



# Exploring the Horizons

A Study of Unserved Air Routes to, from and within  
Sub-Saharan Africa

Volume III

June 2026

---

COMMERCIAL AIRCRAFT

Fleet and Network Planning Marketing  
MCMAM

**AIRBUS**

Geert LEMAIRE  
Marketing Director  
Fleet and Network Planning Marketing  
MCMAM

[geert.lemaire@airbus.com](mailto:geert.lemaire@airbus.com)

Airbus S.A.S.  
2, rond point Emile Dewoitine  
31703 BLAGNAC CEDEX  
FRANCE

**AIRBUS**

# 01

Introduction



# Introduction

---

Africa's aviation sector continues its upward trajectory, marked once again this year by significant shifts in regional and international route dynamics. Driven by economic integration, urbanisation, growing tourism, and expanding trade links, the demand for air travel continues to grow—both within the continent and between Africa and the rest of the world. Yet, despite these encouraging trends, a significant bottleneck remains: many city pairs continue to be unserved or underserved. Passengers frequently rely on lengthy, indirect itineraries, which ultimately slows down the tangible economic benefits and seamless connectivity that robust air transport is designed to deliver.

Since the release of the first and second editions of Airbus' report, *“Exploring the Horizons - A study of unserved air routes to, from and within Sub-Saharan Africa,”* the regional aviation ecosystem has continued to evolve. Network expansions, fleet modernisation initiatives, updated air service agreements—coupled with major infrastructure developments both recently completed and currently underway—are collectively reshaping the environment for air transport growth. However, as this third edition demonstrates, connectivity gaps remain substantial. This updated report identifies the most critical unserved routes to, from, and within the Sub-Saharan region, providing indications of how advancements in aircraft capabilities and innovative route development strategies can bridge these gaps, connect African communities, and unlock fresh air transport growth.

The period following the previous edition of this report has been marked by a number of tangible fleet and network developments. A couple of prime examples illustrate this momentum: In terms of fleet modernisation and new capabilities, Air Côte d'Ivoire has bolstered its operations with the addition of the advanced Airbus A330-900 to its fleet. At the same time, the long-range, single-aisle Airbus A321XLR is securing a growing presence in airline fleets around the world. Recent deliveries of the A321XLR to airlines like Saudia (the aircraft featuring a premium section with full-flat seats) and India's IndiGo signal a paradigm shift; these aircraft—and their sister ships—are likely to soon appear on new routes to and from Sub-Saharan Africa. Additionally, Air Seychelles has received Cabinet approval for its international long-haul fleet strategy. The airline envisions the lease of two A321XLR aircraft, a move designed to drive a tailored long-haul network expansion with highly optimised capacity.

Simultaneously, rapid network expansions are actively rolling out across the continent. With the recent deployment of its new A350-900 on a non-stop service from Cairo to Los Angeles, Egyptair stands out by connecting Africa non-stop to the US West Coast. In April 2026, Etihad announced significant network expansions into Africa, opening up an important wave of new corridors linking the African continent to the airline's global network via Abu Dhabi. Over in the southern hemisphere, Qantas launched its new, non-stop service linking Perth to Johannesburg in December 2025. The newly operational Air Congo announced in May 2026 that it is preparing for its long-haul debut with a non-stop service to Belgium.

# Introduction

---

European carriers are also doubling down on African leisure and business hubs: Brussels Airlines announced a new route between Brussels and Kilimanjaro starting in June 2026, while Edelweiss recently deployed its flagship A350-900 on a new route from Zurich to Windhoek, Namibia. Intra-African connectivity continues to build momentum as well, highlighted by examples such as Ethiopian Airlines securing approval to launch operations to Mauritius starting in July 2026. Furthermore, TAAG Angola Airlines has fully shifted all operations to Luanda's new airport—using the asset to build and expand its new hub—as it continues dispatching its A220s on routes to destinations including Cape Town, Abidjan, and Maputo.

Airbus continues to strongly advocate for the development of connectivity to, from, and within Sub-Saharan Africa. Air transport is a vital socio-economic enabler—improving access to countries, driving economic growth, stimulating trade, and connecting diverse people and cultures. Airbus constantly works together with airlines, airports, and air transport stakeholders around the world in rigorously evaluating emerging route and network development opportunities, and in identifying fleet solutions that enable these advancements. Airbus has leveraged its in-house analytical capabilities to deliver this third edition of the unserved routes report in support of AviaDev's initiatives to drive route and network developments in Sub-Saharan Africa. This third edition of the unserved routes study is released on the occasion of the AviaDev conference held in Gaborone in June 2026.

# 02

Top Unserved  
City Pairs  
and  
Trends Analysis



# Top unserved city pairs

This third edition of the Unserved Routes Report reveals fresh dynamics among the top unserved markets to, from, and within Sub-Saharan Africa. Even so, many city pairs from previous editions reappear in the current rankings. The findings and the full analysis reaffirm the central insight from our previous edition, that the air transport sector is inherently dynamic. While high-level perspectives often suggest stability, or slow changes only, digging deeper exposes a rapidly evolving landscape driven by subtle but impactful shifts. A comprehensive analysis of these findings is presented in part 4 of this document.

Based on the integration of observed O&D traffic data with scheduled flight data, the top unserved city pairs to and from Sub-Saharan Africa for this year are outlined below.

