Exploring the horizons

A study of unserved air routes to, from and within Sub-Saharan Africa

Volume II

June 2025

Airbus
Fleet and Network Planning Marketing
MCMAM

AIRBUS

Part I
Building the stage

Introduction

This report marks the second issue of Airbus' analysis of the most important unserved air routes to, from, and within sub-Saharan Africa. It builds upon the initial evaluation presented at last year's AviaDev 2024 conference in Windhoek. At that time, the first issue of the report provided a comprehensive assessment of key city pairs generating significant origin-destination traffic but lacking non-stop flights. Having reached that crucial first milestone, we can now effectively review and discuss how the market has evolved in this year's update. This report equally includes a new balance of the most important unserved city pairs for sub-Saharan Africa.

This update confirms that the air transport industry functions within an intensely dynamic environment, influenced by an array of constantly evolving factors. Nothing in this industry is set in stone. Even if launching non-stop flights on certain city pairs seems unattractive today for various reasons, evolving market and industry dynamics can quickly turn them into appealing options. Therefore, it's crucial for airlines to remain fully informed, flexible, and swift in seizing opportunities.

The constant change is clearly seen in the shifting balance of supply and demand. Airlines frequently expand in some markets while scaling back in others. Traffic numbers fluctuate, and the routings connecting passengers take on unserved city pairs are constantly evolving, with certain transit airports gaining or losing popularity. Simultaneously, airline networks are continuously developing, with routes being opened or closed, and both frequencies and capacities being adjusted. Changes in schedules can render connections at certain transit hubs more efficient and convenient, while others may become less so. This environment naturally leads to some airlines thriving while others face challenges.

Beyond these core dynamics, the industry is further shaped by the emergence of significant advancements in aircraft technology. The past year has brought notable advancements, including the first deliveries and entry-into-service of the highly anticipated A321XLR with launch customers Iberia and Aer Lingus. Though still new in service, the aircraft type holds significant potential to boost future air connectivity to, from, and within Africa. Additionally, the impressive A350-1000 entered service in Africa with Ethiopian Airlines, and the A220, notably now in service with TAAG, continues to redefine regional travel with its enhanced comfort levels and longer-range capabilities.

Furthermore, the broader air transport ecosystem is influenced by economic development, global and regional trade dynamics, evolving diplomatic ties and the geopolitical climate. These are matters the global air transport industry is acutely aware of and that are closely monitored by many actors in the industry at the time this report was prepared. Crucially, the air transport ecosystem is also shaped by travel facilitators such as relaxed air service agreements and more open visa policies.

Airbus conducted this study in cooperation with AviaDev for the AviaDev 2025 conference in Zanzibar this June. Leveraging its advanced in-house analytical capabilities, Airbus partners with AviaDev to foster air transport growth and improve connectivity across Africa, ultimately making air travel accessible to everyone. This cooperation is a valuable addition to the work done by Airbus' fleet and network planning marketing team. This team of 17 continuously partners with airlines worldwide, assisting them in crafting effective business strategies and in identifying the optimal networks and fleets to achieve their goals and respond to the dynamics of the air transport industry.

Executive summary

Africa’s top tier unserved routes

This report, compiled by Airbus' Fleet and Network Planning team (Airbus CE - MCMAM), presents an updated analysis of critical unserved air routes to, from, and within sub-Saharan Africa. Prepared as a contribution to the AviaDev 2025 conference in Zanzibar, this report leverages Airbus' analytical capabilities as a collaborative effort to stimulating the development of the air transport sector and to enhancing connectivity across Africa.

This updated report, which complements last year's edition presented at the AviaDev 2024 conference in Windhoek, introduces a few new unserved routes to the list of top unserved city pairs, while a small number of city pairs have been removed. Nevertheless, the core list has remained largely consistent with last year’s list. What truly changed was what lies below the surface: the dynamic shifts in traffic flows, the evolving trajectories flown by passengers, increasing or decreasing competition, adjustments in frequencies and capacities and things alike. Delving into these underlying factors reveals the inherent complexity and constant flux of the air transport industry, which is truly exposed to a very dynamic environment. This sector demands continuous effort to stay abreast of developments, monitor emerging opportunities, adapt flexibly to change, and act swiftly to capitalize on new possibilities.

The analysis spans October 2023 to September 2024, utilizing traffic data from Sabre, schedule data from OAG, and aircraft-specific data from Cirium's fleets analyser, supplemented by macroeconomic and demographic information from various sources. The methodology identifies unserved routes with sufficient Origin & Destination (O&D) traffic to sustain continuous non-stop flights. Future route openings are projected for 2027 at the earliest, based on a conservative O&D traffic growth of 2.5% CAGR. A 65% stimulation factor is incorporated for new non-stop services, recognizing that convenience, promotional fares, and marketing can significantly boost demand. A 70% market capture rate is assumed for newly launched non-stop flights.

The analysis reveals a prevalent trend of O&D traffic growth across most top unserved city pairs, highlighting increasing demand for and viability of non-stop air service. Notable long-haul growth routes include Lagos-Toronto (+28%) and Lagos-New York (+19%), signaling strong demand for North American links from Nigeria. Similarly, Kinshasa-Dubai (+21%) and Douala-Dubai (+18%) indicate rising demand for Central Africa-Middle East connectivity. The Cape Town-Lagos route exhibited exceptional year-on-year growth of 67%, underscoring significant demand for direct links between Southern and West Africa. Other high-growth routes within Sub-Saharan Africa include Abidjan-Johannesburg (+33%) and Dakar-Nairobi (+23%). Conversely, some routes, such as Lagos-Manchester (-15%) and Durban-London (-10%), experienced traffic reductions.

The Abidjan-Johannesburg city pair is a new entrant among the top unserved routes, driven by substantial O&D passenger growth. The Dakar-Nairobi city pair is also a new addition, driven by significant O&D passenger growth. Despite no non-stop service, traffic has surpassed pre-pandemic levels and grown over 20% year-on-year on this city pair. A non-stop link could – here too - primarily boost intra-African trade and business.

Executive summary

Africa’s top tier unserved routes

The report emphasizes that various Airbus aircraft types, including the A220, the A320-family including the A321XLR, the A330neo, and the A350, offer unique combinations of performance, capacity, comfort, and operating economics suitable for these unserved routes. While recommendations are provided for each route as an isolated case, actual airline decisions involve comprehensive network and fleet evaluations, which Airbus' team conducts in close cooperation with airlines.

To optimally foster future air transport growth, it would be beneficial for airlines to cultivate a thorough understanding of the newest generation of aircraft capabilities. This knowledge could prove instrumental in developing innovative fleet, network, and operational solutions to address previously unconsidered market needs. Concurrently, airports might consider actively monitoring these aircraft developments and performance metrics to effectively pursue opportunities and enhance connectivity by leveraging the most suitable available aircraft capabilities.

The dynamic nature of the air transport industry is further underscored by recent developments beyond the scope of this report's core analysis. In the period following the evaluation timeframe, several airlines have initiated or resumed non-stop services on routes previously identified as unserved in this document. For instance, Delta Air Lines returned to seasonal operations on the Lagos-New York route at the end of 2024 and in Q1 2025, deploying A330ceos and A330neos. Similarly, Uganda Airlines commenced non-stop flights between Entebbe and London Gatwick in May 2025, utilizing their A330-800 aircraft. Additionally, Kenya Airways reintroduced non-stop service between Douala and Abidjan in May 2025, operating it as a tag-end flight to their Nairobi-Douala service with a narrowbody aircraft, and is understood to hold Fifth Freedom traffic rights for this segment. These significant developments will be thoroughly reviewed and detailed in next year's report, which will encompass the period during which these changes occurred

Methodology and Data Sources

As previously indicated, a straightforward approach to screening unserved air routes is by merging O&D traffic data with flight schedule data and by successively filtering out city-pairs that have adequate O&D traffic levels to support continuous non-stop flights but that lack such non-stop service.

With the objective to asses traffic, schedules, capacities and more generally also full market developments, Airbus purchases data from third parties, just as many airlines and other stakeholders of the commercial air transport industry do. Specifically for this study, traffic data from Sabre were combined with schedule data from OAG. As part of the process and in order to identify the presence of charter flights on the city pairs – if any –, cross-checks were made against recorded flight data as extracted from the flightradar24-database. Aircraft specific data, where needed in this study, were extracted from Cirium's fleets analyser and other data, including macro-economic and demographic information, country profiles, etc. come from S&P Global, available United Nations data files, the World Bank and similar sources.

Given the rapid changes in the commercial air transport landscape, the most effective approach for conducting a study that culminates in a report like this one is to define and adhere to a specific evaluation period. The reference-data used for this study were extracted from the data sources mentioned above for a period of 12 successive months from the beginning of October 2023 to the end of September 2024, corresponding to the most recent 12 months' period for which full traffic data were accessible at the time the study was done.

With the objective of identifying those unserved routes that can be viable candidates for future openings, it is essential to find an aircraft type that is both capable of performing the route and that features the right capacity to accommodate the traffic while equally offering an acceptable flight frequency with decent load factors. When addressing the performance of the aircraft, range capability obviously first comes to mind. Nevertheless, take-off and landing performance also need to be considered. The latter is especially required for airports with specific runway-limitations, high outside air temperatures, a high altitude or a combination of these factors. All Airbus aircraft types with typical 2-class or 3-class configurations were part of the evaluation and typical airline evaluation rules were used for the performance assessment. As the Airbus product range covers standard seating configurations of 100 seats and above, the unserved routes discussed in this report can accommodate these aircraft types and capacity. Some more specific indications are included in the description of each unserved route in the subsequent sections of this report.

As the decision to open a new non-stop service is not made overnight and as opening new routes can be a lengthy process – if only from an operational and commercial perspective –, the assumption was made that any potential new route will be opened in 2027 soonest. O&D traffic on the identified unserved city-pairs was projected to continue growing at a conservative CAGR of 2.5% until that time. This CAGR of 2.5% compares to a CAGR of 4.4% for traffic growth to, from and within Africa in the period to 2043 as published in the Airbus Global Market Forecast (GMF) in 2024.

Methodology and Data Sources

Launching a new non-stop service typically leads to an increase in passenger demand. This effect is commonly known as stimulation. Several factors account for this effect.

- A new non-stop service makes the destination more accessible. It encourages people to travel to this destination while they might not have considered doing so before the non-stop service existed.
- Convenience of the non-stop service also contributes to an increased demand. People who abstain from traveling to the destination due to the complexity of the trip and the time it requires, may well decide to do the trip if a non-stop flight exists.
- The launch of non-stop flights often comes with promotional fares. Beyond such initial period, fares for the non-stop service can remain attractive. While yields on non-stop flights are typically higher, total fares for non-stop flights can be lower than those for connecting itineraries, particularly if e.g. the connecting route involves a significant detour. As such, price-sensitive travelers may well get attracted to the non-stop service.
- The introduction of a new route usually results in a cooperation between the airline, the airport and the tourism board of the destination and is usually accompanied by marketing efforts. This increases awareness of the non-stop flight and also generates interest to travel to the newly-served destination.
- A last factor is that of economic impact. New routes attract new traffic. That leads to an increased economic activity in the destination, which in turn will generate new business potential and a potentially increased level of business travel.

The degree of stimulation generated by new non-stop services varies from case to case. It depends, for instance, on the airline's business model and the type of destination. Low cost carriers generally stimulate traffic more than full service carriers. A new non-stop service launched by a low cost carrier to an appealing tourism-destination in summertime generally stimulates traffic considerably more than a new non-stop flight launched by a full-service carrier to an established industrial center. Stimulation factors observed so far range from some percentage points to several hundred percent and beyond. In this study, a conservative and simplified approach was adopted by assuming a stimulation of 65% only, applied on the identified O&D traffic for the reference period and regardless of the city pair.

Even if sufficient O&D traffic is present on a selected unserved route, even if this traffic is expected to grow in the future and even if a certain level of traffic stimulation needs to be anticipated, it is also important to recognise that not all traffic will be captured when initiating a non-stop service. There will always be reasons why some people prefer to travel on connecting flights, with a transit in another airport. It is for this reason that only a share of the projected total traffic is considered to be captured by the new non-stop service on the identified O&Ds. The market capture of the newly launched non-stop flights in this study is assumed to be 70%.

Methodology and Data Sources

A distinction must be drawn between the introduction of a simple point-to-point service and the incorporation of a new destination into in an already established and extensive network. The addition of a new destination in a hub-and-spoke network will not only create a new non-stop service between the hub and the newly-served destination, but it will also create a new O&D pair with every other destination that already exists in the network, be it with a transit through the hub of the airline. The outcome is that a new non-stop service can generate some extra connecting traffic in the network of the airline. Obviously this extra network-traffic needs to be accounted for on the leg between the newly opened destination and the hub. Once again, a conservative approach was adopted for this study by assuming a level of 15% connecting traffic, applied on the identified O&D traffic for the reference period and regardless of the city pair.

Particular challenges arise when trying to match required aircraft performance with capacity per flight, flight frequency and load factors. Traffic growth, traffic stimulation and attracting connecting traffic goes hand in hand with offering flexibility and choice to the customer. The higher the frequency of flights, the greater the flexibility and choice the customer has to organize the trip and the higher growth, stimulation and level of connecting traffic on board will be. However, the capacity per flight should align with the traffic that can be captured to secure load factors and to keep the economic performance and profitability of the service in check. The Airbus products embody unique and unmatched combinations of performance, capacity, comfort on board and operating economics, positioning them well to be used on the top unserved routes discussed in this report. The study presented in this report and the classification of the top unserved city pairs was contingent upon meeting two criteria at the start-up of the non-stop service: achieving a minimum average load factor of 70% and operating at least three flights per week each way.

Limitations of the study and this report:

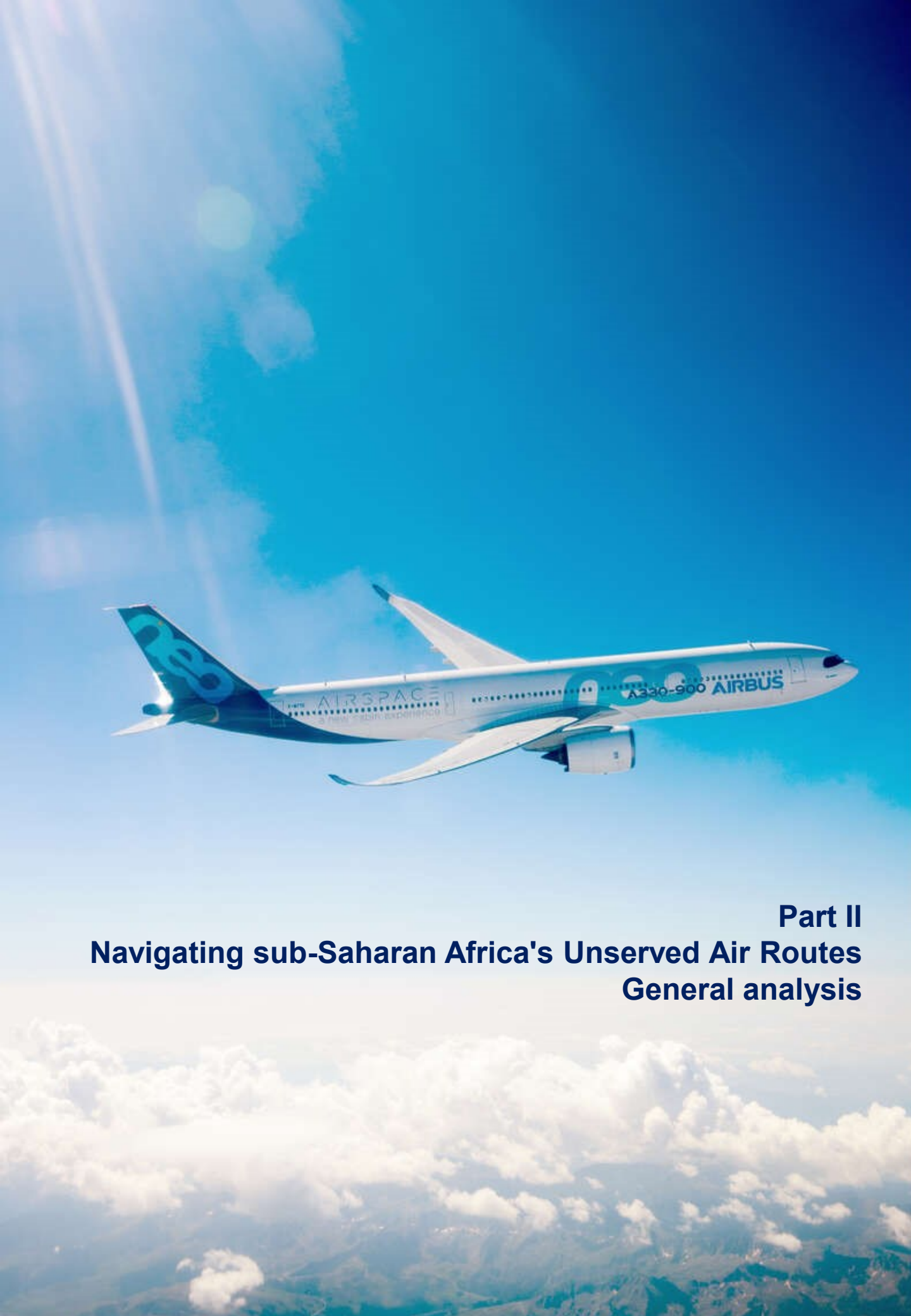
- The unserved routes in the study were identified by means of O&D traffic that existed during the reference period of the study. Any city pair with potential that did not record any traffic during the reference period – no matter for what reason - is therefore not captured.
- Geopolitical matters, constraints resulting from air service agreements, airport slot constraints and any other potential constraints were not considered.
- Economic evaluations covering yields, correlated revenue potential, operating cost analyses and resulting potential profitability of the identified unserved routes were not included within the scope of the study. These elements are considered as customised and confidential information and can vary considerably between airlines. Airbus typically handles these kinds of analyses in private discussions with the airline.
- Only routes that are relevant to aircraft with a capacity of 100 seats and above are considered. Domestic routes were not studied.

Methodology and Data Sources

- Possible moves of competing connecting airlines are not considered in this study. Depending on the importance of the traffic captured by competing airlines, connecting over their hub(s), different levels of competitive reactions need to be anticipated and catered for. A typical reaction to undermine the success of the new non-stop service is a (temporary) reduction of fares offered by the competing connecting airline(s). The business case for the launch of a non-stop service on an unserved route therefore should include a plan to respond to such competing moves. Performing a sensitivity analysis with the market capture as a variable could be an appropriate way to assess this risk.

- Many more unserved city pairs beyond those discussed in this report have the potential to get a non-stop service in the future. The scope of this report is limited to a selection of the top unserved routes only. Any other unserved city pair can still be evaluated separately and might still justify a non-stop service, even if not covered in this report.

- For most of the routes in this report, a recommendation is provided for the aircraft type, capacity, and frequency of service that could be effective. These recommendations are made for each route as if it were a fully isolated case. Naturally, decisions regarding the acquisition or lease of an aircraft type are not based solely on a single route. Comprehensive evaluations of the entire network and fleet solutions typically precede any aircraft acquisition or lease decisions. Airbus' fleet and network solutions team generally conducts these evaluations in close cooperation with the airline(s).



Part II
Navigating sub-Saharan Africa's Unserved Air Routes
General analysis

Navigating sub-Saharan Africa's Unserved Air Routes
General trends and comparative analysis

This year's analysis encompasses the period from October 2023 up to and including September 2024. This timeframe was chosen on the basis of the availability of comprehensive and detailed traffic data. Comparisons will be included that contrast the evaluated period with the preceding equivalent period, from October 2022 up to and including September 2023. While the core analysis focuses on these specific past periods of twelve months, airline operations planning allows projections into the future. OAG-data covering network and schedule data were available up to the end of 2025 at the moment this report was produced. This extended visibility enables the inclusion of additional insights covering recent and short term future activity on the reported unserved city pairs.

During the period from October 2023 to September 2024, it was observed that the vast majority of the unserved city pairs reported in last year's analysis remained without non-stop air service. Consequently, the in-depth insights and detailed analysis presented in Volume 1 of this report largely continue to hold true. Nevertheless, for each of these unserved city pairs, this Volume 2 of the report will include updates on any significant developments that have occurred since the previously reported period, offering a refined understanding of their current status. Furthermore, some additional appealing unserved city pairs are included in this year's report. Finally, given that this year's AviaDev conference is organized in Zanzibar, particular attention will also be dedicated to evaluating unserved routes to and from Tanzania.

The table below summarises some key data for the top unserved city pairs connecting sub-Saharan Africa to other regions as included in the Volumes 1 and 2 of this unserved routes report.

To / From sub-Saharan Africa	Period from 10/2023 - 09/2024		Equivalent preceding period 10/2022 - 09/2023	Rank in Volume I report (June 2024) Ref. Note 1	Period from 10/2023 to 09/2024 vs Period from 10/2022 to 09/2023	
City pair	Rank	Reported Non-directional O&D traffic	Reported Non-directional O&D traffic		Traffic growth / reduction	Relative Traffic growth / reduction
Harare-London	1	110.9k	98.9k	1	+12.0k	+12%
Johannesburg-Mumbai	2	85.9k	82.8k	2	+3.1k	+4%
Lagos-New York	3	77.6k	65.1k	3	+12.6k	+19%
Entebbe-London	4	72.7k	67.2k	5	+5.5k	+8%
Lagos-Toronto	5	66.9k	52.5k	4	+14.5k	+28%
Kinshasa-Dubai	6	62.9k	52.1k	not covered	+10.8k	+21%
Douala-Dubai	7	56.9k	48.3k	not covered	+8.6k	+18%
Nairobi-Washington	8	55.6k	48.7k	9	+6.9k	+14%
Cape Town-Brussels	9	49.4k	51.5k	7	-2.1k	-4%
Brussels-Johannesburg	10	48.4k	42.1k	not covered	+6.3k	+15%
Durban-London	11	47.5k	52.8k	8	-5.3k	-10%
Dar es Salaam-London	14	45.0k	40.0k	not covered	+5.1k	+13%
Zanzibar-London	15	44.7k	38.6k	not covered	+6.2k	+16%
Lagos-Manchester	out of top 20	42.1k	49.4k	6	-7.2k	-15%
Lagos-Houston	out of top 20	41.7k	39.4k	10	+2.3k	+6%

Note 1: The reference period of 12 successive months used for the evaluations in Volume 1 of this report was December 2022 up to and including November 2023. This period of 12 successive months therefore slightly differs from the 12 months' periods used for the evaluations in this Volume 2 of the report and explains some of the deviations in the numbers.

