



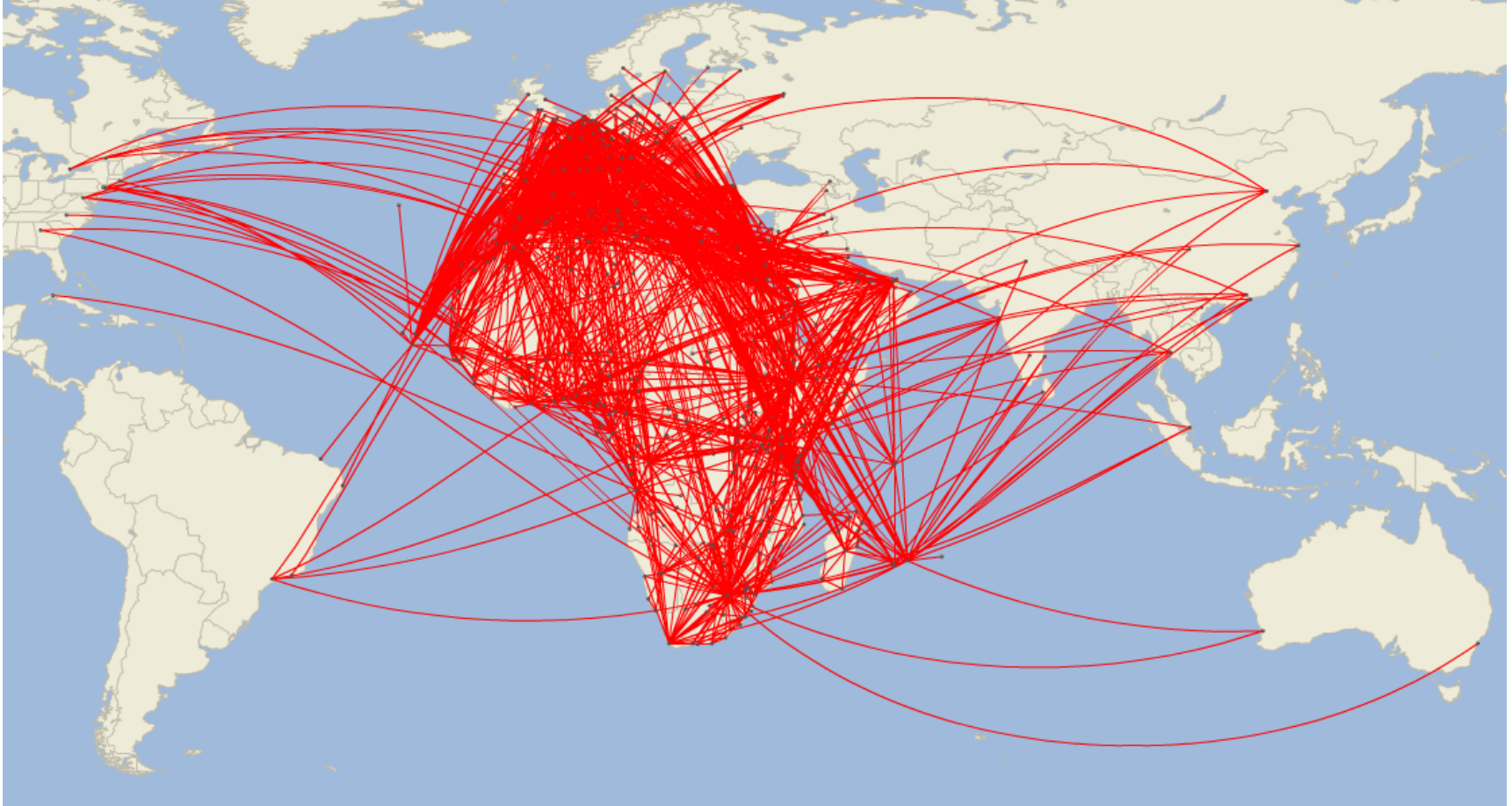
Air Connectivity in Africa: *Challenges & Opportunities*

