

# Mobility & Importance of Seamless Passenger Processing for Africa

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20 May 2024

AIRLINES ASSOCIATION OF SOUTHERN AFRICA



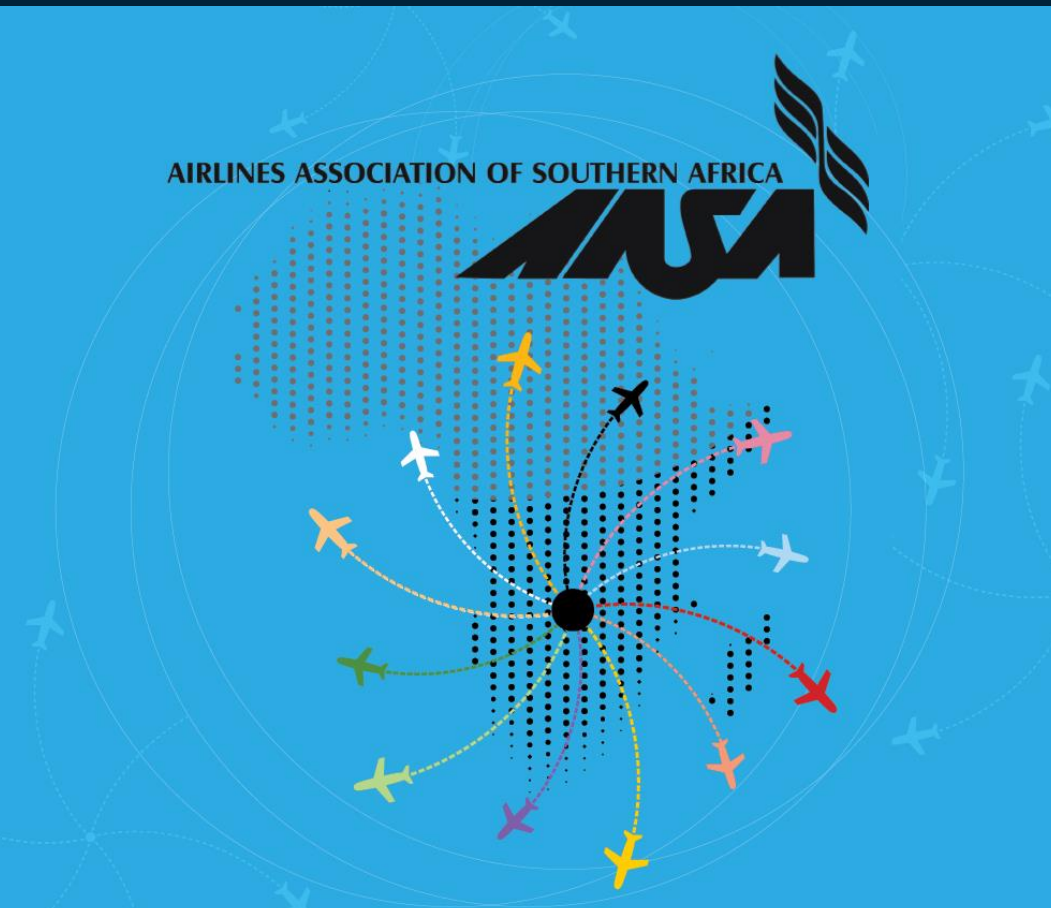
# Presentation at a glance

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1. Overview
2. Africa global positioning
3. Single Africa Air Transport Market Progress
4. Cross border Practices
5. Functional demarcations
6. Mobility concepts
7. Mobility and Aviation are inseparable – way forward
8. Concluding remarks

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# AASA Airline Members



# AASA Associate Members

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# Think about this...

“Those who would judge us  
merely by the heights we have  
achieved would do well to remember  
the depths from which we started.”

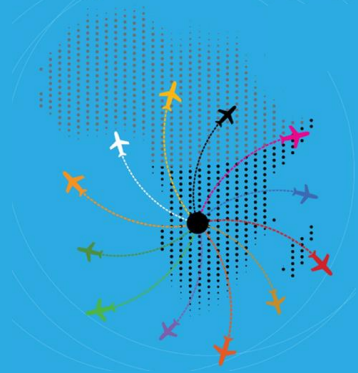
—Kwame Nkrumah—







# Africa global positioning – who we are...



Land mass, population and the comparative GDP.



