

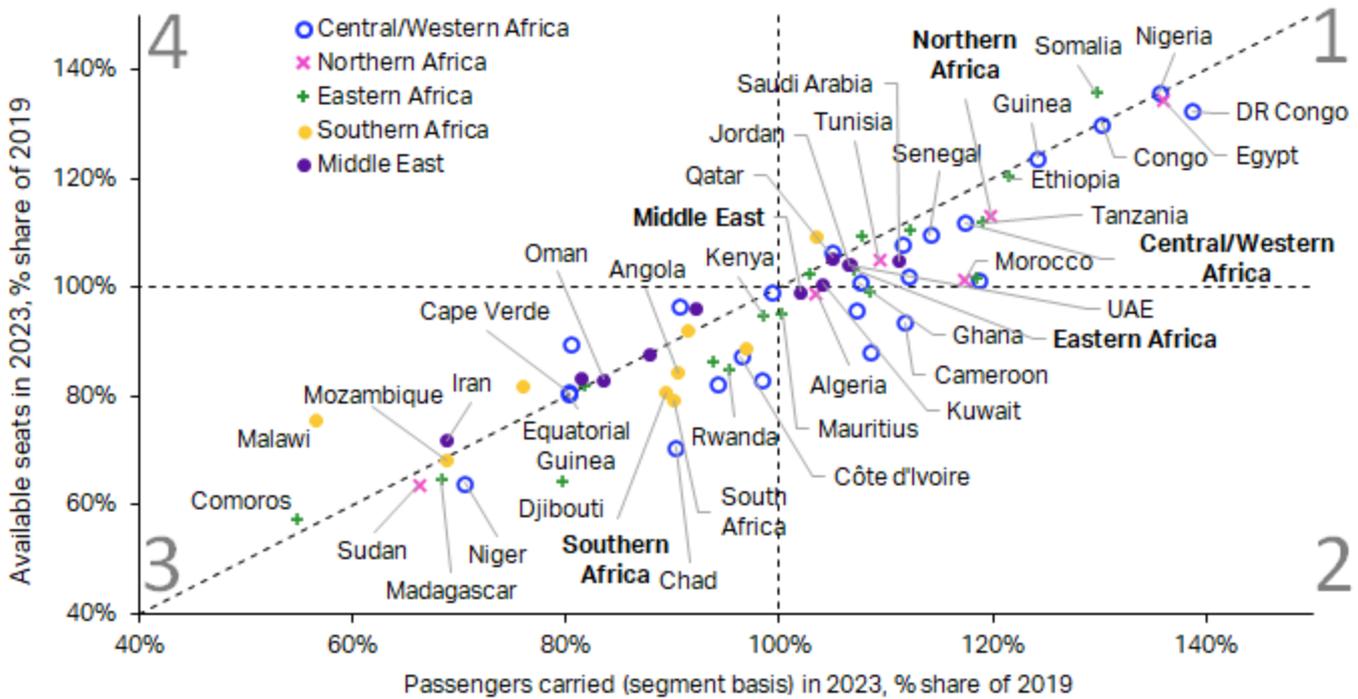


Chart of the Week

5 April 2024

Mixed outcomes, positive outlook for Middle East & Africa

Total available seats and passengers in Middle Eastern & African countries (2023 vs 2019)



Source: IATA Sustainability and Economics, OAG, DDS, selected countries

- Load factors in the Middle East and Africa region improved significantly in 2023, as the number of origin-destination passengers reached 105% of 2019 levels, while the number of available seats reached 101%. Outcomes vary considerably across the region, but all countries below the diagonal line recorded higher load factors in 2023 than in 2019, as the growth in the number of passengers carried (horizontal axis) exceeded that of available seats (vertical axis).
- Of the main sub-regions, Northern Africa and Central/Western Africa showed the strongest expansion in passenger volumes to 120% and 117%, respectively, compared to 2019. Some countries saw recovery to in excess of 130%. Within Northern Africa, all countries except Sudan surpassed 2019 passenger levels, partly driven by a rebound in tourism in the sub-region. On the other hand, for Central/Western Africa the results are more varied. In this case, the overall performance was driven by the largest markets, most notably Nigeria, which alone constitutes 41% of the sub-region's total and grew to 136% of its 2019 level.
- The Middle East, by far the largest sub-region market, just surpassed 2019 passenger numbers at 102%. Nonetheless, going forward the region's annual scheduled deliveries of new aircraft in 2025-2027 are expected to be roughly double that of 2023; a clear signal of the optimism regarding regional growth prospects. Southern Africa remains the only sub-region still below 2019 passenger levels. This is primarily driven by the outcome for South Africa, which stood at 90% of its 2019 passenger levels in 2023.
- The load factor improvement across the majority of the countries in the Middle East and Africa region is supportive of improved financial performance. This is particularly relevant for Africa, where historically the industry has struggled to generate sustained profitability, partly due to passenger load factors typically lagging the global average.

Terms and Conditions for the use of this IATA Economics Report and its contents can be found [here](#). By using this IATA Economics Report and its contents in any manner, you agree that the IATA Economics Report Terms and Conditions apply to you and agree to abide by them. If you do not accept these Terms and Conditions, do not use this report.

IATA Sustainability & Economics
economics@iata.org