1. London-Harare
2. Johannesburg-Mumbai
3. Dubai-Kinshasa
4. Lagos-Toronto
5. Guangzhou-Lagos
6. Douala-Dubai
7. Dubai-Harare
8. Brussels-Cape Town
9. London-Zanzibar
10. Brussels-Johannesburg



## Top unserved city pairs

---

Turning to intra-Sub-Saharan traffic, this year's list of leading unserved city pairs is as follows:

1. Cape Town-Lagos
2. Dakar-Libreville
3. Abuja-Nairobi
4. Bamako-Brazzaville
5. Dakar-Nairobi



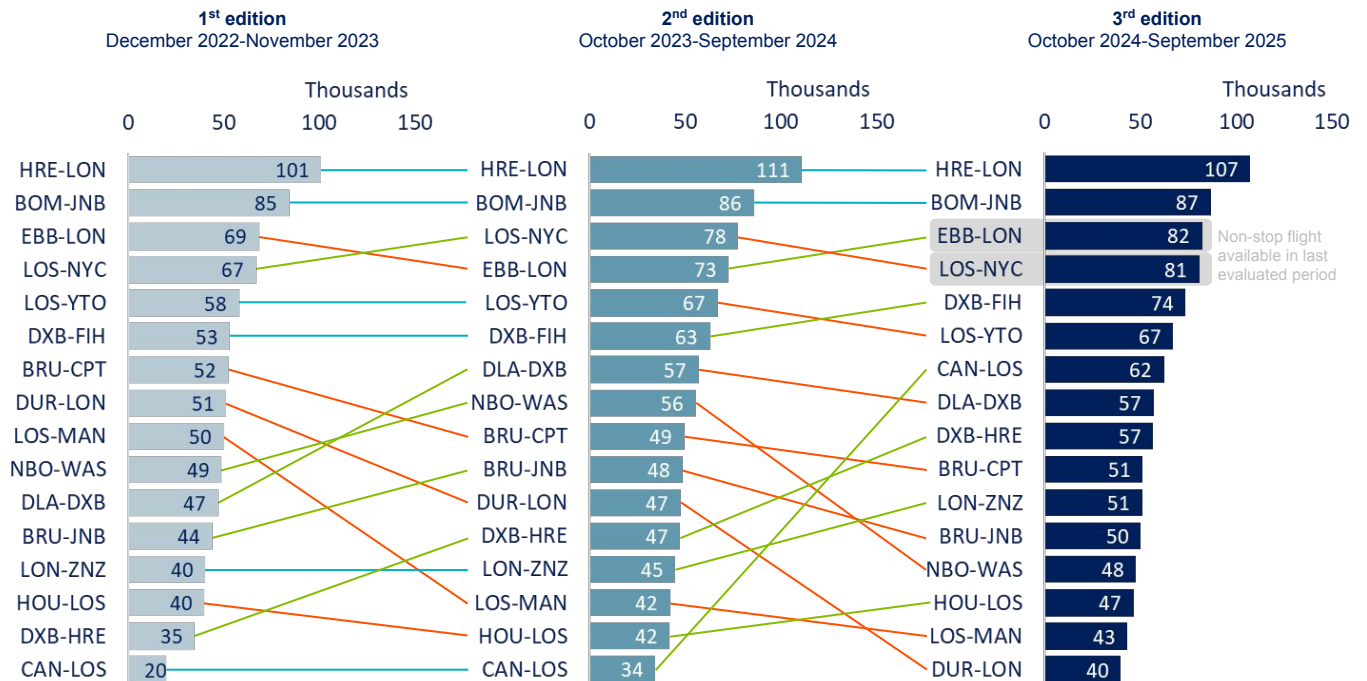
The O&D traffic data behind most of the unserved city pairs in these lists demonstrates a clear upward trajectory in market demand, effectively validating the sector-wide growth dynamics presented later in this report.

This third edition allows us to trace the demand evolution of the city pairs featured in our historical top 10 or top 5 lists. Analysing these O&D traffic shifts reveals whether these markets have since secured non-stop service, if new routes have emerged through accelerated growth, or if previous contenders have dropped off due to declining demand. The charts below illustrate these market dynamics.

# Top unserved city pairs

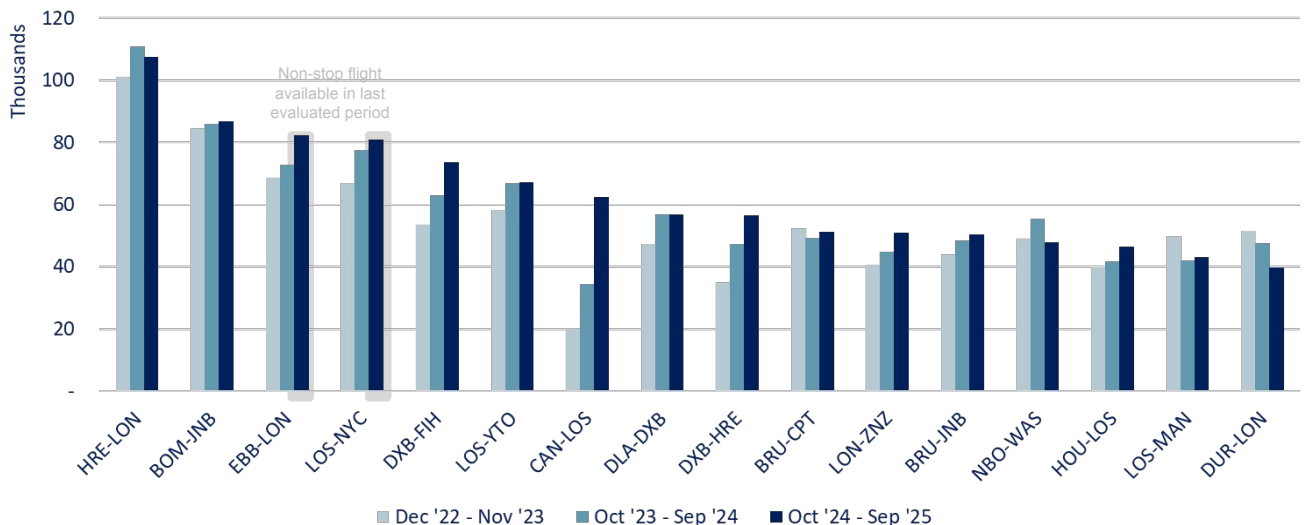
## A. Unserved City Pairs to / from Sub-Saharan Africa

Non-directional O&D traffic (Rolling 12-Month Basis)



Combining the data from the charts above and below reveals that, independent of ranking fluctuations, O&D traffic increased in 12 of the 16 city pairs featured in the top unserved markets over the past few years. Within the timeframe covered by the three editions of the study, two of the 16 city pairs initiated scheduled services for at least a portion of the 12-month evaluation windows.