Brian Pearce,
Chief Economist,
IATA

www.iata.org/economics

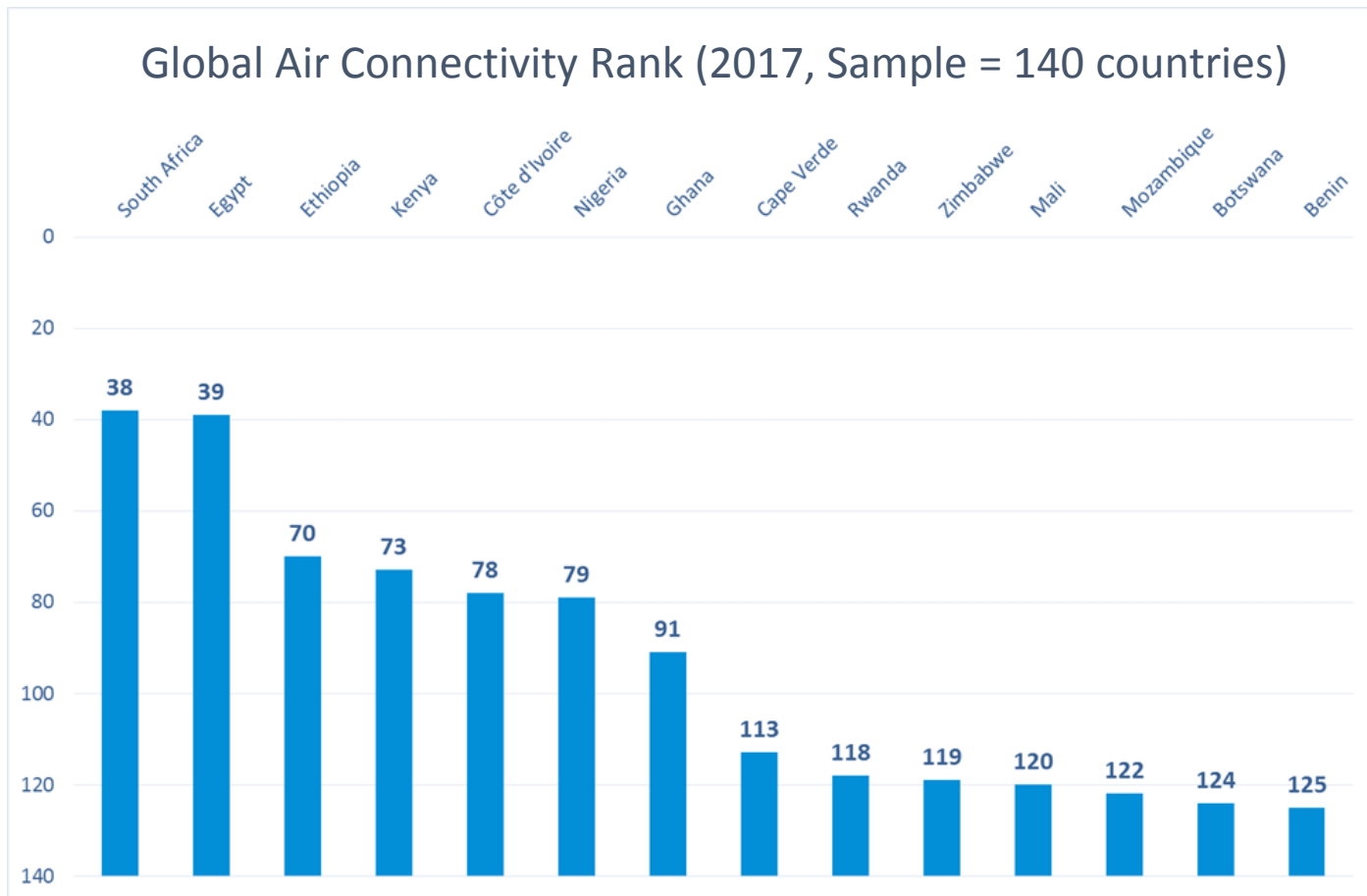


Aviation connects African businesses to world markets



