0%
8	3	9	Murtala Muhammed Airport	Nigeria	6 526 034	14.6%	-10.2%
9	13	7	Alger Houari Boumédiene Airport	Algeria	6 317 793	190.7%	-19.4%
10	4	14	Nnamdi Azikiwe International Airport	Nigeria	5 985 596	13.4%	10.7%

All the top ten airports in terms of total passengers represented 50% of overall passenger traffic in Africa in 2022.

The passenger traffic in Africa is quite dependent on the international passenger traffic, with the latter representing **60%** of overall passenger traffic in 2022 and **65%** in 2019. It is also worth mentioning that **72%** of international passenger traffic in 2019 (pre-covid) has been recovered in 2022.

On the other hand, domestic passenger traffic, representing **37%** of the total passenger traffic in 2022, has recovered **91%** of its pre-covid traffic (2019).

In the ranking of the ten best airports in terms of international passenger traffic, the presence of airports not in the top ten total passenger traffic is noteworthy. The airports concerned have a strong tourist connotation, namely Marrakech Menara International Airport (Morocco) and Sharm El Sheikh International Airport (Egypt).

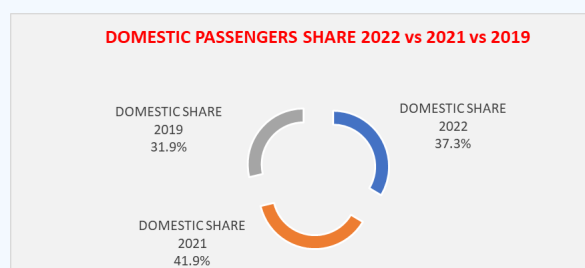
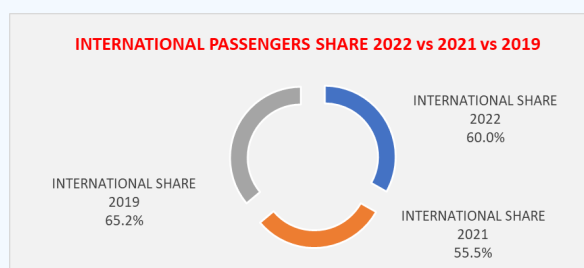
In terms of international passenger traffic in 2022, Cairo International Airport in Egypt continues to dominate the top ten list, being the only airport having again surpassed its international passenger traffic figure of 2019 (**+4.1%**).

The table below shows the comparative ranking of the top ten airports in Africa for the international passenger traffic in 2022. Three airports in Egypt are in this top ten ranking.

TOP 10 AFRICAN AIRPORTS IN TERMS OF INTERNATIONAL PASSENGERS 2022*

2022 RANK	2021 RANK	2019 RANK	AIRPORTS	COUNTRY	INT PAX 2022	% change vs 2021	% change vs 2019
1	1	1	Cairo International Airport	Egypt	16 452 148	76.0%	4.1%
2	4	4	Mohammed V Airport	Morocco	6 752 740	90.3%	-27.4%
3	2	5	Hurghada International Airport	Egypt	6 544 978	45.0%	-6.4%
4	8	3	OR Tambo International Airport	South Africa	5 970 982	172.5%	-39.8%
5	6	6	Tunis Carthage International Airport	Tunisia	5 346 870	109.4%	-14.8%
6	11	7	Marrakech Ménara Airport	Morocco	4 738 654	226.3%	-20.6%
7	7	10	Jomo Kenyatta International Airport	Kenya	4 692 753	84.5%	-9.2%
8	18	8	Alger Houari Boumédiene Airport	Algeria	4 129 715	444.1%	-27.1%
9	5	2	Addis Ababa Bole International Airport	Ethiopia	3 778 635	11.9%	-62.7%
10	3	9	Sharm El Sheikh International Airport	Egypt	3 708 996	-6.9%	-29.7%

* Top 10 International passengers enplaned and deplaned



When analyzing the air traffic by sub-region, the Northern region dominated the passenger traffic with a share of **45%** in 2022, which is normal with 4 airports in the region in the top ten ranking. The Southern region followed with a **21%** share, strongly driven by airports in South Africa. The Eastern and Western sub-regions had a similar share at around **16%** whereas the Central sub-region had a share of **1%**.

Regarding the recovery of the post-covid passenger traffic, the Western sub-region has reached **92%** of that traffic in 2022. The Northern sub-region at **88%** is seeing a gradual increase in passenger traffic following the relaxation of travel restrictions after Q1 in 2022. The Eastern sub-region at **76%** and Southern sub-region at **70%**, notably penalized by stricter sanitary measures, are struggling to approach to the 2019 passenger traffic performance. On the other hand, the Central region at **62%** is still lagging behind in its recovery.