Navigating sub-Saharan Africa's Unserved Air Routes
General trends and comparative analysis

The data for October 2023-September 2024 reveals a predominant trend of growth in O&D traffic for most of the top unserved city pairs, reinforcing the interest in investigating the strong and often increasing demand for non-stop air service.

Routes like Lagos-Toronto (+28%) and Lagos-New York (+19%) have demonstrated substantial growth, highlighting considerable demand that could drive the establishment of more non-stop links to North America from Nigeria. Similarly, Kinshasa-Dubai (+21%) and Douala-Dubai (+18%) show robust growth, signaling increasing demand for connectivity between Central Africa and the Middle East. Both city pairs are therefore worth including in this report.

While overall growth is evident, some routes experienced traffic reduction, most notably Lagos-Manchester (-15%, dropping out of the top 20) and Durban-London (-10%), suggesting changing market dynamics. Previously unranked routes between Dar es Salaam and London, and between Zanzibar and London, were included in this report to coincide with this year's AviaDev conference being held in Zanzibar, Tanzania. Notably, they ended up in this year's top 15 of unserved city pairs to and from sub-Saharan Africa. The strong traffic growth on Dar es Salaam-London (+13%) and on Zanzibar-London (+16%) between the two evaluated periods points to evolving demand patterns, suggesting these unserved city pairs are potentially worth putting on the radar for future non-stop flight opportunities. The latter especially applies when projecting into the future and when applying traffic growth and traffic stimulation assumptions as described in the methodology of this report's analysis.

Within sub-Saharan Africa	Period from 10/2023 - 09/2024		Equivalent preceding period 10/2022 - 09/2023	Rank in Volume I report (June 2024) Ref. Note 1	Period from 10/2023 to 09/2024 vs Period from 10/2022 to 09/2023	
City pair	Rank	Reported Non-directional O&D traffic	Reported Non-directional O&D traffic		Traffic growth / reduction	Relative Traffic growth / reduction
Abidjan-Douala	1	37.8k	32.5k	2	+5.3k	+16%
Dakar-Libreville	2	34.0k	31.6k	1	+2.4k	+8%
Cape Town-Lagos	3	26.4k	15.8k	4	+10.6k	+67%
Abidjan-Johannesburg	4	19.9k	15.0k	not covered	+4.9k	+33%
Dakar-Nairobi	5	16.9k	13.8k	not covered	+3.1k	+23%
Abuja-Nairobi	6	16.4k	18.6k	3	-2.2k	-12%
Dakar-Douala	9	14.5k	16.5k	5	-2.0k	-12%

The data above covering unserved city pairs within sub-Saharan Africa equally reveals a predominant trend of growth in O&D traffic for most of these top unserved routes. This highlights the often increasing demand for enhanced connectivity within the continent. Notably, the Cape Town-Lagos route experienced exceptional growth, increasing by 67% (+10.6k passengers), making it the strongest performer and emphasizing the demand for more non-stop links between Southern and West Africa. Other significant growth routes include Abidjan-Johannesburg (+33%) and Dakar-Nairobi (+23%), both of which were not previously ranked in the top tier.

Note 1: The reference period of 12 successive months used for the evaluations in Volume 1 of this report was December 2022 up to and including November 2023. This period of 12 successive months therefore slightly differs from the 12 months' periods used for the evaluations in this Volume 2 of the report and explains some of the deviations in the numbers.

Navigating sub-Saharan Africa's Unserved Air Routes
General trends and comparative analysis

While the overall trend shows that traffic on the top unserved city pairs within sub-Saharan Africa is expanding, some unserved routes, such as Abuja-Nairobi and Dakar-Douala which were both in last year's top 5 unserved city pairs within sub-Saharan Africa, experienced a notable decline of 12%. This decline suggests either shifting market dynamics or new obstacles discouraging travel between both cities. In contrast, the sustained high traffic on routes like Abidjan-Douala (+16%) and Dakar-Libreville (+8%) at the top of the list further emphasizes the consistent demand for connections between West and Central Africa.

It's important to note that some operators do offer air transport services between the city pairs listed as unserved city pairs in the table above. However, the data available for the evaluated periods shows that these services often involve the same aircraft performing multiple successive links. For example, while travel from Dakar to Libreville is possible and offered by some airlines, the journey includes one or more stops between the origin and destination. In the context of this report, such services are not considered non-stop, and consequently, these city pairs are still categorized as unserved.

Air transport to, from, and within sub-Saharan Africa is significantly impacted by pronounced seasonal fluctuations in demand, a trend particularly evident across many of the region's top unserved routes. Addressing this challenge effectively necessitates flexible operational strategies, such as seasonal services or flights tailored to short periods of peak demand. Historically, airlines have implemented solutions like triangle, circular, or tag-end flights to manage varying loads. A more dynamic approach to fleet deployment is now feasible thanks to the expanded range capabilities of Airbus' single-aisle aircraft. For instance, widebody aircraft can be deployed during peak seasons, while a transition to single-aisle operations can occur during periods of lower demand. Crucially, the introduction of aircraft like the A321XLR has significantly broadened the scenarios where this operational flexibility can be applied. This strategy could even extend to managing weekly variations in demand. A key advantage of the Airbus product range, from the A320 family through the A380, is its mixed-fleet/single-fleet flying capability. This allows trained crews to seamlessly switch between different aircraft types, enabling scenarios such as an A321 flying to a destination, with the crew resting there, and then flying an A330 back from the same destination the following day, optimizing fleet utilization and crew deployment.

A more detailed analysis of the traffic data as shown below and across the surveyed unserved city pairs reveals a consistent trend: economy class passengers constitute the overwhelming majority of travelers, suggesting a predominantly price-sensitive market. This is particularly evident on the Douala-Dubai route, which shows the lowest premium percentage at 4%, indicating a strong leisure, VFR, or highly price-driven market. Consequently, while reinforcing connectivity between Central Africa and the Middle East presents a promising growth area, Kinshasa-Dubai emerges as the preferred route for a potential launch due to its more balanced passenger profile.

Conversely, routes such as Nairobi-Washington stand out with a significantly higher premium passenger share and the largest absolute number of premium travelers, suggesting a greater presence of business, diplomatic, or high-yield leisure traffic. Johannesburg-Brussels (12%) and Dar Es Salaam-London (11%) also demonstrate notably higher premium percentages compared to the average.

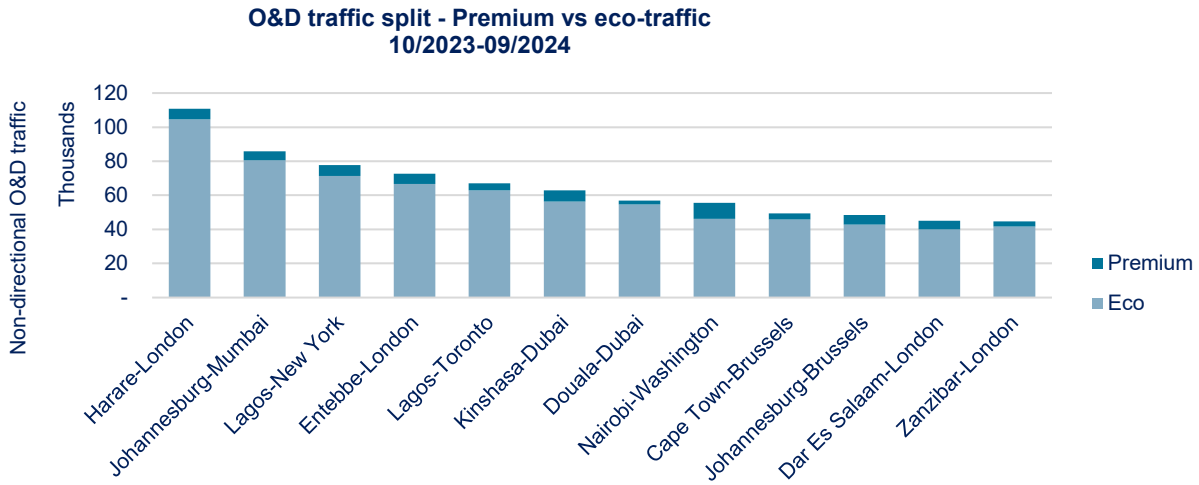
Navigating sub-Saharan Africa's Unserved Air Routes

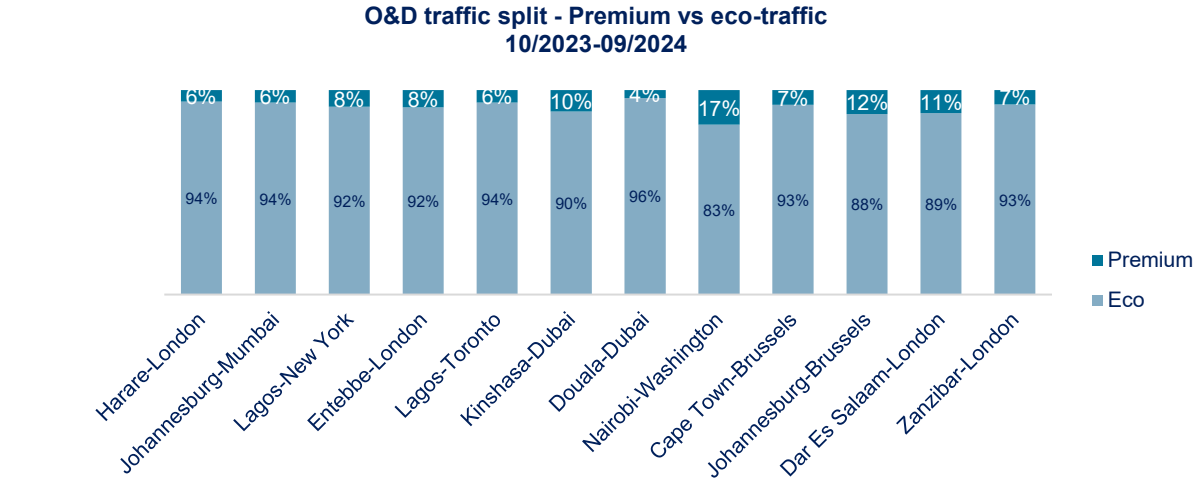
General trends and comparative analysis

Source: Sabre

For airlines, these findings underscore the necessity of prioritizing competitive economy class fares and ample capacity to capture the dominant market share, while simultaneously developing targeted premium strategies to attract and retain the valuable, higher-yielding passenger segments on specific routes like Nairobi-Washington and Johannesburg-Brussels.

Unserved city pairs to and from sub-Saharan Africa



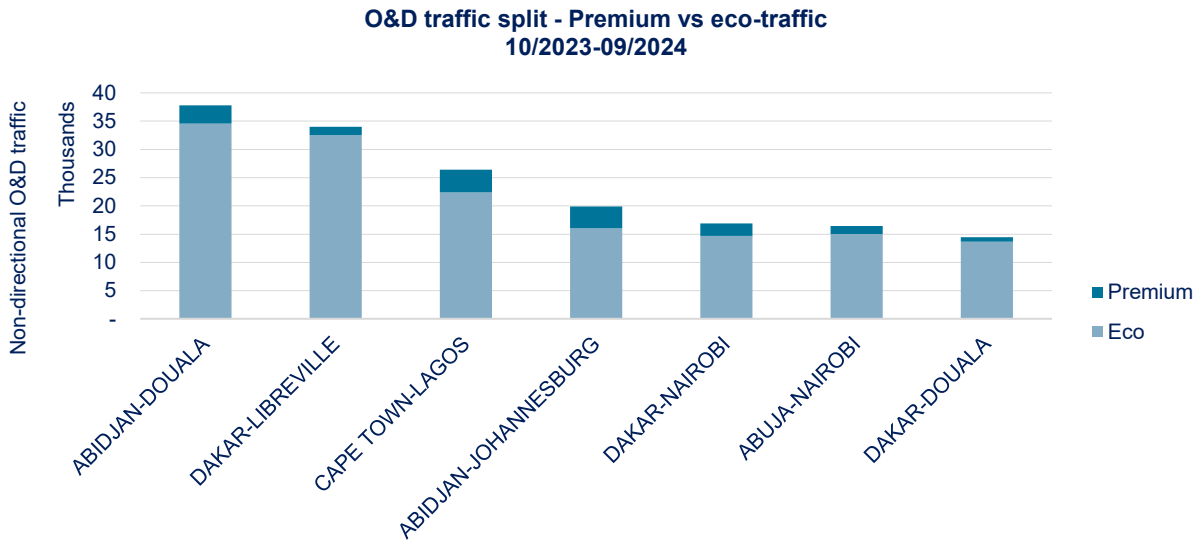


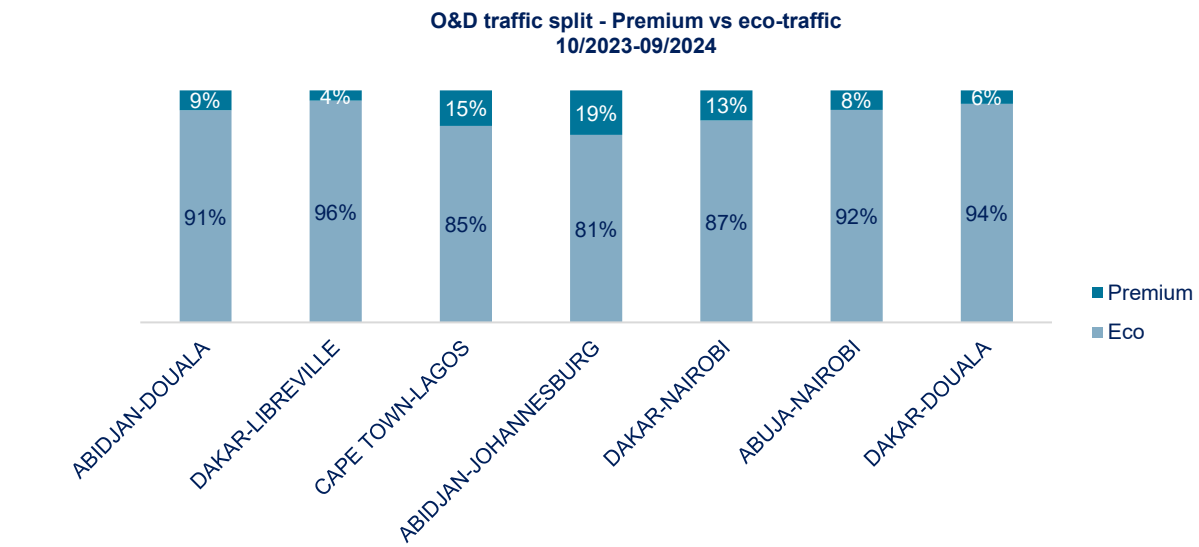
Navigating sub-Saharan Africa's Unserved Air Routes

General trends and comparative analysis

Source: Sabre

Unserved city pairs within sub-Saharan Africa



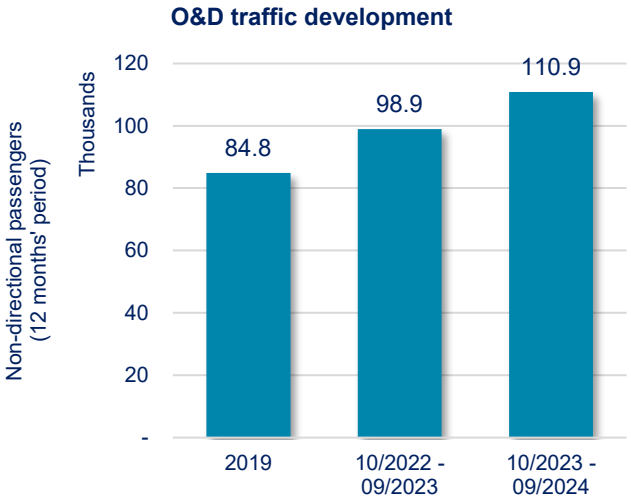


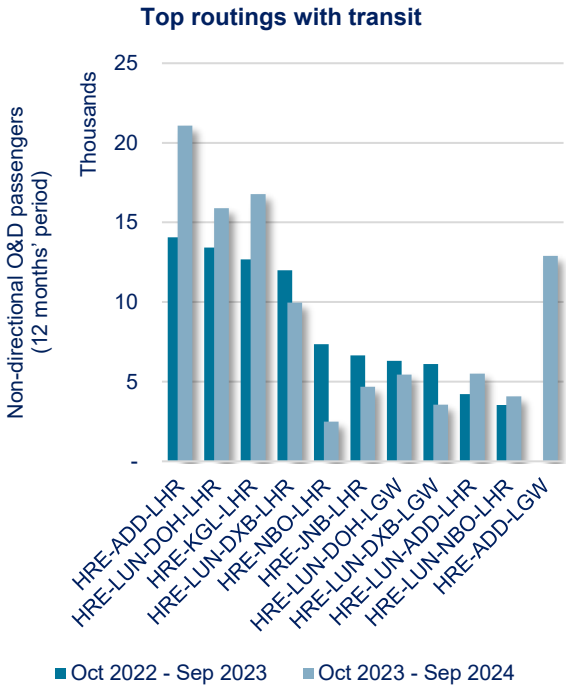
Part III
Unserved city pairs to and from sub-Saharan Africa

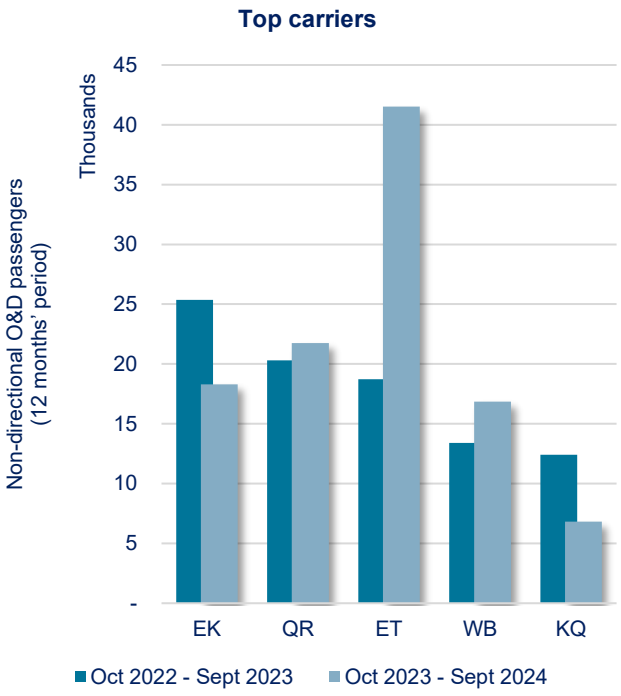
Top Unserved City Pairs to and from sub-Saharan Africa

Harare-London

Source: Sabre







2019-2024 CAGR: 5%
2023-2024 YOY growth: 12%

Top Unserved City Pairs to and from sub-Saharan Africa

Harare-London

The Harare-London route continues to be the most important unserved city-pair in our evaluation, a consistent trend from our previous analysis. Despite the global pandemic, traffic on this route showed remarkable resilience, growing by 12% year-on-year and surpassing pre-pandemic levels with a 5.5% Compound Annual Growth Rate (CAGR) since 2019.

This dynamic was largely shaped by Ethiopian Airlines (ET). Their strategic move to start operations between Addis Ababa (ADD) and London Gatwick (LGW) from the end of 2023 successfully drew a significant volume of connecting traffic for the Harare-London route. As a result, ET has dramatically increased its market share and is now the dominant carrier, effectively connecting passengers through its Addis Ababa hub. The launch of the LGW-route clearly let ET capitalize on Origin & Destination (O&D) demand to and from London, serving travelers whose primary destination is London rather than those connecting to other flights there.

ET's aggressive expansion came at the expense of other established carriers. Emirates (EK) and Kenya Airways (KQ) saw a notable decline in their market share, despite EK having been the leading operator on this city-pair in the preceding 12-month period, connecting passengers via Dubai. ET's success in challenging a major Middle Eastern carrier like EK highlights a key insight: even on competitive routes, the right product, competitive pricing in combination with convenient connections, and a preferred destination airport for the specific traffic type can significantly shift market dominance.

This development provides a compelling example for other routes with low yields, where challenging established carriers might seem intimidating. The Harare-London market, primarily driven by leisure and VFR traffic—which inherently results in lower average yields—demonstrates that strategic choices and new route openings can be highly impactful.

Ethiopian Airlines' (ET) strategic introduction of a new flight between Addis Ababa and London Gatwick has clearly captured a significant portion of the origin and destination (O&D) traffic between London and Harare. It has also spurred considerable growth on the London-Harare city pair. This observation makes one wonder how passenger flows might shift further and how traffic might get stimulated further if a direct, non-stop air service were to connect Harare and London.