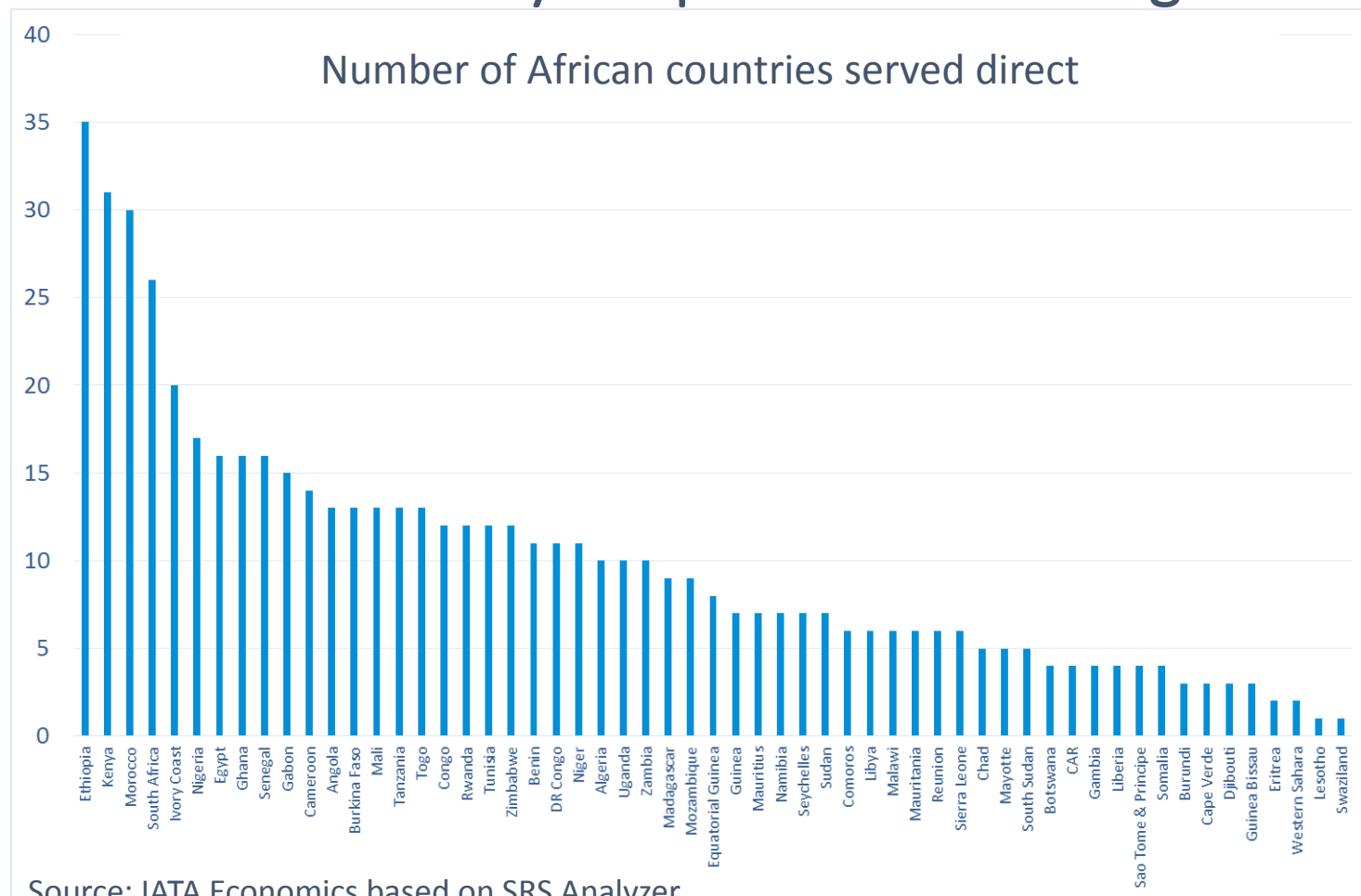
Source: SRS Analyzer

But connectivity could be improved across much of Africa

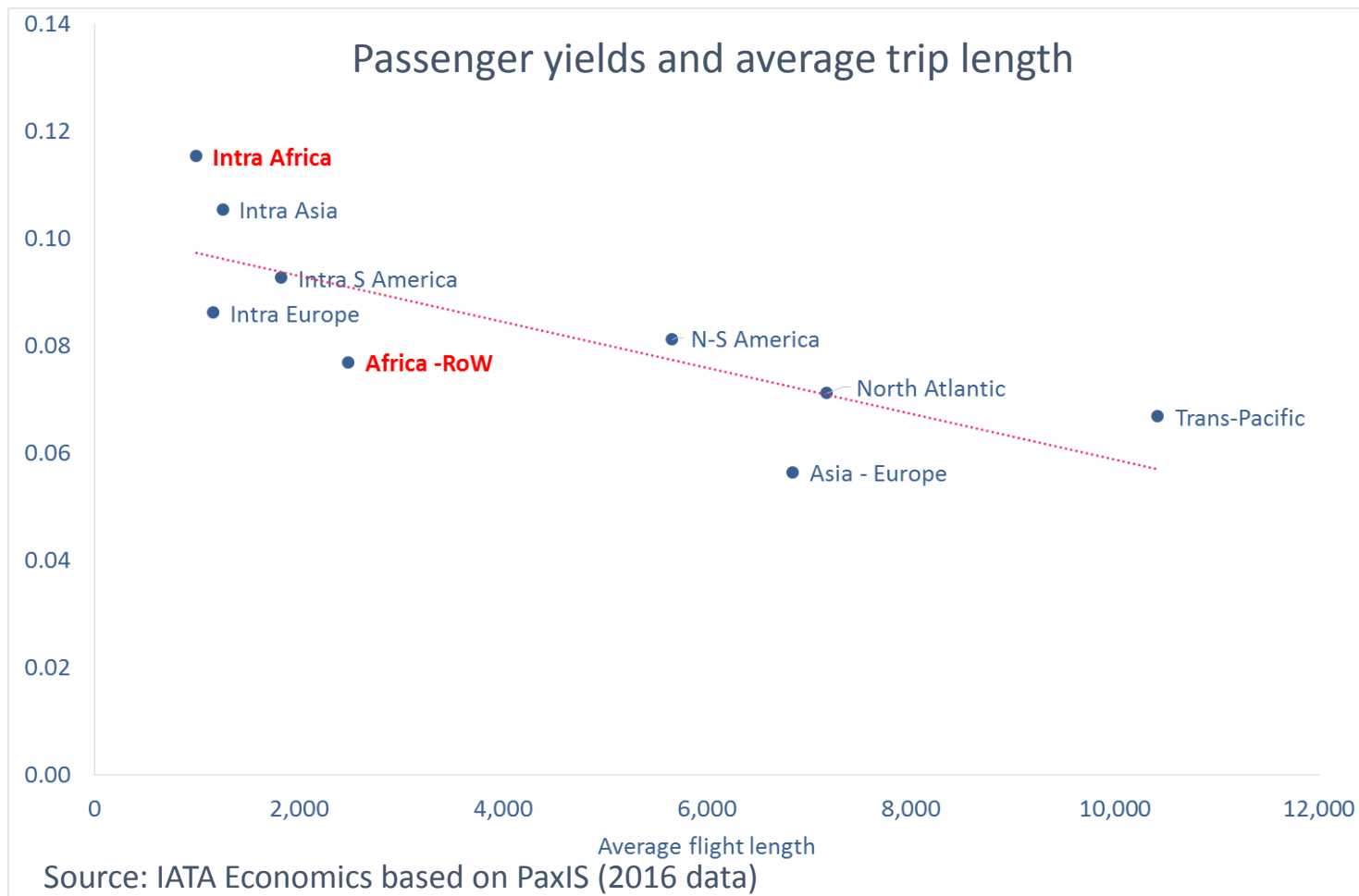


