

## SUMMARY OF AFRICAN GLOBAL TRAFFIC FOR THE YEAR 2024

The  
**voice** of  
**African**  
**airports**



# SUMMARY

- I. Introduction
- II. General Overview
- III. International and Domestic traffic
- IV. Traffic per region
- V. Point of Attention
- VI. ACI World Data Collection & Coverage Overview

# I/ INTRODUCTION (1/5)

## ACI Africa presentation



ACI Africa Website <https://www.aci-africa.aero/>

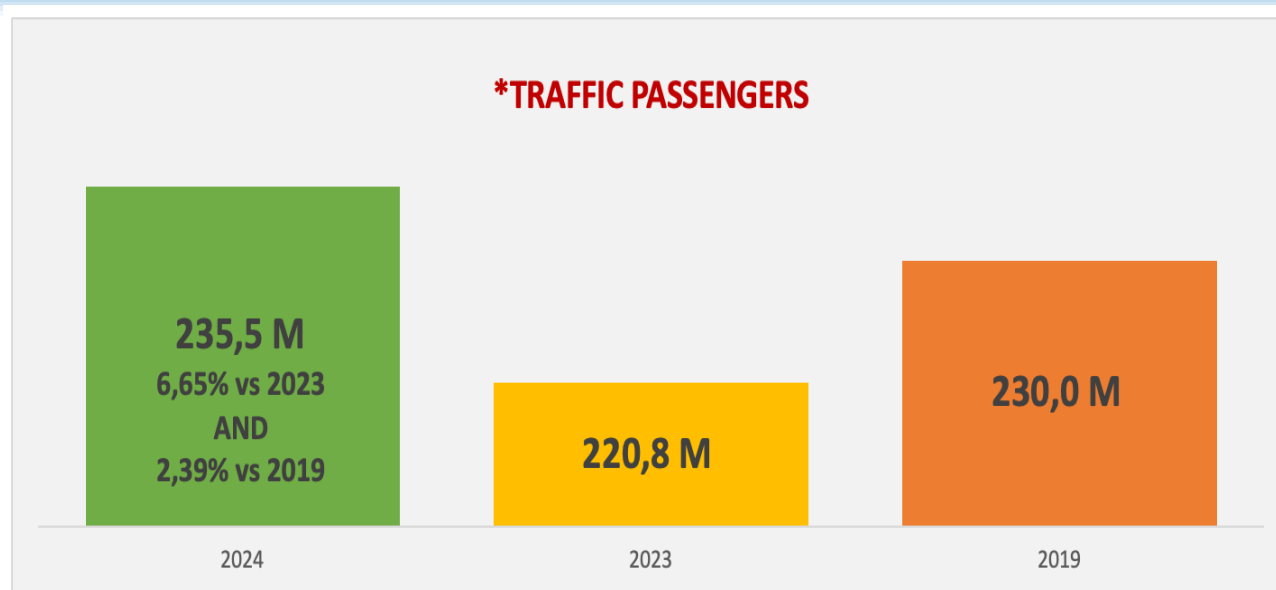
ACI Africa (Airports Council International, Africa region), is the international association of African airports, part of the wider Airports Council International family (ACI World), which has 712 members, managing 1925 airports in 171 countries and territories.

ACI Africa is the voice of African Airports and has as prime objective to advance the interests of airports and to promote professional excellence in airport management and operations on the African continent.

At the end of 2024, ACI Africa was composed of :

- 72 regular members
- In 53 managing countries
- More than 265 airports
- 65 business partners