The above is summarized in the table below.

REGION AFRICA	PASSENGER SHARE 2022 (%)	% OF RECOVERY 2022 vs 2019
Central	1%	62%
East	17%	76%
North	45%	88%
South	21%	70%
West	16%	92%
TOTAL	100,00%	78%

Country-wise, the ranking in terms of total passenger traffic in 2022 is tabulated below. Egypt dominates the top five with close to 38 million passengers handled at its airports in 2022. The other African countries in this ranking are respectively South Africa, Morocco, Nigeria and Kenya.

Rank	Country	Total Pax 2022
1	Egypt	37,942,427
2	South Africa	30,087,353
3	Morocco	20,549,844
4	Nigeria	14,193,600
5	Kenya	8,957,594

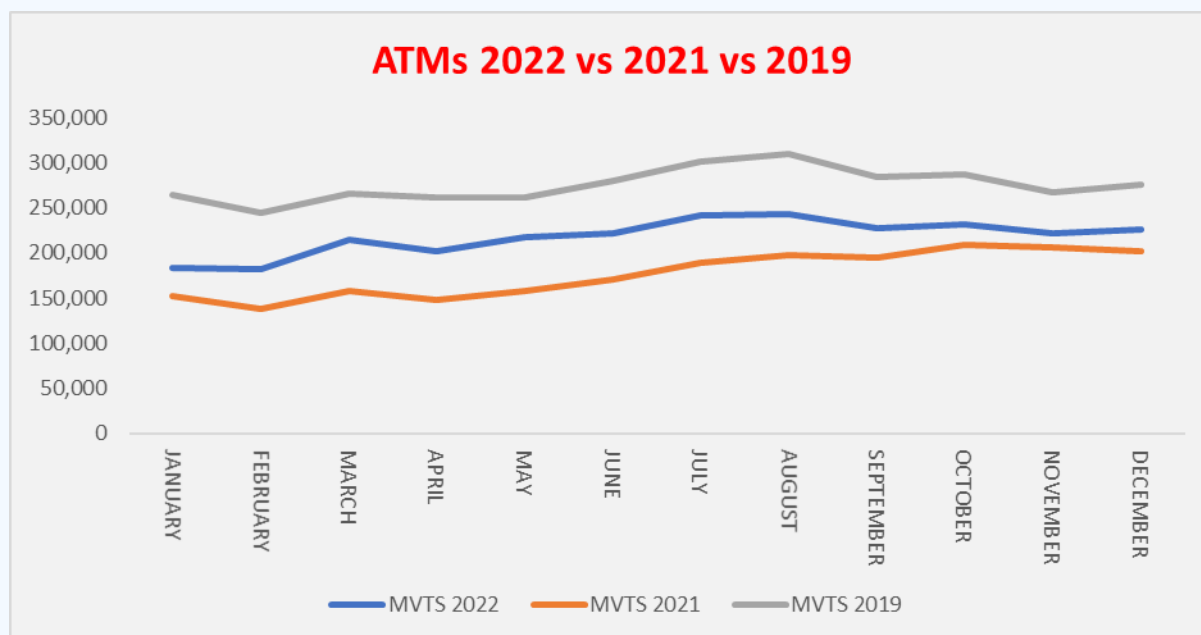
AIR MOVEMENTS (ATMs)



As for the passenger traffic, the number of aircraft movements (ATMs – Arriving and Departing) in 2022 has grown compared to 2021 **(+23%)** but still not to the level of 2019 **(-21%)** pre-covid period.

The top ten airports for aircraft movements represented **39%** of the total aircraft movements in

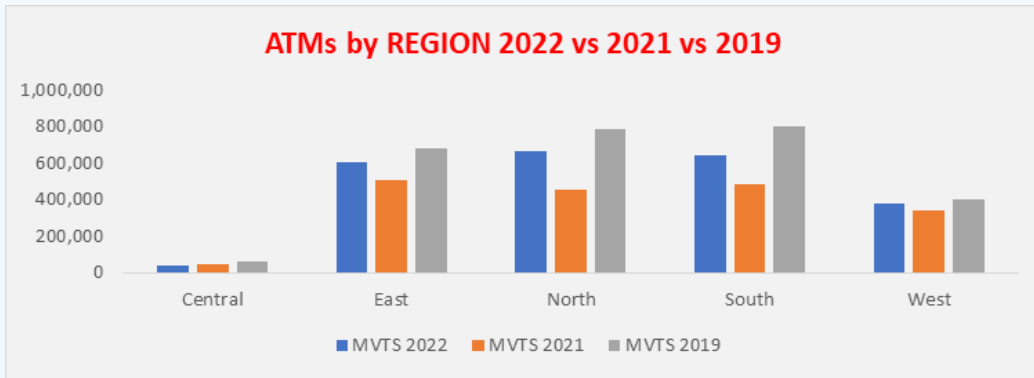
2022 compared to **37%** and **34%** respectively in 2021 and 2019. The chart below depicts the evolution of the aircraft movements in 2022 compared to 2021 and 2019.