Source: IATA Economics based on SRS Analyzer

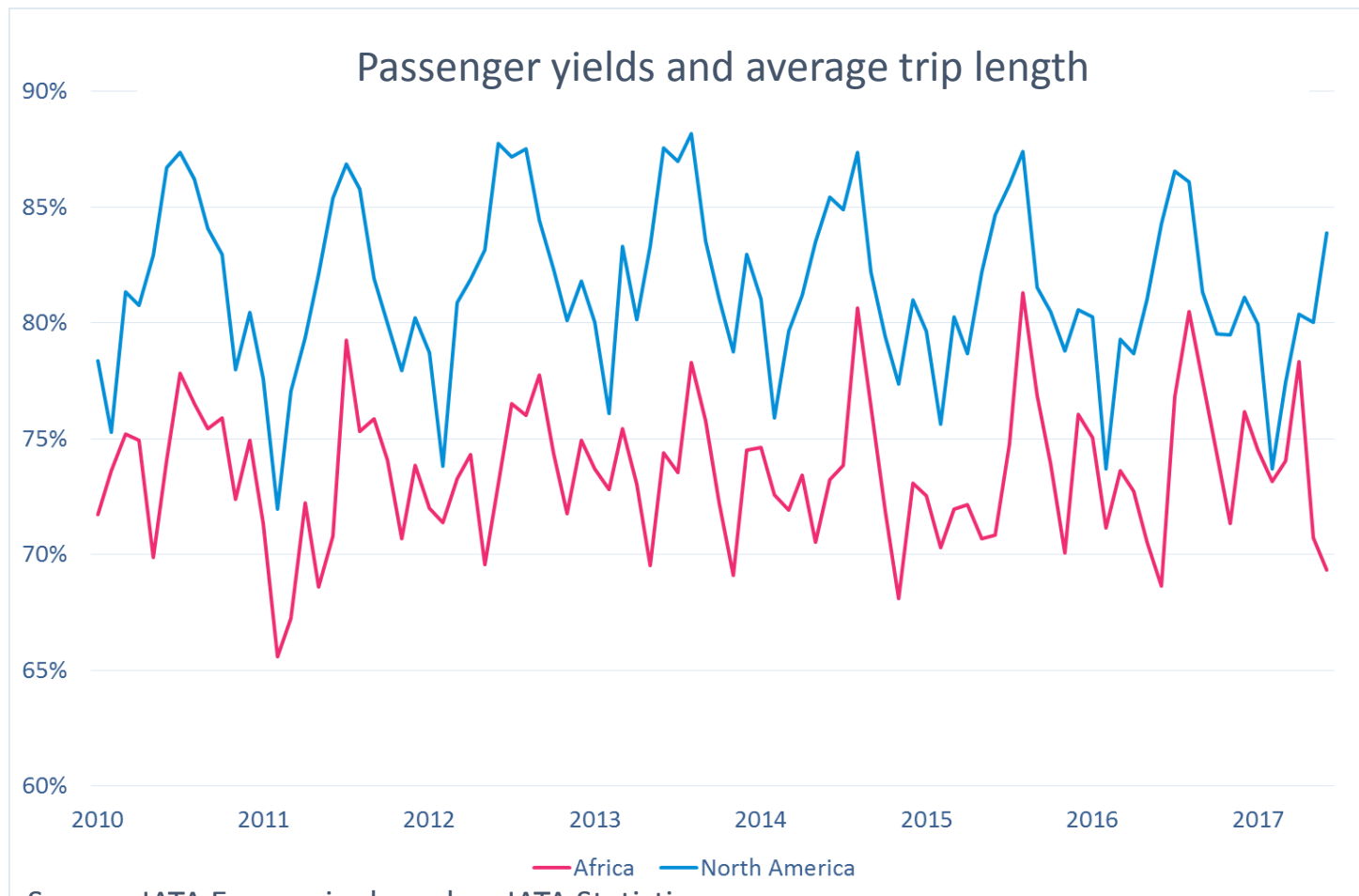
Intra-African connectivity is a particular challenge