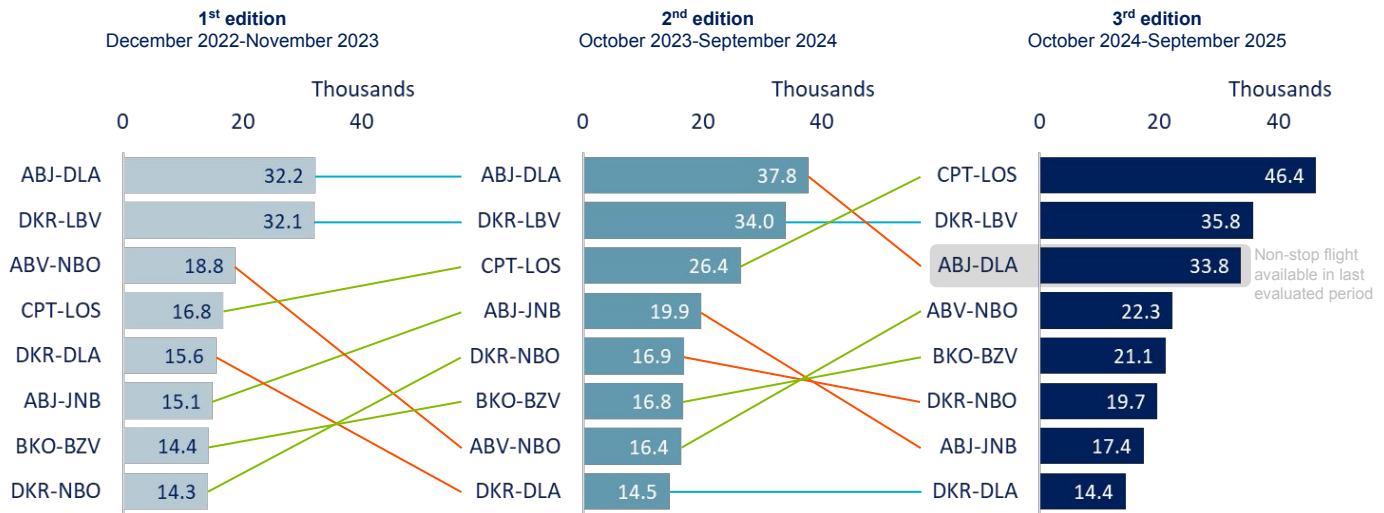
Non-directional O&D traffic (Rolling 12-Month Basis)



# Top unserved city pairs

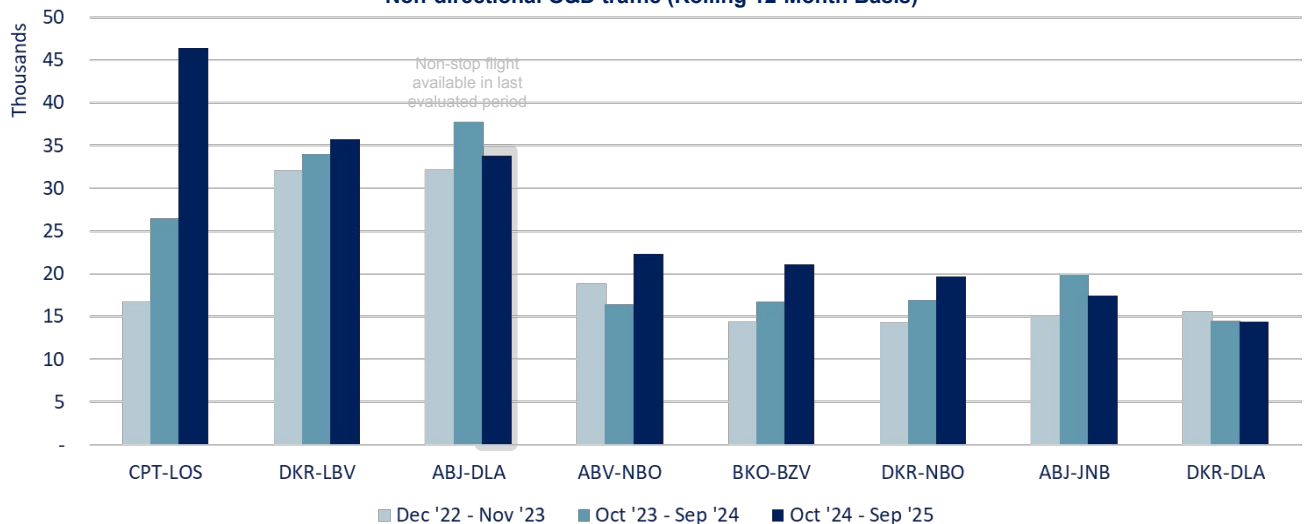
## B. Unserved City Pairs within Sub-Saharan Africa

Non-directional O&D traffic (Rolling 12-Month Basis)



Similarly, seven of the eight unserved Sub-Saharan city pairs in the evaluations showed higher O&D demand this period compared to two years ago. One city pair identified as unserved in previous editions has since secured scheduled service. Kenya Airways introduced three weekly flights between Douala and Abidjan in May 2025, structured as a tag-end flight to its Nairobi–Douala service.

Non-directional O&D traffic (Rolling 12-Month Basis)



# Market Dynamics

Evaluating network developments across Sub-Saharan Africa reveals ongoing adjustments, with new routes opening and others closing. Year-over-year analysis of the rolling 12-month period from October 2024 to September 2025 shows a modest net increase in connectivity. Specifically, for routes operating at a minimum average frequency of three flights per week, the network reached 728 active routes, up by just 11 from the prior period.

Number of routes to/from/within Sub-Saharan Africa with minimum 3 directional weekly frequencies



While these numbers look favourable at first glance, benchmarking them against other global markets provides some perspective.

