Africa passenger traffic approaching full recovery
Cargo traffic stands almost 20% above 2019 level

Source: IATA Sustainability & Economics, Tourism Economics
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.

Middle East Annual Growth: 0.1% higher than global growth (3.8%).

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%.

Africa Annual Growth: 0.1% lower than global growth (3.8%)

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
98% of blocked funds cleared in Nigeria

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

Source: IATA Sustainability & Economics, Tourism Economics
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

<table>
<thead>
<tr>
<th>Region</th>
<th>2019-2023 (Avg)</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>1.19</td>
<td>1.30</td>
<td>0.80</td>
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<tr>
<td>IATA Members</td>
<td>0.73</td>
<td>0.58</td>
<td>0.77</td>
</tr>
<tr>
<td>MENA</td>
<td>1.16</td>
<td>1.30</td>
<td>1.16</td>
</tr>
<tr>
<td>AFI</td>
<td>6.38</td>
<td>10.88</td>
<td>6.38</td>
</tr>
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</table>

2023 vs 2022 accident rate
Jet Hull Loss accident rate is lower or the same in all Regions

Source: IATA Sustainability & Economics, Tourism Economics

<table>
<thead>
<tr>
<th></th>
<th>World</th>
<th>IATA Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>2022</td>
<td>0.24</td>
<td>0.05</td>
</tr>
<tr>
<td>2019-2023 (Avg)</td>
<td>0.14</td>
<td>0.08</td>
</tr>
</tbody>
</table>

2023 vs 2022 accident rate
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

<table>
<thead>
<tr>
<th>Region</th>
<th>2023</th>
<th>2022</th>
<th>2019-2023 (Avg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>0.57</td>
<td>1.76</td>
<td>1.21</td>
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<tr>
<td>IATA Members</td>
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<tr>
<td>MENA</td>
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<td>0.00</td>
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</tr>
<tr>
<td>AFI</td>
<td>2.42</td>
<td>9.40</td>
<td>5.04</td>
</tr>
</tbody>
</table>

2023 vs 2022 accident rate
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

Source: IATA Sustainability & Economics, Tourism Economics
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.

Source: IATA Sustainability & Economics, Tourism Economics
Collaborative Aviation Safety Improvement Program (CASIP) for Africa launched with 12 partners

Source: IATA Sustainability & Economics, Tourism Economics
CASIP Work Streams

Operational Safety

Training, Capacity – Building and Improvement Monitoring

SIRM Africa
Media Briefing

Q & A

Thank you

Source: IATA Sustainability & Economics, Tourism Economics