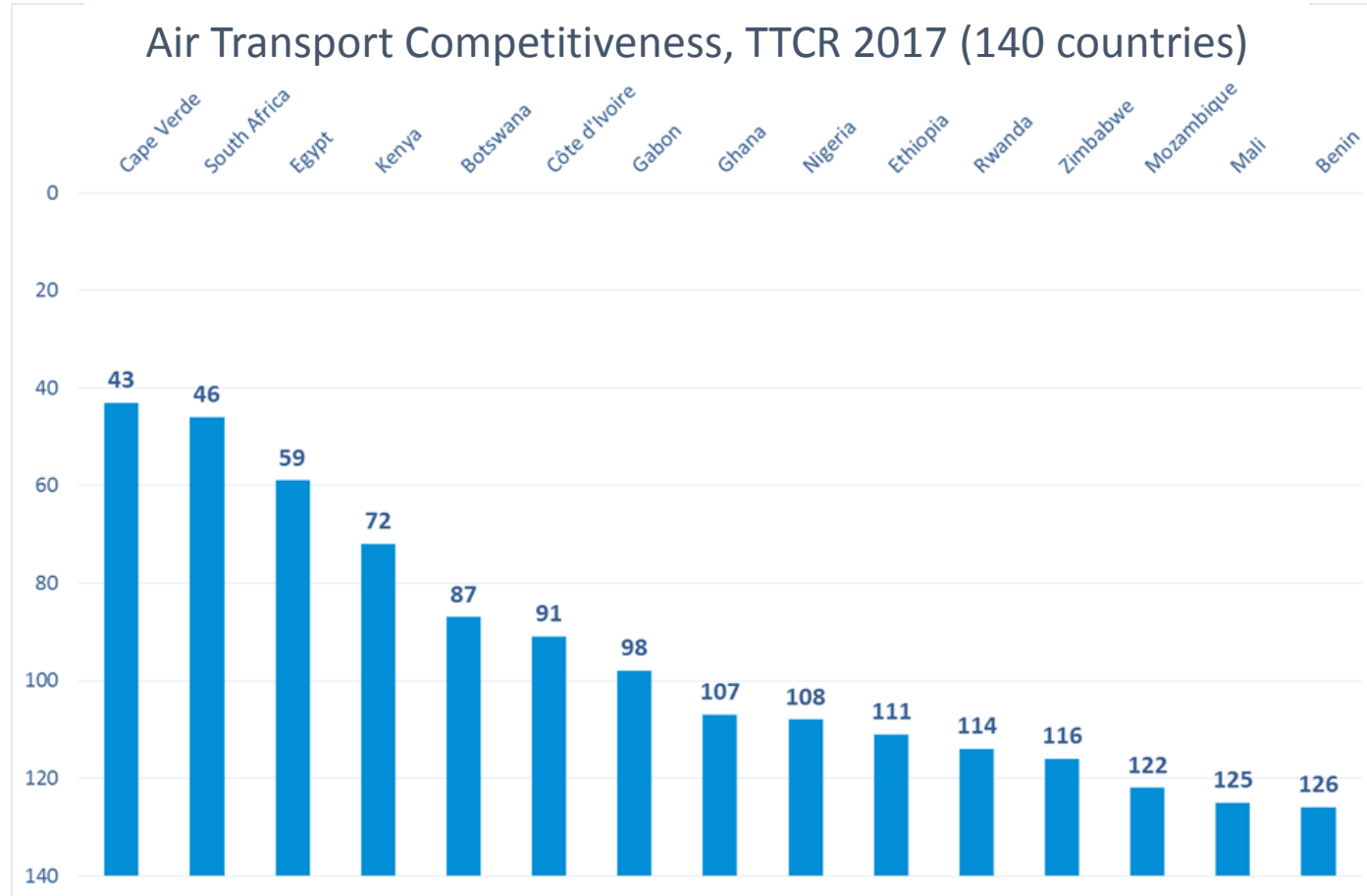
Fares on Intra-Africa routes are high



But load factors aren't