The top ten African airports in terms of aircraft movements in 2022 are tabulated below with OR Tambo International Airport in South Africa taking the first spot followed by Cairo International Airport in Egypt and Addis Ababa Bole International Airport in Ethiopia.

TOP 10 AFRICAN AIRPORTS IN TERMS OF AIRCRAFT MOVEMENTS 2022							
2022 RANK	2021 RANK	2019 RANK	AIRPORTS	Country	ATM 2022	% change vs 2021	% change vs 2019
1	1	1	OR Tambo International Airport	SouthAfrica	174 624	36,43%	-20,20%
2	2	2	Cairo International Airport	Egypt	163 579	46,04%	0,84%
3	8	3	Addis Ababa Bole International Airport	Ethiopia	108 244	68,22%	-12,70%
4	6	4	Jomo Kenyatta International Airport	Kenya	93 983	29,94%	-19,19%
5	3	6	Murtala Muhammed Airport	Nigeria	93 979	7,91%	-2,05%
6	5	-	Wilson Airport	Kenya	90 689	21,09%	-
7	7	5	Cape Town International Airport	South Africa	88 183	31,00%	-9,07%
8	4	9	Nnamdi Azikiwe International Airport	Nigeria	88 042	9,46%	24,43%
9	9	7	Mohammed V Airport	Morocco	68 362	42,53%	-28,15%
10	16	8	Alger Houari Boumédiene Airport	Algeria	57 790	69,18%	-32,97%

In 2022, the Northern, Southern and Eastern sub-regions of Africa had a fairly close share of the aircraft movements in Africa at **29%**, **27%** and **26%** respectively, as depicted below.



REGION AFRICA	ATMs SHARE 2022 (%)	% CHANGE 2022 vs 2019
Central	2%	-36%
East	26%	-11%
North	29%	-16%
South	27%	-20%
West	16%	-7%
TOTAL	100%	-21%

CARGO

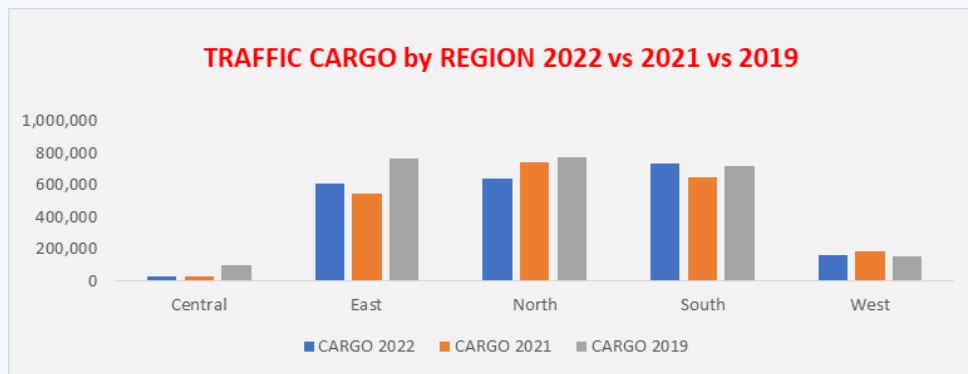
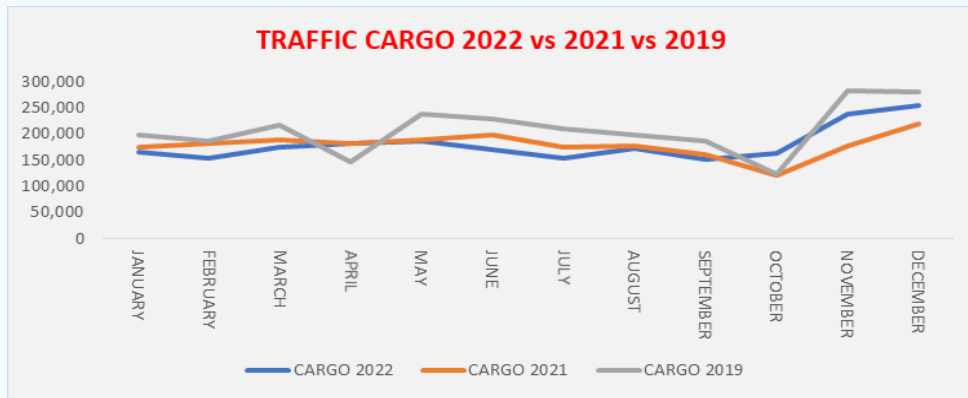


lagging behind with **7%** and **1%** respectively.