Region	Number of Routes <sup>1</sup>
Sub-Saharan Africa	728
Africa (incl. Sub-Saharan Africa)	1 194
Latin America	763
Indian Subcontinent	1 018
Middle East	1 116
Asia & Pacific	2 259
China	2 884
North & Central America	4 555
Europe & CIS	5 466

<sup>1</sup>: to/from/within regions averaging minimum 3 directional flights/week over the evaluated 12-month period

While this data signals an underserved market, it also highlights important expansion potential. Consequently, a core objective for the Sub-Saharan air transport sector is expanding networks that deliver frequent, reliable flights.

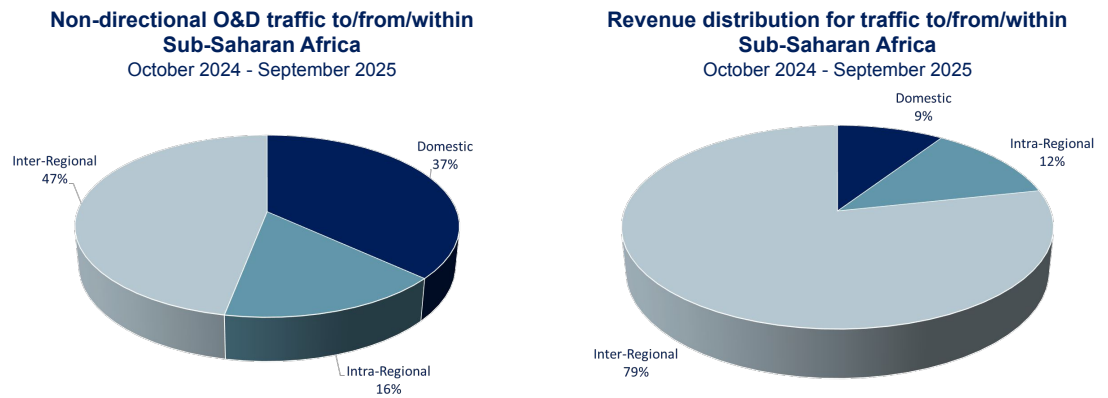
While conceptually straightforward, its practical implementation is seriously challenged by Africa's complex market realities. The following paragraphs outline some key factors shaping this landscape, concluding with actionable insights on how to address these challenges.

# Market Dynamics

## A. Passenger Demand

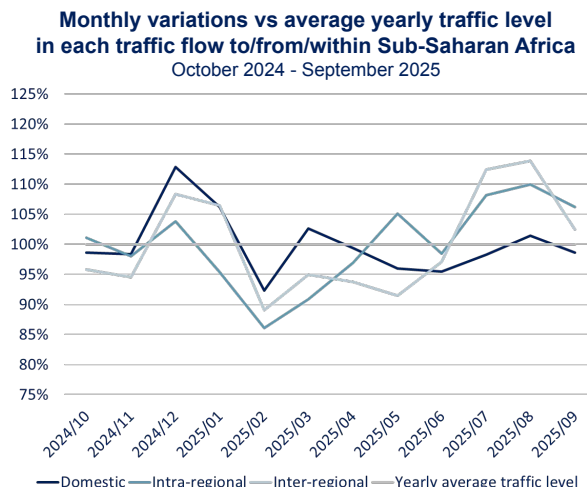
### a. Source markets

On the passenger side, Sub-Saharan traffic is shaped by distinct source markets. Segmenting O&D traffic into domestic, intra-regional, and inter-regional flows reveals that nearly half of all Sub-Saharan traffic originates or terminates outside the continent. In contrast, intra-regional traffic is remarkably low, accounting for just 16% of the total. SABRE data maps out the revenue breakdown across these specific segments.



In conclusion, capturing international traffic flows is vital for market viability. Conversely, intra-regional traffic stands out as Sub-Saharan Africa's least developed segment, highlighting a clear priority for targeted regional expansion.

### b. Seasonality



# Market Dynamics

---

Seasonal variations in traffic flows demand highly flexible capacity allocation. A robust fleet strategy must resolve a core dilemma: size the fleet to capture peak-season demand—which requires either absorbing low-season downtime or finding secondary deployments for idle aircraft—or size for the low-season trough, intentionally spilling high-season demand to competitors.

Ultimately, an adaptable fleet architecture is essential to navigate these seasonal swings.

## c. Premium vs Economy demand

Averaging 6%, the proportion of premium traffic here is notably high compared to the wider African continent and other major global regions, where premium demand typically hovers around 4% within a 2% to 7% range. Moreover, this premium-to-economy ratio varies significantly by route, as demonstrated in the subsequent unserved city-pair evaluations. Because premium passengers are highly time-sensitive and require the flexibility to modify itineraries at the last minute, high flight frequency is critical.

Premium cabin expectations in Sub-Saharan Africa present a compelling paradox: because intra-continental travel is exceptionally costly due to factors like high fuel prices and high taxes, premium passengers demand a standard of comfort far exceeding what is typically tolerated on short-to-medium-haul routes in Europe or North America. Premium travelers expect dedicated, physically wider business class seating featuring robust legroom and footrests. This expectation is further reinforced by the fierce intercontinental competition from global carriers deploying flagship products—including enclosed privacy suites—into major African hubs. Premium passengers who experience ultra-premium comfort on long-haul sectors find it highly disappointing to transition to sub-standard seating for the final leg of their journey, making consistent, high-quality cabin hardware a critical operational necessity for regional connections.