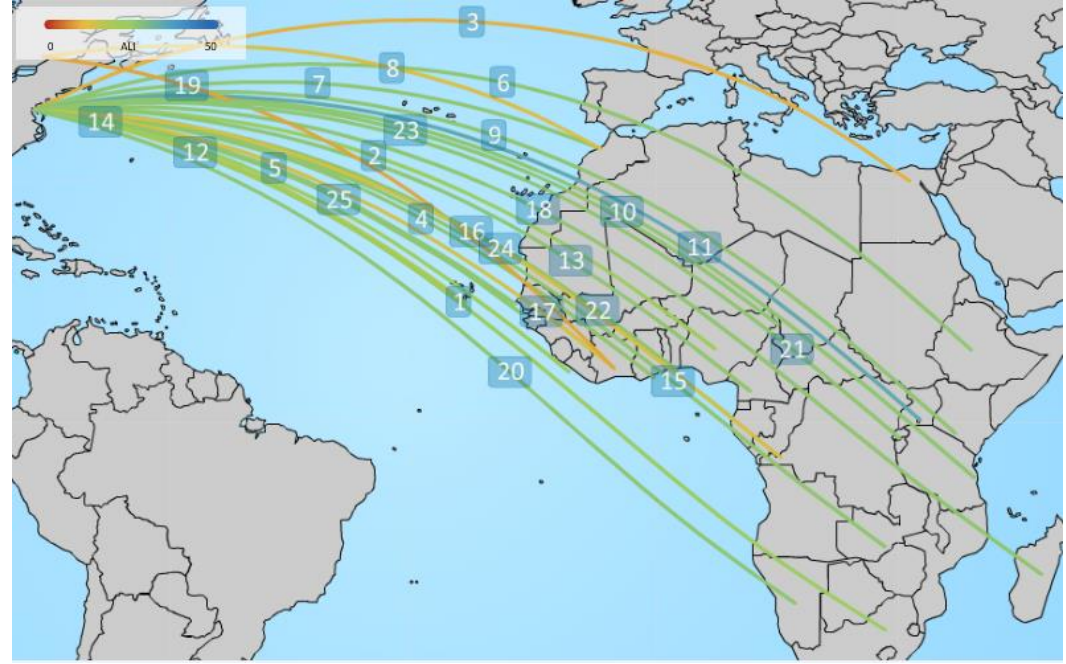
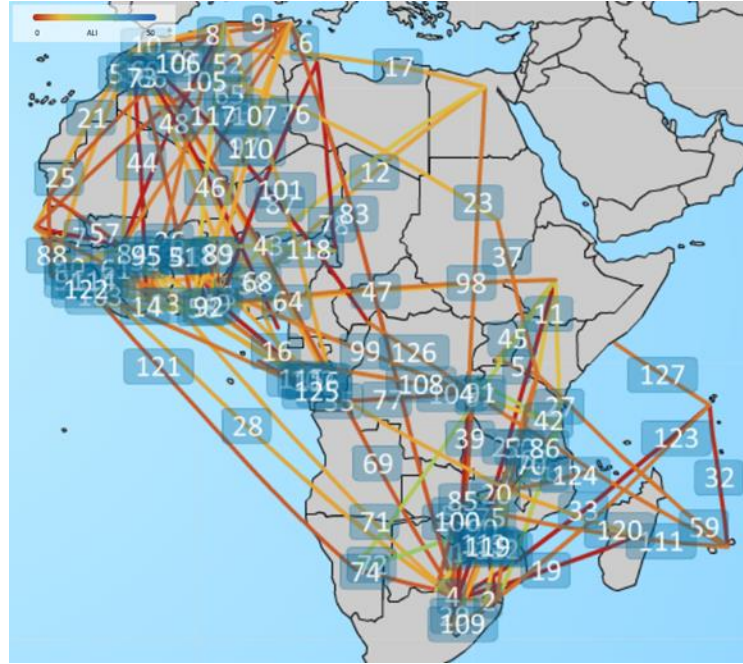


