

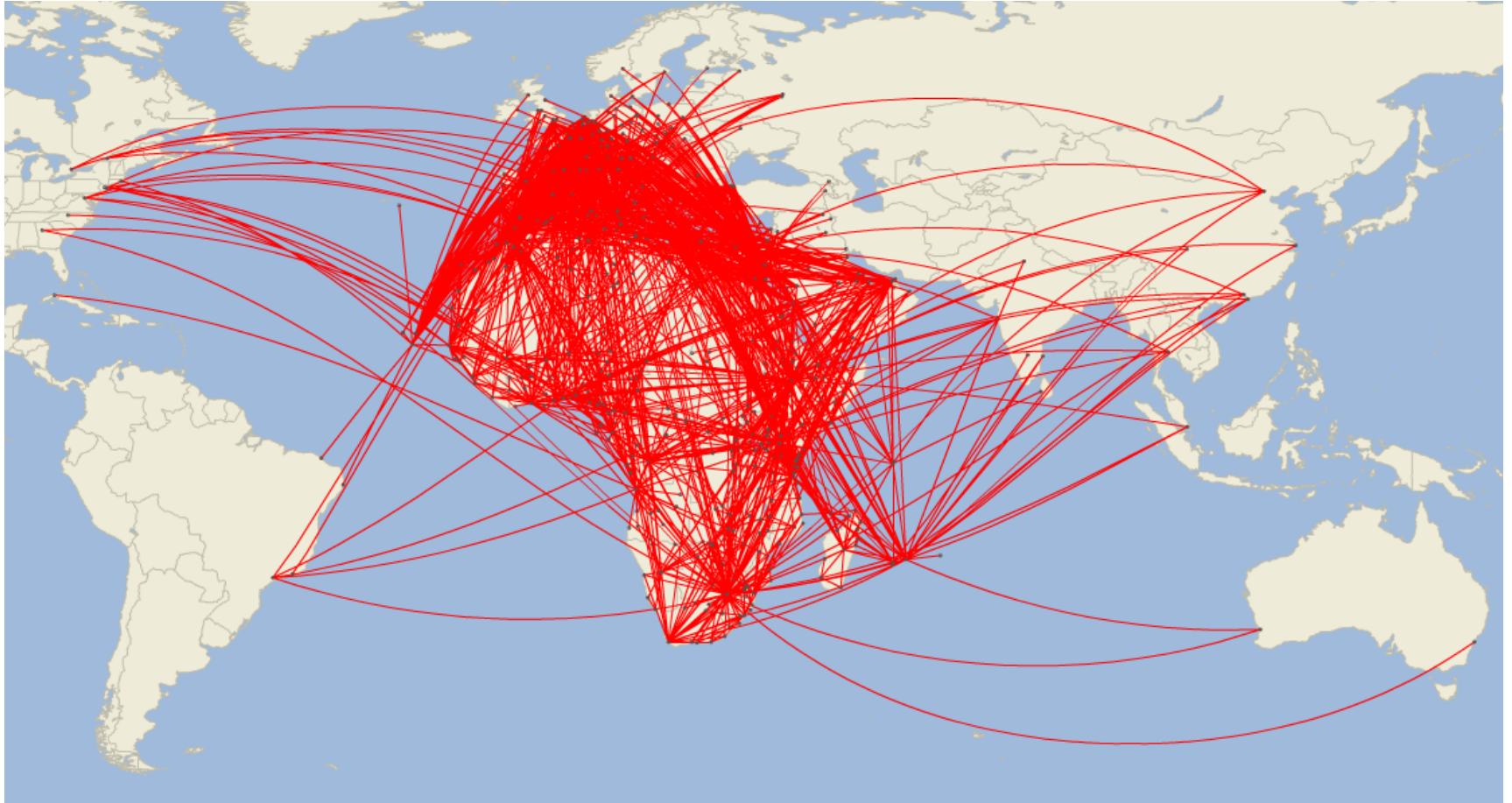


# Air Connectivity in Africa: *Challenges & Opportunities*

Brian Pearce,  
