

**Special Edition:
AFRICA**



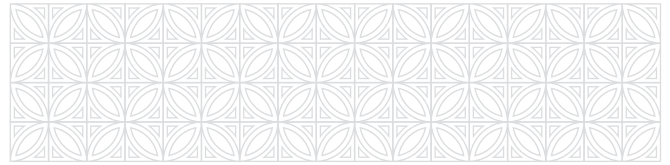
On the occasion of the 9th Aviation Africa Summit & Exhibition 2025
Kigali, Rwanda

The Re-Positioning of Africa in Aviation: Towards a Shift in the Hubbing Dynamics

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AFRICA DEMOGRAPHY: GROWTH AND PROGRESS



AFRICAN DEMOGRAPHY GROWTH AND PROGRESS



By committing to break down these various barriers, we will send a tremendous signal in Africa and beyond that it is no longer business as usual.”

H.E. President Paul Kagame

Republic of Rwanda

Population growth

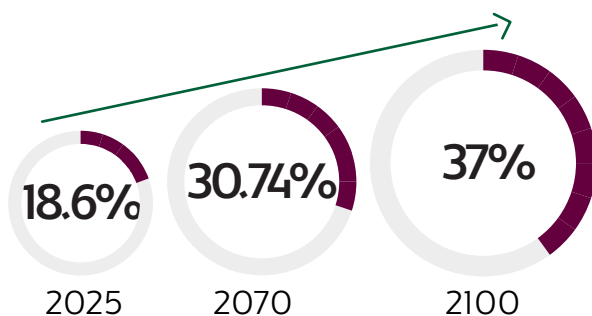
Current estimates suggest there are about 1.3 billion people on the continent as per data compiled by the United Nations Population Fund (UNFPA).

Population projections

2050	⇒	2.4 billion
2070	⇒	3.1 billion
2100	⇒	3.8 billion



Africa's share of global aviation should match Africa share of global population



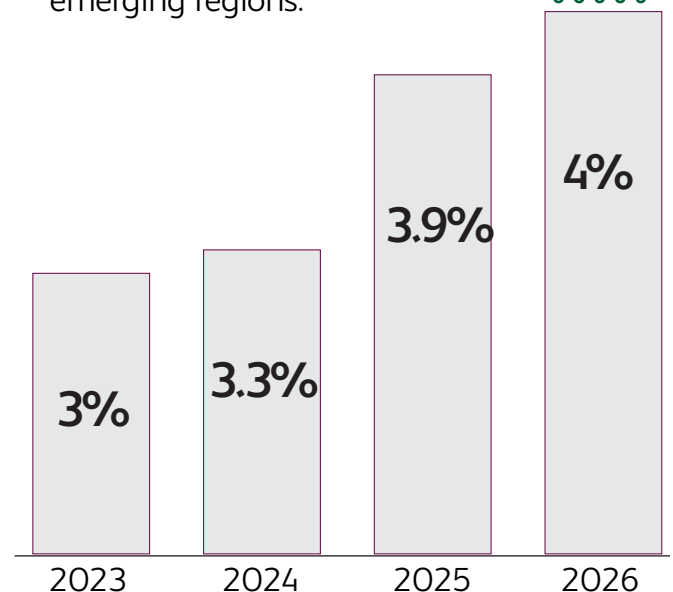
Source: United Nations Population Division

Economic growth

The 2025 African Economic Outlook from the African Development Bank shows that the continent's general economic performance continues to improve.

Gross Domestic Product projections

Africa's growth is projected to be higher than that of other emerging regions.



Source: African Economic Outlook 2025
African Development Bank Group



SAATM AND THE AFRICAN UNION AGENDA 2063



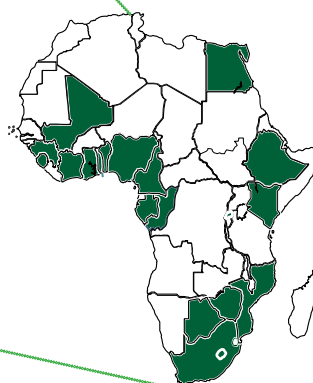
African Union Agenda 2063 is the strategic framework for the socio-economic transformation of the continent over the next 50 years.

It builds on, and seeks to accelerate the implementation of past and existing continental initiatives for growth and sustainable development.



37 countries signed SAATM

15 out of the 37 have already signed a Memorandum of Implementation



The Single African Air Transport Market (SAATM)

SAATM is a flagship project of the African Union Agenda 2063, an initiative of the African Union to create a single unified air transport market in Africa.