Competitiveness performance varies significantly



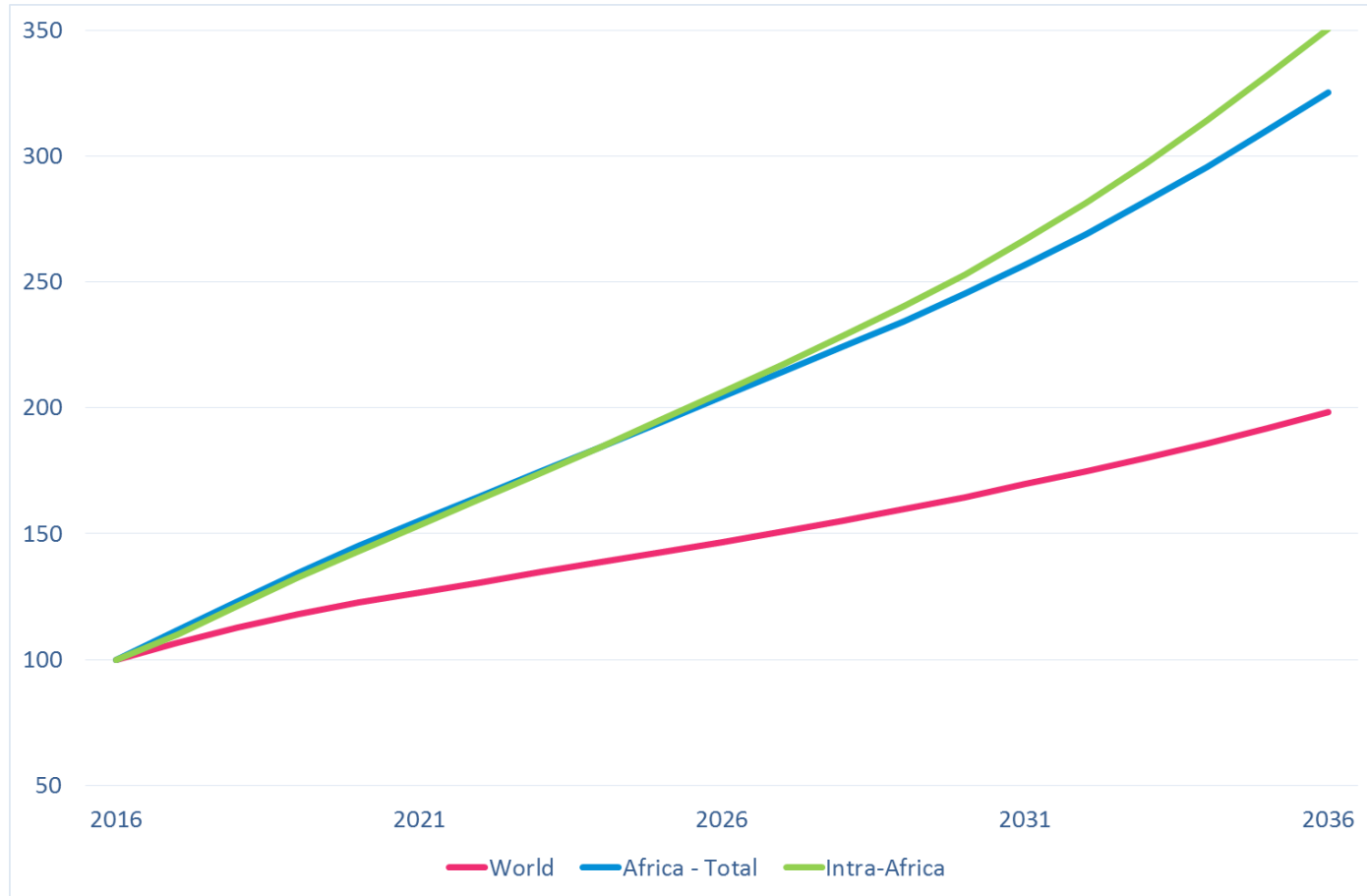
Source: World Economic Forum

Lack of market access is a key issue



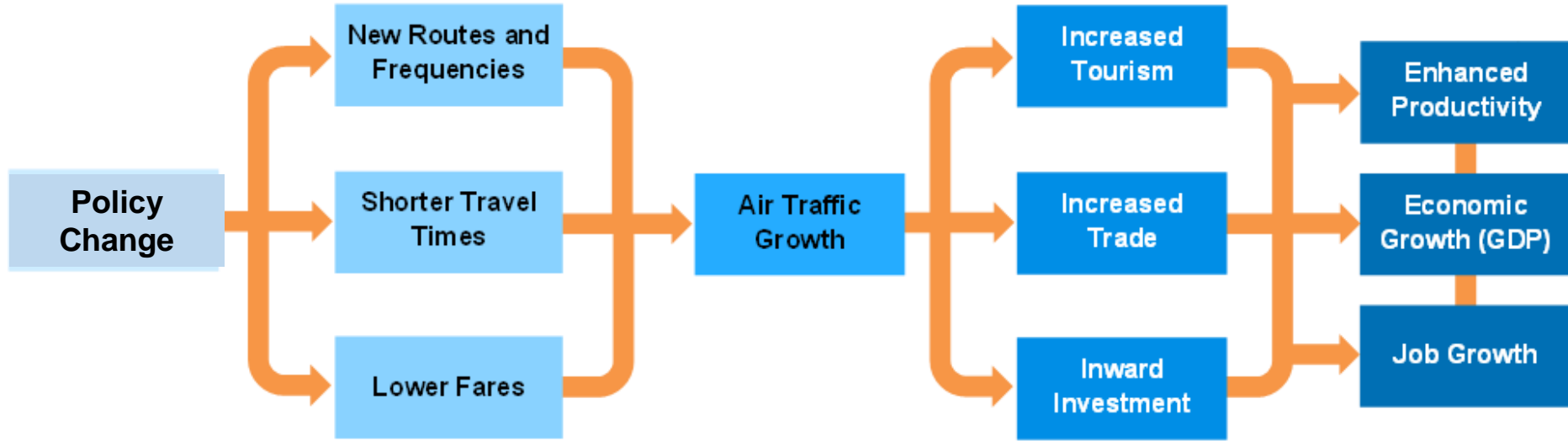
Source: WTO Air Services Agreement Projector

The potential for air travel growth is very significant



Source: IATA, Tourism Economics

Air connectivity facilitates economic activity



New routes would translate into major time savings



Route	Travel Time Before Liberalisation	Travel Time After Liberalisation	Time Saving
Port Elizabeth (South Africa) - Windhoek (Namibia)	5-6 Hours (1-Stop)	2.5 Hours (Direct)	2.5-3.5 Hours
Port Harcourt (Nigeria) - Accra (Ghana)	5 Hours (1-Stop)	1.5 Hours (Direct)	3.5 Hours
