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Media Briefing Africa and Middle East

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Source: IATA Sustainability & Economics, Tourism Economics

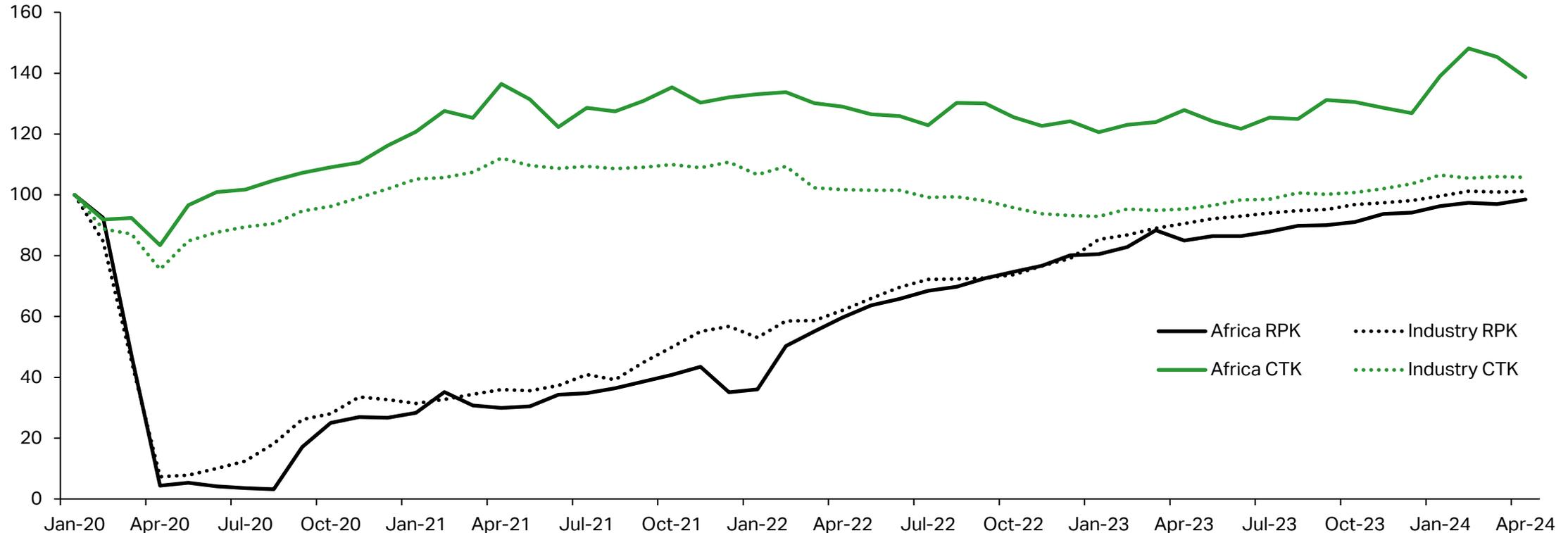


Africa passenger traffic approaching full recovery

Cargo traffic stands almost 20% above 2019 level

Africa and Industry total RPK and CTK, Seasonally Adjusted