# I/ INTRODUCTION (2/4)

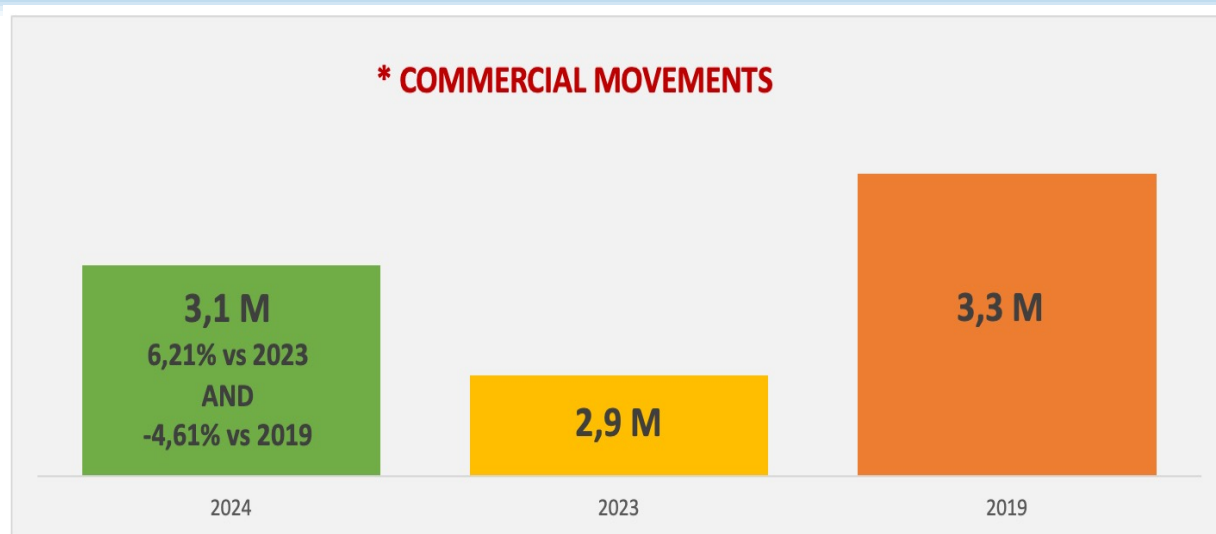


- Sample size of 180 airports representing more than 90% of the traffic
- traffic volumes have reached record highs, illustrating the robust growth and recovery within the industry.

\*Total passengers enplaned and deplaned, passengers in transit counted once

- This steady growth was predominantly driven by key markets in Egypt, Ethiopia, Morocco, Kenya, and South Africa, to name a few.
- passenger traffic volumes have not only fully recovered but have also surpassed pre-pandemic levels seen in 2019

# I/ INTRODUCTION (3/4)



\*Air Traffic Movements: landings and takeoffs

- The trend in aircraft movements is indeed encouraging (+6,21% vs 2023)
- But not to 2019 level yet, 4.61% below that benchmark year.
- Several factors could contribute to why the 2019 levels have not yet been fully reached

- Regulatory Barriers: Inconsistent regulations and policies across different countries can complicate cross-border operations and limit competition.
- Some airlines may still be in the process of restoring routes and capacity to their pre-pandemic levels.
- Some airlines use wide-body aircraft instead of smaller aircraft to be more efficient (pax up while ATMs down). 5

# I/ INTRODUCTION (4/4)

## Key highlights (Cargo)



\*Cargo loaded and unloaded in Tons

- The cargo sector is experiencing a pattern similar to the recovery in aircraft movements
- +5,00% vs 2023 but 2,57% below 2019 level
- Several factors might contribute to this gap compared to 2019
- **Economic Challenges** : Many African economies have faced slow recovery from the pandemic due to a combination of factors, including lower GDP growth, inflation, and foreign exchange constraints

- **Infrastructure Limitations** : In some regions, challenges in transportation and logistics infrastructure.
- **Reduced Global Output** : The global economic recovery is uneven, with supply chain issues and geopolitical tensions affecting international trade and reducing demand for air cargo in some markets.
- **Competition and Market Dynamics** : In some areas, there may be increased competition from other modes of transport, such as shipping or road freight, which can influence air cargo volumes.

## II/ GENERAL OVERVIEW (1/6)


### Overall traffic summary

TRAFFIC AFRICA YEAR 2024 VS 2023 VS 2019									
PERIOD	MOVEMENTS			PASSENGERS			CARGO (T)		
	MVTS 2024	VAR 24/23	VAR 24/19	TOT PAX 2024	VAR 24/23	VAR 24/19	FRET 2024	VAR 24/23	VAR 24/19
Q1	757 896	12,55%	-2,30%	53 747 505	9,38%	2,94%	617 798	5,55%	2,03%
Q2	767 760	5,32%	-4,53%	56 837 602	6,66%	3,92%	604 612	5,12%	-1,93%
Q3	815 144	2,03%	-9,07%	62 908 553	2,67%	-2,32%	542 053	2,66%	-9,00%
Q4	813 082	5,84%	-2,02%	62 036 748	8,57%	7,06%	677 788	6,32%	-1,63%
YEAR	3 153 881	6,21%	-4,61%	235 530 408	6,65%	2,74%	2 442 252	5,00%	-2,57%

- The consistent positive variations across all quarters for passenger numbers, aircraft movements and cargo vs 2023, point towards a sustainable recovery and growth trajectory
- In the third quarter of 2024, there was a noticeable decline of 2.12% in passenger traffic at African airports compared to 2019.
- Despite the decline in the third quarter, the fourth quarter of 2024 saw a positive shift, with growth of 7.06% compared to 2019
- The decline in cargo and movements compared to 2019 highlights the need for targeted strategies to address the nuanced challenges faced by different segments of the African aviation industry.