## d. Traffic growth

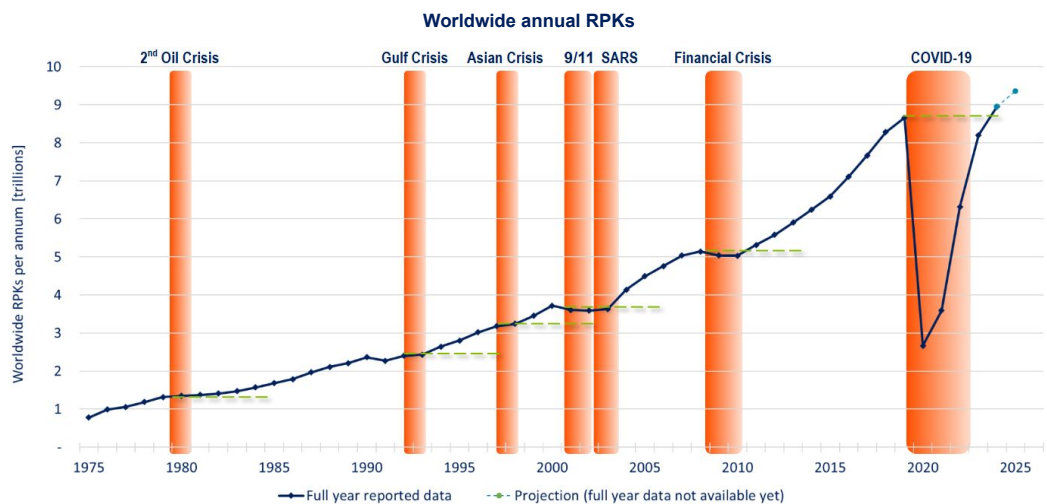
The air transport industry is fundamentally driven by growth. Looking back as far as data is available, demand for air transport has continuously increased—a trend that persists today.

While the industry has traditionally been vulnerable to external shocks, demand remains remarkably resilient. Two important observations stand out:

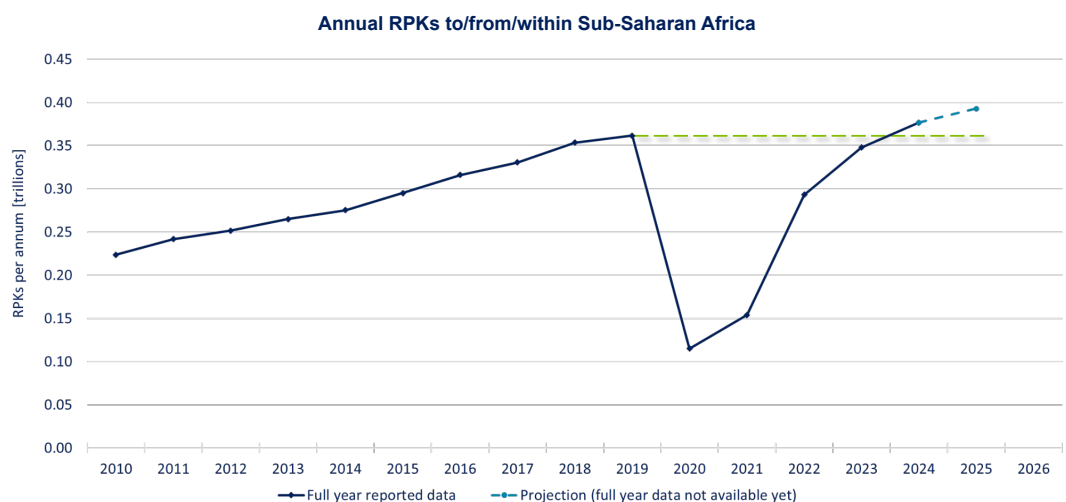
- no matter the nature of a crisis, demand for air transport always returns;
- it consistently continues to grow beyond pre-shock levels.

# Market Dynamics

The chart below illustrates the historical evolution of global air traffic (measured in RPKs) to substantiate these observations.



While a long-term dataset of this depth is not available for Sub-Saharan Africa specifically, the accessible data presented below firmly validates the exact same conclusions.



Airbus' Global Market Forecast (GMF) serves as our guide for projecting future traffic growth. The model is built on the core principle that air travel is intrinsically linked to economic prosperity—measured through macroeconomic variables such as GDP growth, middle-class expansion, urbanisation, and trade liberalisation. Additionally, critical factors like known infrastructure developments and decarbonisation objectives are fully factored into the analysis.

# Market Dynamics

The regional segment of Airbus' 2025 GMF for Africa models the continent's growth up to 2044 based on an overall GDP CAGR of 3.8%, a population increase of 690 million, and an urban influx of 420 million people. Factoring in a 3.7% CAGR for exports and a 150 million-person expansion of the middle class, the forecast yields the following passenger traffic growth projections for major flows to, from, and within Africa:

Traffic flow	2027 - 2044 CAGR
Within Africa	+5.4%
Africa - Europe & CIS	+3.3%
Africa - Indian Subcontinent	+6.1%
Africa - Middle East	+5.5%
Africa - China	+5.8%
Africa - Asia & Pacific	+5.3%
Africa - North America	+3.2%
Africa - Latin America	+5.3%