Indexed to Jan 2020 = 100

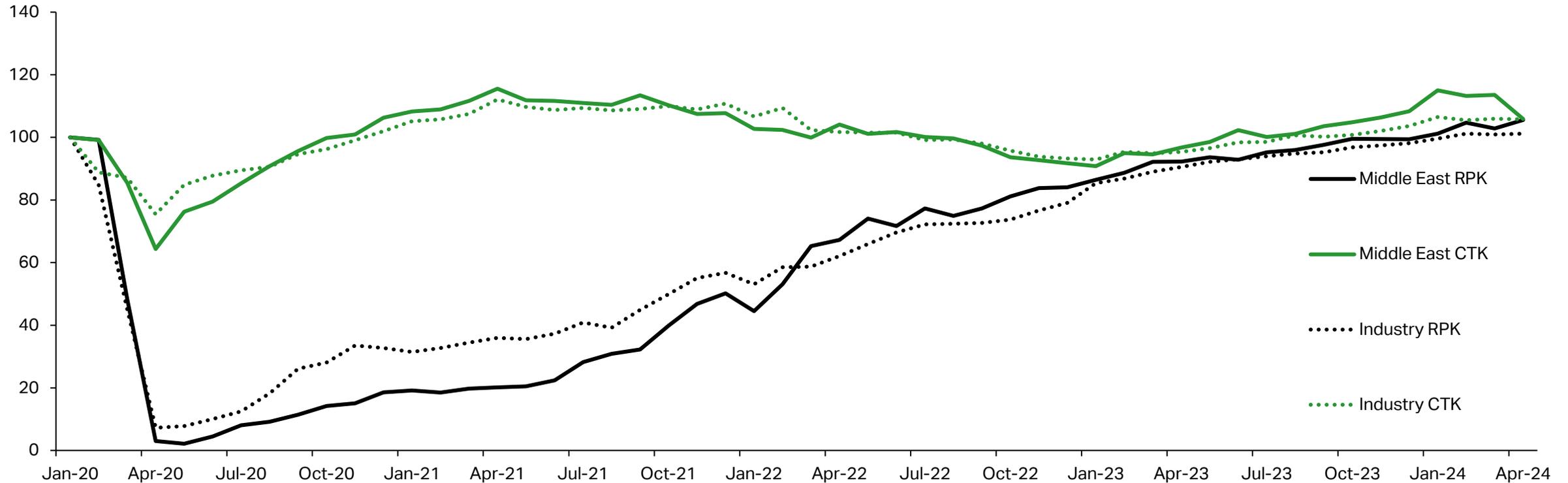


Middle East carriers' passenger traffic fully recovered

ME CTKs currently stand 6.4% above 2019 level

Middle East and Industry total RPK and CTK, Seasonally Adjusted

Indexed to Jan 2020 = 100



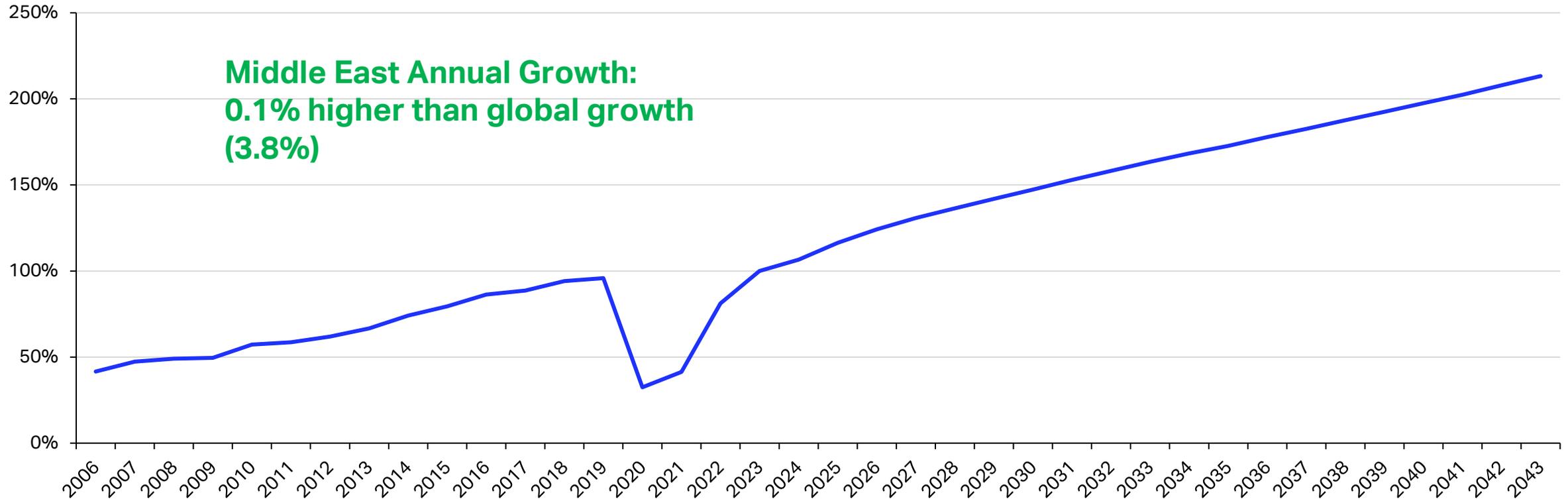
Source: IATA Sustainability & Economics, Tourism Economics