## II/ GENERAL OVERVIEW (2/6)

### Overall traffic summary (Flash Traffic)



AIRPORTS COUNCIL INTERNATIONAL

AFRICA

FLASH TRAFFIC ACI AFRICA YEAR 2024

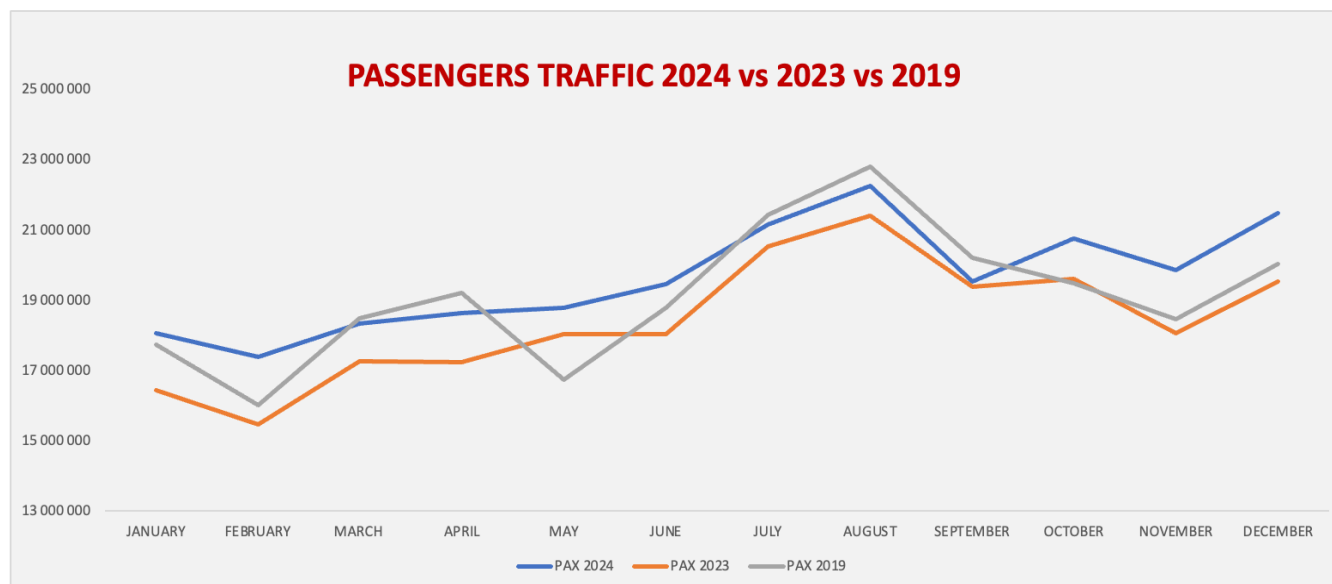
	YEAR 2024	SHARE 2024	VAR 24/23	VAR 24/19
<b>Total Commercial Passengers</b>	235 530 408	100,00%	6,65%	2,39%
Direct passengers	230 328 210	97,79%	6,56%	3,32%
Transit	5 202 198	2,21%	10,76%	-26,73%
<b>Traffic By Region (With Transit)</b>				
Central	4 007 311	1,70%	8,20%	-6,15%
East	38 672 461	16,42%	7,79%	3,69%
North	114 822 553	48,75%	13,39%	28,07%
South	46 715 228	19,83%	6,04%	-11,59%
West	31 312 855	13,29%	2,49%	2,11%
<b>International traffic (Without Transit)</b>	161 229 747	70,00%	9,70%	7,55%
<b>Domestic traffic (Without Transit)</b>	69 098 463	30,00%	-0,10%	-5,38%
<b>Commercial movements</b>	3 153 881	100,00%	6,21%	-4,61%
<b>Cargo (T)</b>	2 442 252	100,00%	5,00%	-2,57%