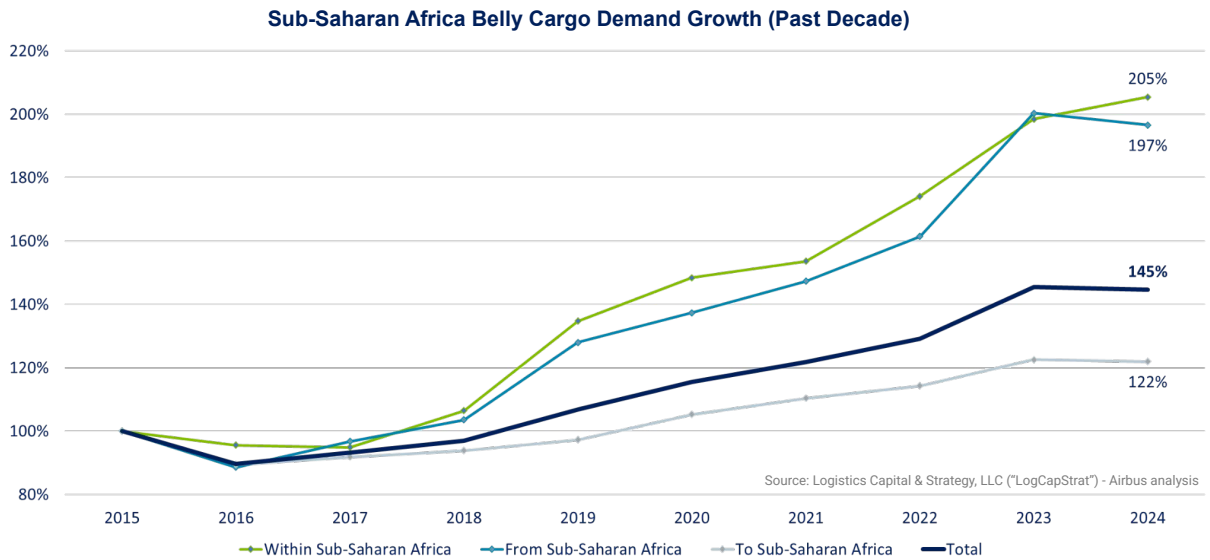
These growth projections reflect broader industry averages, meaning expansion will inevitably vary by route and airline. An important takeaway from this study is that traffic development across many of the unserved city pairs featured in this report has outperformed these baseline figures, with certain of these unserved markets even demonstrating significantly higher growth.

In general, managing this growth demands a proactive strategy for both optimising the existing network and entering new markets. Planning across routes, networks, and fleets must look past the initial launch phase to fully account for long-term traffic maturity. Ultimately, sizing aircraft capacity for future, stabilised demand remains the paramount requirement.

## B. Cargo

Alongside passenger traffic, air cargo flows represent a vital pillar of route planning. While belly cargo has historically often been treated as an incidental add-on to passenger operations, changing market dynamics dictate that it be fully integrated into network expansion strategies. This paradigm shift is particularly pronounced across Sub-Saharan Africa. Given the region's sparse surface transport infrastructure, air cargo capabilities are a major driver of route viability and must be factored into every evaluation. The graph on the following page illustrates the expansion of belly cargo over the past decade. Notably, growth is particularly robust for intra-Sub-Saharan corridors. Overall, total belly cargo demand to, from, and within the region has surged by approximately 50% over the last ten-year period.

# Market Dynamics



Airbus' GMF projects that air cargo, measured in Freight Tonne Kilometers (FTK), will expand at a 3.3% CAGR over the next 20 years. Driven by a projected increase in global trade, this growing demand will be felt across the industry, spanning both dedicated freighters and belly cargo operations. Sub-Saharan air cargo operations are poised to benefit from this market growth, making it essential for the region's industry to align its capabilities accordingly.

## C. Africa specifics

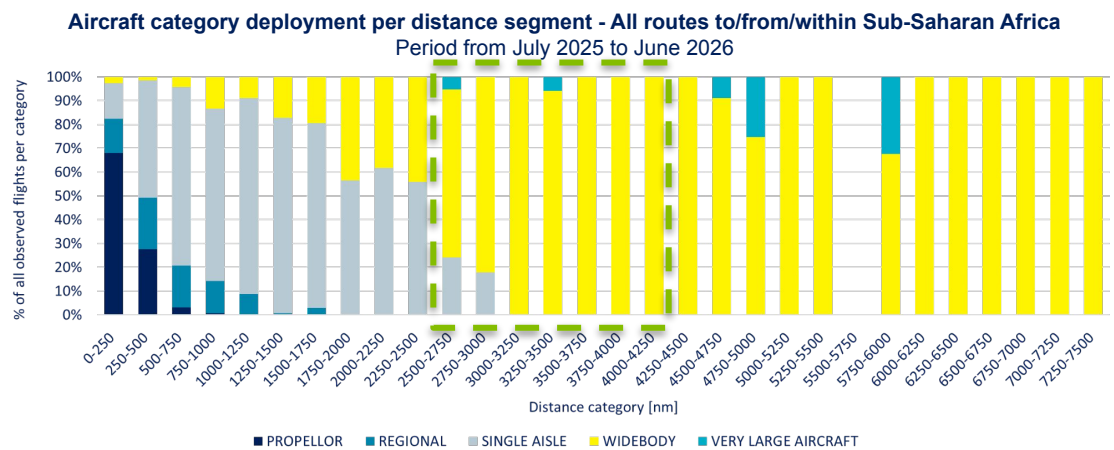
### a. Geography

The region's vast geography dictates immense distances between destinations, effectively turning many intra-continental routes into long-haul operations. For perspective, mainland Africa's north-to-south span covers roughly 8,096 kilometers (4,370 nm) in great circle distance—comparable to the distance between London and Beijing—while its west-to-east axis extends 7,470 kilometers (4,030 nm), mirroring a flight from London to Vancouver. Commercial flight schedules vividly reflect this geographic scale: Addis Ababa to Mauritius and Cape Town to Nairobi both require over 5.5 hours, Lagos to Johannesburg takes 6.5 hours, and Johannesburg to Cairo spans a significant 8.5 hours.

Traditionally, intra-African sectors have relied on widebody aircraft to bridge regional distances. While this strategy injected substantial per-flight capacity into the market, it forced airlines to limit flight frequencies to avoid overcapacity. Beyond pure range requirements, passenger comfort—specifically the demand for premium widebody amenities like fully lie-flat seats—has been a primary driver for deploying twin-aisle aircraft on these lengthy intra-regional sectors.

# Market Dynamics

The following chart details aircraft category utilisation by route distance for all Sub-Saharan African operations over the evaluated 12-month period.



The chart reveals that on routes exceeding 2,500 nm, widebody aircraft are used almost exclusively. As previously noted, flight frequencies are often restricted to less-than-daily when using widebodies on intra-regional flights to prevent overcapacity from undermining load factors or eroding yields.

Crucially, the dotted box illustrates the typical operating domain of the A321XLR. As demonstrated by the standard range circles provided in the appendix—and applying realistic performance assumptions tailored to African operators—the aircraft typically carries 172 passengers over a distance of 4,150 nm.