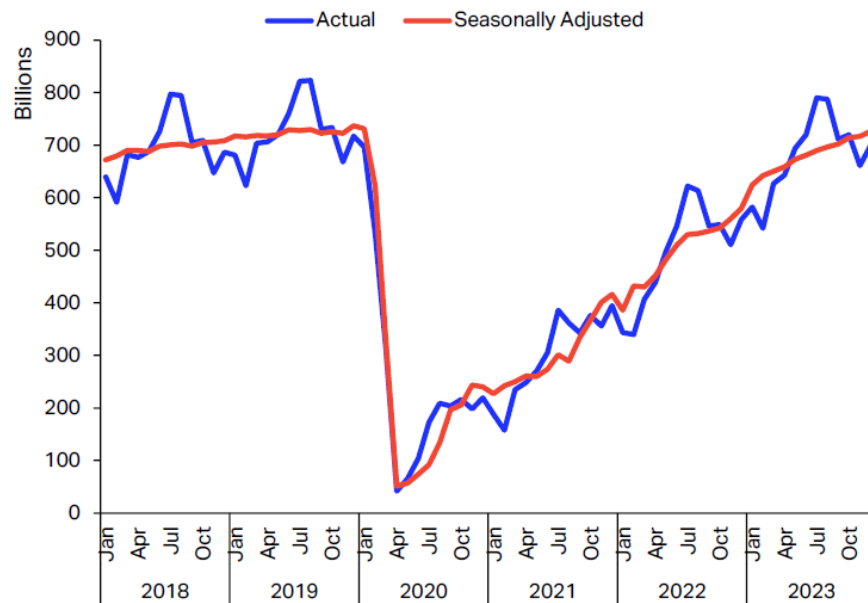
## Africa combined – compared to some economies

	TOTAL AREA	POPULATION ESTIMATE (2022)	DENSITY	GDP NOMINAL TOTAL	GDP NOMINAL PER CAPITA
<b>AFRICA</b> 	30,370,000 km <sup>2</sup>	1,393,676,444	46.1/km <sup>2</sup>	\$2.96 trillion	\$2,180
<b>USA</b> 	9,833,520 km <sup>2</sup>	331,893,745	33.6/km <sup>2</sup>	\$25.03 trillion	\$75,179
<b>CHINA</b> 	9,596,961 km <sup>2</sup>	1,411,778,724	145[11]/km <sup>2</sup>	\$20.256 trillion	\$14,340
<b>GERMANY</b> 	357,022 km <sup>2</sup>	83,695,430	232/km <sup>2</sup>	\$4.031 trillion	\$48,398



## Global Passenger recovery 2023 – Passengers

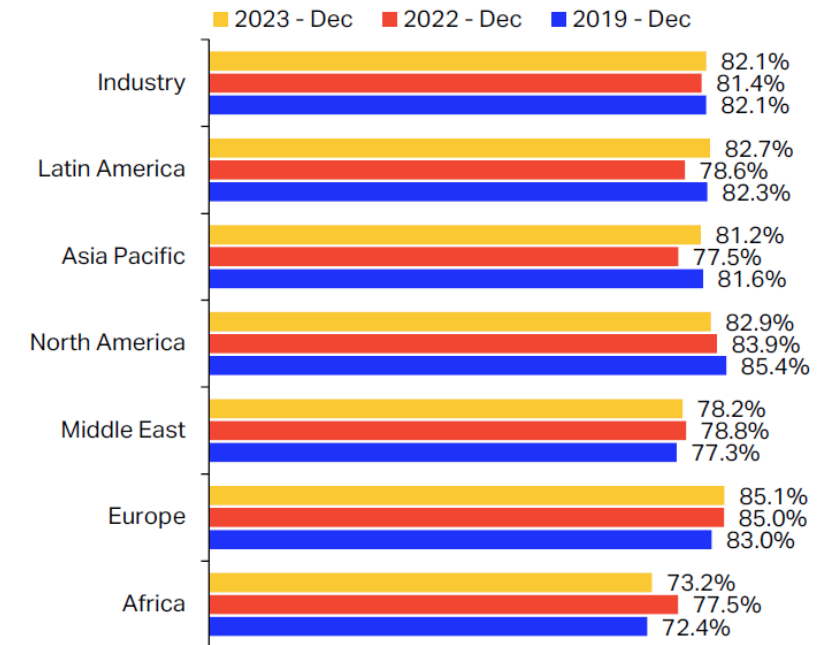
**Chart 2** – Global air passengers, RPKs, billions per month



Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Air passenger traffic, measured in RPKs, increased 25.3% YoY in December. Compared to the same month in 2019, traffic levels in 2023 were 2.5% lower. In seasonally adjusted terms, RPKs grew 1.3% month on month (MoM) aligning with the pace the industry saw over the past year, thus demonstrating the ongoing positive trend (Chart 2).