Chief Economist,  
IATA

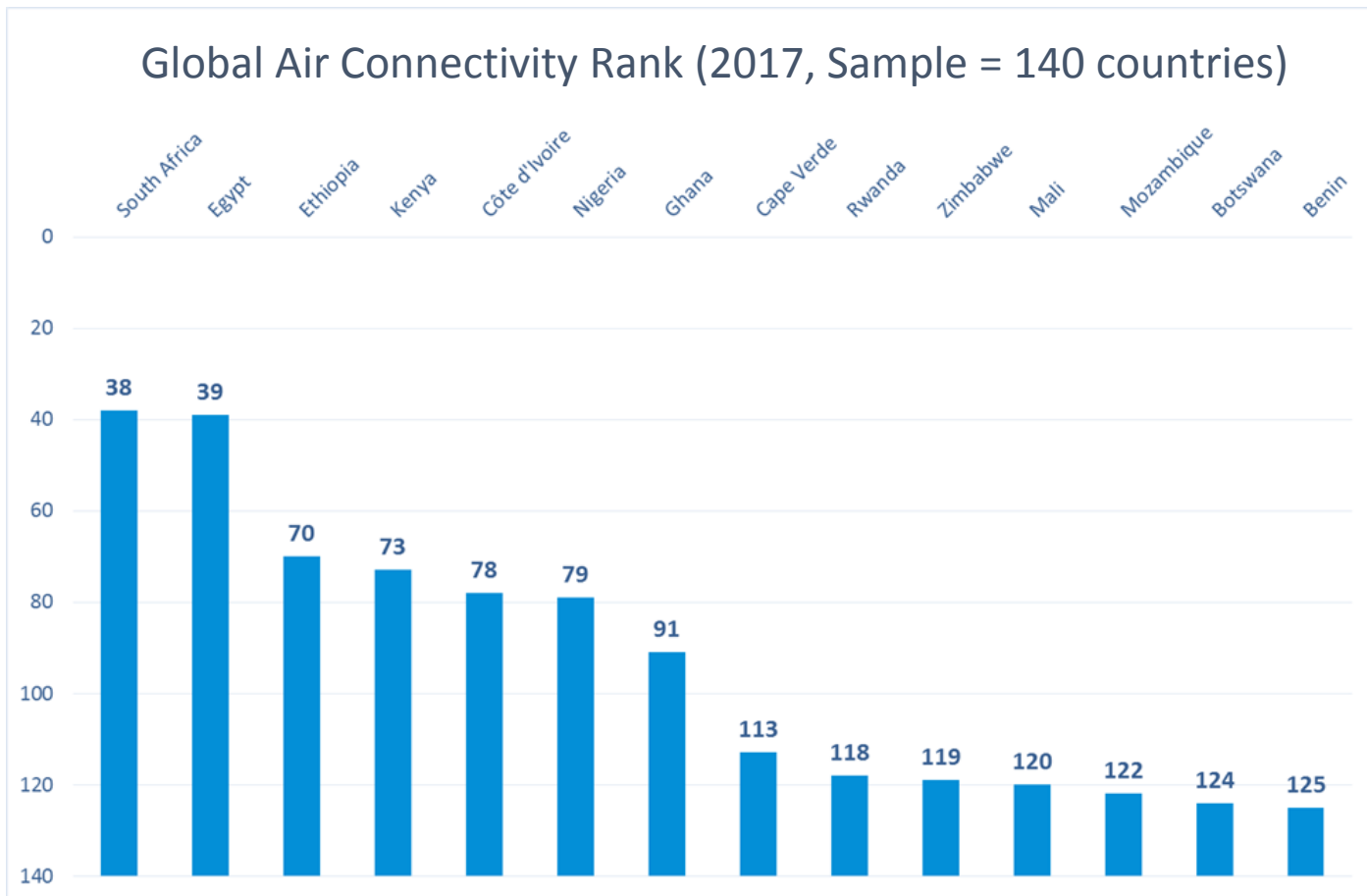
[www.iata.org/economics](http://www.iata.org/economics)