- 2.39% increase compared to 2019
- 3.32% increase compared to 2019, excluding transit passengers
- Transit traffic decreased by 26.73% compared to 2019, due to a lack of connectivity
- Recovery of African air traffic varies from region to region



## II/ GENERAL OVERVIEW (3/6)

### Passengers



- significant change in 2024 compared to 2023
- Not the same compare to 2019
- Best performance in Q4 with +7,06%

- Full recovery by the end of 2024, signaling a positive turnaround for the industry (2,39% vs 2019)

## II/ GENERAL OVERVIEW (4/6)

### Top 10 African Airports in passengers traffic

* TOP 10 AFRICAN AIRPORTS IN TERMS OF PASSENGER TRAFFIC YEAR 2024							
2024 RANK	2023 RANK	2019 RANK	AIRPORTS	COUNTRY	PAX 2024	% change vs 2023	% change vs 2019
1	1	2	Cairo International Airport	Egypt	28 974 638	10,5%	52,6%
2	2	1	OR Tambo International Airport	South Africa	18 459 076	5,3%	-14,3%
3	3	3	Addis Ababa Bole International Airport	Ethiopia	11 799 224	13,6%	-1,6%
4	5	5	Aéroport Mohammed V	Morocco	10 449 372	8,4%	0,0%
5	4	4	Cape Town International Airport	South Africa	10 366 555	6,8%	-5,6%
6	6	8	Hurghada International Airport	Egypt	9 636 689	9,6%	28,5%
7	9	11	Aéroport Marrakech Ménara	Morocco	9 250 943	34,0%	45,3%
8	8	7	Houari Boumediene International Airport	Algeria	9 151 517	15,0%	16,8%
9	7	6	Jomo Kenyatta International Airport	Kenya	8 754 580	6,6%	5,4%
10	10	10	Aéroport International de Tunis Carthage	Tunisia	7 269 832	9,1%	12,0%

- The 10 busiest airports remains the same than in 2023
- Changes in terms of position
- Marrakesh 11<sup>th</sup> in 2019 is in the top 10 in 2023 and 2024, 9<sup>th</sup> and 7<sup>th</sup> respectively
- Addis Ababa, Mohammed V and Cairo experienced growth due to the resumption of flights and an increase in tourism.
- Or Tambo and Cape Town, despite their performance in 2024 vs 2023, have not yet reached the level they achieved in 2019
- In South Africa, domestic traffic represents 69% of the total air traffic in 2024. Nevertheless, South Africa continues to attract significant international traffic, particularly from neighboring countries, with popular destinations including the USA and Asia.