Addis Ababa (Ethiopia) - Port Harcourt (Nigeria)	9-10 Hours (1-Stop)	5 Hours (Direct)	4-5 Hours
Cairo (Egypt) - Port Harcourt (Nigeria)	9-12 Hours (1-Stop)	5.5 Hours (Direct)	3.5-6.5 Hours
Dakar (Senegal) - Abuja (Nigeria)	6-7 Hours (1-Stop)	4 Hours (Direct)	2-3 Hours
Luanda (Angola) - Durban (South Africa)	6-7 Hours (1-Stop)	3.5-4.0 Hours (Direct)	2.5-3.5 Hours

Source: Interviews for IATA & AFCAC

National economies would see significant benefits

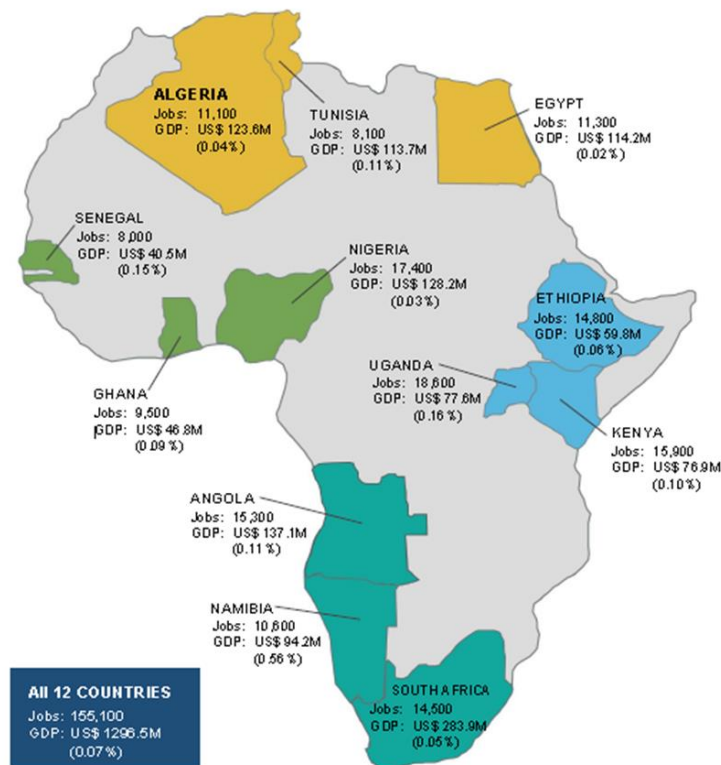


Figure in parenthesis is the GDP impact as a percentage of national GDP.
All financial figures are in 2013 prices.

Source: Intervistas for IATA & AFCAC

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