# Aviation connects African businesses to world markets



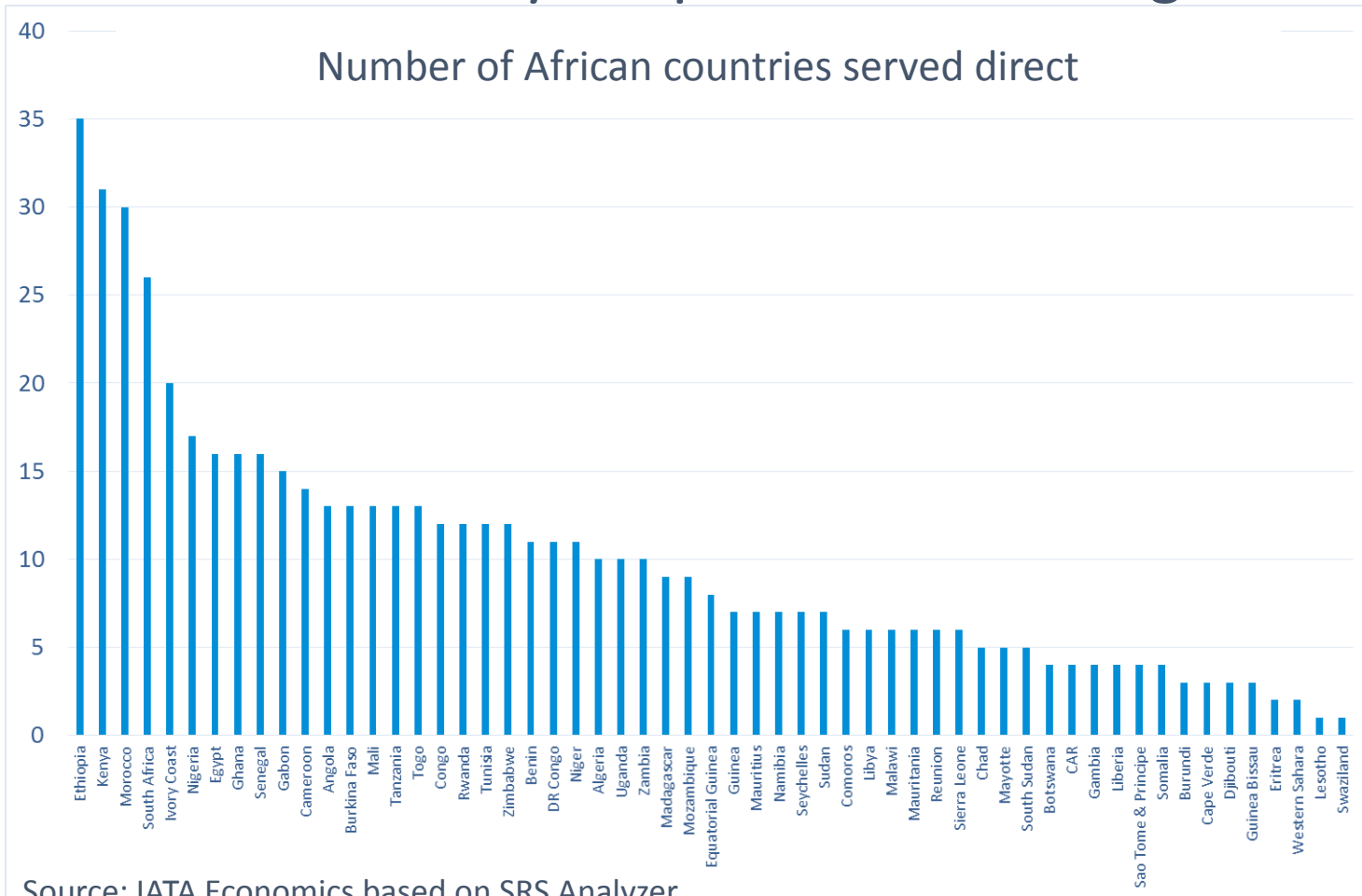
Source: SRS Analyzer