Stakeholders in the implementation of SAATM



African Civil Aviation Commission (AFCAC) is the Executing Agency Of The Yamoussoukro Decision (YD)



The African Airline Association (AFRAA) has been developing air transport policies in Africa.



The African Development Bank (AfDB) Groups' objective is to spur sustainable economic development and social progress in its regional member countries.



The Guiding Vision for Agenda 2063 is the African Union Vision

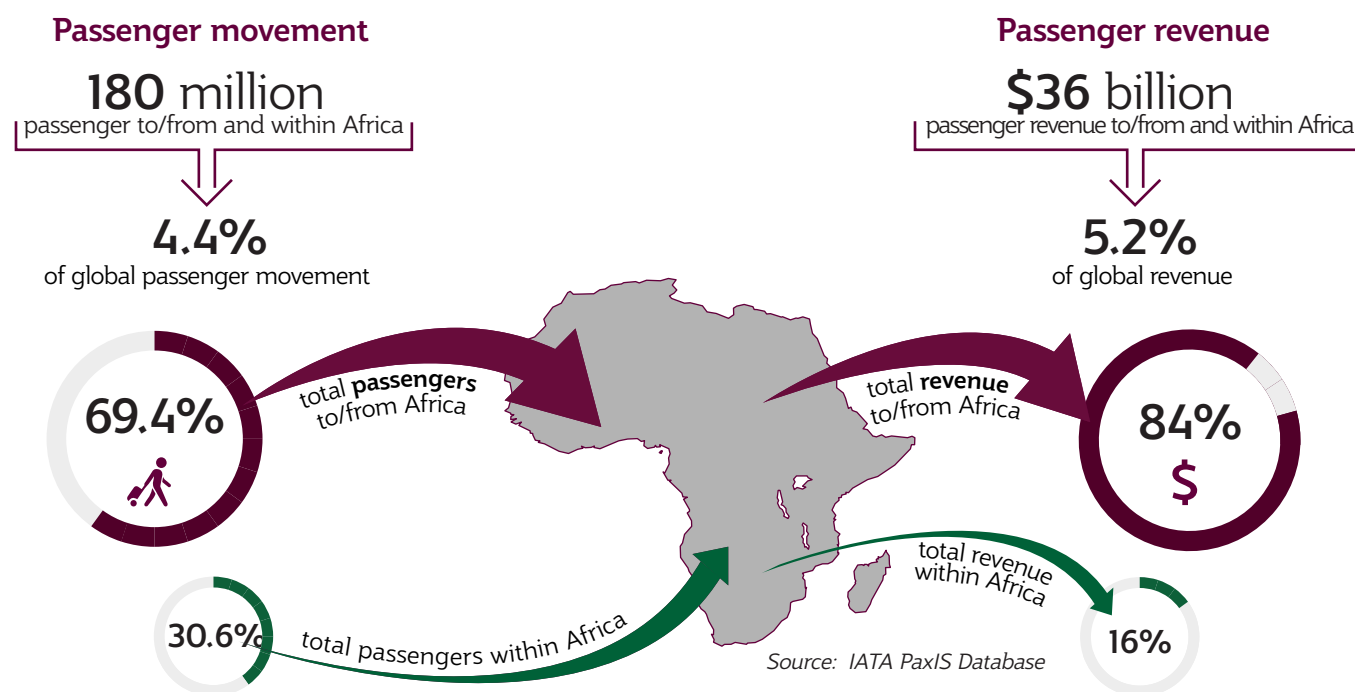
The SAATM will eliminate the need for separate bilateral air service agreements (BASAs) between individual countries.