**Chart 3** – Passenger load factors, by airline region of registration % share of ASKs



Sources: IATA Sustainability and Economics, IATA Monthly Statistics

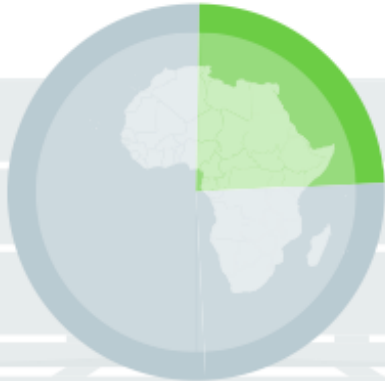
Industry seat capacity, measured in ASKs, grew by 24.1% compared to December 2022 and reached 97.5% of pre-pandemic levels. Passenger load factors (PLF) remained in the vicinity of 2019 levels (Chart 3). Industry-wide seat occupation was 0.8 ppt superior to the previous year and in line with the December 2019 number.

## What proportion of African countries are fully open to African travellers?

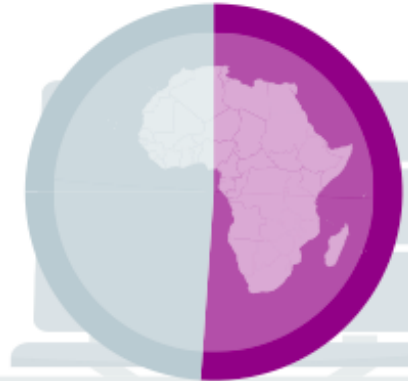
Africans can obtain a visa on arrival in **24%** of other African countries  
(down from 28% in 2020)



Africans don't need a visa to travel to **25%** of other African countries  
(down from 26% in 2020)



Africans need a visa before travelling to **51%** of other African countries  
(up from 46% in 2020)












Africans have liberal access to **49%** of other African countries  
(down from 54% in 2020)





## SAATM SADC SIGNATORIES

-  1. Angola
-  2. Botswana
-  3. Democratic Republic of Congo
-  4. Eswatini
-  5. Lesotho
-  6. Mozambique
-  7. Namibia
-  8. South Africa
-  9. Zambia
-  10. Zimbabwe