# But connectivity could be improved across much of Africa



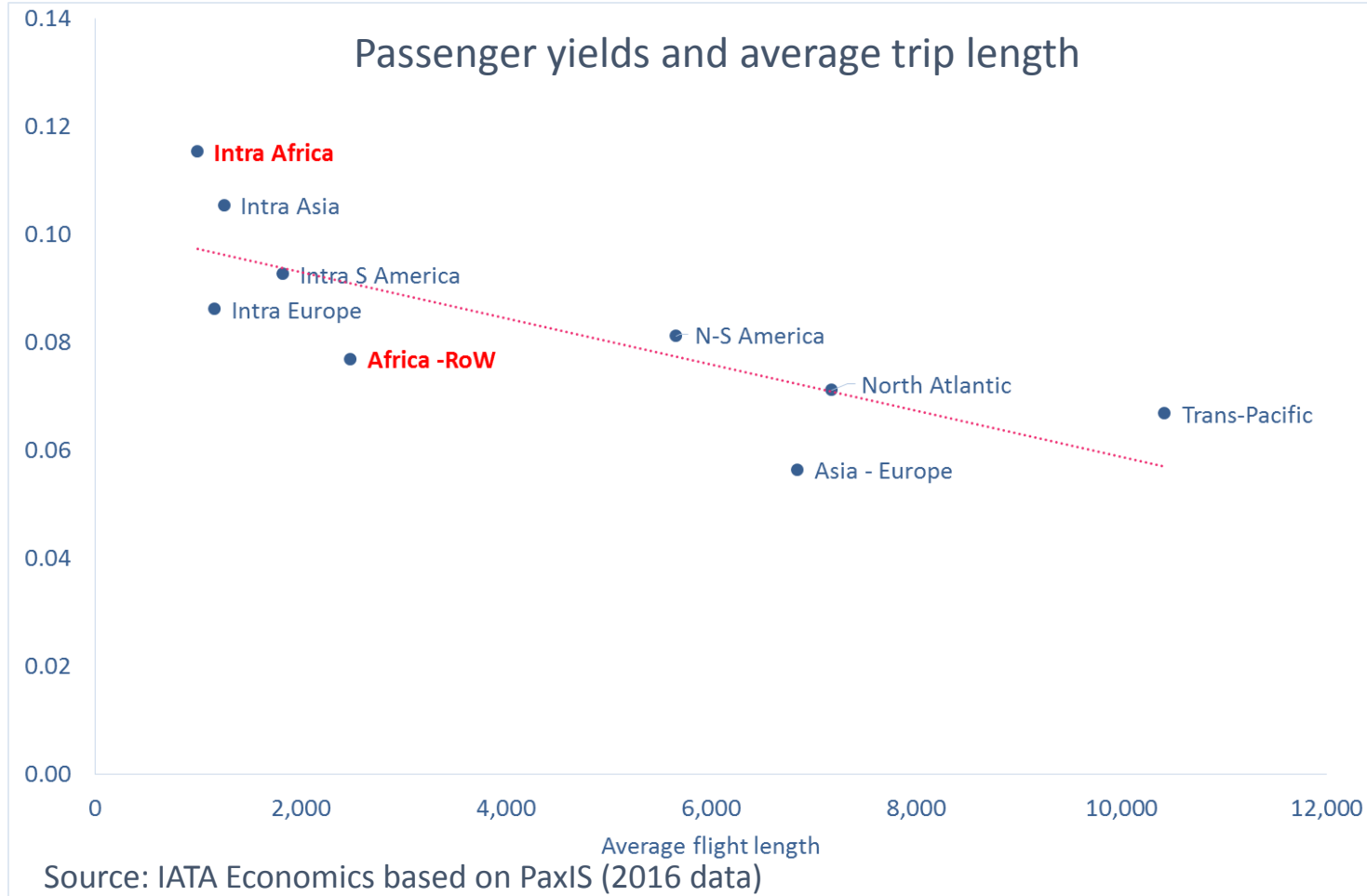
Source: IATA Economics based on SRS Analyzer