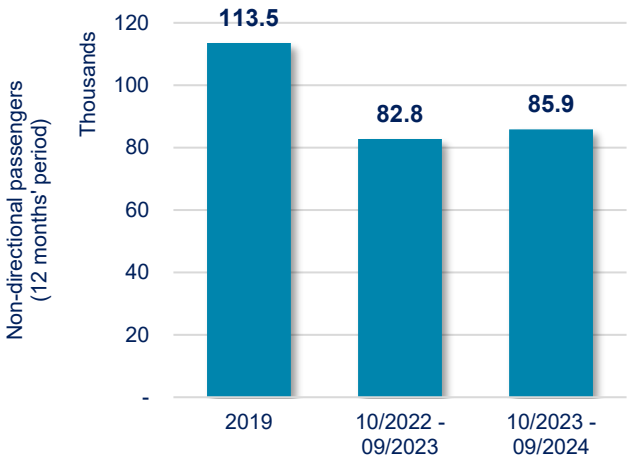
Based on the methodology described above, the projected traffic volume could support a daily round-trip using an aircraft type with capacity up to 330 - 350 seats (including types like A330-300/-900, or the A350-900). This frequency needs to be considered as an average number and might fluctuate with seasonal demand. Given that the predominant traffic on this route consists of cost-sensitive economy passengers, the cabin configuration should be designed to optimize unit costs for this specific traffic segment.

Top Unserved City Pairs to and from sub-Saharan Africa

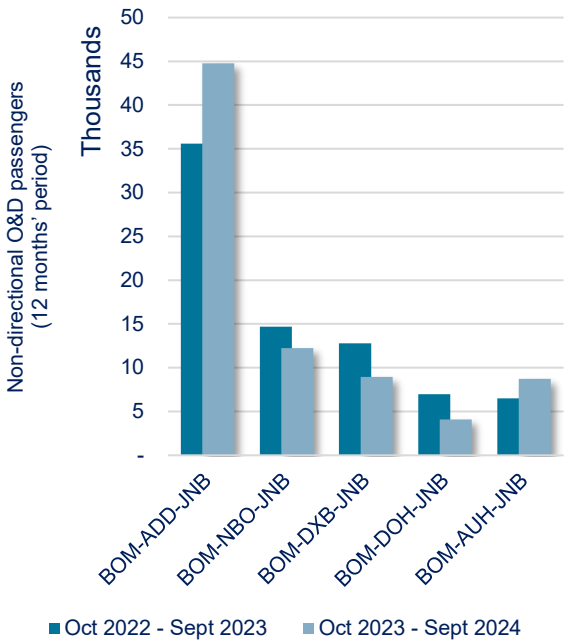
Johannesburg-Mumbai

Source: Sabre

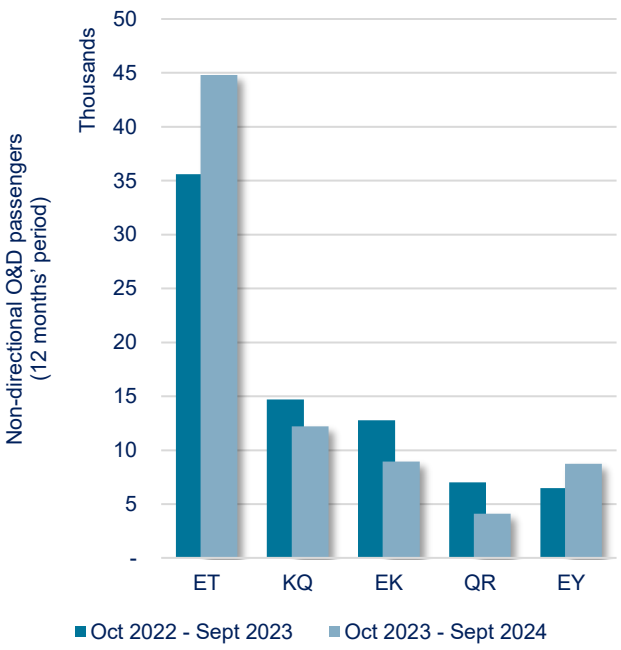
O&D traffic development



Top routings with transit



Top carriers



2019-2024 CAGR: -5%
2023-2024 YOY growth: 4%

Top Unserved City Pairs to and from sub-Saharan Africa

Johannesburg-Mumbai

Analysis of the Origin & Destination (O&D) traffic between Johannesburg and Mumbai reveals it remains significantly below pre-pandemic levels. The route, which once saw 114,000 passengers, now handles just 85,900. Despite this, a positive sign is the nearly 4% year-on-year traffic growth observed between the previous equivalent period and the evaluation in Volume 2 of this report.

Several compelling opportunities are emerging. A key positive development for this unserved city pair is the simplified visa process for Indian citizens traveling to South Africa. The *Trusted Tour Operator Scheme* (TTOS), implemented since early 2025, allows vetted Indian tour operators to submit streamlined group visa applications through the Department of Home Affairs, significantly cutting down on individual red tape. Historically, Indian travelers – whether for long-term migration or short-term tourism – have strongly favored destinations with easier visa access.

Furthermore, the Indian population is projected to grow significantly in the next decade, with its economy expected to become the world's third largest by the mid-2030s. Crucially, the Indian middle class is forecasted to expand by over 460 million people. To put this into perspective, that is more than twice Brazil's current population or larger than the entire current population of the European Union. This demographic segment is a key driver of air transport demand growth, making the long-term prospects for this route at least promising.

It's crucial to consider the role of the BRICS group of countries in the future development of the Johannesburg-Mumbai air route. Both South Africa and India are founding members of BRICS, which has recently expanded to include Egypt, Ethiopia, Iran, Saudi Arabia, and the UAE. As these nations strengthen their economic and political ties, significant effects on future air transport development are anticipated. A key outcome of this closer cooperation can be a strong push to establish more direct air links among member states. This enhanced collaboration can lead to the creation of new trade corridors within the group of countries, directly stimulating demand for both air cargo and passenger services along these routes. BRICS nations can further explore ways to boost air connectivity among themselves. Notably, in the five years preceding the pandemic, O&D traffic between the original five BRICS countries increased with a compound annual growth rate of 12.5%, demonstrating clear potential
.
All things considered, it's worth diligently monitoring trends on the currently unserved Johannesburg-Mumbai city pair. When all the necessary elements are in alignment, launching this non-stop flight would be a strategic move and operators have shown a keen interest in relaunching the route.

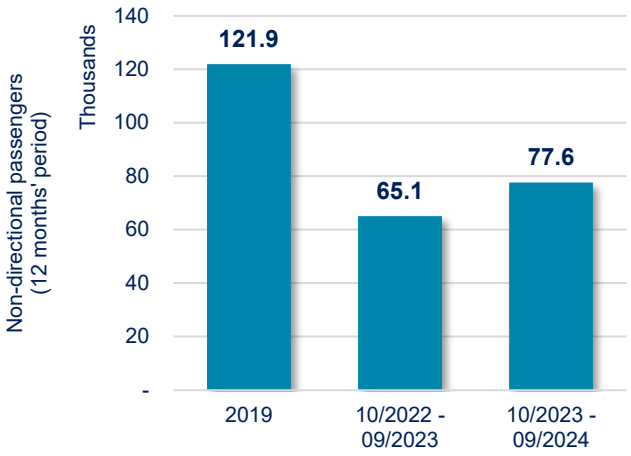
Launching the non-stop flight may push traffic levels back to the pre-pandemic state or may possibly even result in a significant traffic volume increase in combination with the arguments described above.

Top Unserved City Pairs to and from sub-Saharan Africa

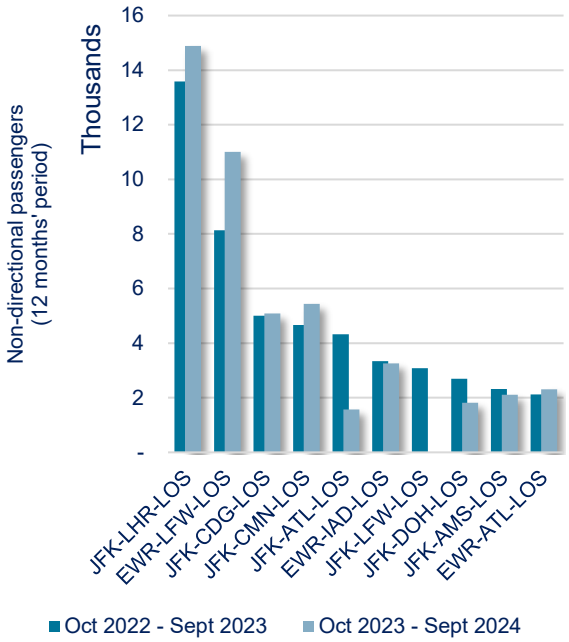
Lagos-New York

Source: Sabre

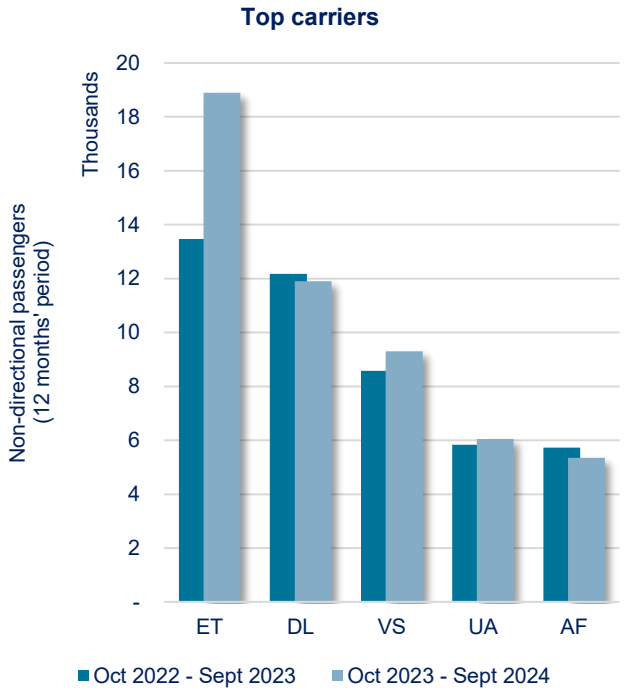
O&D traffic development



Top routings with transit



Top carriers

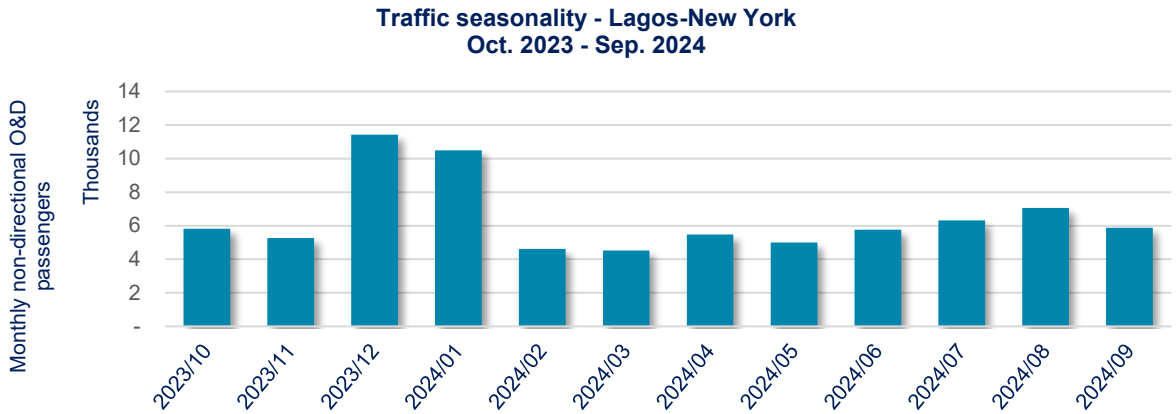


2019-2024 CAGR: -9%
2023-2024 YOY growth: 19%

Top Unserved City Pairs to and from sub-Saharan Africa

Lagos-New York

Source: Sabre



The Origin & Destination (O&D) traffic between Lagos and New York remains significantly below pre-pandemic levels. In 2019, this route saw 121,900 passengers, but in the current evaluation period, it handled just 77,600. Despite this, there's a positive trend: a 19% year-on-year traffic growth between the previous equivalent period and the current evaluation period, indicating traffic is on a recovery trajectory.

This city pair is characterized by a pronounced period of peak demand, specifically during the December-January timeframe. This surge is primarily driven by a powerful confluence of holiday travel, the substantial Nigerian diaspora, and vibrant cultural celebrations in December, famously dubbed "Detty December." The events act as a massive magnet, drawing Nigerians living abroad, particularly those in the United States, to return home. This creates incredibly high demand, even with commented higher fares, often leading to flights from the US to Nigeria being "full to the brim."

OAG data highlights dynamic operational patterns on this city pair. While it suggests Delta Air Lines (DL) historically operated non-stop flights year-round (e.g. in 2019, averaging around three directional flights per week), its more recent history shows targeted services. DL repeatedly relaunched operations on the city pair between 2020 and 2022, only to halt them afterwards. More recently and beyond the time frame covered in the analysis for this report, DL returned to the Lagos-New York route specifically from December 2024 to the end of March 2025, precisely covering the peak demand season. DL initially utilized the smaller capacity Airbus A330-200, then increased to the higher capacity A330-900 for periods of top demand. Following this peak period, the Lagos-New York non-stop route was suspended again.

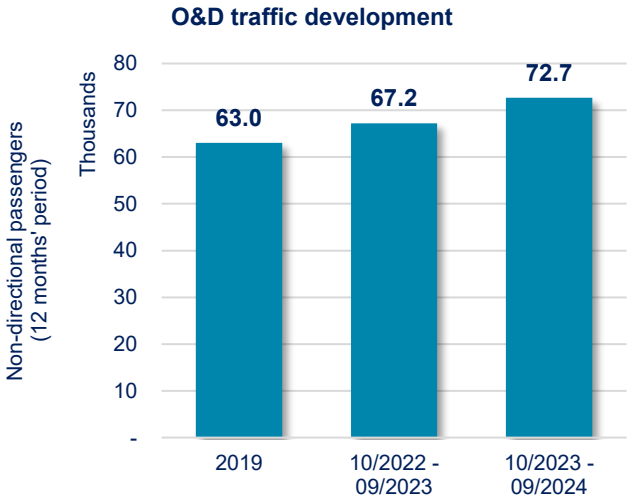
Ethiopian Airlines' service via Lomé to Newark gained considerable traction after the airline rerouted its JFK flight via Abidjan in 2024. Overall, ET significantly grew its Lagos-New York traffic, while other overseas carriers remained relatively stable.

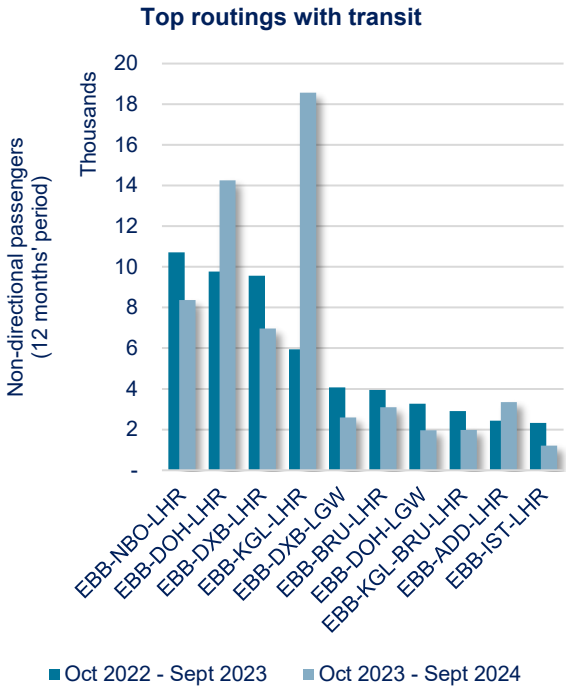
Looking ahead, and as traffic continues to grow on Lagos-New York, the period of non-stop operations could potentially be extended to start earlier and last a bit longer, covering so-called shoulder periods and utilizing smaller capacity aircraft, such as the A330-200, as an intermediate step towards a potential year-round service being re-installed in the future.

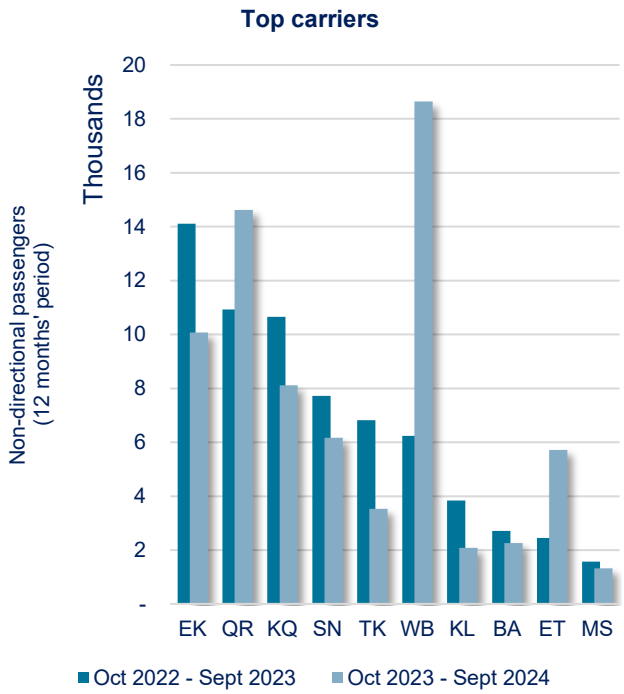
Top Unserved City Pairs to and from sub-Saharan Africa

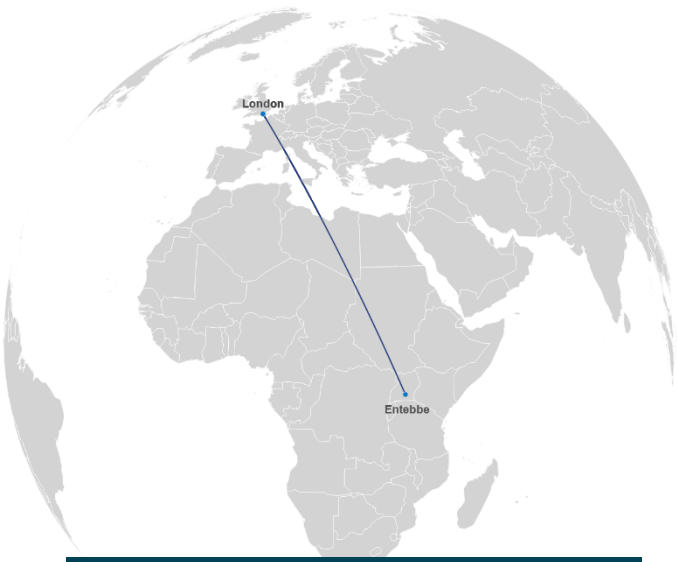
Entebbe-London

Source: Sabre









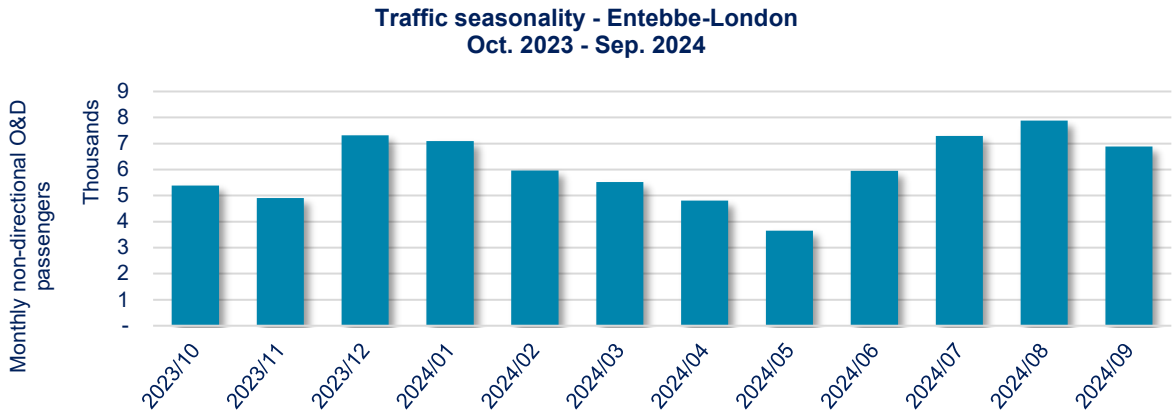
2019-2024 CAGR: 3%
2023-2024 YOY growth: 8%

AIRBUS

Top Unserved City Pairs to and from sub-Saharan Africa

Entebbe-London

Source: Sabre



Traffic on the Entebbe-London city pair has demonstrated a robust recovery, largely surpassing pre-pandemic numbers. A CAGR of 3% was recorded for the 2019-2024 period, accompanied by an impressive 8% year-on-year growth between the last and current city pair reviews.

A key factor in this significant growth is the considerable increase in via-traffic captured by Rwandair, connecting passengers via Kigali (KGL). This surge is primarily attributed to Rwandair's decision to increase flights between Entebbe and Kigali and, more importantly, to nearly double its frequency of flights between Kigali and London, offering a near-daily service. Given the close geographical proximity of Kigali and Entebbe, this routing presents an efficient travel option for passengers.

Interestingly, this strategic move by a smaller African carrier has impacted larger, non-African carriers. Emirates, Turkish Airlines, and KLM have lost some ground on this city pair, as has Kenya Airways. This could illustrate how well-executed strategic moves by smaller African carriers can have an impact on traffic flows between carefully chosen city pairs, even when competing against established global players.

Looking ahead, Uganda Airlines commenced non-stop operations on the Entebbe-London (LGW) route in May 2025. This launch took place after the period covered by this study, so subsequent reports will provide valuable insights into evolving traffic patterns. Uganda Airlines is poised to capture at least a share of the existing via-traffic and is also expected to stimulate some level of new traffic. The airline is operating this route with the Airbus A330-800, featuring a cabin configuration of 20 Business Class seats, 28 Premium Economy seats, and 210 Economy seats, totaling 258 seats per flight. This aircraft size is an excellent fit as a long-haul route-opener, capable of serving the typically price-sensitive economy class traffic while effectively capturing demand from the more premium segments.