The evolution of cargo traffic (Inbound and Outbound) has been less linear in 2022 although experiencing a good recovery from the 2019 volume (**+87%**).

In terms of distribution by sub-region, the cargo traffic was more homogeneous with three sub-regions enjoying between **28%** and **33%** of market share. The Western and Central sub-regions are however

The above analysis are shown below.

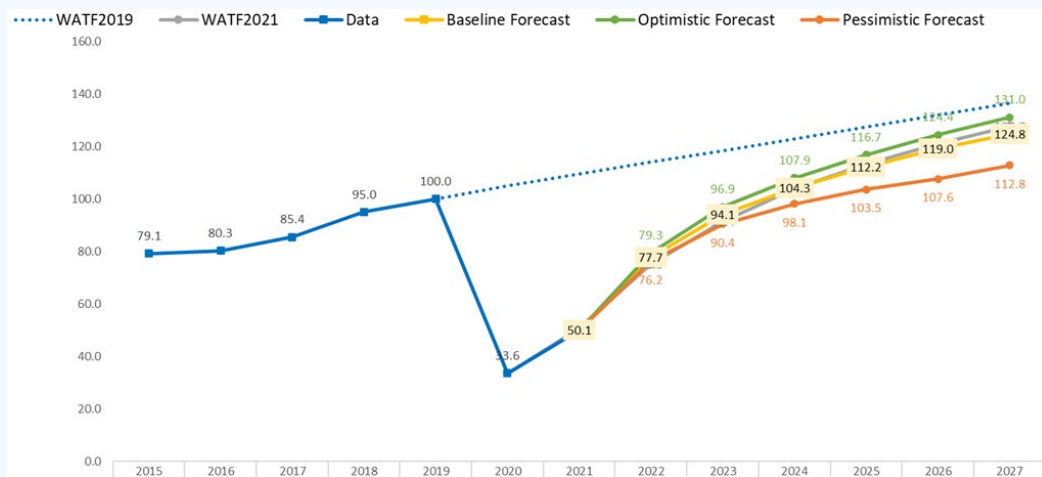


REGION AFRICA	CARGO SHARE 2022 (%)	% CHANGE 2022 vs 2019
Central	1%	-71%
East	28%	-9%
North	30%	-5%
South	34%	16%
West	7%	22%
TOTAL	100%	-13%

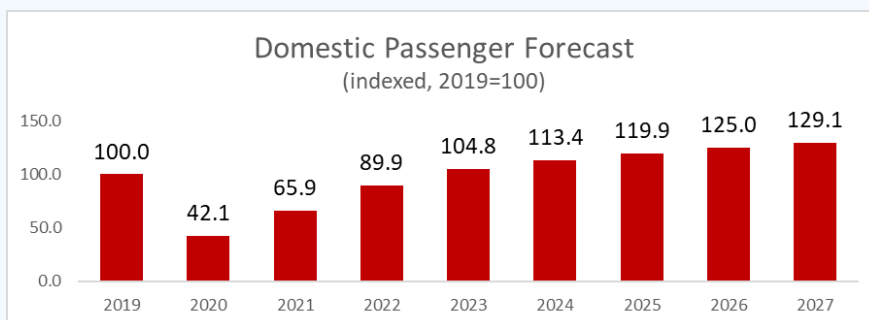
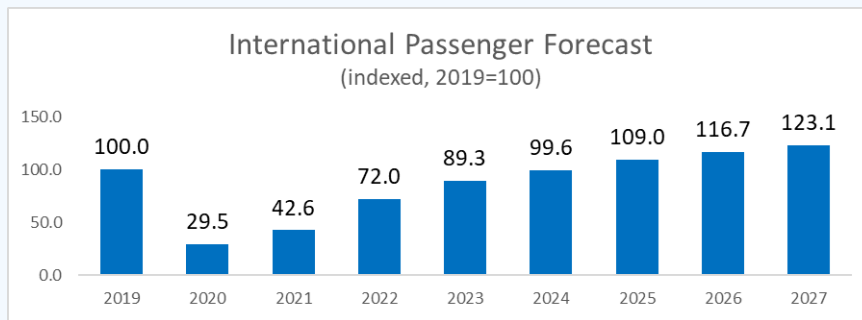
FORECAST



The chart below (using a baseline of 100 for 2019) illustrates the forecast of the passenger traffic for Africa until 2027 based on three scenarios: baseline, optimistic and pessimistic. In the worst case scenario, a recovery in passenger traffic to the 2019 level is anticipated in 2025.



The forecasts of the international and domestic passenger traffic in Africa are depicted below.





ACI Africa Media Team

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