# Intra-African connectivity is a particular challenge

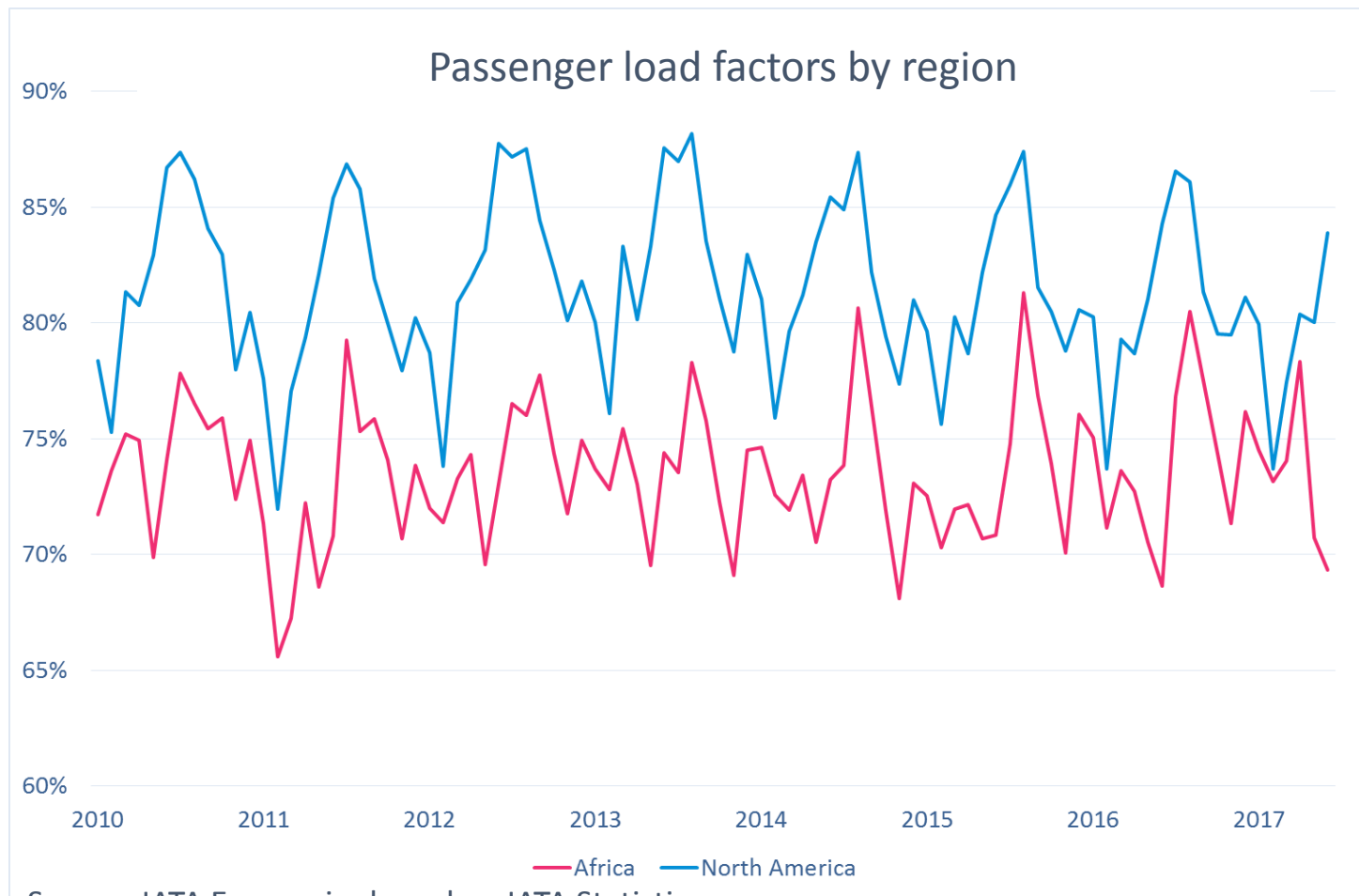


Source: IATA Economics based on SRS Analyzer

# Fares on Intra-Africa routes are high