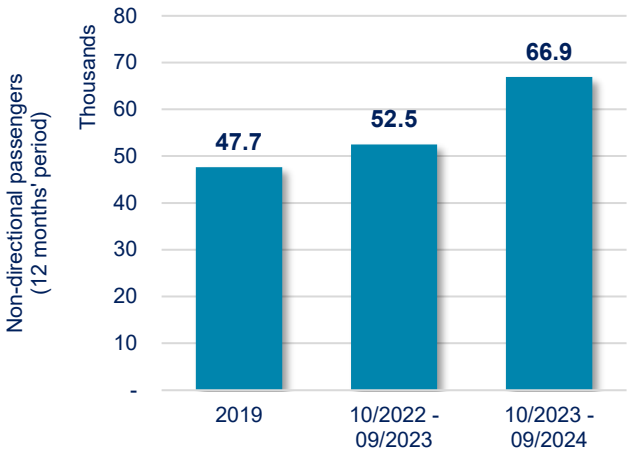
The timing of Uganda Airlines' launch appears strategic. May precedes the period of historically higher demand for this route, positioning the airline well to capitalize on the upcoming peak. By opting to serve London Gatwick, Uganda Airlines' primary objective must be to cater to the Origin & Destination (O&D) traffic directly to and from London, rather than focusing on connecting traffic through London. The future traffic development on this city pair will be closely monitored, promising new insights in the next report update.

Top Unserved City Pairs to and from sub-Saharan Africa

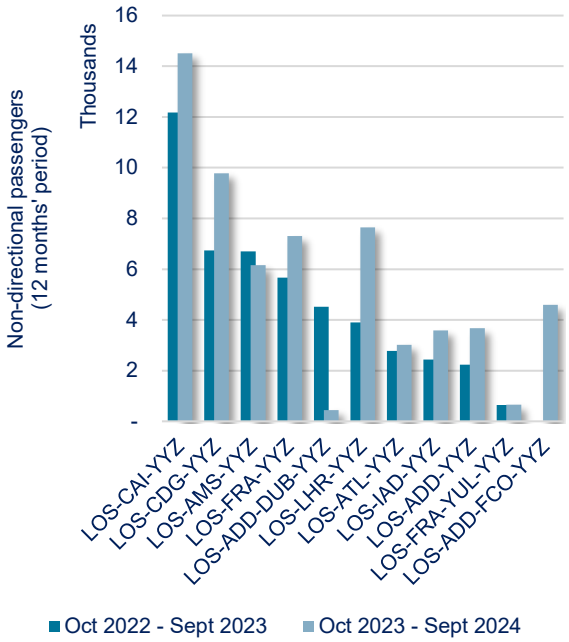
Lagos-Toronto

Source:Sabre

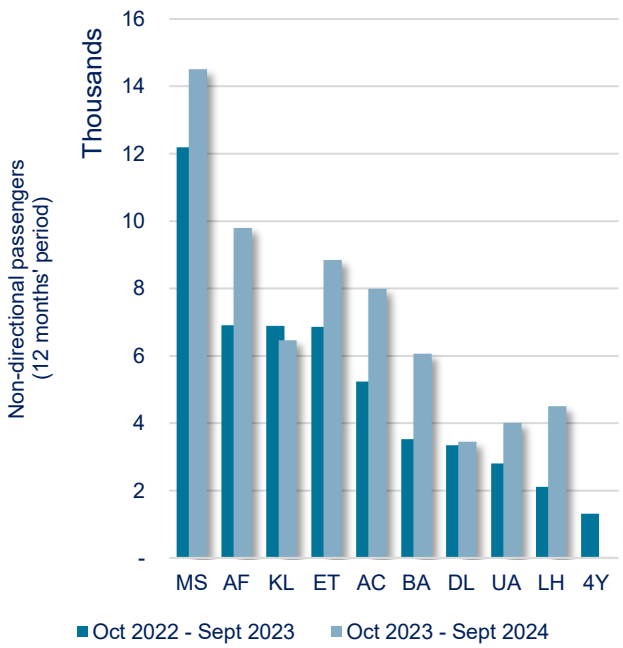
O&D traffic development



Top routings with transit



Top carriers

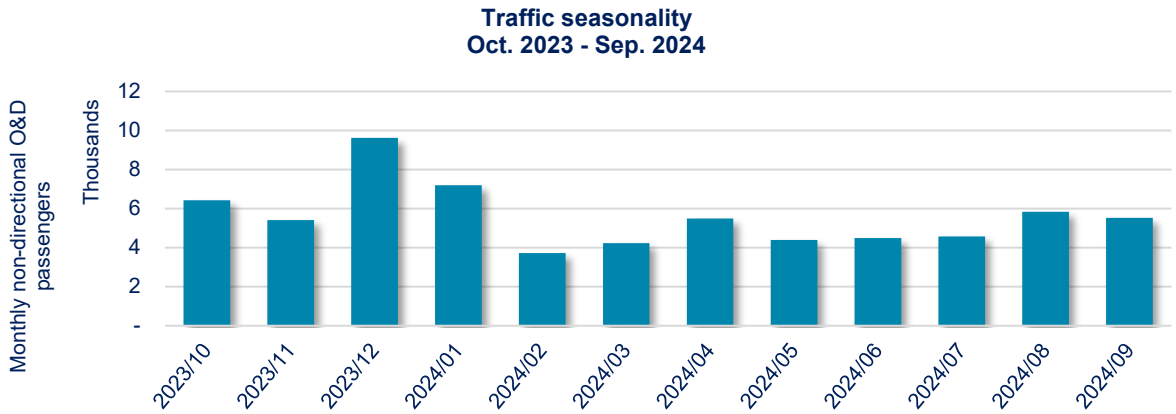


2019-2024 CAGR: 7%
2023-2024 YOY growth: 28%

Top Unserved City Pairs to and from sub-Saharan Africa

Lagos-Toronto

Source: Sabre



The Lagos-Toronto city pair holds significant potential, ranking as the fifth most important unserved route to and from sub-Saharan Africa and notably featuring the strongest year-on-year growth rate in O&D traffic of the long-haul unserved city pairs covered in this report. Total traffic numbers have now significantly surpassed pre-pandemic levels and continue to grow rapidly, making this city pair a prime candidate for closer examination and potential future transition to a non-stop service.

The inherent willingness to travel on this route, despite the absence of a non-stop service, is clearly demonstrated by the substantial detours passengers undertake. The majority of the via-traffic travels through Cairo (CAI), representing a very long trajectory on the journey from Lagos to Toronto. Yet, this traffic flow is consistently growing, contributing to Egyptair's increasing strength on the city pair. Connections via Europe are also popular, with Air France via Paris, Lufthansa via Frankfurt (FRA), and British Airways via London Heathrow (LHR) all showing significantly improved performance compared to the previous evaluation period. It's worth noting that the decline in traffic routed via LOS-ADD-DUB-YYZ, alongside the increase in traffic via LOS-ADD-FCO-YYZ, is a direct result of Ethiopian Airlines' strategic decision in 2023 to re-route its North American-bound traffic from Addis Ababa (ADD) via Rome (FCO) instead of Dublin (DUB). It is also important to highlight the LOS-ADD-YYZ traffic in the *Top routings* graph as traffic originating in Toronto (YYZ) and travelling to Lagos (LOS) via Addis Ababa, given that the YYZ-ADD sector is operated non-stop only in that direction.

Air Canada is performing very well on this city pair, ranking fourth among top carriers and appearing to be the most likely airline to eventually launch a non-stop service. However, a noticeable hesitation persists, most probably due to its joint ventures in the trans-Atlantic market with Star Alliance airlines like United Airlines, Lufthansa, Swiss, and Brussels Airlines. Within these frameworks, economic and operational agreements between partner airlines can influence route decisions, potentially limiting the immediate incentive for a non-stop Lagos-Toronto service. If so and if this cooperation continues to dictate strategy, and in the absence of an immediate candidate airline on the African continent, the chances of seeing a non-stop service launched anytime soon may be limited. Nonetheless, the air transport environment is highly dynamic, and any change, including even a potential new entrant on this trans-Atlantic city pair, could drastically alter the situation, emphasizing the importance of continuous monitoring.

Top Unserved City Pairs to and from sub-Saharan Africa

Lagos-Toronto

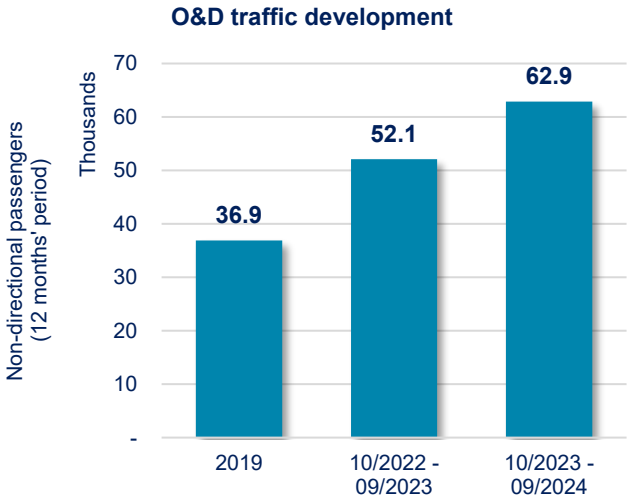
The seasonal pattern of traffic on this route, as illustrated in the provided graph, mirrors that of the Lagos-New York unserved city pair, with peak demand occurring around December-January. This seasonality should be considered in any potential service launch.

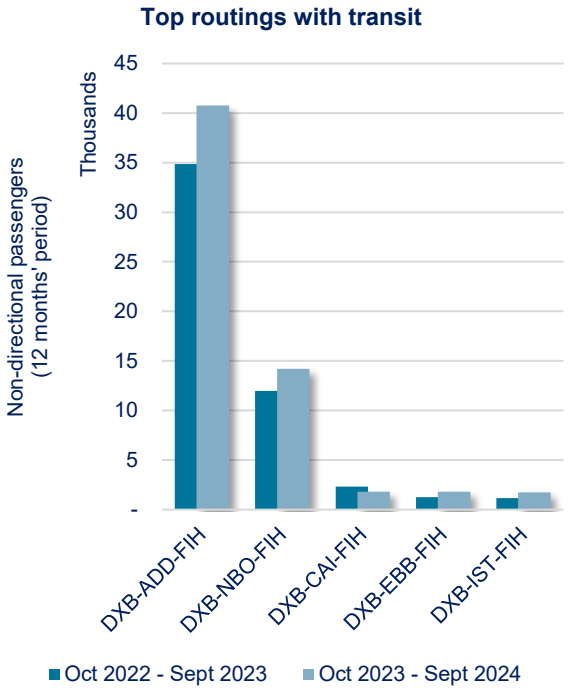
Following Delta Air Lines' temporary re-entry into the Lagos-New York market with A330 deployments during late 2024 and Q1 2025, it's clear that any variant of the A330 family would also be a strong fit for the Lagos-Toronto route. These aircraft types offer favorably low unit costs, aligning well with the route's predominantly economy-skewed traffic.

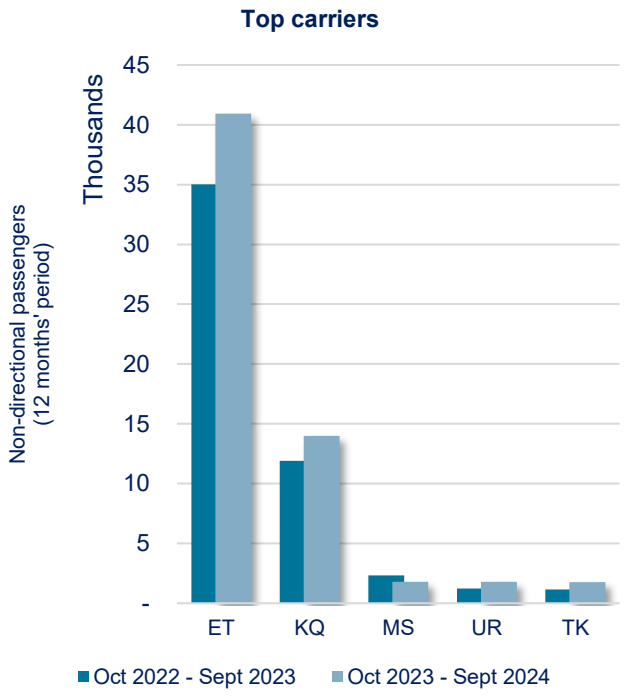
Top Unserved City Pairs to and from sub-Saharan Africa

Kinshasa-Dubai

Source: Sabre







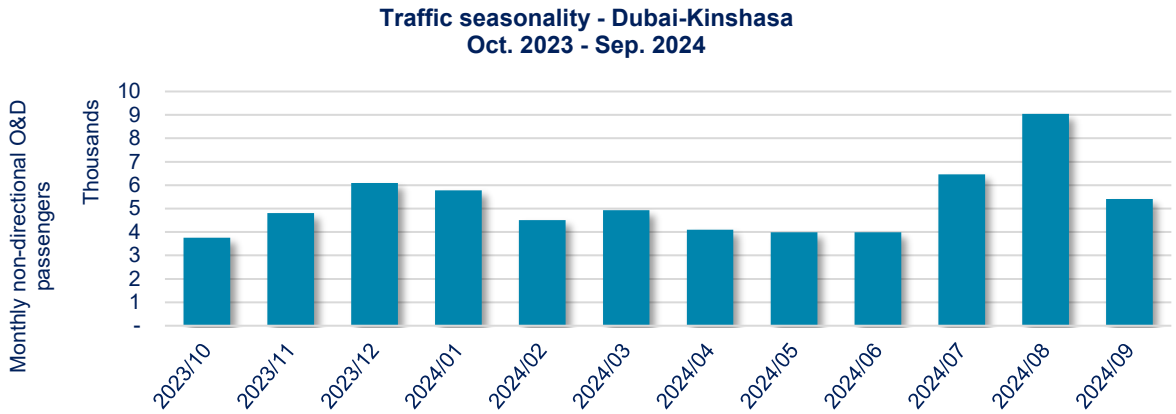
2019-2024 CAGR: 11%
2023-2024 YOY growth: 21%

AIRBUS

Top Unserved City Pairs to and from sub-Saharan Africa

Kinshasa-Dubai

Source: Sabre



Based on OAG schedule data available at the time this report was produced, the Kinshasa-Dubai route has historically not seen any non-stop service. Flydubai briefly operated flights between Dubai and Kinshasa (FIH) from April 2018 to February 2019, but these were routed via Entebbe (EBB). The EBB-FIH-EBB segments served as "tag-end" flights to their Dubai-Entebbe service, a setup that is understood to require double crews and crew overnight stays in Entebbe. The latter adds cost and operational complexity and makes the operation less rewarding. Furthermore, from available Sabre data, it's understood that flydubai did not possess 5th freedom traffic rights to transport passengers between Entebbe and Kinshasa.

Current connectivity between Central Africa and the Middle East remains limited. According to OAG data for 2025, Qatar Airways (QR) is the sole operator offering non-stop flights between Central Africa and the Middle East, connecting FIH to Doha (DOH) with an average of two weekly frequencies each way, utilizing widebody aircraft. This service was launched in June 2024. Despite this limited direct access, approximately 348,000 passengers traveled between the Middle East and Central Africa during the evaluated period from October 2023 to September 2024, with the majority transiting through hubs such as Addis Ababa (ADD), Kigali (KGL), or Nairobi (NBO).

Given the observed significant O&D traffic growth between Kinshasa and Dubai over recent years, all occurring without a non-stop flight, such non-stop service holds substantial potential. It could not only attract a significant share of today's connecting traffic but also stimulate additional demand. Given the scarcity of non-stop flights between Central Africa and the Middle East, a non-stop service between Kinshasa and Dubai could potentially also attract a significant amount of connecting traffic, originating or ending in Central Africa, provided consistent feed to/from Kinshasa can be secured.

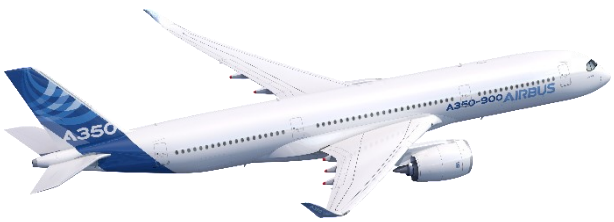
Current O&D traffic numbers show considerable demand volatility throughout the year, with peak demand occurring in the July-September period and towards the end of the year.

The route's traffic breakdown, as inserted at the beginning of this chapter, indicates a relatively strong share of premium traffic compared to other unserved routes in sub-Saharan Africa, which reinforces the interest in evaluating the option of starting non-stop service on the city pair.

Top Unserved City Pairs to and from sub-Saharan Africa

Kinshasa-Dubai

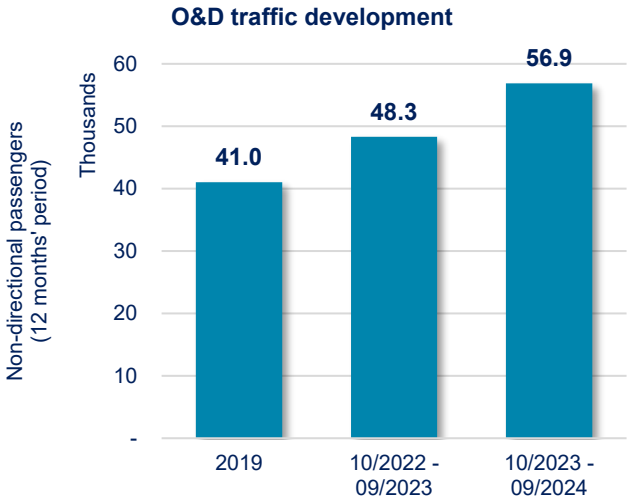
From an operational standpoint, a widebody aircraft like the A350-900, potentially operated by a major carrier like Emirates, could effectively serve the route, offering the added potential advantage of significant cargo revenue. Alternatively, the Airbus A321XLR presents a compelling single-aisle option, providing the necessary range and allowing for rapid frequency build-up without introducing vast capacity. A high-frequency operation typically attracts premium traffic, making the non-stop flight more lucrative while significantly improving Central Africa's accessibility from the Middle East. Considering the route's demand volatility, an alternating operation utilizing aircraft types like the A321XLR, A330neo, or even the A350 could be considered to effectively capture varying levels of demand, all while leveraging Airbus' mixed fleet and single fleet flying capabilities for streamlined operations, as already discussed above.

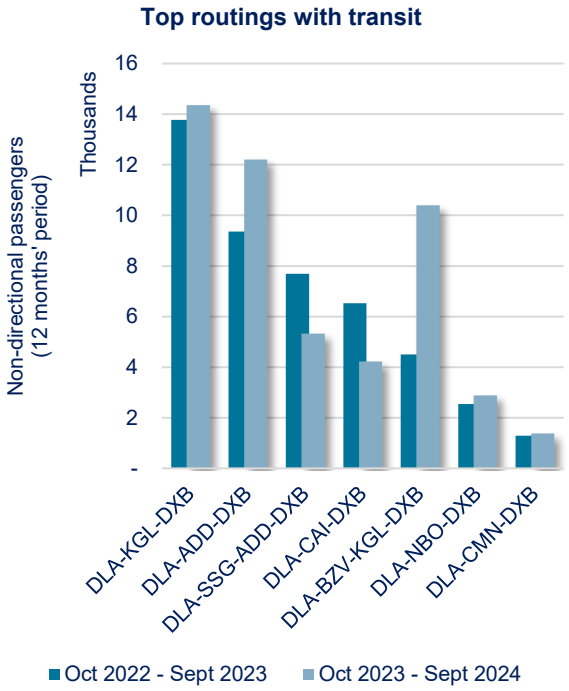


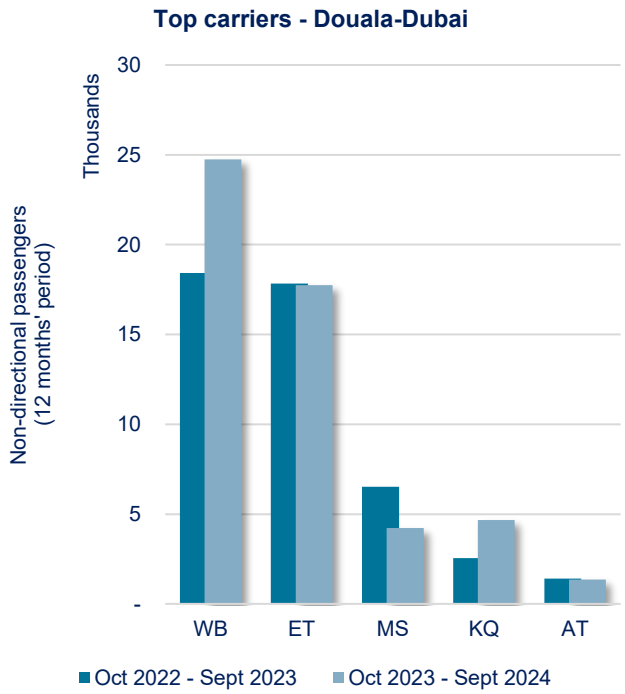
Top Unserved City Pairs to and from sub-Saharan Africa

Douala-Dubai

Source: Sabre







2019-2024 CAGR: 7%
2023-2024 YOY growth: 18%

AIRBUS

Top Unserved City Pairs to and from sub-Saharan Africa

Douala-Dubai

Source: he Observatory of Economic Complexity (OEC)

The air route between Douala and Dubai represents a significant market that currently lacks non-stop service. Historical schedule data from OAG, dating back to 2005, indicates that Cameroon Airlines operated a non-stop flight on this city pair, utilizing a Boeing 757-200 aircraft with an average of two directional flights per week until September 2008.