Consequently, the A321XLR can enter this operating envelope to displace widebody aircraft on existing routes, increasing frequencies to a daily status—or higher—without flooding the market with excess seats. Furthermore, the aircraft is ideally suited for pioneering new long-range markets where thin demand would otherwise render widebody operations unviable.

Beyond range and capacity, the A321XLR introduces several critical product and operational advantages:

- Premium product alignment: The cabin can accommodate full flat seats, essential for capturing high-yield traffic on long sectors.
- Single-aisle economics: It enables long-haul network expansion while retaining highly efficient single-aisle operating costs.
- Fleet commonality: It integrates seamlessly into existing Airbus single-aisle fleets, offering identical maintenance procedures, standardised spare parts and engine pools, and streamlined pilot training.
- Mixed Fleet Flying (MFF): For operators with mixed fleets, it unlocks significant flight crew synergies when deployed alongside Airbus widebody aircraft.

# Market Dynamics

---

## **b. Geopolitics and state policies**

Geopolitical instability in certain Sub-Saharan corridors continues to impact regional air transport, occasionally restricting airspace availability to foreign carriers. Consequently, operators may face sudden disruptions that render key network sectors inaccessible, forcing extensive and inefficient re-routings. In these scenarios, deploying aircraft that pair optimal capacity with robust range and performance characteristics offers a vital operational safeguard.

Furthermore, market access remains constrained by protectionist policies favouring domestic flag carriers, while operating costs are heavily inflated by steep airport fees, elevated fuel prices, and heavy state-imposed taxes. Consequently, using highly efficient aircraft is critical to achieving the aggressive cost optimisation required to maintain profitability.

## **D. Summary**

For both airline and airport network planners, understanding Sub-Saharan Africa's distinct operational challenges is critical to unlocking successful route development. Planners must stay ahead of evolving aircraft advancements—specifically the unique capacity-range combinations they offer—and the untapped market segments they can effectively service.

In this landscape, Airbus products deliver significant advancements and unmatched capabilities. By optimising capacity, range, and belly cargo performance, these aircraft enable robust new business cases. This shifts the economic calculus, by unlocking superior operating efficiencies and revenue generation potential that translate into compelling, profitable operations. Previously dormant route evaluations could be viably revived and reassessed.

To bridge current development gaps, Sub-Saharan Africa's strategy hinges on prioritising regional network expansion, optimising domestic operations and simultaneously safeguarding the long-haul connectivity required to drive inbound international traffic.

# Market Dynamics

---

To support this strategy, regional operators will need the newest generation aircraft specifically capable of addressing six critical operational pillars:

- Extended range capabilities: efficiently covering the continent's immense geographic distances on long-haul missions.
- Optimised capacity: aligning cabin capacity with thinner initial demand while remaining scalable enough to accommodate future market growth.
- Belly cargo capacity: providing ample lower-deck freight capabilities to strengthen route economics and maximise revenue diversification.
- Optimised operating costs: delivering aggressive cost efficiencies to safeguard profitability within Sub-Saharan Africa's high-cost operating environment.
- Operational flexibility: adapting seamlessly to fluctuating capacity requirements driven by seasonality or day-of-week demand variations.
- Premium passenger comfort: offering widebody-equivalent cabin comfort, featuring dedicated business class sections and full flat seating capabilities where market demand dictates.

Securing long-term network success relies on airport planners actively courting airlines that leverage these advanced aircraft capabilities to catalyse new route launches.

Within this demanding operational framework, the Airbus product range delivers an exceptionally compelling portfolio of solutions tailored to the future of the African air transport industry.

# 03

Methodology and  
Data Sources



# Methodology and data sources

---

Consistent with previous editions, this analysis incorporates premium external data: traffic data from Sabre, schedule and capacity data from OAG, and cargo data from Logistics Capital & Strategy, LLC (LogCapStrat).

The study evaluates the 12-month period from October 2024 through September 2025, which constitutes the most recent timeframe for which the combined traffic, schedule, and capacity data were fully available at the time of analysis. Charts depicting full-year 2025 data are based on verified, final figures for the period January through October, and are completed with provisional data for November and December.

This analysis employs the methodology detailed in previous editions of this document, which are available for download on the Airbus in Africa website.

The analysis evaluates O&D traffic flows to, from, and within Sub-Saharan Africa, adopting the United Nations geographic definition of the region (illustrated in the map below).

While this study focuses on traffic dynamics and airline competition, demand analysis represents just one facet of network development. Operational cost structures and projected profitability must be weighed equally.



Additionally, although belly cargo can act as a critical revenue driver—or even a route's financial backbone—detailed cargo assessments are excluded from the unserved city pair analysis in this document.

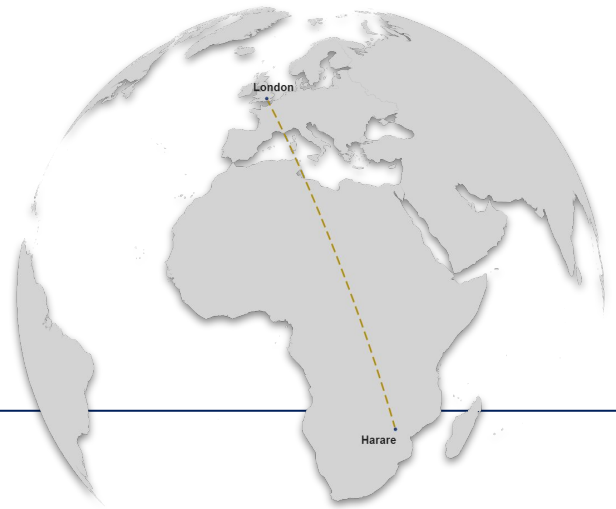
Furthermore, any aircraft type suggestions provided herein are made on a strictly standalone basis. In practice, airlines must integrate route and network planning with broader fleet strategies. Because these decisions are shaped by various constraints, in reality, the aircraft type chosen for a route reflects the best overall fit in a combined network and fleet solution rather than a single-route ideal. Since airline performance is evaluated at the network level, the ultimate objective is to maximise overall network efficiency under existing constraints, making it acceptable in a limited number of cases for an aircraft type to be sub-optimal for one specific route.