Middle East passenger numbers will double, reaching 530 million in 2043

Traffic will grow at an average annual rate of 3.9% over the 2023 – 2043 period

Passengers, % share of 2023



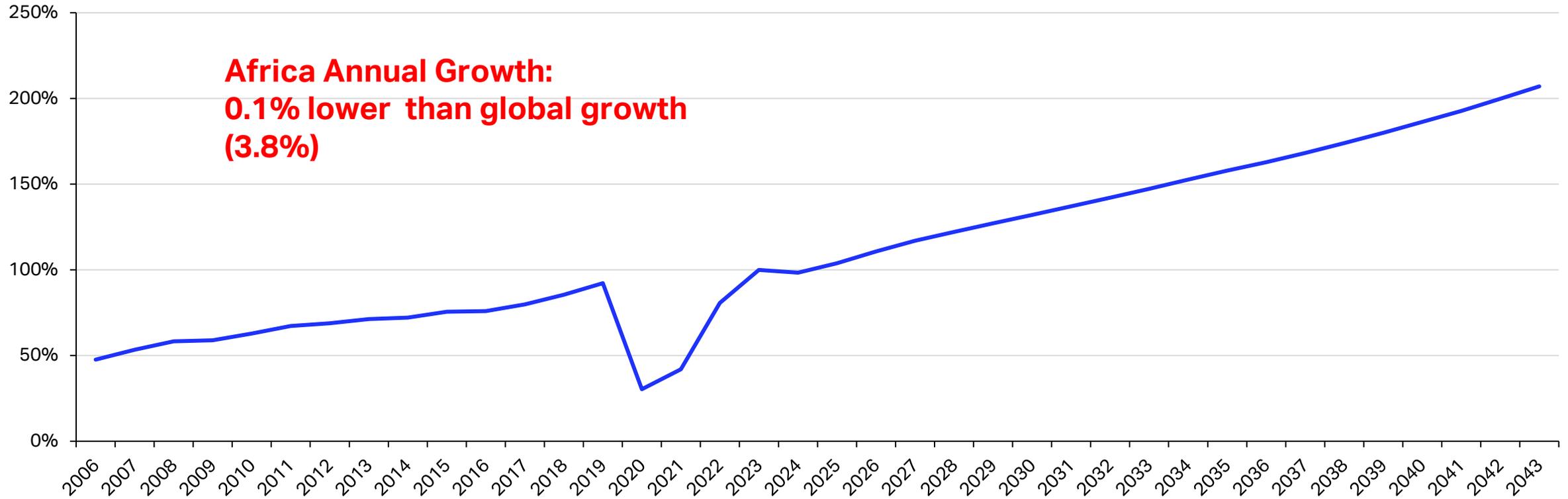
Source: IATA Sustainability & Economics, Tourism Economics



Africa traffic is projected to reach 345 million in 2043, more than doubling from 2023

Average annual growth rate is expected to be 3.7%

Passengers, % share of 2023



Source: IATA Sustainability & Economics, Tourism Economics



AME Priorities

Blocked Funds

Harmonized Regulations

Safety and Flight Operations

Source: IATA Sustainability & Economics, Tourism Economics



Blocked Funds – April 2024

- **\$1.8 billion** in blocked funds globally down from \$2.3 billion in April 2023
- **\$1.1 billion** in AME down from \$1.9 billion in April 2023

Top countries with blocked funds in AME (as of April 2024)

Algeria - **\$286m**
XAF Zone - **\$151m**
Ethiopia - **\$148m**
Lebanon - **\$129m**
Eritrea - **\$75m**