Despite the absence of a direct link, O&D traffic on the Douala-Dubai city pair has largely surpassed pre-pandemic levels, demonstrating an impressive 18% year-on-year traffic growth between the previous equivalent period and the current evaluation. This robust growth clearly indicates a strong existing desire for travel between the two cities, which is presently being met solely through connecting flights.

In contrast to the Kinshasa-Dubai city pair, where Addis Ababa (ADD) serves as the predominant transit hub with Ethiopian Airlines as the dominant carrier, Kigali (KGL) is the primary transit airport for Douala-Dubai traffic, with Rwandair emerging as the strongest operator. Interestingly, Egyptair is the third most important operator on this city pair, connecting passengers via its Cairo hub. Royal Air Maroc holds the fifth place, connecting passengers on the city pair via Casablanca. Both routings represent comparatively long detours on the journey between Douala and Dubai.

An important characteristic of the Douala-Dubai route's passengers is the split between economy and premium classes, which is less balanced than for the Kinshasa-Dubai case. Only 4% of the current O&D traffic is premium, marking the lowest level of premium traffic among all top-tier unserved city pairs to or from Sub-Saharan Africa discussed in this report.

Despite the lower premium passenger share, a compelling opportunity lies in the robust and growing trade relationship between Cameroon and the UAE. Douala, as a key port and economic center for Cameroon, plays a pivotal role in this dynamic. For instance, in 2023, UAE exports to Cameroon reached $321 million, an annualized growth rate of 27.7% since 2018 (from $94.5 million). Concurrently, Cameroon's exports to the UAE soared to $899 million in 2023, representing an annualized growth rate of 18.7% since 2018 (from $381 million). This strong and growing trade relationship presents a major opportunity to also drive air cargo demand, which could significantly bolster the business case for a direct flight and potentially compensate for the less rewarding passenger yield profile. Furthermore, Cameroon's strategic geographical position as the start-point of the Douala-N'Djamena economic corridor, a vital trade route for Central Africa, further enhances its potential in the regional cargo network.

With the vision to enable and support growing air connectivity, Douala International Airport sees major rehabilitation works, aiming to strengthen Cameroon's role as a transport hub for Central Africa.

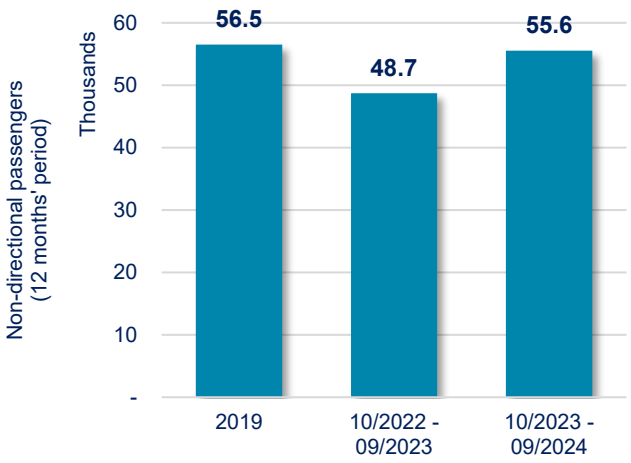
Based on the methodology and assumptions described in the dedicated chapter of this report, the A330-200 and A330-300, just as the A330neo variants, could sustainably perform a non-stop passenger service on the city pair with a weekly frequency beyond 3 directional flights, all while also developing and stimulating the air cargo business and revenue.

Top Unserved City Pairs to and from sub-Saharan Africa

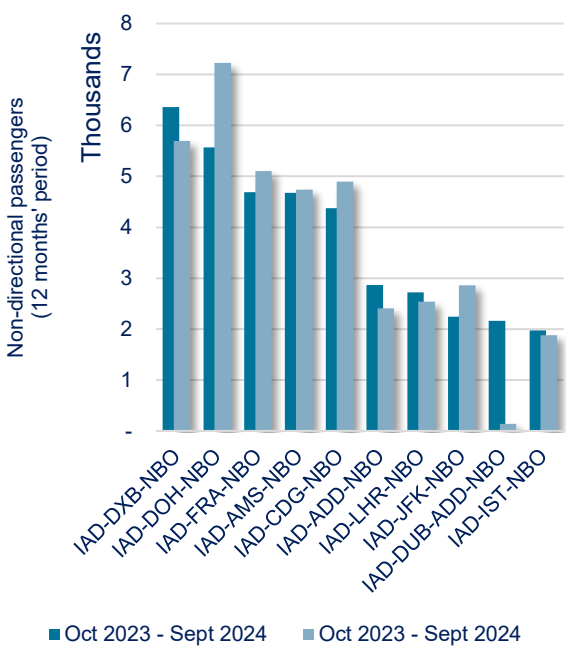
Nairobi-Washington

Source: Sabre

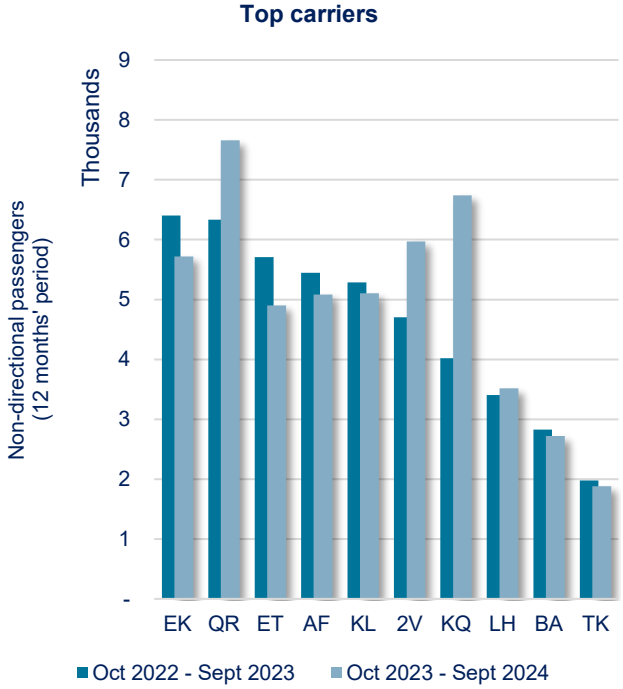
O&D traffic development



Top routings with transit



Top carriers



2019-2024 CAGR: 0%
2023-2024 YOY growth: 14%

Top Unserved City Pairs to and from sub-Saharan Africa

Nairobi-Washington

Demand for air travel between Nairobi and Washington D.C. has not only rebounded to pre-pandemic levels but surged by an impressive 14% in the past year, positioning it in 6th place in the list of strongest growing unserved city pairs to and from sub-Saharan Africa and in 7th place when addressing relative growth. When focusing on absolute O&D traffic numbers, this city pair has climbed from last year's 9th position to 8th this year amongst these unserved city pairs.

The robust traffic is unsurprising given the significant ties between Nairobi, a pivotal economic and political hub in East Africa, and Washington D.C., the nexus of North American political and diplomatic power. Both cities host important international organizations and agencies, such as the UN's regional headquarters and the World Food Programme's regional office in Nairobi and the World Bank Group and IMF headquarters in Washington.

This unique nexus fuels substantial business-related, diplomatic, and governmental travel, which is reflected in the highest levels of premium traffic observed on the identified unserved routes to and from Sub-Saharan Africa as discussed in this report.

Beyond official and business interests in sectors like technology, renewable energy, agriculture, and infrastructure, demand is further bolstered by American tourism to Kenya's national parks, substantial VFR traffic from the East African diaspora in North America, and academic collaborations between Kenyan and US institutions.

The diverse and high-value traffic as observed on this city pair, strongly prefer regularly scheduled daily non-stop flights, which offer the flexibility their dynamic environments require. From this perspective, a non-stop flight between both cities would be strongly welcomed, could further stimulate traffic and could make the economic case pretty compelling. However, the route is a challenging route from an aircraft performance perspective. The combination of Nairobi's high altitude with prevailing high temperatures make take-off for this long route a challenge. As already addressed in Volume 1 of this report, advanced optimization techniques will enable obtaining favourable payloads on this route to North America and both the A330-800 and A350-900 could qualify for the role.

Kenya Airways is growing its importance in serving the Nairobi-Washington D.C. city pair, mainly by carrying a portion of the connecting traffic on its non-stop flights between Nairobi and New York.

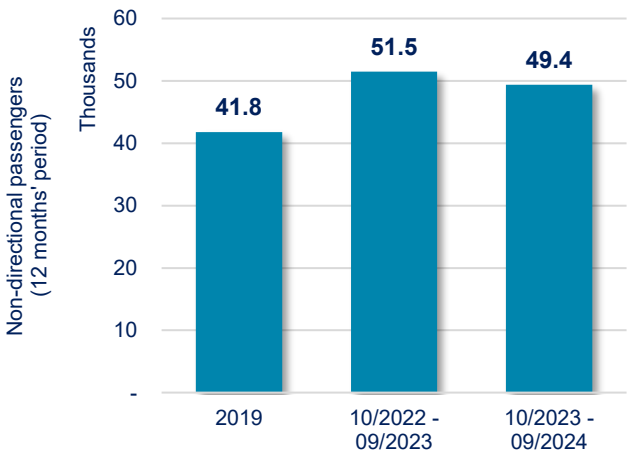
The future trajectory of this route will require close monitoring though, as potential changes in US political policies, particularly those implemented by the Trump administration, such as tangible reductions in foreign aid or – more general – the implementation of stricter entry requirements for the citizens of some African countries, could potentially dampen demand for air travel on this crucial link. Next year's report will allow for further elaboration on this matter.

Top Unserved City Pairs to and from sub-Saharan Africa

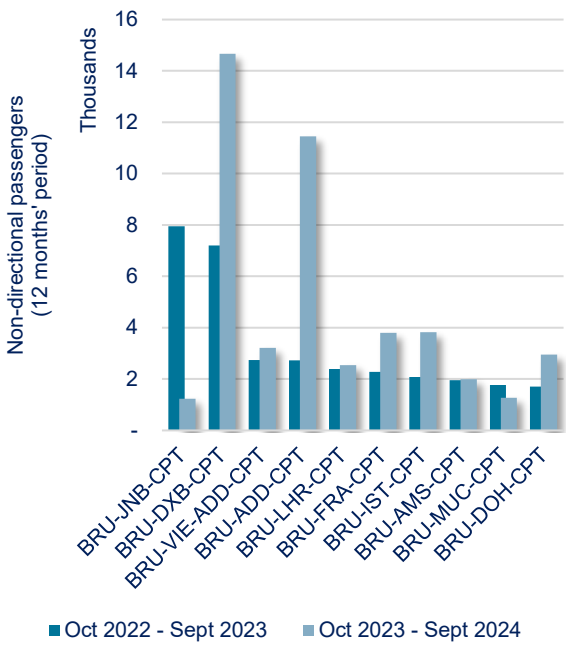
Cape Town-Brussels

Source: Sabre

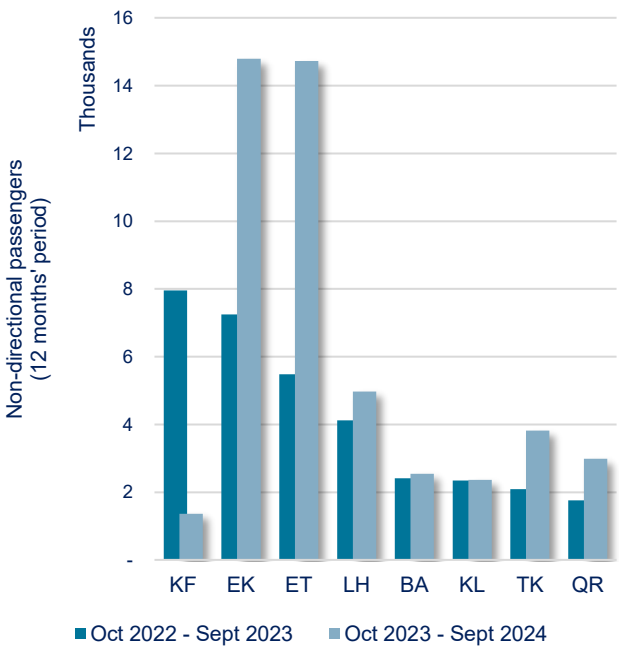
O&D traffic development

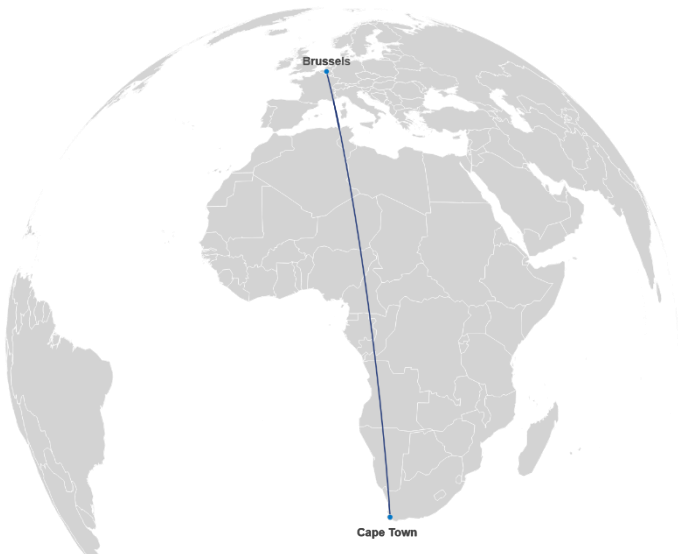


Top routings with transit



Top carriers





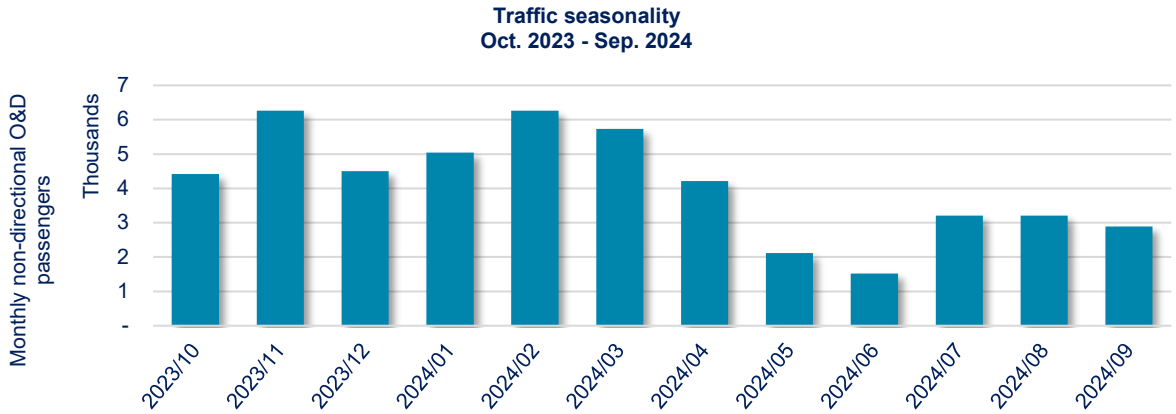
2019-2024 CAGR: 3%
2023-2024 YOY growth: -4%

AIRBUS

Top Unserved City Pairs to and from sub-Saharan Africa

Cape Town-Brussels

Source: Sabre



The Cape Town-Brussels unserved city pair continues to exhibit intriguing dynamics. While the O&D traffic experienced a slight contraction between this year's and last year's reviews, it retains its position among the top unserved city pairs connecting to or from sub-Saharan Africa. Notably, the O&D traffic remains above pre-pandemic levels, demonstrating a robust 3% CAGR between 2019 and 2024.

This resilience is particularly evident given the recent market shift. Air Belgium previously catered to a significant portion of the O&D traffic on this route, operating flights from Brussels to Cape Town with a stop in Johannesburg. However, the airline ceased all scheduled passenger services, including its Brussels-Johannesburg/Cape Town route, in October 2023. Despite this service discontinuation, the O&D traffic between Brussels and Cape Town did not collapse; instead, it was successfully re-channeled onto different routings. This outcome strongly indicates a fundamental and sustainable demand inherent to this city pair, positioning a potential non-stop service as a compelling case for future study and consideration.

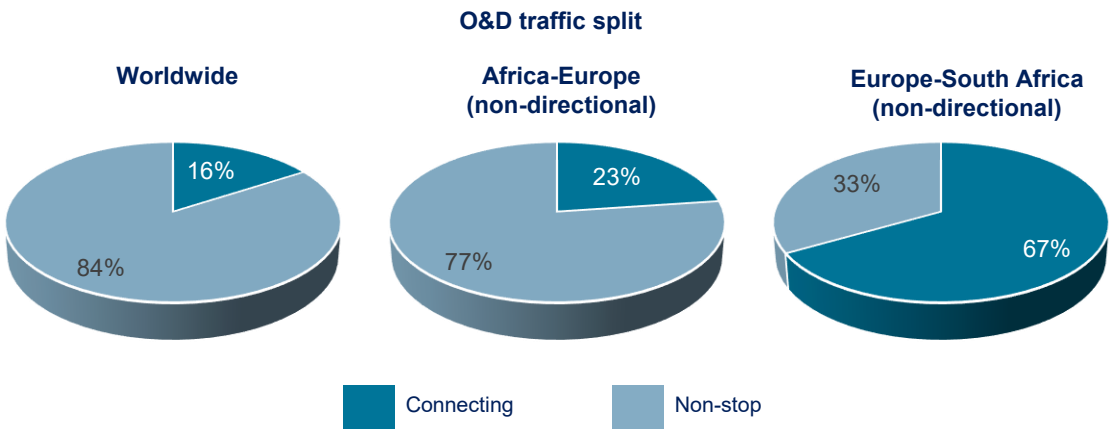
Following Air Belgium's departure, Emirates and Ethiopian Airlines have predominantly filled the void, connecting traffic via their respective hubs in Dubai and Addis Ababa. Turkish Airlines, Qatar Airways, and Lufthansa also increased their presence on the O&D, though to a significantly smaller extent compared to Emirates and Ethiopian. When excluding fare considerations, Emirates emerged as the leader in connectivity, offering a double daily flight between Brussels and Dubai, which facilitated connections to a double daily service between Dubai and Cape Town, averaged over the report's evaluation period. Ethiopian Airlines, while benefiting from a shorter geographical detour via its Addis Ababa hub, offered – on average over the period – 4 frequencies per week on the Brussels-Addis Ababa segment. Despite offering comparable or even much better frequencies on each leg, Qatar Airways and Turkish Airlines captured less traffic than Ethiopian Airlines. Ethiopian's strong position is likely attributable to its Star Alliance membership, which includes the Lufthansa Group airlines like Brussels Airlines, a dominant player in the Belgian catchment area. These partnerships presumably guide their passengers towards Ethiopian Airlines for this specific city pair, underscoring the influence of alliance networks on O&D traffic flow.

At its core, the year-round O&D traffic between Belgium and South Africa is a testament to their diverse and enduring connections. The consistent baseline demand comes from essential business,

Top Unserved City Pairs to and from sub-Saharan Africa

Cape Town-Brussels

Source: Sabre



diplomatic, educational, and VFR travel, which effectively complements the more volatile seasonal tourism peaks. Demand typically soars in November and again during the February-March period. These surges directly align with school holidays in Belgium (and, by extension, Europe) and correspond with Southern Africa's summer season.

A non-stop service between Cape Town and Brussels would ideally cater to these seasonal traffic fluctuations. Analysis of the city pair's traffic reveals a predominantly price-sensitive market, with 93% of passengers opting for economy class and a modest 7% in premium cabins. This clear split in demand dictates that any product and service offering on this route must be specifically tailored to appeal to the value-conscious traveler.

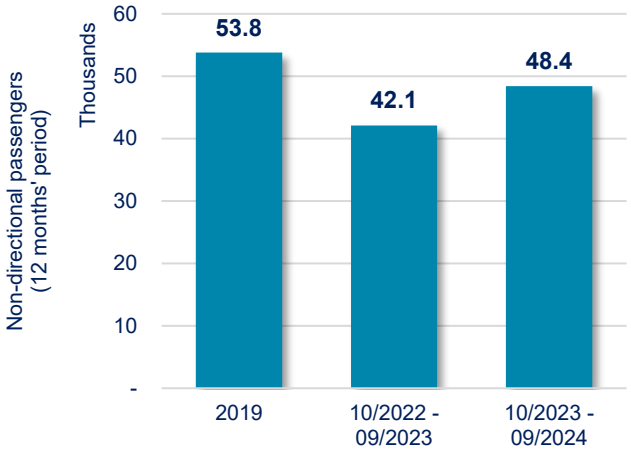
Finally, it's worth noting that an additional non-stop service between Europe and South Africa would likely not be displaced, particularly when considering current global O&D traffic patterns. Globally, only about 16% of O&D traffic involves a connecting flight at a transit airport. For all O&D traffic between Europe and Africa during the evaluated period, this split shows 23% connecting traffic versus 77% non-stop. However, the picture changes dramatically for traffic between Europe and South Africa. Here, roughly two-thirds of travelers connect at a transit airport, while only about one-third fly non-stop. While an extra non-stop service between Cape Town and Brussels wouldn't drastically alter this overall landscape, it would undoubtedly enhance the service level for that specific O&D pair and modestly increase the availability of non-stop options within this particular traffic flow.