## II/ GENERAL OVERVIEW (5/6)

### Movements

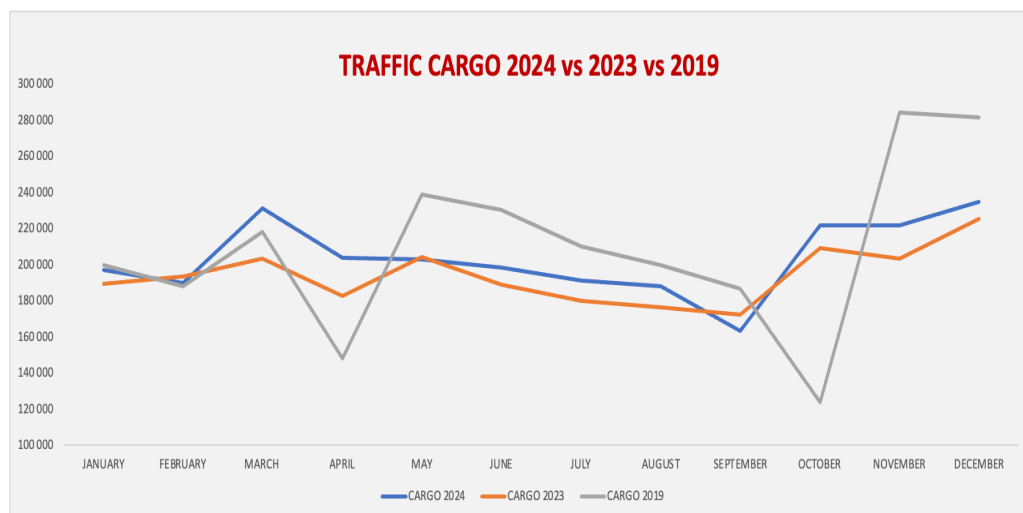


* TOP 10 AFRICAN AIRPORTS IN TERMS OF ATMs YEAR 2024							
2024 RANK	2023 RANK	2019 RANK	AIRPORTS	COUNTRY	ATM 2024	% change vs 2023	% change vs 2019
1	1	2	Cairo International Airport	Egypt	214 065	6,87%	31,96%
2	2	1	OR Tambo International Airport	South Africa	201 967	0,99%	-7,70%
3	3	3	Addis Ababa Bole International Airport	Ethiopia	165 091	16,54%	33,15%
4	4	4	Jomo Kenyatta International Airport	Kenya	111 448	4,79%	-4,17%
5	5	5	Cape Town International Airport	South Africa	100 249	1,73%	3,38%
6	9	7	Aéroport Mohammed V	Morocco	94 743	13,55%	-0,42%
7	10	8	Houari Boumediene International Airport	Algeria	87 912	10,86%	1,98%
8	6	6	Murtala Muhammed International Airport	Nigeria	86 115	-3,77%	-10,24%
9	8	9	Nnamdi Azikiwe International Airport	Nigeria	81 571	-3,39%	15,28%
10	11	11	Aéroport International de Tunis Carthage	Tunisia	72 841	9,70%	10,14%

- 2024 surpasses 2023 indicating steady growth
- Compare to 2019, only january exceeded that year's level
- Top 5 remains the same in 2024 and 2023
- Top 10 represents 39% of total ATMs in 2024

## II/ GENERAL OVERVIEW (6/6)

### Cargo (T)



* TOP 10 AFRICAN AIRPORTS IN TERMS OF CARGO YEAR 2024							
2024 RANK	2023 RANK	2019 RANK	AIRPORTS	COUNTRY	CARGO (T) 2024	% change vs 2023	% change vs 2019
1	1	2	Cairo International Airport	Egypt	214 065	6,87%	31,96%
2	2	1	OR Tambo International Airport	South Africa	201 967	0,99%	-7,70%
3	3	3	Addis Ababa Bole International Airport	Ethiopia	165 091	16,54%	33,15%
4	4	4	Jomo Kenyatta International Airport	Kenya	111 448	4,79%	-4,17%
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10	11	11	Aéroport International de Tunis Carthage	Tunisia	72 841	9,70%	10,14%

- Air cargo remained stable across the continent, with some fluctuations depending on region
- In 2024 we passed 2023 level (+5,00%) but not 2019 level (-2,57%)
- Airports such as Cairo, Or Tambo, Addis Ababa and Jomo Kenyatta have historically been significant hubs for air cargo on the African continent
- These airports play crucial roles in regional and international logistics, benefiting from strategic locations, relatively advanced infrastructure, and connectivity to key trade routes.

# III/ INTERNATIONAL AND DOMESTIC TRAFFIC (1/4)

## Top 10 African airports in terms of international passengers

* TOP 10 AFRICAN AIRPORTS IN TERMS OF INTERNATIONAL PASSENGERS YEAR 2024							
2024 RANK	2023 RANK	2019 RANK	AIRPORTS	COUNTRY	PAX 2024	% change vs 2023	% change vs 2019
1	1	1	Cairo International Airport	Egypt	24 431 492	14,2%	54,6%
2	2	2	Addis Ababa Bole International Airport	Ethiopia	10 104 933	15,0%	-0,3%
3	3	4	Aéroport Mohammed V	Morocco	9 336 240	8,3%	0,4%
4	4	5	Hurghada International Airport	Egypt	8 943 257	11,3%	28,0%
5	6	7	Aéroport Marrakech Ménara	Morocco	8 855 134	32,5%	48,3%
6	5	3	OR Tambo International Airport	South Africa	8 192 046	8,2%	-17,4%
7	7	6	Aéroport International de Tunis Carthage	Tunisia	7 094 956	9,4%	13,0%
8	8	10	Jomo Kenyatta International Airport	Kenya	6 721 914	8,0%	30,0%
9	9	8	Houari Boumediene International Airport	Algeria	6 514 413	16,1%	15,0%
10	10	9	Sharm El Sheikh International Airport	Egypt	6 062 113	18,2%	14,9%

- Countries with popular tourist destinations due to their rich historical sites, favorable climates, and beautiful coastlines and an efficient airport hub make up the international top 10
- Upgrades and expansions at many of these airports contribute to their ability to accommodate more passengers.
- OR Tambo supports South Africa's position as a key business and economic center on the continent, attracting business travelers.
- National Carrier Operations Ethiopian Airlines is one of Africa's largest and fastest-growing carriers, influencing passenger numbers at its home airport.
- Tunisia benefit from cultural ties with Europe and the Middle East, as well as their roles in diplomatic travel due to historical and political relationships.