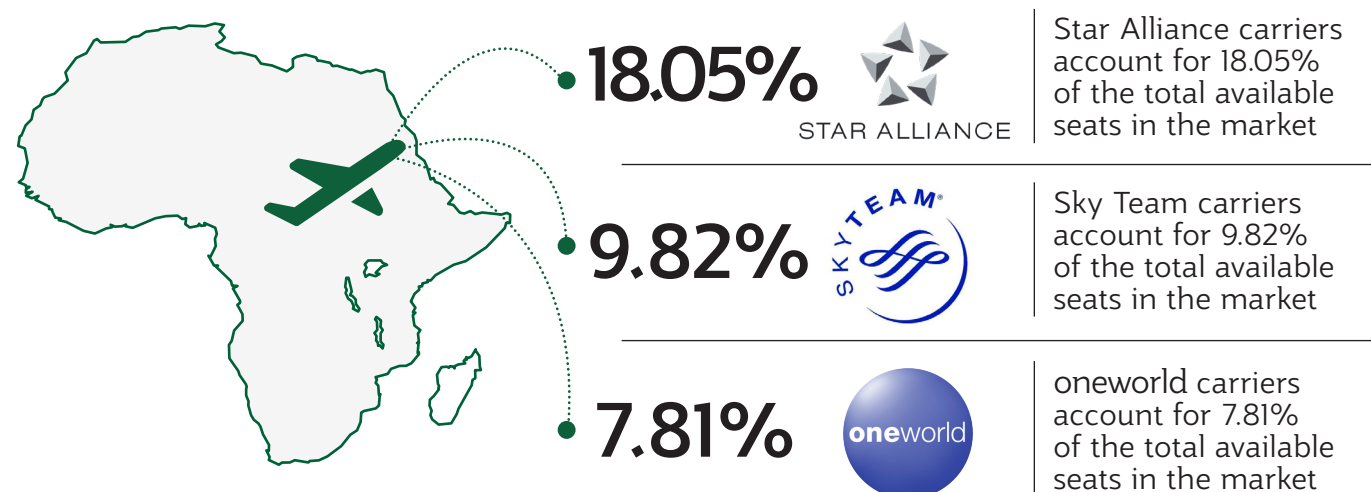
THE SHIFT IN THE HUBBING DYNAMICS AND A GLOBAL REPOSITIONING FOR AFRICA



In 2024, approximately 180 million passengers were carried to, from and within Africa, generating over 36 billion US dollars in revenue.



African airlines have been critical of foreign airlines “stealing their lunch”



From an airline perspective, 15 airlines have captured 60% of the inter-continental market revenues and 51% of the passenger movements.

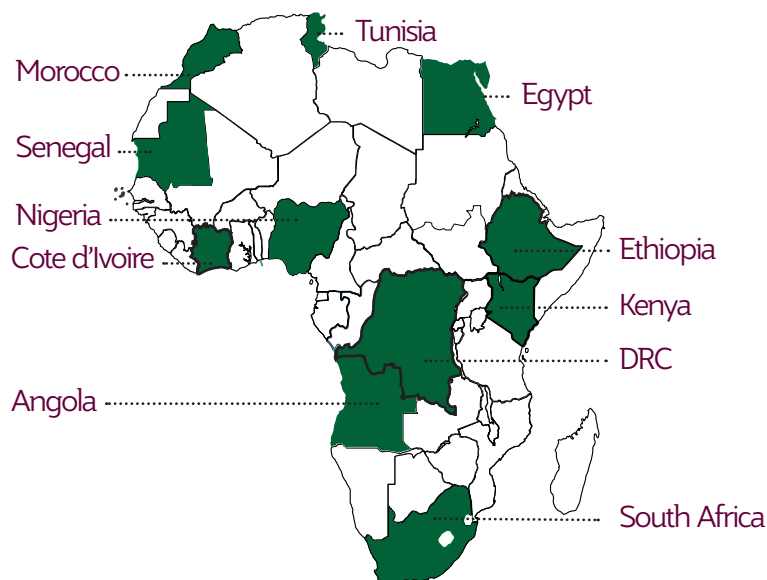
Top 5: EK 8.58%, ET 8.58%, AF 7.35%, QR 5.15%, TK 4.58% of revenue.



Moving to the topic of airports...

Similar levels of concentration of capacity appear. Of the approximately 176 international airports in Africa, 10 airports in 8 countries account for 47% of total seat capacity and 46% of the total revenues of the entire aviation market to and from Africa.

Top 10 airports in Africa



 **176** International airports in Africa

Concentration of traffic (international)

Airports	Seat Capacity	Revenue
Top 10	50%	47%
Others	50%	53%
100%		

Concentration of traffic (Domestic)

Airports	Seat Capacity	Revenue
Top 10	48%	44%
Others	52%	56%
100%		

Shifting hubbing dynamics

Global connectivity brings opportunities and prosperity. A shift towards a new hubbing dynamic will put many African capitals on the global map of aviation.

The proposed shift will complement the implementation of the Single African Air Transport Market (SAATM) initiative and ensure Africa's global leadership in aviation for years to come.

Recipe for growth

- Medium size airlines in under-served markets
- Super-connecting hubs
- Latest airport technology
- Best passenger experience
- High levels of efficiency

Qatar Airways collaboration with African Airlines



The AU Passport

The AU Passport is a common passport document that is set to replace existing nationally-issued African Union member state passports



QATAR & AFRICA – PARTNERS IN DEVELOPMENT



Qatar Airways' commitment to the African continent is undeniable.



We currently operate passenger services to 30 destinations in 21 countries. We also operate all-cargo services to 5 countries across the continent, carrying African agricultural products and other African imports to Qatar and beyond.