Top Unserved City Pairs to and from sub-Saharan Africa

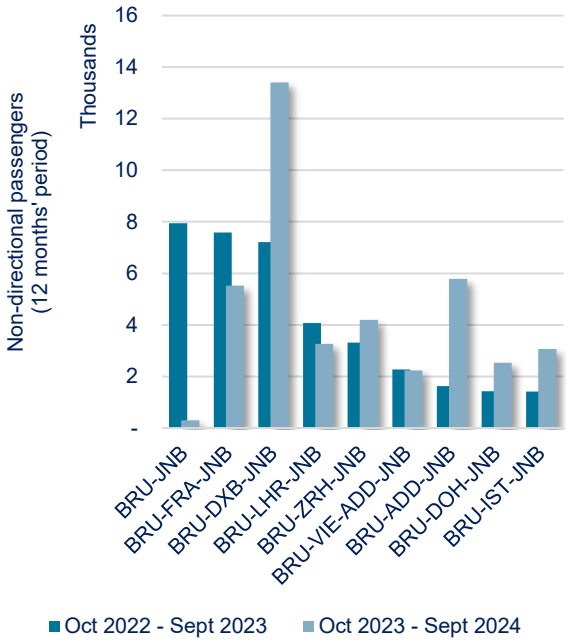
Johannesburg-Brussels

Source: Sabre

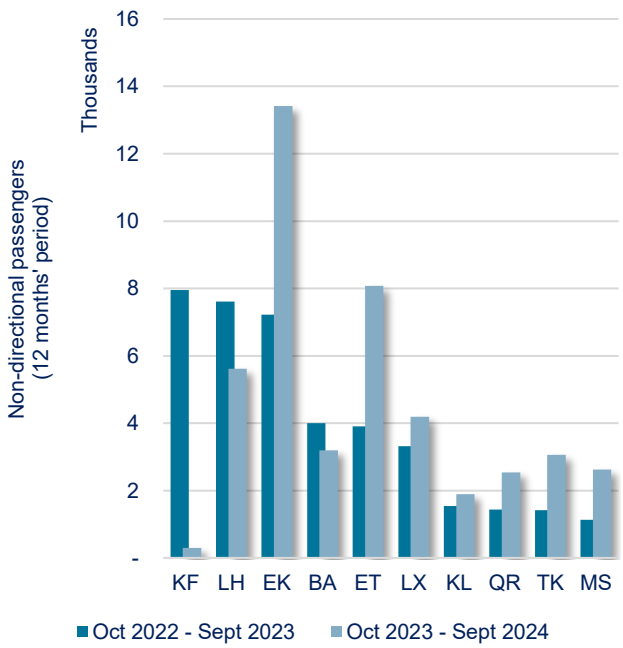
O&D traffic development

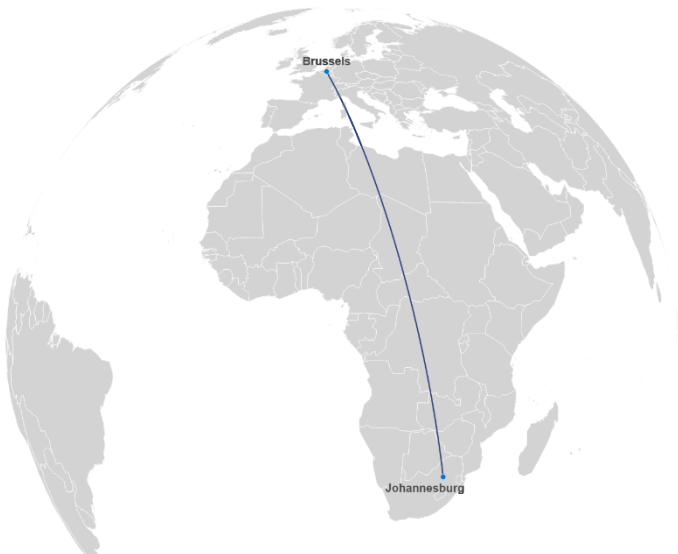


Top routings with transit



Top carriers



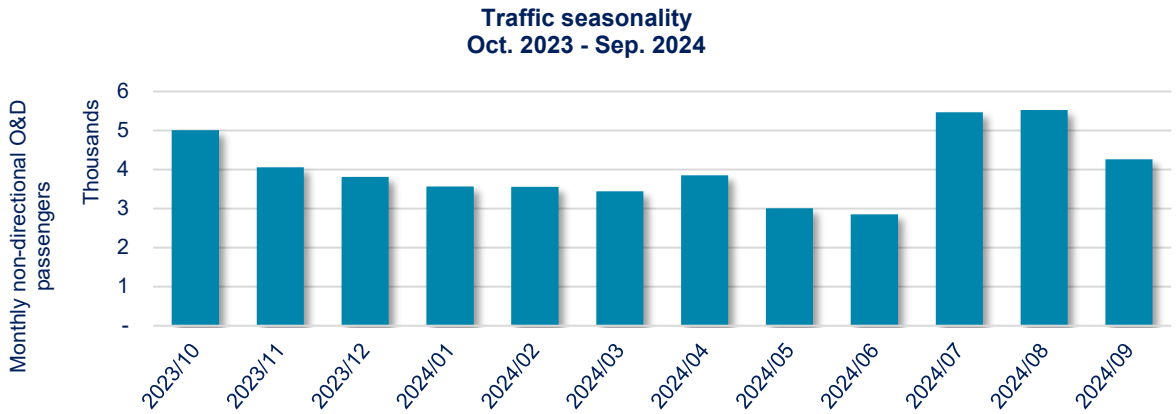


2019-2024 CAGR: -2.1%
2023-2024 YOY growth: 15%

Top Unserved City Pairs to and from sub-Saharan Africa

Johannesburg-Brussels

Source: Sabre



The Johannesburg-Brussels route has recently entered the ranks of top unserved city pairs connecting to or from sub-Saharan Africa. This inclusion is a result of both consistent growth in the route's total Origin & Destination (O&D) traffic during the evaluation period and a decline in O&D traffic for some other unserved city pairs featured in last year's report. Many of the insights and interpretations applicable to the Cape Town-Brussels analysis within this report largely resonate with the dynamics observed on the Johannesburg-Brussels route.

A key distinction, however, lies in the recovery of O&D traffic levels. Unlike Cape Town-Brussels, which has surpassed pre-pandemic figures, Johannesburg-Brussels traffic has yet to return to its previous benchmarks. While Cape Town is predominantly a tourism-driven destination characterized by significant seasonal variations, Johannesburg's traffic is more heavily influenced by business, diplomatic, and governmental travel. Although the total O&D traffic for Johannesburg-Brussels is slightly smaller than that for Cape Town-Brussels, it boasts a higher share of premium traffic, standing at 12%. This makes it the second most significant unserved city pair to or from sub-Saharan Africa in terms of premium traffic share among those featured in this report.

Further analysis of year-round traffic patterns reveals that despite a marginally smaller overall 12-month O&D volume compared to Cape Town-Brussels, the minimum monthly traffic for Johannesburg-Brussels is notably larger. For instance, June typically represents the lowest demand month for both routes; however, Johannesburg-Brussels maintained approximately 3,000 non-directional O&D passengers, whereas Cape Town-Brussels saw a reduction to about 1,500 passengers in the evaluated period. This is particularly insightful given that Cape Town-Brussels experienced higher demand spikes, exceeding 6,000 passengers in November and February, while Johannesburg remained around 5,500 passengers in its best month. This disparity underscores that Johannesburg's demand is far more driven by year-round stable business, diplomatic, governmental, and VFR travel than Cape Town's. From this perspective, a non-stop flight connecting Johannesburg to the heart of Europe presents a compelling strategic rationale.

Top Unserved City Pairs to and from sub-Saharan Africa

Johannesburg-Brussels

Both the Cape Town-Brussels and Johannesburg-Brussels non-stop services could be effectively served by either the A330neo or the A350. Both aircraft types meet the operational demands and are increasingly popular for deployment on routes between Europe and Africa, as well as North America and Africa. They both possess the necessary range capability and crucial take-off performance, especially vital for long-haul flights departing from Johannesburg, which is known for its high-altitude and hot conditions.

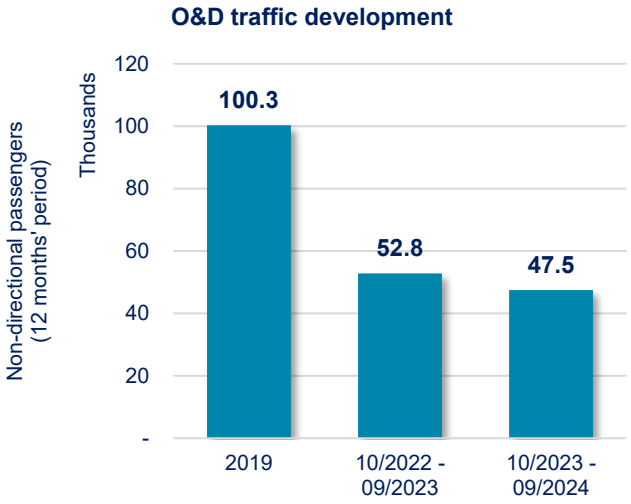
However, given the seasonality of both routes and the prevalent price-sensitive nature of the traffic, the A330-900 stands out for its lower unit cost, making it an ideal match for the market's economic profile. While the A350-900 remains a highly capable aircraft for the routes, offering robust performance and passenger comfort, it is particularly well-suited for capturing the premium traffic, especially on the Johannesburg route where the premium share is higher. Today, both aircraft types are regular visitors to both Johannesburg and Cape Town airports, operated by a diverse range of airlines including Condor, TAP Air Portugal, Turkish Airlines, Singapore Airlines, Delta Air Lines, Ethiopian Airlines, Cathay Pacific, Qatar Airways, and Air Mauritius.

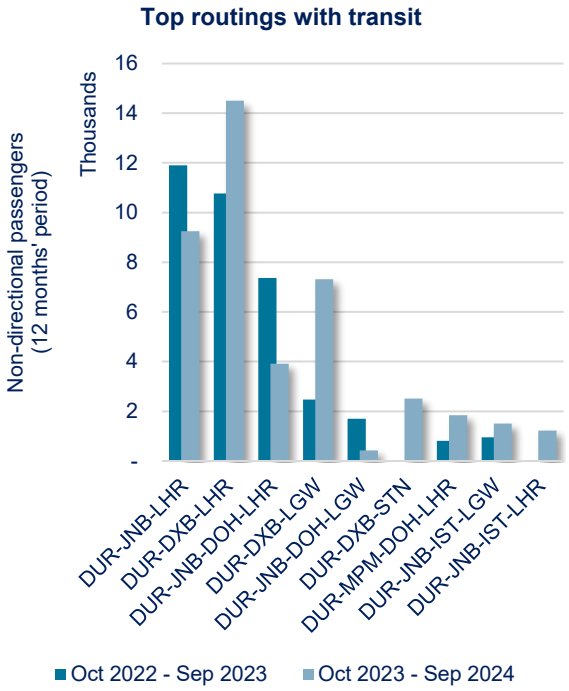
Brussels Airlines might seem like a strong candidate to operate this route. However, Lufthansa Group's broader strategy may prioritize overall group interests over individual route performance for a single airline. For instance, with Lufthansa’s presence in South Africa, serving Johannesburg and Cape Town from Frankfurt year-round and with the seasonal service from Munich to Johannesburg and Cape Town, feeding these flights is likely a priority. What's more, Brussels Airlines doesn't have the aircraft in its current fleet capable of serving the O&D non-stop, though that could certainly change in the future. Ultimately, South African Airways, as a fellow Star Alliance member, could potentially step in once their fleet allows for it.

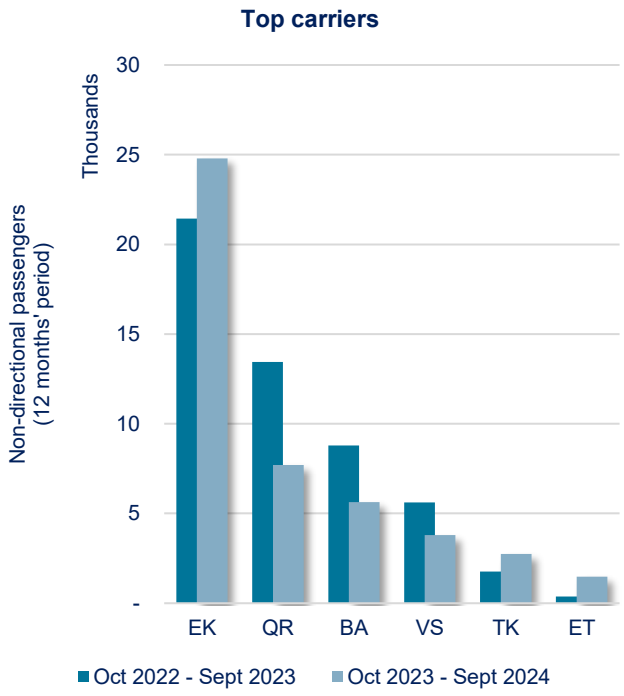
Top Unserved City Pairs to and from sub-Saharan Africa

Durban-London

Source: Sabre







2019-2024 CAGR: -14%
2023-2024 YOY growth: -10%

Top Unserved City Pairs to and from sub-Saharan Africa

Durban-London

Recent analysis of the London-Durban city pair indicates a notable decline in O&D traffic, suggesting a challenging outlook for this city pair as an unserved route to or from sub-Saharan Africa. This downturn is primarily attributed to the discontinuation of British Airways' non-stop service, which, after its launch in 2018, was initially suspended in March 2020 due to the pandemic. Although OAG data shows that a brief return occurred between October 2021 and February 2022, non-stop flights have not resumed since.

This absence has had a significant impact, with overall O&D traffic plummeting from over 100,000 non-directional passengers in 2019 to less than half of that volume during the report's reference period. Even when compared to the pre-non-stop flight era (2015-2017), which typically saw around 73,000 annual passengers, current traffic levels remain low.

While several elements have contributed to the shift in traffic patterns, it's a complex interplay of factors rather than a single cause. We've seen South Africa's overall air traffic on a path to recovery, though it's still finding its way back to pre-pandemic peaks. Economic fluctuations and evolving consumer confidence in both the UK and South Africa have also played a part. Operationally, the time it has taken to fully re-establish seamless non-stop connections between Durban and key South African hubs like Johannesburg and Cape Town has naturally affected onward journeys to London. Durban also faces important competition from these larger hubs as they, too, work to attract new air services in the wake of the pandemic and to make their traffic grow beyond. Added to this mix are evolving perceptions around safety and local infrastructure, along with shifts in marketing approaches and airline strategies. Ultimately, a significant factor appears to be the continued absence of British Airways' direct service between Durban and London, which, when present, clearly provided a strong boost to the route.

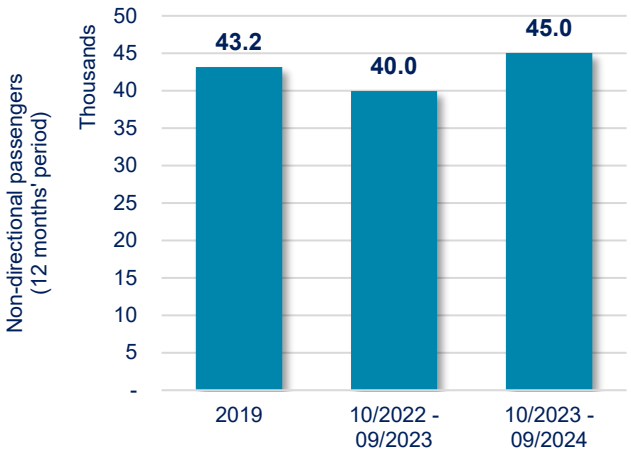
However, Durban seems to be gearing up for a resurgence as a premier air transport destination from London and other vital international markets. This exciting prospect hinges on a dynamic, collaborative approach, actively fostering both demand and supply-side growth. It is understood that efforts are made to create a sustainable and appealing environment for air services. Important initiatives are underway, with the dedicated efforts of the Durban Direct Committee, driving route development strategies aimed at securing new direct air links. Adding to this momentum is the anticipated opening of the Club Med Resort in 2026, an important project poised to inject a boost into tourism demand and global visibility. While the London-Durban route currently sits just outside this year's top 10 unserved O&Ds to or from sub-Saharan Africa, its historic and inherent strategic importance should keep it on the radar. A proactive attitude should put candidate airlines in the position to seize opportunities the moment they emerge and serve the destination non-stop.

Top Unserved City Pairs to and from sub-Saharan Africa

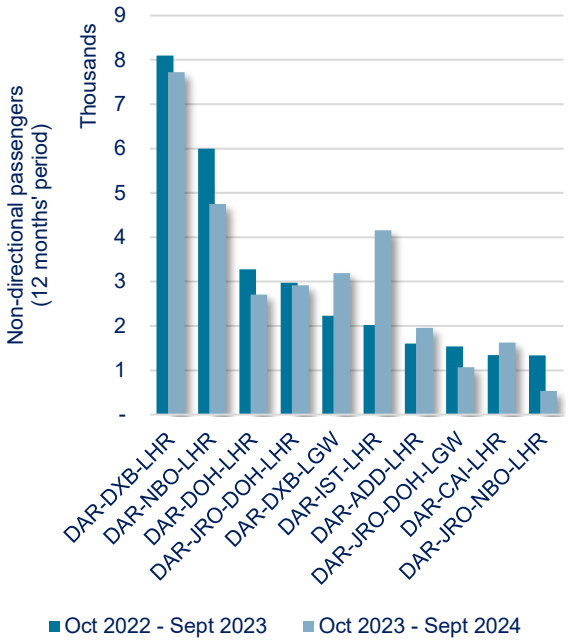
Dar es Salaam-London

Source: Sabre

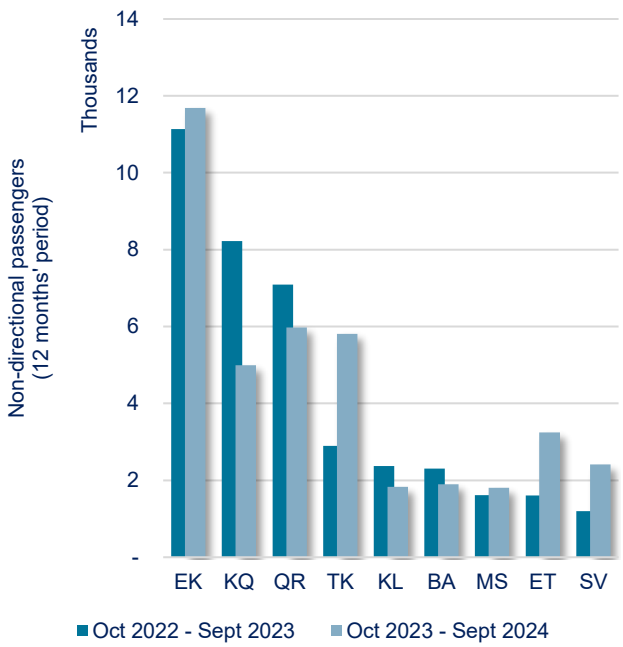
O&D traffic development



Top routings with transit



Top carriers



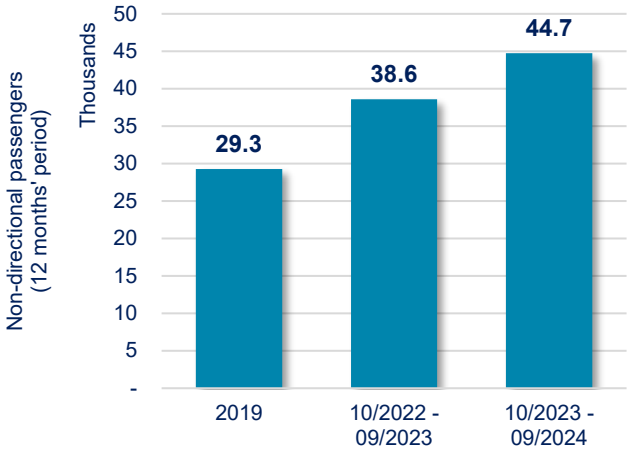
2019-2024 CAGR: 1%
2023-2024 YOY growth: 13%

Top Unserved City Pairs to and from sub-Saharan Africa

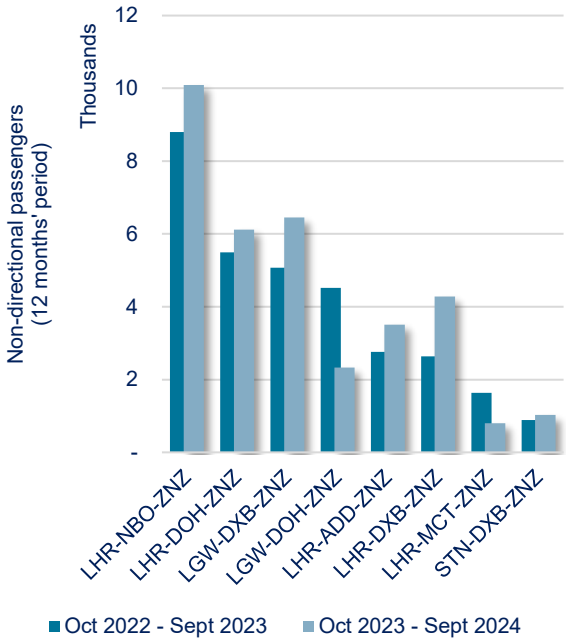
Zanzibar-London

Source: Sabre

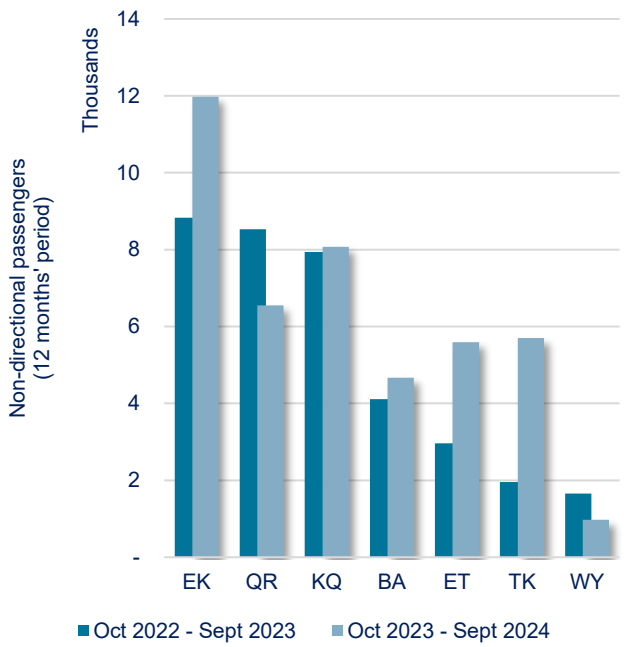
O&D traffic development



Top routings with transit



Top carriers



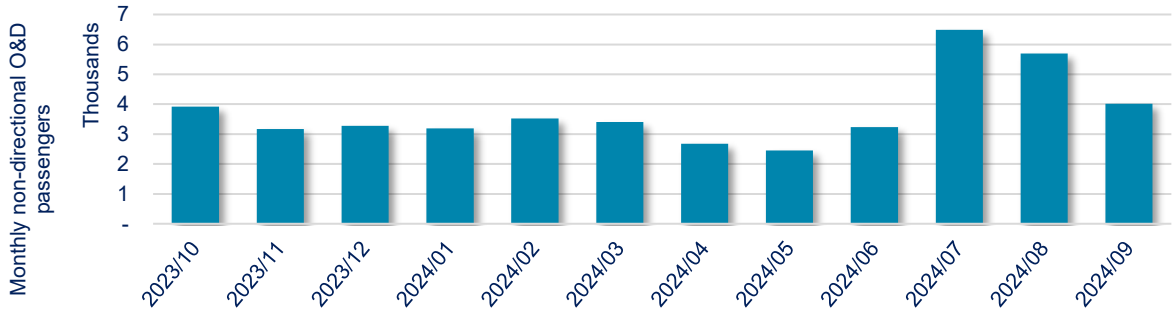
2019-2024 CAGR: 9%
2023-2024 YOY growth: 16%