# III/ INTERNATIONAL AND DOMESTIC TRAFFIC (2/4)

## Top 10 African airports in terms of domestic traffic

* TOP 10 AFRICAN AIRPORTS IN TERMS OF DOMESTIC PASSENGERS YEAR 2024							
2024 RANK	2023 RANK	2019 RANK	AIRPORTS	COUNTRY	PAX 2024	% change vs 2023	% change vs 2019
1	1	1	OR Tambo International Airport	South Africa	10 179 332	3,2%	-11,8%
2	2	2	Cape Town International Airport	South Africa	7 282 261	5,6%	-13,0%
3	4	3	King Shaka International Airport	South Africa	4 677 805	1,0%	-20,1%
4	3	4	Nnamdi Azikiwe International Airport	Nigeria	4 130 159	-13,7%	-5,6%
5	5	5	Murtala Muhammed International Airport	Nigeria	3 850 630	-4,3%	-6,4%
6	6	6	Cairo International Airport	Egypt	3 016 901	-10,7%	37,6%
7	7	7	Houari Boumediene International Airport	Algeria	2 636 812	12,3%	21,4%
8	8	10	Jomo Kenyatta International Airport	Kenya	1 993 677	2,8%	23,1%
9	9	8	Addis Ababa Bole International Airport	Ethiopia	1 694 291	6,0%	-8,2%
10	10	9	Port Elizabeth National Airport	South Africa	1 514 357	10,9%	-12,7%

- Airports in major cities like Johannesburg (OR Tambo), Cape Town, and Lagos (Murtala Muhammed) are located in economic hubs, driving frequent domestic travel for business purposes.
- Strong domestic airlines contribute to airport traffic
- Airports in capital cities like Cairo and Houari Boumediene International in Algiers experience significant domestic traffic from government activities and national administration.
- Nigeria's Nnamdi Azikiwe International and Murtala Muhammed International serve densely populated regions in Nigeria, one of Africa's most populous countries. High population centers generate substantial domestic air travel demand
- 4 South Africa airports in domestique top 10



# III/ INTERNATIONAL AND DOMESTIC TRAFFIC (3/4)

## Top 10 African countries in terms of domestic passengers traffic

* TOP 10 AFRICAN COUNTRIES IN TERMS OF DOMESTIC PASSENGERS YEAR 2024						
2024 RANK	2023 RANK	2019 RANK	COUNTRIES	PAX 2024	% change vs 2023	% change vs 2019
1	1	1	South Africa	26 160 051	4,2%	-13,0%
2	2	2	Nigeria	9 306 776	-8,7%	-8,4%
3	3	3	Egypt	6 122 784	-14,3%	27,6%
4	4	5	Kenya	3 879 697	-3,7%	33,7%
5	6	4	Morocco	3 403 032	32,6%	14,9%
6	5	6	Tanzania, United Republic of	3 210 748	6,6%	17,2%
7	7	7	Algeria	2 636 812	12,3%	21,4%
8	8	8	Ethiopia	1 694 291	-15,2%	-8,2%
9	9	9	Mozambique	1 140 227	-1,6%	-13,6%
10	10	11	Ghana	862 727	11,2%	25,0%

- Countries with highest domestic traffic volumes are South Africa (38%), Nigeria (14%) and Egypt (9%)
- These three countries account for 61% of domestic traffic in 2024
- In terms of market share, between international and domestic, the domestic passenger share is 30% in 2024 vs 32% in 2023 and 33% in 2019. African traffic remains heavily dependent on international traffic (70% in 2024)

# III/ INTERNATIONAL AND DOMESTIC TRAFFIC (4/4)

## Share of The Global Domestic Traffic Market In 2023

SHARE OF THE GLOBAL DOMESTIC TRAFFIC MARKET IN 2023	
REGIONS	* MS (%)
Afrique	30%
Asie-Pacifique	61%
Europe	26%
Amérique latine et Caraïbes	69%
Moyen-Orient	22%
Amérique du Nord	85%
Monde	55%

\*MS : Market Share

\* Source ACI Monde (IntelligenceHub)

- In terms of market share, between international and domestic, the domestic passenger share is 30% in 2024 vs 32% in 2023 and 33% in 2019. African traffic remains heavily dependent on international traffic (70% in 2024)



