

Air transport supports 6.2 million jobs and \$55.8 billion in African economic activity¹⁶⁸. That is 1.8% of all employment and 2.6% of all GDP in African countries in 2016.

Every person directly employed in the aviation sector and in tourism made possible by aviation supported another 14.8 jobs elsewhere in Africa. Similarly, \$5.40 of economic activity was supported elsewhere in Africa for every \$1 of gross value added directly created by the air transport sector.

The aviation sector in Africa directly employed over 415,000 people in 2016. A sub-sectoral analysis of these workers suggests that:

- » **146,400 (35% of the total) were employed by airlines or handling agents** as, for example, flight crew, check-in staff, maintenance crew, or head office staff;
- » **33,200 (8%) had jobs with airport operators** in, for example, airport management, maintenance, and security;
- » **192,800 (46.5%) worked on-site in airports** at, for example, retail outlets, restaurants, and hotels;
- » **28,600 (7%) were employed in the manufacture of civil aircraft** (including systems, components, airframes, and engines); and
- » **14,500 (3.5%) worked for air navigation service providers** in, for example, air traffic control and engineering.

Airlines, airport operators, retailers and other on-site businesses at airports and air navigation service providers and civil aircraft manufacturers also contribute to GDP in Africa. In 2016, the operations of these businesses directly generated a \$10.3 billion contribution to GDP.

The aviation sector's spending with suppliers is estimated to have supported a further 601,000 jobs and a \$6.8 billion gross value added contribution to GDP. In addition, wage payments to staff – by the aviation sector and businesses in the aviation sector's supply chain – supported 248,000 more jobs and a \$2.8 billion gross value added contribution to GDP.

The aviation sector also facilitates a substantial amount of tourism in Africa. This stimulates still more economic activity, as tourists spend their money with restaurants, hotels, retailers, tour operators, and other providers of consumer goods and services. In 2016, spending by foreign visitors who flew to African countries supported an estimated 4.9 million jobs and a \$35.9 billion contribution to GDP.

In total, accounting for the sector's direct impact, its supply chain impact, its wage expenditure impact, and the impact of tourism made possible by air transport, the aviation sector supported an estimated 6.2 million jobs and a \$55.8 billion contribution to GDP in Africa in 2016.

Air travel in Africa is expected to continue to grow at about 4.9% per year over the next two decades¹⁷⁸. This increase will, in turn, drive growth in the economic output and jobs that are supported by the air transport industry over the next 20 years. Oxford Economics forecasts that by 2036 the impact of air transport and the tourism it facilitates in Africa will have grown to support 9.8 million jobs (60% more than in 2016) and a \$159 billion contribution to GDP (a 184% increase).

As the economy across much of the continent improves, governments in Africa must alter their historical view of aviation as a specialised or elite sector and begin to see it as a strategic asset. High taxes and charges, inadequate infrastructure, capacity and skills gaps, and, most notably, a lack of connectivity across the continent have created a less than ideal growth environment.

Since 2014, there has been a renewed drive by African leaders and policymakers to improve Africa's socio-economic prospects through improving connectivity across the continent. Research shows that if 12 key markets in Africa had open air services with each other, an additional \$1.3 billion would be added to the GDP of those countries, creating an additional 155,000 jobs, saving travel times and making air travel more convenient and affordable for travellers¹⁷⁹.

In January 2018, African Union heads of state launched the Single African Air Transport Market, and its implementation is now being rolled out across the continent, with 26 countries so far joining the initiative and up to 40 expected by the end of 2018. This project, along with the Continental Free Trade Area in Africa and the visa facilitation initiative, are three African Union Agenda 2063 flagship projects that will accelerate aviation growth across the continent and have the potential to provide better than forecast economic growth. However, this project relies on effective implementation from governments, working with the industry, to succeed.

98 million
passengers¹⁶⁹

236 billion
RPKs¹⁷¹

161
airlines¹⁷³

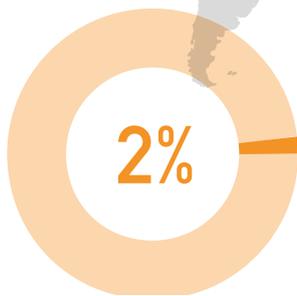
36
air navigation service providers¹⁷⁶ **968,000**
tonnes of freight¹⁷⁵

1,130,000
flights¹⁷⁰

349
commercial airports¹⁷²

1,277
aircraft in service¹⁷⁴

68%
average regional load factor¹⁷⁷



Africa's share of global passenger traffic, 2017



Aviation is a catalyst for Rwanda's development

Rwanda has recognised air transport as the key enabler of its development and a vehicle to position itself to become a regional service, tourism and conference hub.

To achieve economic and social development as part of its Vision 2020, the landlocked country has invested heavily in its national carrier, airport infrastructure and capacity building to connect the country to markets overseas, ensure access for business professionals and investors, and create employment.

A vibrant aviation sector also facilitates tourism in the country, which is its first foreign exchange earner. Rwanda received over 1.3 million tourists in 2015, earning \$318 million.

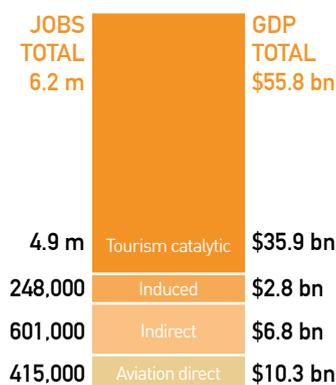
Rwanda's airports have over the years had a consistent annual passenger traffic growth rate of 13%, indicating the need to consider the expansion of airport facilities. The Strategic Transport Master Plan includes investments into the construction of a new international airport and the expansion and rehabilitation of Kigali International Airport and two regional airports. The overall investment in aviation infrastructure is estimated at \$789 million for 2019-2030.

In recent years, the national carrier, RwandAir, has become one of Africa's fastest-growing airlines. With the steady growth of its fleet and expansion of its route network, including to the Middle East, India and Europe, it is being positioned as a strategic national asset with which to serve and open Rwanda to business, tourism and conferences.

To meet the growing demand for a skilled workforce, Akagera Air School, a helicopter flying school based in Kigali, will expand to fixed wing pilot training in 2018 with the hope of increasing the number of locally born pilots from around 20% of the country's flight crew today. Akagera Air School also plans to later open aircraft mechanical and service crew departments.

No opportunity is missed to promote the local economy through aviation. RwandAir advances the Made in Rwanda initiative by offering local beverages and snacks on its flights. It has partnered with local roastery Question Coffee to serve Rwandan specialty coffee, a partnership which supports smallholder women farmers in Rwanda and promotes the product beyond the country's borders.

Total jobs and GDP supported by air transport in Africa



Direct jobs generated by air transport in Africa