Source: IATA Sustainability & Economics, Tourism Economics



60%

of blocked funds are in AME

\$1.1

billion of blocked funds in AME

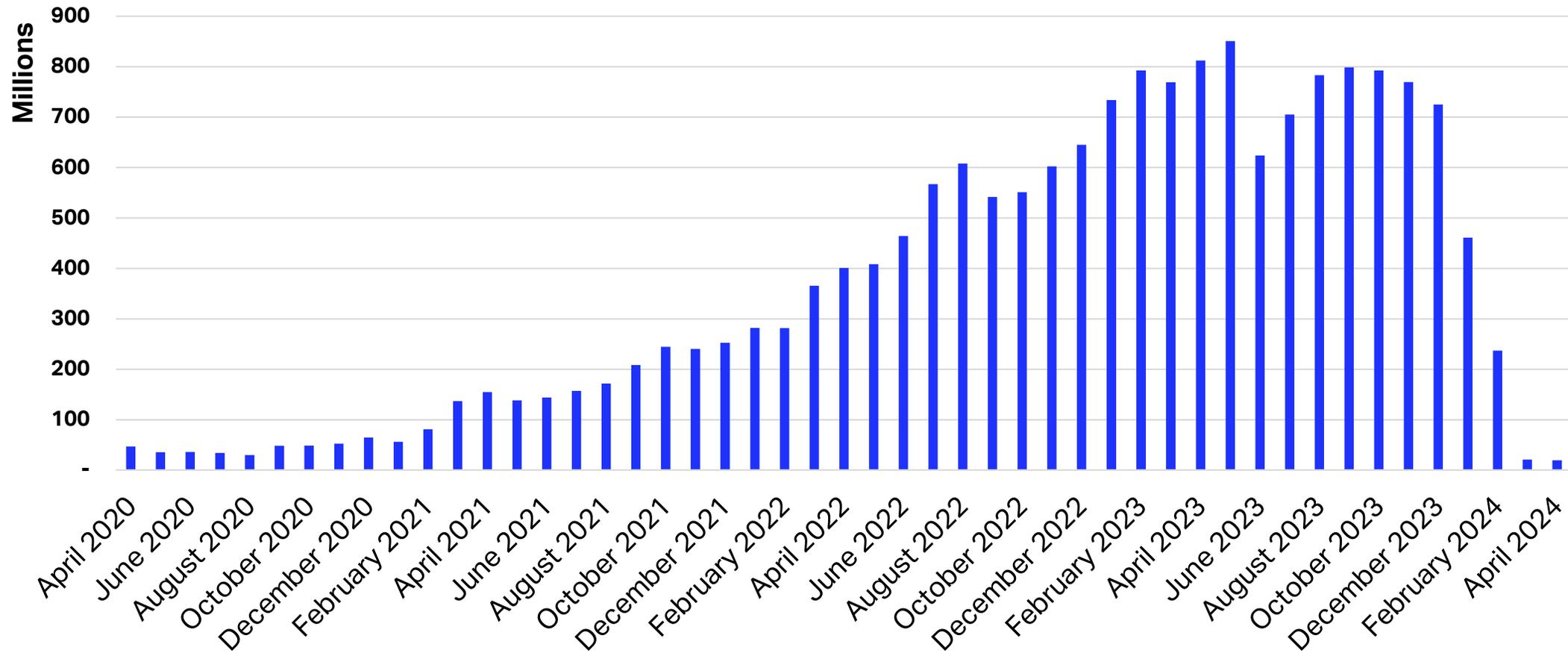


+24

countries globally with blocked funds

98% of blocked funds cleared in Nigeria

Nigeria Blocked Funds Evolution



Source: IATA Sustainability & Economics, Tourism Economics



Harmonized Regulations



Taxes and Charges



Passenger Rights

Harmonized Regulations: Taxes and Charges

Challenges

- Absence of Economic Regulations
- Lack of Consultation
- Inconsistence Interpretations of ICAO Policies
- CAPEX Overspend

Successful Collaboration

- Saudi Arabia
- Egypt
- South Africa

Harmonized Regulations: Passenger Rights in MENA

Governments must work closely with industry to ensure regulations are aligned with industry recommendations and ICAO principles.