## IV/TRAFFIC PER REGION

REGION AFRICA	PASSENGER SHARE 2024 (%)
Central	2%
East	16%
North	49%
South	20%
West	13%
<b>TOTAL</b>	<b>100%</b>

REGION AFRICA	ATMs SHARE 2024 (%)
Central	3%
East	24%
North	33%
South	26%
West	14%
<b>TOTAL</b>	<b>100%</b>

REGION AFRICA	CARGO SHARE 2024 (%)
Central	3%
East	35%
North	23%
South	24%
West	15%
<b>TOTAL</b>	<b>100%</b>

- The northern region dominates with a market share of 49%. This is driven by the tourism economy, particularly in Morocco and Egypt.
- The southern region comes 2nd with 20% market share
- The biggest development potential remains in the Central region, with a market share of 2%

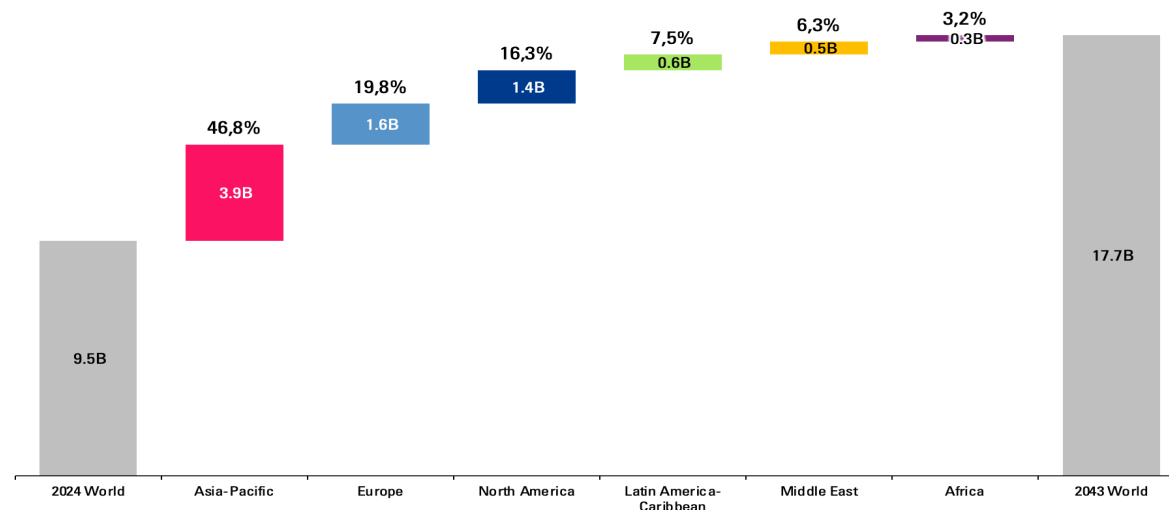
# V/POINT OF ATTENTION (1/2)

## TOTAL PASSENGERS VARIATIONS 2024 vs 2023

REGIONS	2024 vs 2023	Perspectives 2025 vs 2024
<b>Africa</b>	<b>6,65%</b>	<b>4,76%</b>
Asia-Pacific	14,34%	6,68%
Europe	8,06%	3,64%
Latin America and the Caribbean	3,96%	4,09%
Middle East	8,57%	6,88%
North America	4,09%	3,06%
World	9,03%	4,84%