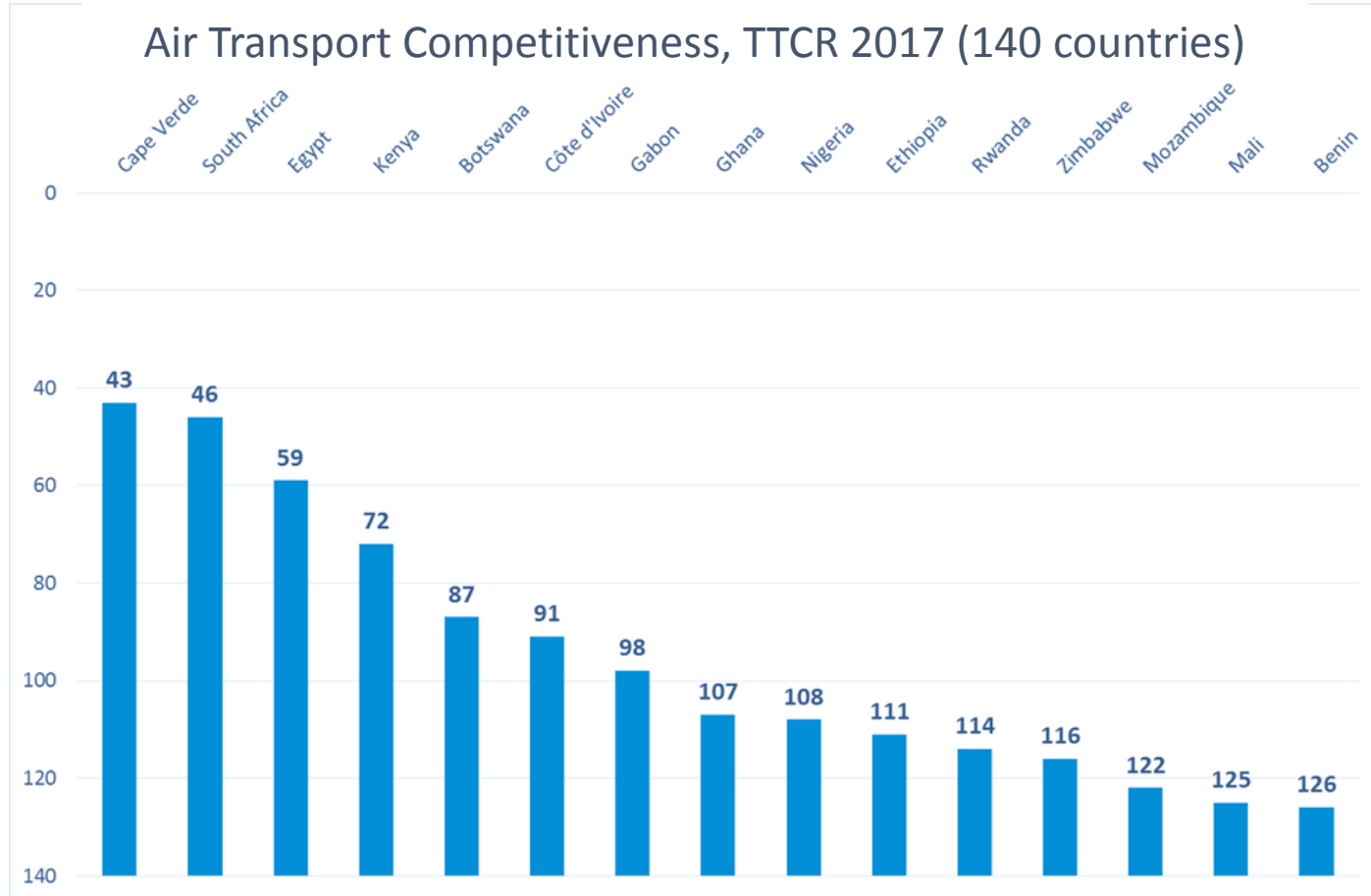


# But load factors aren't



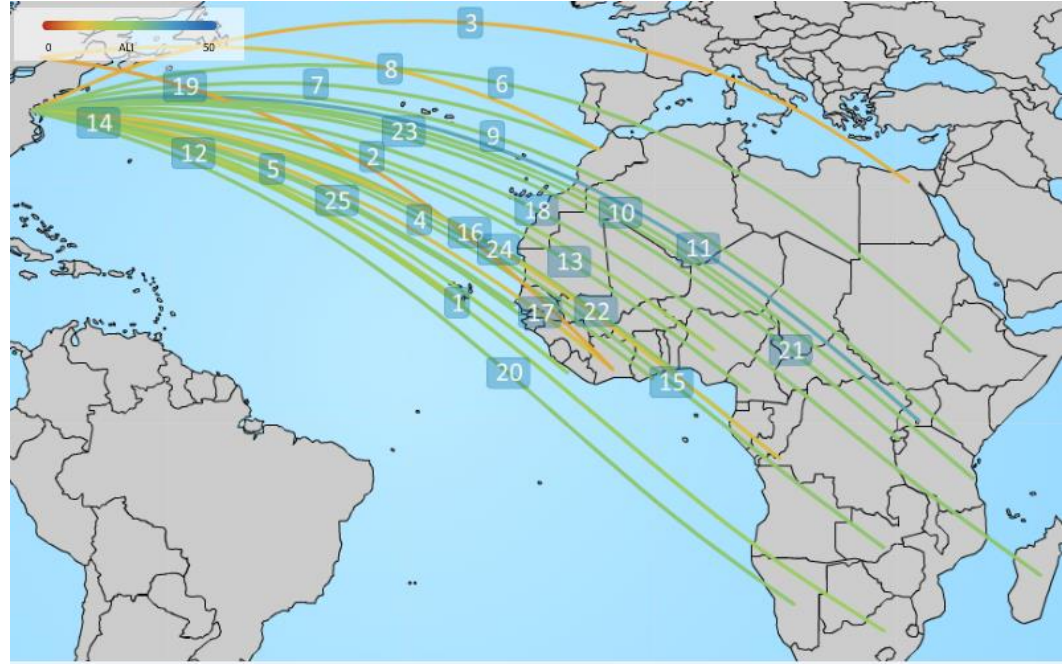
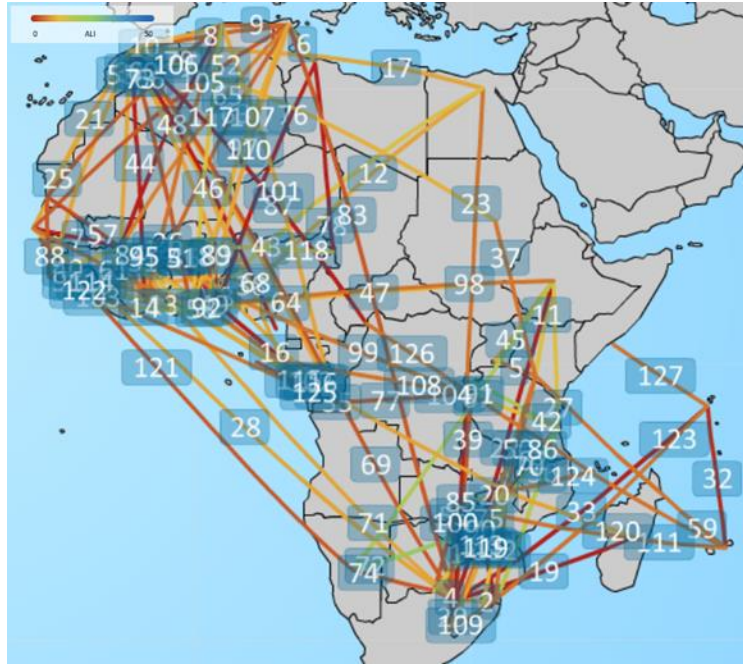
Source: IATA Economics based on IATA Statistics