Qatar Airways' operations to the African continent

- **30** Destinations (passenger) in 21 countries
- **5** countries in Africa operate all-cargo services

Pre-COVID

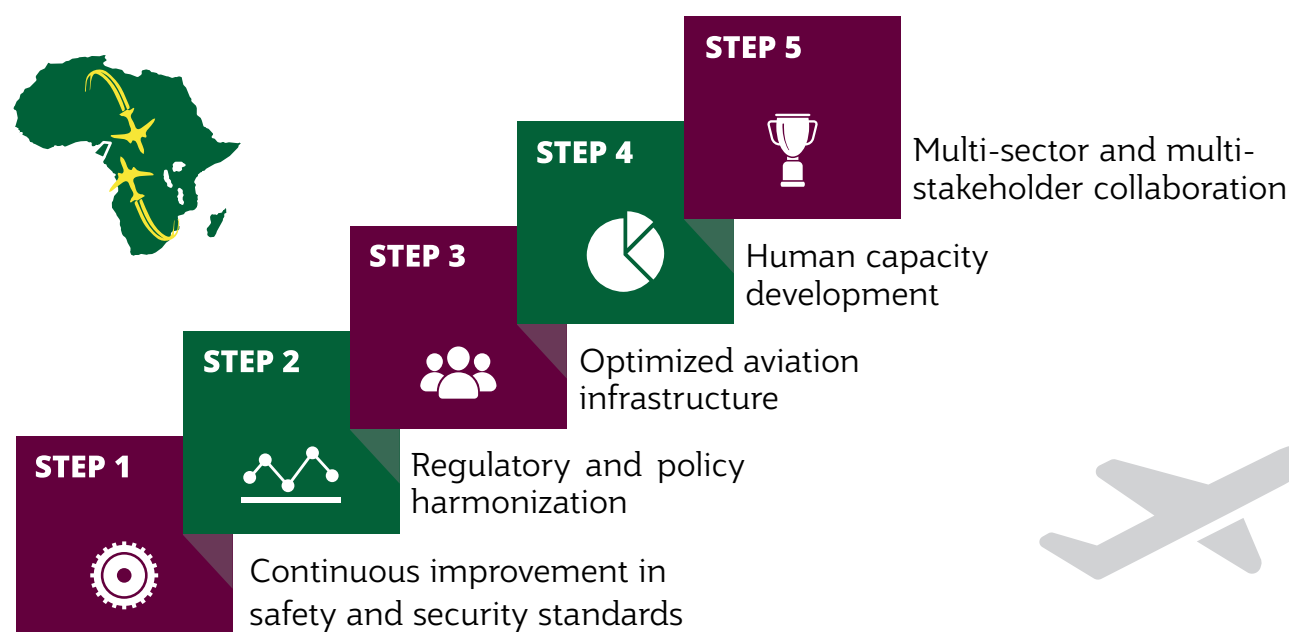
Qatar Airways operated to **23** markets through **133** weekly frequencies

Current Operation

Qatar Airways currently operating **30** markets through **182** weekly frequencies



Our proposal supports the pillars of the Single African Air Transport Market



Strengthening areas of collaboration

- **Flight Information Region** – Building a safer and more efficient route network in partnership with civilian and military authorities is critical for overflying traffic and airline hub development.
- **Training/Capacity Building** – The creation of education and training programs to ensure effective management and leadership within the airline industry.
- **Infrastructure Development** – Investment in the transportation systems, including airports and associated surface transportation, will support continued growth.
- **Tourism Development** – Aviation plays a central role in supporting the tourism sector, and is a key driver of economic development. Kigali, which is number one in conference tourism in Africa, is a good example.



There are mutual benefits to investment and collaboration with local aviation partners

The aim is to enhance freedom of movement, to serve the market and to spur development. We believe in Africa's aviation potential and stand ready to offer a long-term partnership. For Qatar Airways, collaboration and sustainable investments in:

- Local infrastructure
- Human capital
- Capacity building



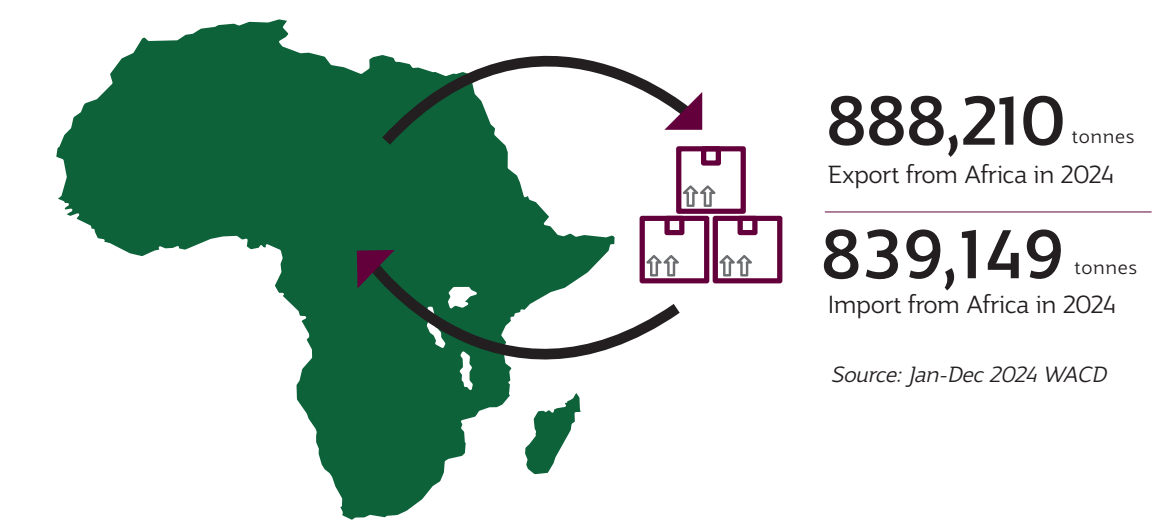


QATAR AIRWAYS CARGO EXPANDS FREIGHTER NETWORK IN AFRICA



Qatar Airways Cargo the world’s largest cargo carrier has a wealth of experience in the air freight business and offers cargo capacity on a young and modern fleet of 28 freighters including belly-hold services to a global network using more than 240 passenger aircraft. Qatar Airways Cargo also offers distinctive products, namely QR Pharma, QR Live, QR Charter and QR Express offering efficiency and compliance in the handling of temperature-sensitive pharmaceutical cargo, transportation of live animals as well as time-critical shipments.

The total African continent cargo import/export



Qatar Airways African Cargo Operations

	10	
	weekly freighters to Africa (on average)	
QR Exports from Africa		QR Imports to Africa
79,645 tonnes		78,160 tonnes



QATAR AIRWAYS' ROLE IN PROTECTING ENDANGERED SPECIES



The illegal trade in wild animals and animal products is one of the biggest threats to the survival of some of the world's most endangered species. Qatar Airways contributes to sustainable development in Africa by preventing illegal wildlife trade.

Qatar Airways has a zero tolerance policy towards the illegal trade of endangered wildlife and is actively engaged in stopping illegal wildlife transportation.

Our objective for wildlife is to:

- Manage wildlife sensitively and invest in conservation projects



United for Wildlife's Transport Industry Declaration brings together wildlife charities, government agencies and private companies to fight the illegal trade and trafficking of wildlife.

Qatar Airways signed the Declaration in March 2016



USAID's Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES)

Partnership is a select group of private sector, non-government organisations and government agencies collaborating to combat wildlife crime across transportation networks.

Qatar Airways joined the ROUTES Partnership in October 2017.

CROAMIS reporting

Qatar Airways Cargo's upgraded booking system requires additional information for endangered animal shipments listed under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) listings. This has improved detection rates and resulted in the rejection of numerous animal shipments.

Wildlife occurrences are reported internally using Qatar Airways' occurrence reporting system.



KEY MESSAGES



“We absolutely need to establish a single market in Africa. The only way for the continent to reach its full potential is by making it easier for airlines to operate within it. . . The continent is missing out on significant growth opportunities due to the high costs associated with its fragmented market.”

Mr. Willie Walsh

Director General, International Air Transport Association (IATA)

“The benefits of the SAATM will be realised through its effective implementation by the States that have committed and by the remaining States to sign up.

Mr. Abderahmane Berthe

Secretary General, African Airlines Association (AFRAA)

“[Aviation] has enabled many of these countries and continents, who have access to resources – natural resources, people resources – to have the ability to take those to other parts of the world, or to transport them in a way that not just adds value, but also helps the world.

Ms. Adefunke Adeyemi

Secretary General, African Civil Aviation Commission (AFCAC)

“Partnerships will differentiate the outcome . . . from previous efforts to stimulate Africa’s development with air transport. By partnering, stakeholders will effectively pool their resources, research, expertise, time and funding to support common goals...”

Mr. Kamil Al Awadhi

IATA Regional Vice President, Africa and Middle East

“Liberalisation can lead to new routes and frequencies, shorter travel times and lower fares. This in turn leads to a growth in air travel, bringing about increased tourism and trade, and therefore economic growth and job creation.”

Mr. Ali Tounsi

Secretary General of Airports Council International Africa (ACI)





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