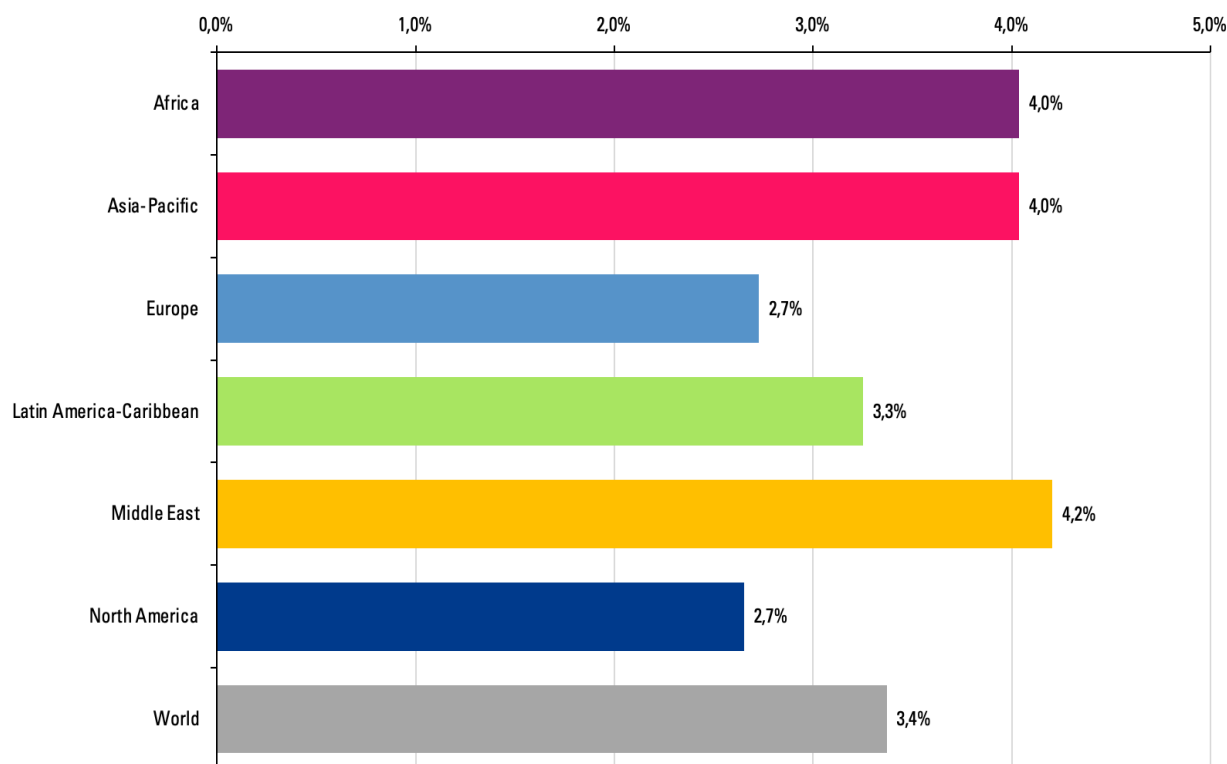
\* Source ACI Monde

## Contributors to Total Passenger Growth by Region Share (2024–2023)



# V/POINT OF ATTENTION (2/2)

**20-years Total Passenger CAGR (%) by Regions**  
(2024-2043)



Only the Middle East (+4.2% CAGR) has a higher CAGR than Africa (4.0% CAGR) between 2024 and 2043.

With growth almost comparable to that of the most dynamic regions, investment in this sector is crucial

African authorities therefore have every interest in implementing mechanisms that will ensure the development of air traffic on the continent.

Adoption of the SAATM (Single African Air Transport Market) Out of the 37 signatory States, only 10 States (27%) implemented the 8 concrete measures, AFCFTA (African Continental Free Trade Area) and the FMPP (Free Movement of Persons Protocol) of the African Union.

These initiatives aim to make air travel in Africa smoother, more frequent and integrated into a more cooperative continental economy. Their adoption can stimulate additional growth, both economically and in terms of air traffic for the African continent.

\* Compound Annual Growth Rate or CAGR

# VI/ACI WORLD DATA COLLECTION & COVERAGE OVERVIEW (1/3)

## Data Sources

### Primary Sources:

- Member & Non-member Airports
- Airport Operators
- Civil Aviation Authorities
- Publicly Available Sources (e.g., airport websites)

### Estimates:

- Used for major airports when data is missing
- Replaced with actual figures when available

# VI/ACI WORLD DATA COLLECTION & COVERAGE OVERVIEW (2/3)

## Macroeconomic Data

Purchased data includes:

- GDP
- Population Figures
- Airfare Data
- Used for long-term forecasting
- **Not included in iHub or shared with members** (due to legal agreements)

# VI/ACI WORLD DATA COLLECTION & COVERAGE OVERVIEW (3/3)


## Data Coverage & Global Traffic Coverage

- **Annual Dataset:** 2,700 airports
- **Monthly Dataset:** 1,350 airports
- Compared to OAG's 4,200 commercial airports
- **Annual Data:** 95% of global traffic
- **Monthly Data:** 80% of global traffic
- **OAG (Official Airline Guide):**
  - Comprehensive global flight schedule and airline data
  - Industry standard for planning, analysis, and operations

# THANK YOU

“Without data, you’re just another person with an opinion.”

Dr. W. Edwards Deming, Economist & Statistician



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