Source: IATA Sustainability & Economics, Tourism Economics



All Accident Rate per Region of Operator

Both AFI and MENA regions saw an improvement in the accident rate per million sectors

Source: IATA Sustainability & Economics, Tourism Economics

	World	IATA Members
2023	0.80	0.77
2022	1.30	0.58
2019-2023 (Avg)	1.19	0.73

↓ ↑ 2023 vs 2022 accident rate



Jet Hull Loss per Region of Operator

Jet hull loss accident rate is lower or the same in all Regions

Source: IATA Sustainability & Economics,
Tourism Economics

	World ↓	IATA Members ↓
2023	0.00	0.00
2022	0.24	0.05
2019-2023 (Avg)	0.14	0.08

↓ ↑ 2023 vs 2022
accident rate

MENA

0.00	2023
0.00	2022
0.00	2019-2023

AFI

0.00	2023
0.00	2022
0.28	2019-2023

Turboprop Hull Loss per Region of Operator

Turboprop hull loss accident rate is lower or the same in 7/8 Regions

Source: IATA Sustainability & Economics,
Tourism Economics

	World ↓	IATA Members =
2023	0.57	0.00
2022	1.76	0.00
2019-2023 (Avg)	1.21	0.12

↓ ↑ 2023 vs 2022
accident rate

MENA =
0.00 2023
0.00 2022
0.00 2019-
2023

AFI ↓
2.42 2023
9.40 2022
5.04 2019-
2023

Challenges: Safety at State Level

Governments need to step up:

Collaboration, planning, investment and effective implementation

Implementation of ICAO Standards for safety needs to be improved:

- 42 States in Africa remain below the Effective Implementation (EI) of ICAO Standards
- 5 States in the Middle East are below Effective Implementation (EI) of ICAO Standards

Opportunities with:

- Improving Runway Safety
- Reducing Callsign Confusion
- Airspace Optimization and Resilience

Focus Africa

Source: IATA Sustainability & Economics, Tourism Economics



Focus Africa Priority Areas

- **Safety:** Improve operational safety through a data driven, collaborative program to reduce safety incidents and accidents, in the air and on the ground.
- **Infrastructure:** Facilitate the growth of efficient, secure, and cost-effective aviation infrastructure.
- **Connectivity:** Promote the liberalization of intra-African market access through the Single African Air Transport Market (SAATM).
- **Finance and Distribution:** Accelerate the implementation of secure, effective and cost-efficient financial services and adoption of modern retailing standards.
- **Sustainability:** Assist Africa's air transport industry to achieve the "Net Zero by 2050" emissions targets agreed to by industry and the UN's International Civil Aviation Organisation (ICAO).
- **Future Skills:** Promote aviation-related career paths and ensure a steady supply of diverse and suitably skilled talent to meet the industry's future needs.

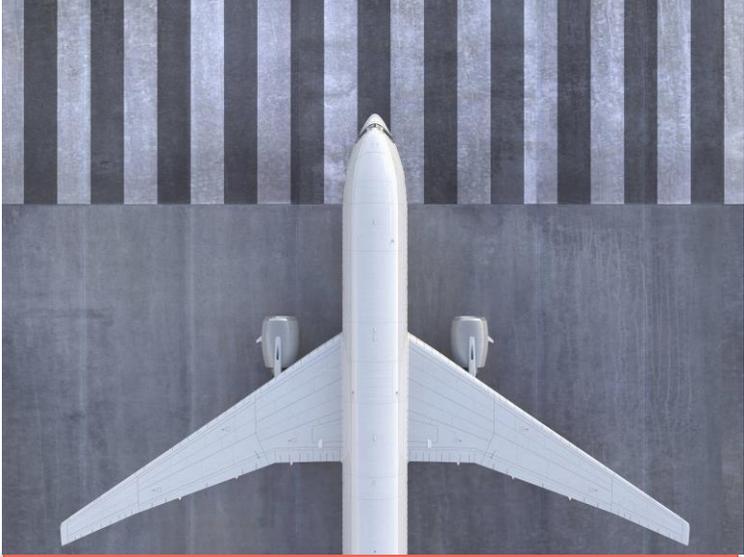
Collaborative Aviation Safety Improvement Program (CASIP) for Africa launched with **12** partners



CASIP Work Streams



Operational Safety



**Training, Capacity –
Building and
Improvement
Monitoring**



SIRM Africa



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Q & A

Thank you

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