# Competitiveness performance varies significantly



Source: World Economic Forum

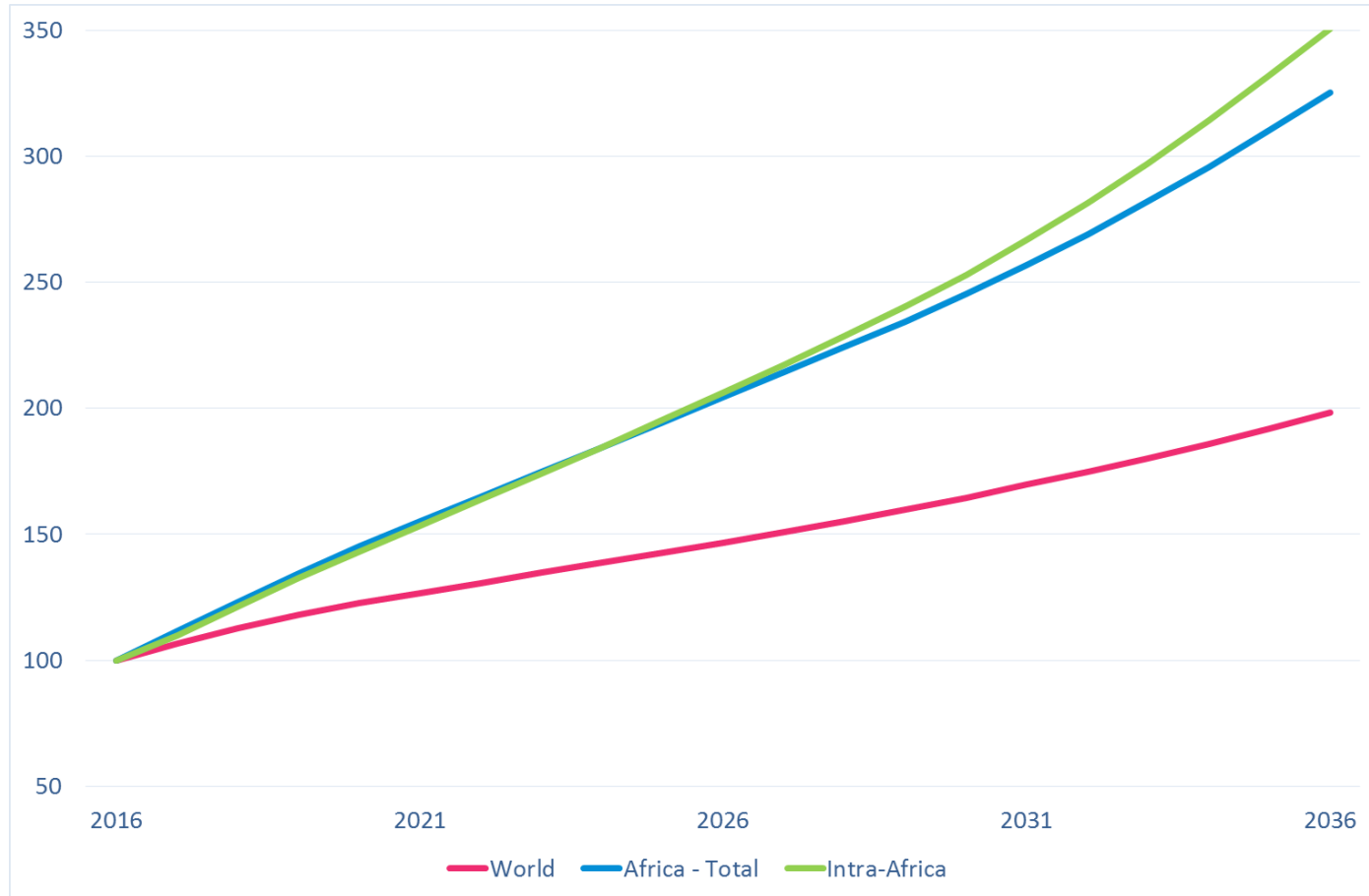
# Lack of market access is a key issue



Source: WTO Air Services Agreement Projector

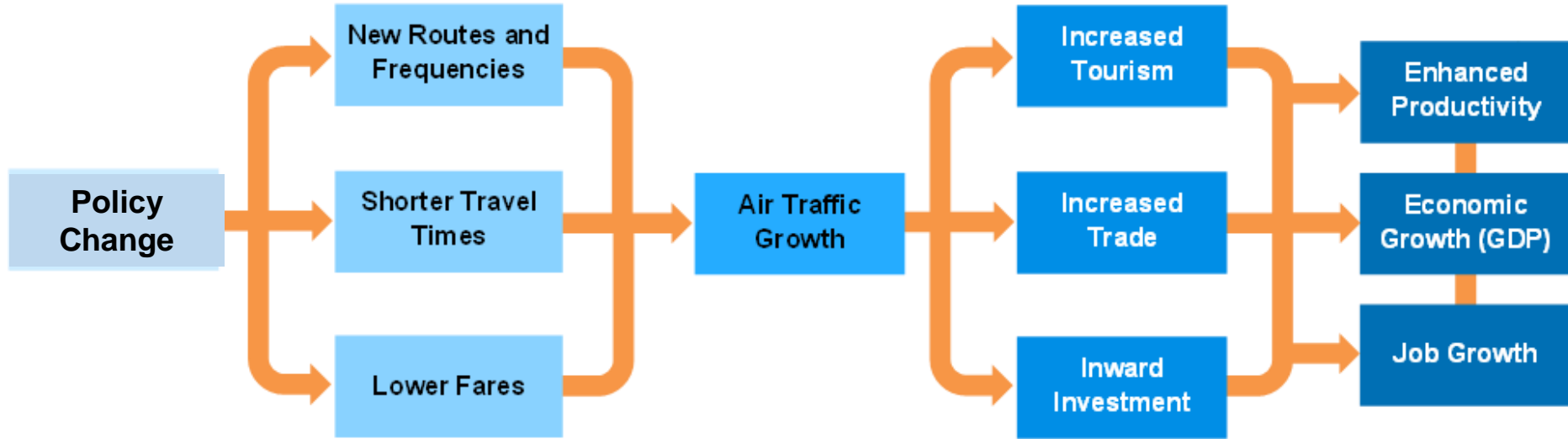


# The potential for air travel growth is very significant



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