Top Unserved City Pairs to and from sub-Saharan Africa

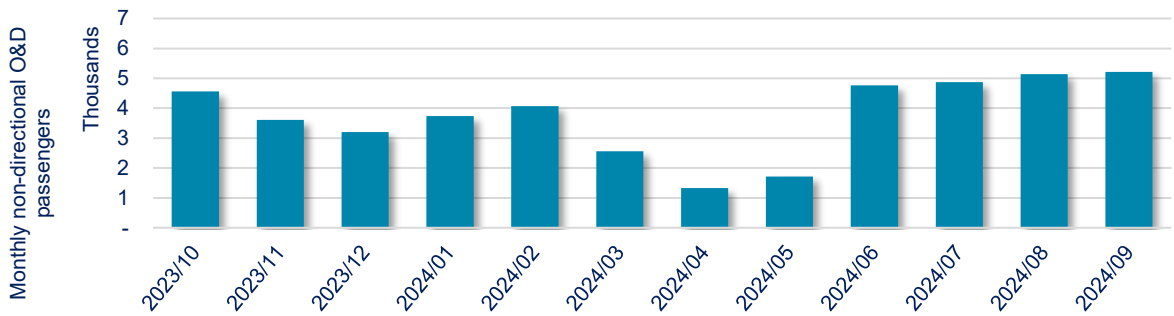
Dar es Salaam-London and Zanzibar-London

Source: Sabre

Traffic seasonality – Dar es Salaam-London
Oct. 2023 - Sep. 2024



Traffic seasonality – Zanzibar-London
Oct. 2023 - Sep. 2024



Top Unserved City Pairs to and from sub-Saharan Africa

Dar es Salaam-London and Zanzibar-London

The air transport dynamics between London and Tanzania, focusing on the Dar es Salaam and Zanzibar markets, is particularly relevant in the context of the AviaDev 2025 event in Zanzibar. Neither city pair currently has non-stop service from London; however, both demonstrate substantial O&D-traffic, ranking 14th and 15th, respectively, among unserved city pairs to or from sub-Saharan Africa during the studied reference period.

Despite their similar overall O&D volumes, a closer examination reveals fundamental differences in their growth trajectories and passenger profiles. London-Zanzibar traffic has not only fully recovered but has significantly surpassed pre-pandemic levels, showing a robust 9% CAGR since 2019, even accounting for the impact of COVID-19. This impressive recovery is further underscored by a 16% Year-over-Year growth when comparing the current reference period to the preceding 12 months. In contrast, London-Dar es Salaam has only just returned to its pre-pandemic traffic volumes, requiring a 13% growth during the last year to achieve this recovery.

Both destinations exhibit distinct seasonal travel patterns from London. Dar es Salaam experiences a sharp increase in traffic during the European summer holiday months of July and August. Zanzibar also sees a rise in London-originating traffic during this period, though its high-demand season is more extended, typically spanning from June through October. April and May represent the low-demand period. Interestingly, cross-referencing with traffic originating from South Africa, particularly the Johannesburg-Zanzibar route, reveals a near-opposite seasonality. December shows a peak demand period, contrasting with London's pattern, which allows Zanzibar to benefit from close to year-round business from diverse source markets.

Current flight trajectories from London to both Dar es Salaam and Zanzibar predominantly involve transits at major hubs in the Middle East, such as Dubai and Doha, as well as Nairobi in East Africa. Notably, Turkish Airlines appears to have made significant efforts to attract more connecting traffic via its Istanbul hub for the Dar es Salaam route during the reference period. The emergence of Saudia in the list of most important carriers between London and Dar es Salaam is also noteworthy. While the traffic carried by Saudia on the city pair remains rather modest, the sharp increase in numbers between 2023 and 2024 certainly warrants attention.

While London-Zanzibar trajectories largely share similar prevailing transit airports, there's a higher proportion of traffic originating from London Gatwick compared to London Heathrow. Conversely, London-Dar es Salaam traffic primarily uses LHR, further emphasizing the more leisure-oriented traffic often associated with LGW. This aligns with observations that Dar es Salaam attracts a higher share of premium traffic, accounting for 11% of its total O&D traffic, compared to 7% for Zanzibar. This suggests a greater prevalence of cost-conscious leisure travelers on the London-Zanzibar route.

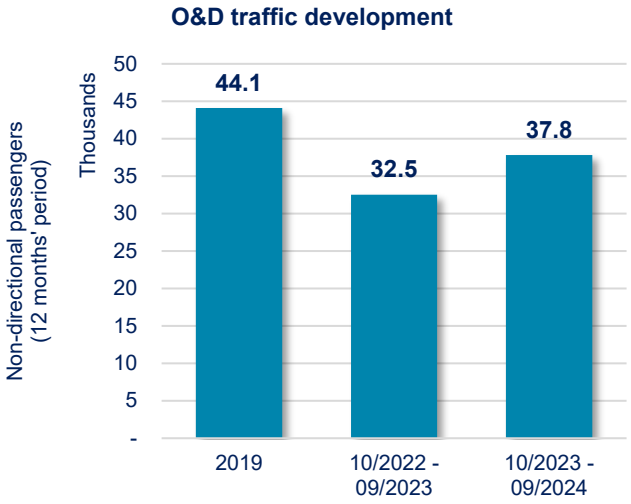
Considering this prevailing leisure-oriented traffic profile, both the A330ceo and A330neo aircraft types would be well positioned to operate on a non-stop London-Zanzibar service, possibly as a seasonal operation. Projections based on the methodology outlined in this document indicate that by 2027, the A330-200/-800 or A330-300/-900 could serve this market with at least three directional frequencies per week, averaged over the entire year. The low unit cost offered by these aircraft would perfectly align with the leisure traffic while also enabling the capture of premium demand on these routes.

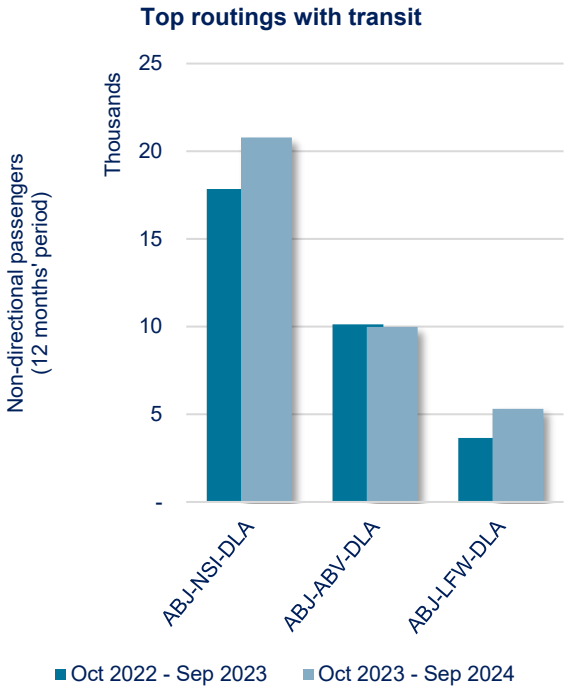
Part IV
Unserved city pairs within sub-Saharan Africa

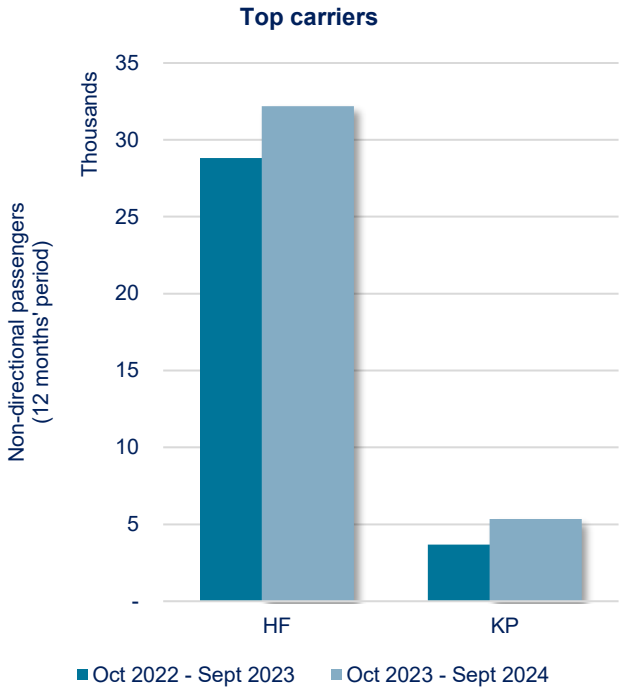
Top Unserved City Pairs within sub-Saharan Africa

Abidjan-Douala

Source: Sabre







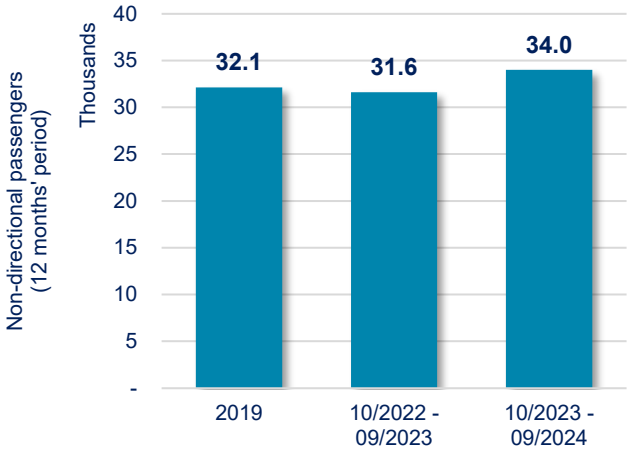
2019-2024 CAGR: -3%
2023-2024 YOY growth: 16%

Top Unserved City Pairs within sub-Saharan Africa

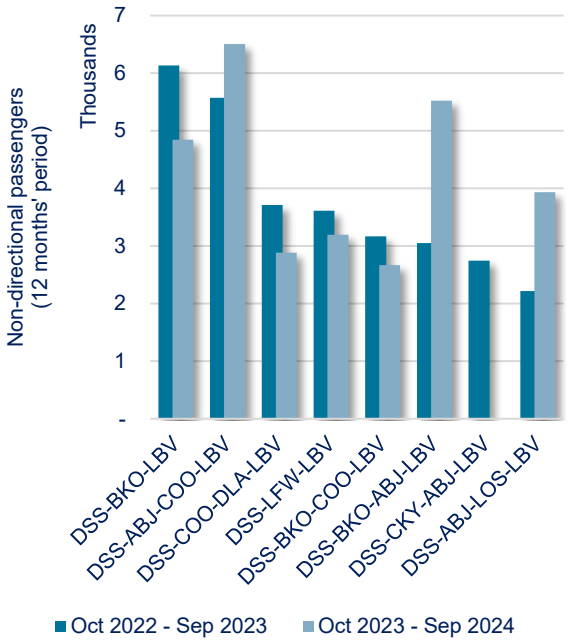
Dakar-Libreville

Source: Sabre

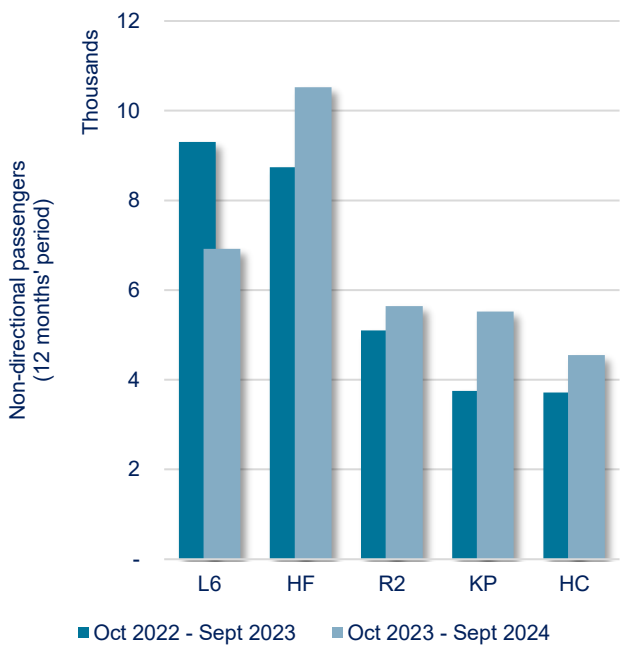
O&D traffic development



Top routings with transit



Top carriers



2019-2024 CAGR: 1%
2023-2024 YOY growth: 8%

Top Unserved City Pairs within sub-Saharan Africa

This year's top five unserved city pairs within sub-Saharan Africa closely mirrors last year's findings, though with slight shifts in ranking. Notably, Abidjan-Douala has surpassed Dakar-Libreville to become the unserved city pair with the highest number of O&D passengers during the evaluation period.

It's important to clarify that while some operators offer air transport services between these listed city pairs, available data indicates these often involve the same aircraft performing multiple successive links. For example, Air Côte d'Ivoire offers travel from Abidjan to Douala; however, during the study's reference period, this journey included one or more intermediate stops. For the purpose of this report, such services are not classified as non-stop, and consequently, these city pairs remain categorized as unserved.

Abidjan-Douala

Traffic on the Abidjan-Douala city pair continues its recovery from the pandemic, reaching approximately 85% of pre-pandemic levels for the reported 12-month period, an increase from 75% noted in last year's report. The primary routings utilized by passengers on the city pair remain largely unchanged, with Air Côte d'Ivoire and ASKY continuing to serve the city pair through connecting services. Both airlines have shown comparable growth in their O&D traffic.

Future projections, based on the methodology outlined previously, indicate that by 2027, the city pair is forecasted to generate sufficient traffic volumes to support daily, or even more frequent, non-stop services using aircraft types such as the A220, A319, or A320. Given that premium traffic constitutes a limited share of the overall volume, a cabin layout featuring a large economy class section would be most suitable. This configuration yields a low unit cost, aligning perfectly with the needs of price-sensitive travelers on this route.

A significant development is the reintroduction of non-stop operations by Kenya Airways on this city pair in May 2025, falling outside the analysis period of this report. Kenya Airways had previously operated this route, ceasing in 2009. The airline is currently utilizing a single-aisle aircraft for an average of three weekly non-stop flights and is understood to hold 5th freedom traffic rights for this route. It will be crucial to analyze how this new non-stop service by Kenya Airways impacts existing connecting traffic and whether it stimulates further growth, which will be detailed in the next year's report.

Dakar-Libreville

The Dakar-Libreville O&D traffic has shown sustained growth, having already recovered and surpassed 2019 levels as reported last year. It continued its upward trajectory with a significant 8% year-on-year growth, making it a compelling candidate for a future non-stop route.

Top Unserved City Pairs within sub-Saharan Africa

Dakar-Libreville (continued)

A noticeable shift in routings has occurred, with Air Côte d'Ivoire emerging as the dominant operator. Their services connect passengers via Abidjan, often involving multiple stops between Dakar and Libreville.

Travel on the city pair is time-consuming. Online flight metasearch engines show that travel times exceeding 24 hours are common. Consequently, a non-stop service would substantially enhance travel convenience and is therefore expected to considerably stimulate traffic.

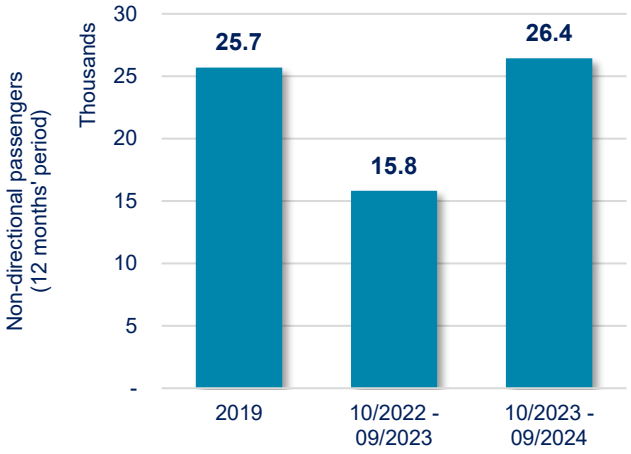
Future projections, based on the methodology outlined earlier, indicate that by 2027, this city pair is forecasted to generate sufficient traffic volumes to support daily, or even more frequent, non-stop services using aircraft like the A220, A319, or A320. Given that the majority of current traffic is economy class, a cabin layout featuring a large economy section would yield a low unit cost, perfectly suiting the price-sensitive nature of travelers on this route.

Top Unserved City Pairs to and from sub-Saharan Africa

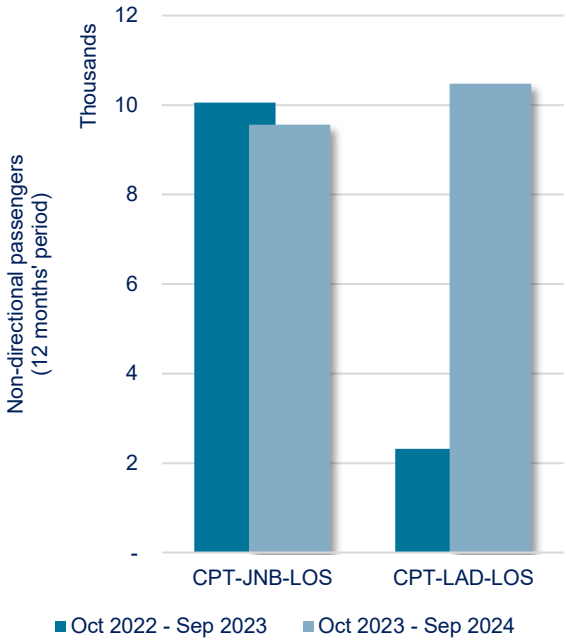
Cape Town-Lagos

Source: Sabre

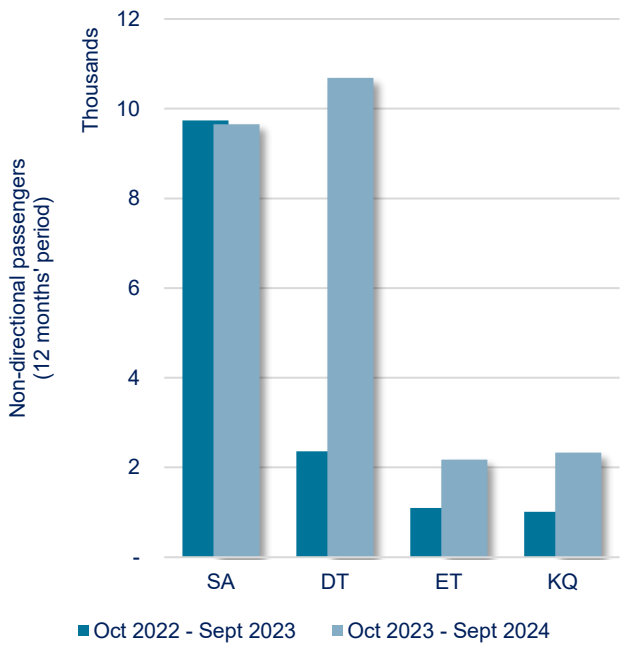
O&D traffic development



Top routings with transit



Top carriers



2019-2024 CAGR: 1%
2023-2024 YOY growth: 67%

Top Unserved City Pairs within sub-Saharan Africa

Cape Town-Lagos

O&D traffic on the Cape Town-Lagos city pair has made a strong recovery, now exceeding pre-pandemic levels, with an impressive growth of 67% observed over the last year. This route stands out for its important share of premium traffic, which accounts for 15% of all traffic—the second highest among unserved city pairs within sub-Saharan Africa.

O&D traffic data reveals that TAAG has captured a substantial share of the connecting traffic, primarily via its Luanda hub. TAAG achieved this by increasing frequencies on both the CPT-LAD and LAD-LOS sectors. Non-directional flights between CPT and LAD rose to close to 750 during the evaluation period, up from 555 during the preceding 12 months, while LAD-LOS flights increased from 225 to about 490. Beyond the timeframe considered for the evaluation in this report, TAAG further bolstered its 2025 schedule, with over 990 non-directional flights for CPT-LAD and nearly 500 for LAD-LOS.