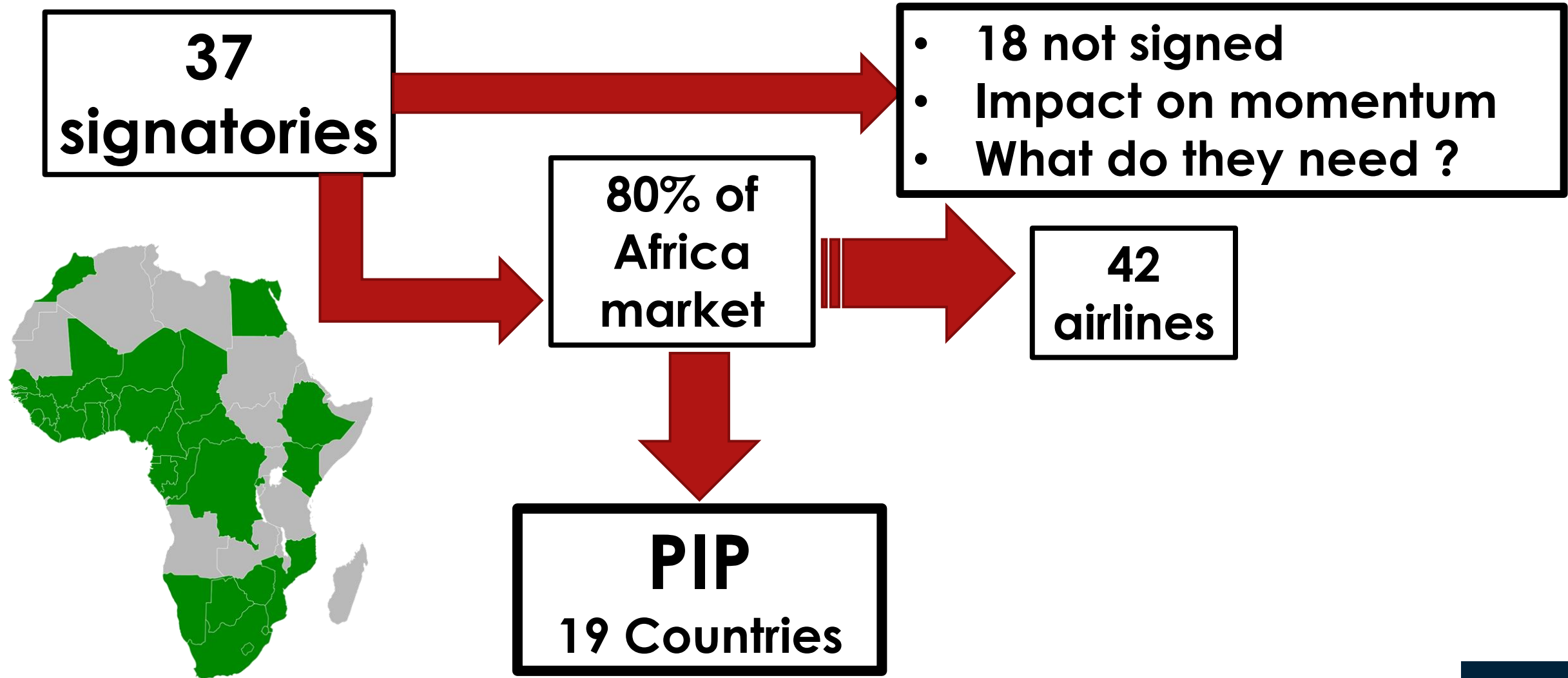


## Africa at large...

### 37 States have signed up

- How many African states have intra-African flights by African carriers
- African carriers only serving intra-African routes
- Increase destinations served only by African carriers
- More than 60 intercontinental destinations
- Some states have more intercontinental destinations than within Africa
- Handful of states combined have more than 100 international flights daily

# Single Africa Air Transport Market...to date






<b>Fast tracking SAATM &amp; FMP</b>	AU 2063 supported by governments
<b>Connectivity</b>	<ul style="list-style-type: none"><li>• Airlines</li><li>• Airports</li><li>• Regulators</li></ul>
<b>Collaboration</b>	<ul style="list-style-type: none"><li>• From statutes to opportunities in Africa</li><li>• Beyond conventions – get things done</li></ul>
<b>Stimulating mobility</b>	<ul style="list-style-type: none"><li>• From visits to experiences &amp; relationships</li><li>• Big 5 far much more than animals</li></ul>
<b>Commitment</b>	<ul style="list-style-type: none"><li>• Accountability</li><li>• Responsibility</li></ul>

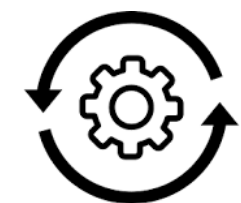
# Aviation enables mobility...what needs to be done



**Airlines**  **Jet fuel cost**  
➤ **Product cost** + **logistics** + **Taxes**



**Passengers**  **Family, Business, Discovery & Mixes**



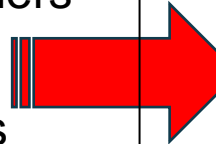
**Borders**   
Airports – optimal facilitation of movement  
 **safety & security (non negotiable)**



**Governments**  **Remove barriers (visas)**  
 **Inaccessible countries – Blocked by red tape**

## Challenges

- **Reciprocity** – applying the rules uniformly
- **Protectionism** – hiding behind sovereignty
- **Inadequate infrastructure** – service providers eg.airports
- **Restrictive legalese** – non physical barriers
- **Insufficient & inadequate** regulatory oversight
- **Prohibitive Taxes, Fees and Charges** – airlines and passengers are targeted
- **Comprehension** of the effect of regulations



## Recommendations

- Airlines included in formulation of policy & regulations
- Progressive dynamic regulatory frameworks to enhance movement of people.
- Reduce/eliminate excessive taxes and charges.
- Encourage collaboration- country to country
- Invest in aviation infrastructure development and maintenance.



# Pause for thought...

*“I did then what  
I knew how  
to do. Now  
that I know  
better, I do  
better”*

*Maya Angelou*



Amasagnalao

Asante

E se

Enkosi

Merci

Obrigado

Tautotera

Tatenda

Thank  
you

Siyabonga

Shukran

Zikomo

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