# National economies would see significant benefits

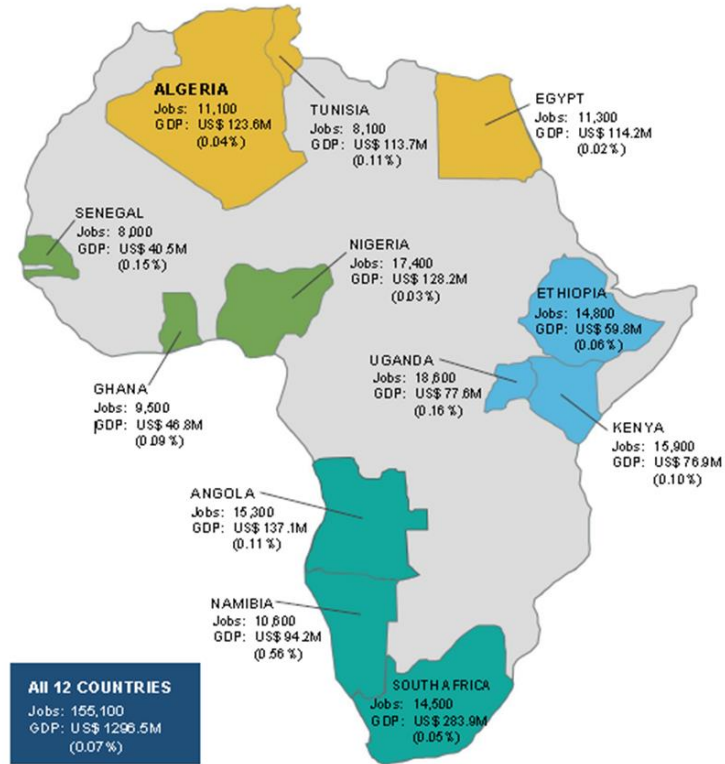


Figure in parenthesis is the GDP impact as a percentage of national GDP.  
All financial figures are in 2013 prices.

Source: Intervistas for IATA & AFCAC

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