Currently, South African Airways and TAAG are the dominant players on this city pair. While Ethiopian Airlines and Kenya Airways carry some traffic via their East African hubs, their share is comparatively small, likely due to the significant detours and extended travel times involved.

SA connects its CPT-LOS traffic via Johannesburg, deploying A330-300 and A340-300 aircraft on the JNB-LOS sector. However, SA's total frequencies on JNB-LOS are considerably lower at 314 non-directional flights during the reference period, despite increasing to 410 in 2025.

This still places TAAG ahead in terms of offering more options and flexibility. A key development is TAAG's strategic deployment of the new and highly comfortable A220 aircraft on both its LAD-CPT and LAD-LOS sectors, a move that will appeal to frequent travelers seeking product quality and value.

The appeal of establishing a non-stop CPT-LOS route is extensive. Currently, non-stop air connectivity between Cape Town and West Africa is non-existent. This is despite Cape Town being a major business center, populous hub, tourism magnet, and cultural center, with many similar cities in West Africa to connect with. The city pair's significant premium traffic, combined with the attractiveness a non-stop flight will have as an alternative to current long connecting travel times, suggests a low-risk opportunity.

Top Unserved City Pairs within sub-Saharan Africa

Cape Town-Lagos (continued)

Such non-stop service could both easily capture a significant part of today's via-traffic, stimulate demand and activate latent demand. Furthermore, it could evolve into a crucial feeder route between South Africa and West Africa via Lagos, opening connections to numerous other destinations from the Lagos hub.

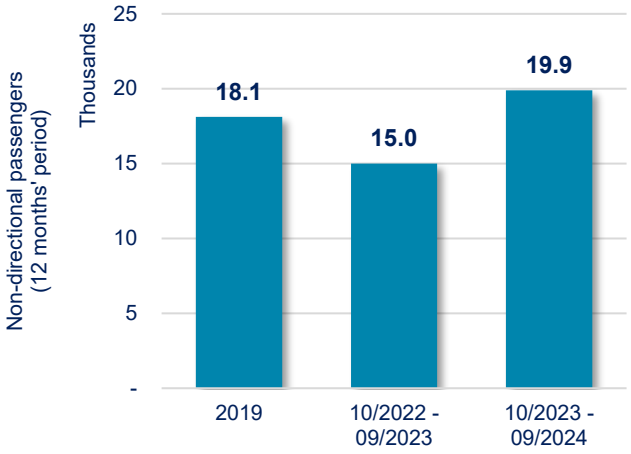
The latest generation Airbus aircraft, including the A220 and A321XLR, are performance-capable for this route, while offering best-in-class comfort standards in each cabin segment. Given the flight-time of a non-stop flight between Cape Town and Lagos, offering a true business class product is essential to cater to this valuable segment. Both aircraft's performance capability and typical cabin capacity allow for effective management of total capacity deployed on the route and enable rapid frequency increases towards a daily service. The latter is highly sought after by business travelers requiring flexibility.

Top Unserved City Pairs within sub-Saharan Africa

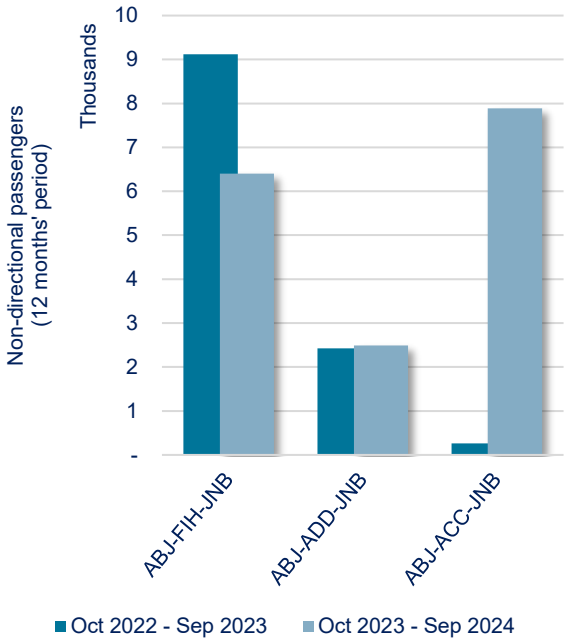
Abidjan-Johannesburg

Source: Sabre

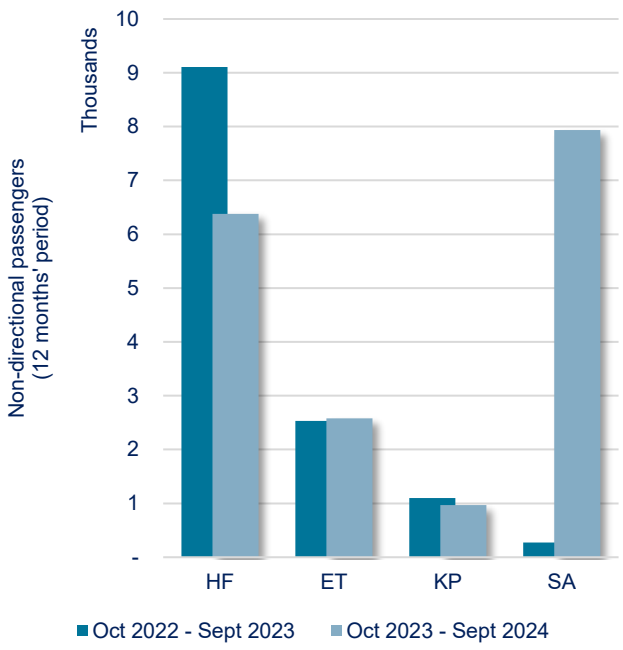
O&D traffic development



Top routings with transit



Top carriers

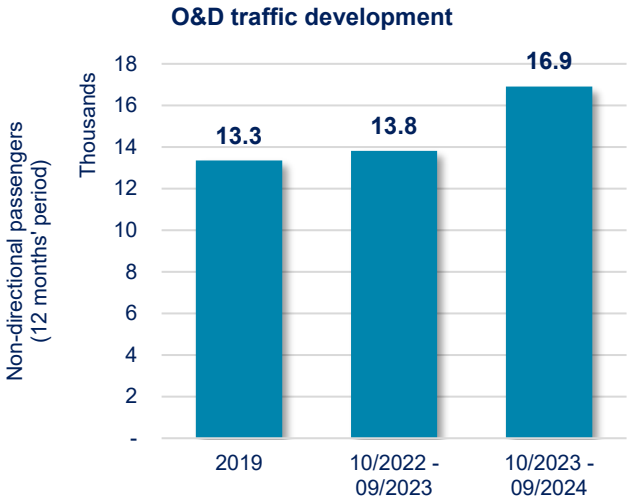


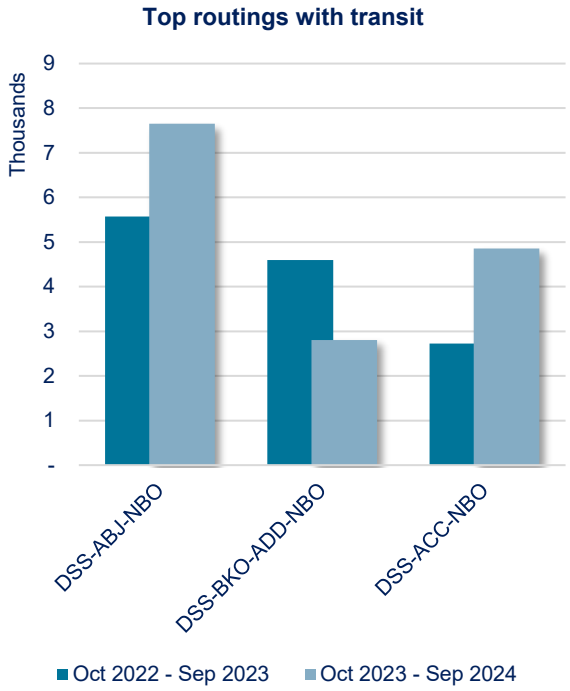
2019-2024 CAGR: 2%
2023-2024 YOY growth: 33%

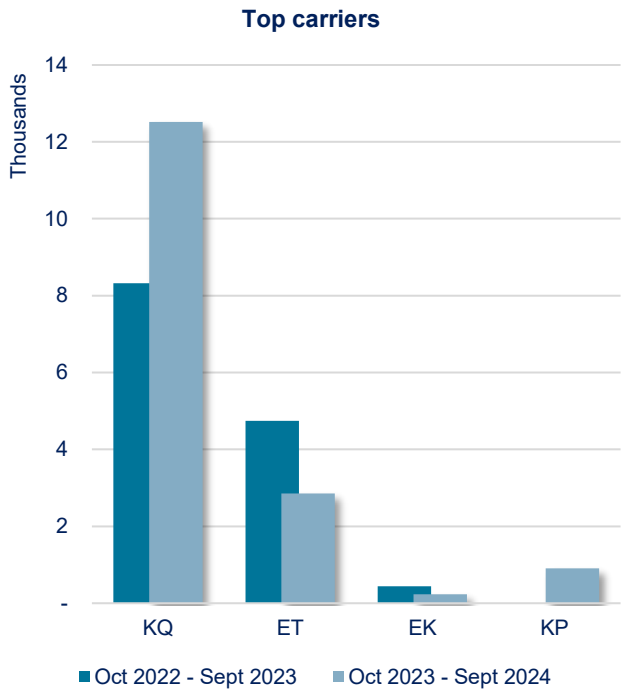
Top Unserved City Pairs within sub-Saharan Africa

Dakar-Nairobi

Source: Sabre







2019-2024 CAGR: 5%
2023-2024 YOY growth: 23%

AIRBUS

Top Unserved City Pairs within sub-Saharan Africa

Abidjan-Johannesburg

The Abidjan-Johannesburg city pair is a new addition to the list of top unserved routes in this report. This inclusion comes after significant growth in overall O&D passenger numbers and total passenger volumes recorded for this city pair during the evaluation period.

OAG and Sabre data show that in the 12 months preceding the report's coverage period, Air Côte d'Ivoire was the primary operator on the ABJ-JNB city pair, utilizing A320-family aircraft and connecting traffic via an intermediate stop in Kinshasa. South African Airways returned to serving this city pair in November 2023, be it with an intermediate stop in Accra. Upon their return, SAA immediately succeeded in capturing a sizable portion of the traffic and contributed significantly to restoring the O&D traffic on the city pair to pre-pandemic levels and beyond.

Despite South African Airways' re-entry, Air Côte d'Ivoire continued their operations via Kinshasa utilizing their Airbus single aisle aircraft. South African Airways initially deployed both A330-300 and A340-300 aircraft, subsequently shifting to using only the A330-300. This deployment strategy gives SAA the largest share of all seats offered on the city pair, thereby attracting the majority of the traffic. OAG data for June 2025 indicates that Air Côte d'Ivoire offers approximately one-third of this capacity, with South African Airways providing the remaining two-thirds.

Furthermore, South African Airways is understood to hold Fifth Freedom traffic rights between Abidjan and Accra. The importance of Fifth Freedom traffic rights for traffic and revenue generation in Africa must be seriously considered. Generally speaking, Fifth Freedom traffic rights can be a factor in an airline's decision to operate tag-end flights or multi-stage services even when non-stop flights could be viable.

The projection method used in this evaluation indicates sufficient O&D traffic to facilitate four directional flights per week using the A321XLR. Notably, premium traffic constitutes 19% of the O&D traffic on this city pair, making it the most significant among all top unserved city pairs in sub-Saharan Africa included in this report. Given that premium traffic strongly prefers non-stop flights, the A321XLR, with its range capability to fly non-stop between JNB and ABJ and its suitable capacity, presents a compelling solution to capture this segment. Overall, this concept warrants further detailed evaluation.

Dakar-Nairobi

The Dakar-Nairobi city pair is also a new addition to this report's list of top unserved routes. While we need to put the reported O&D traffic numbers into perspective, this route's inclusion is due to the significant growth in its overall passenger numbers over the last year and the resulting total passenger volumes recorded.

The Nairobi-Dakar city pair holds significant appeal, primarily due to the current absence of non-stop flights across this vast continental divide. Existing routings typically involve one, and often more,

Top Unserved City Pairs within sub-Saharan Africa

Dakar-Nairobi (continued)

intermediate stops and lengthy layovers, rendering a non-stop service a major convenience improvement. Online flight metasearch engines indicate that travel times frequently exceed 10 hours and, in some cases, can extend beyond a full 24 hours of elapsed time between departure and arrival.

A non-stop link has the potential to catalyze a substantial boost in intra-African trade and business, facilitating easier travel for areas such as commerce and investment between these two key economic hubs.

Traffic levels had already returned to pre-pandemic levels for the 12-month period preceding the one covered in this report. Crucially, these passenger numbers have experienced significant growth, exceeding 20% year-on-year. This growth occurred without a non-stop flight and despite the aforementioned time constraints for the journey. Therefore, a non-stop service could clearly accelerate this traffic growth, and a significant stimulation factor could be incorporated into the potential of such a service.

Kenya Airways has positioned and reinforced itself as the main carrier on this city pair. Ethiopian Airlines is notably the second most important, but has lost ground against Kenya Airways in the evaluated 12-month period. Currently, Kenya Airways primarily channels its passengers through Abidjan or Accra, whereas Ethiopian Airlines' service offer consistently includes at least two stops. OAG data confirms that Ethiopian Airlines previously operated a non-stop flight between Addis Ababa and Dakar, which was ceased in August 2022.

Single-aisle aircraft with a capacity between 115 and 170 seats, possessing the required range capability—especially from Nairobi—would be most suitable for opening this route and could sustainably achieve 3 to 4 directional frequencies per week based on the methodology described above.

From short-haul to ultra long range,
every route has its Airbus aircraft

AIRBUS

A220-100

A220-300

	A220-100	A220-300
Maximum seating	135	160
Typical cabin configuration	100 - 120	120 - 150
Range	3 600 nm 6 700 km	3 400 nm 6 300 km
Powerplants	Pratt & Whitney PW1500G	

A319neo

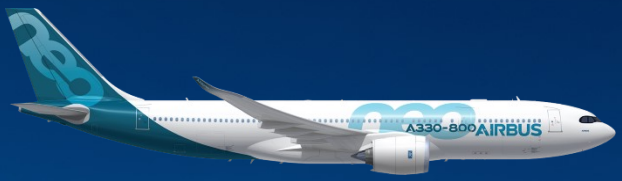
A320neo

A321neo

A321 XLR

	A319neo	A320neo	A321neo	A321 XLR
Maximum seating	160	194	244	244
Typical cabin configuration	120 - 150	150 - 180	180 - 220	180 - 220
Range	3 700 nm 6 850 km	3 450 nm 6 390 km	4 000 nm 7 400 km	4 700 nm 8 700 km
Powerplants	CFMI Leap-1A or Pratt & Whitney PW1100G			

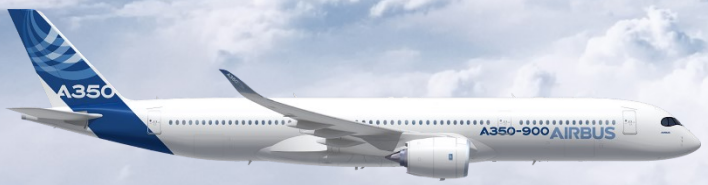
AIRBUS



A330-800

A330-900

	A330-800	A330-900
Maximum seating	406	465
Typical cabin configuration	220 - 260	260 - 300
Range	8 150 nm 15 100 km	7 200 nm 13 300 km
Powerplants	RR Trent 7000	



A350-900

A350-1000

A350F

	A350-900	A350-1000	A350F
Maximum seating / Payload	440	480	111t
Typical cabin configuration	300 - 350	350 - 410	-
Range	8 400 nm 15 500 km	8 700 nm 16 100 km	4 700 nm 8 700 km
Powerplants	RR Trent XWB-84	RR Trent XWB-97	RR Trent XWB-97

AIRBUS

Standard Range Circles

Based on typical African airline evaluation rules

AIRBUS

CAPE TOWN

A220-100 / A321XLR range from Cape Town

A321XLR 101t MTOW
4,100nm with 172 passengers

9¼ hours

A220-100 63.7t MTOW
3,000nm with 116 passengers

7.1 hours

Two-class configuration, max pax payload
105 kg per passenger (including baggage)
JAR 5% trip fuel (Typical int'l)
85% annual headwinds (outbound)
ISA+10 en route temperature
Diversion 150 nm
2% allowance for in-service degradation
CPT 23°C

June 2025

AIRBUS

A330-900 / A350-900 range from Cape Town

A350-900 283t MTOW
7,800nm with 332 passengers

A330-900 251t MTOW
6,550nm with 287 passengers

Two-class configuration, max pax payload
105 kg per passenger (including baggage)
JAR 5% trip fuel (Typical int'l)
85% annual headwinds (outbound)
ISA+10 en route temperature
Diversion 150 nm
2% allowance for in-service degradation
CPT 23°C

June 2025

AIRBUS

LAGOS

A220-100 / A321XLR range from Lagos

June 2025

A321XLR 101t MTOW
4,100nm with 172 passengers

A220-100 63.7t MTOW
3,000nm with 116 passengers

Two-class configuration, max pax payload
105 kg per passenger (including baggage)
JAR 5% trip fuel (Typical int'l)
85% annual headwinds (outbound)
ISA+10 en route temperature
Diversion 150 nm
2% allowance for in-service degradation
LOS 30°C

AIRBUS

A330-900 / A350-900 range from Lagos

A350-900 283t MTOW
7,800nm with 332 passengers

A330-900 251t MTOW
6,550nm with 287 passengers

Two-class configuration, max pax payload
105 kg per passenger (including baggage)
JAR 5% trip fuel (Typical int'l)
85% annual headwinds (outbound)
ISA+10 en route temperature
Diversion 150 nm
2% allowance for in-service degradation
LOS 30°C

June 2025

AIRBUS

Zanzibar

A220-100 / A321XLR range from Zanzibar

A321XLR 101t MTOW
4,100nm with 172 passengers

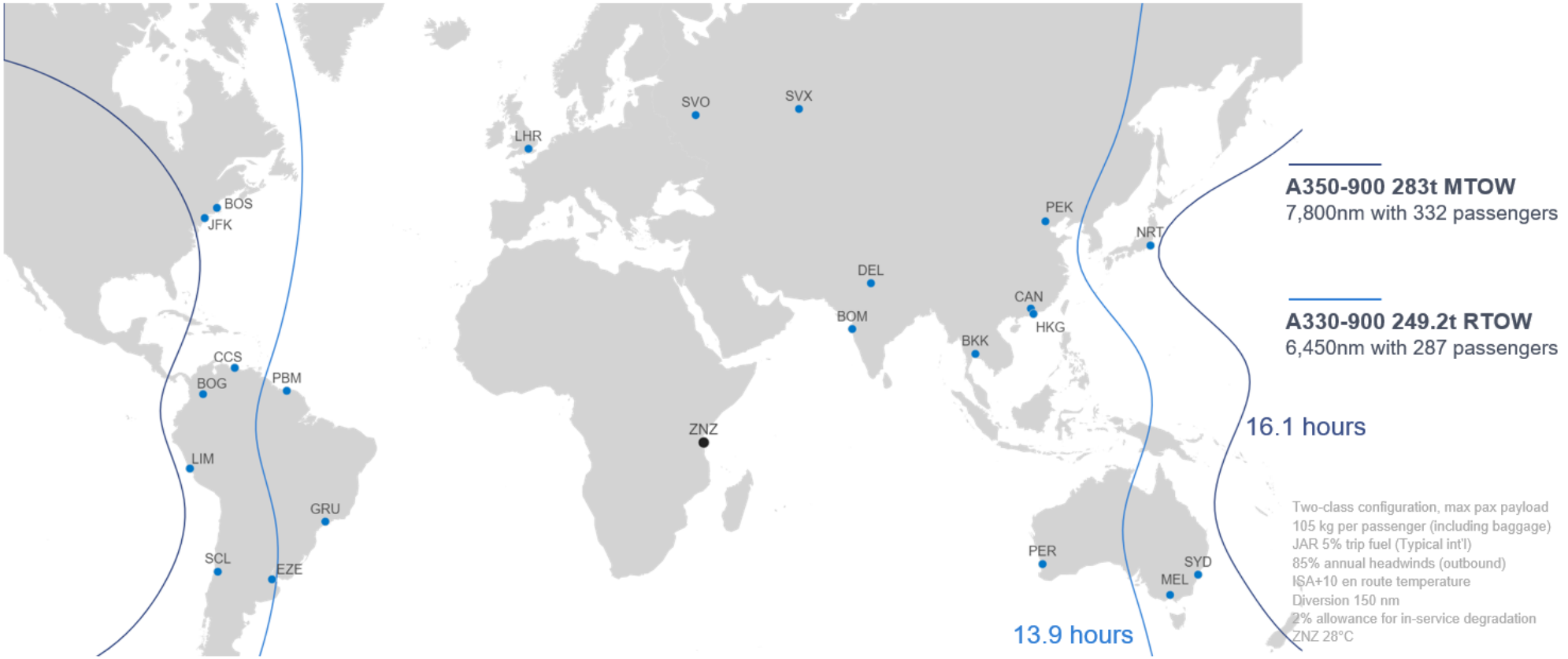
A220-100 63.7t MTOW
3,000nm with 116 passengers

Two-class configuration, max pax payload
105 kg per passenger (including baggage)
JAR 5% trip fuel (Typical int'l)
85% annual headwinds (outbound)
ISA+10 en route temperature
Diversion 150 nm
2% allowance for in-service degradation
ZNZ 28°C

June 2025

AIRBUS

A330-900 / A350-900 range from Zanzibar



June 2025

AIRBUS

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