Ultimately, comprehensive fleet and network evaluations require customised analyses and are conducted on a continuous, bilateral basis between individual airlines and Airbus.



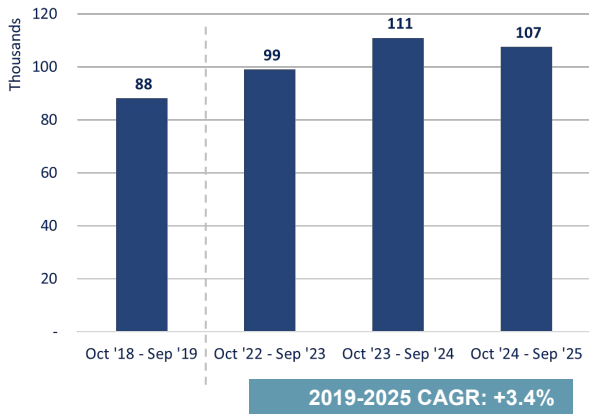
# 04

Unserved city pairs  
to, from and within  
Sub-Saharan Africa

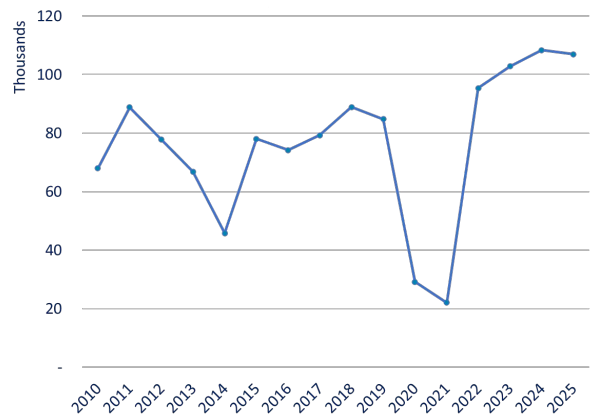


# Harare-London

Non-directional O&D passengers (Rolling 12-Month Basis)

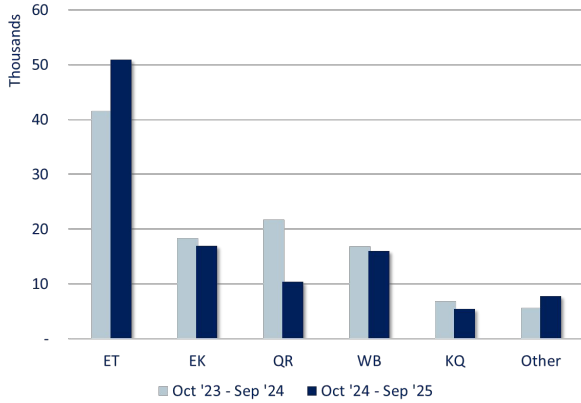


Annual non-directional O&D passengers

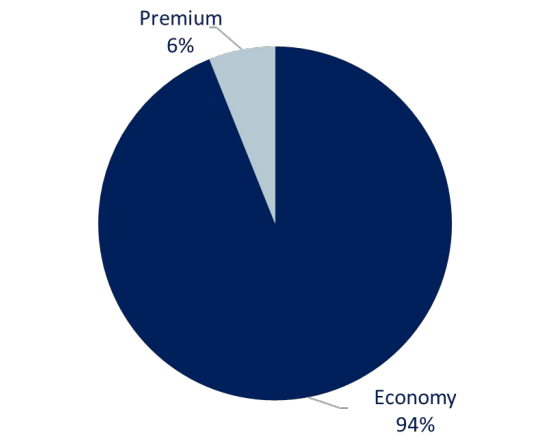


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

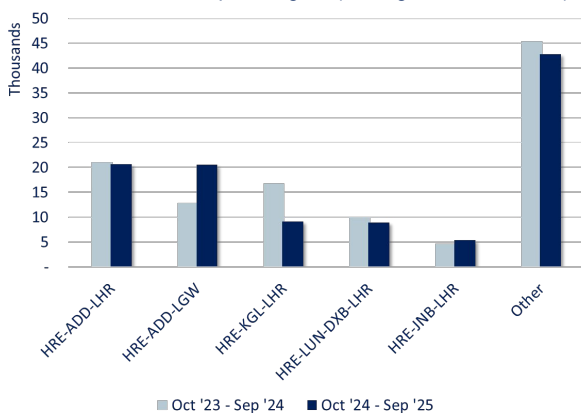


Non-directional O&D passengers (Oct '24 - Sep '25)

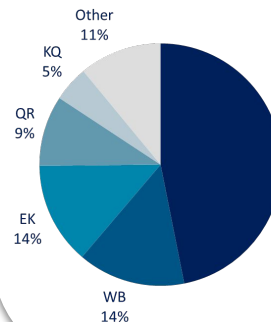


Top Routings with Transit

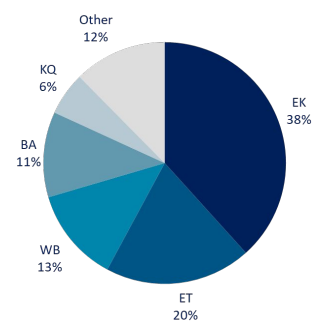
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Harare-London

---

For the third iteration of this unserved routes research, the Harare–London corridor remains the most significant unserved city pair for Sub-Saharan Africa.

Historically, the Harare-London route was a cornerstone of the Zimbabwean air transport industry, formerly served non-stop by British Airways and Air Zimbabwe until 2007 and 2012, respectively. In the first evaluation (2022-2023), the city pair was identified as Africa’s premier unserved route, fueled by a UK-based diaspora of 170,000 Zimbabweans and robust tourism demand for attractions like Victoria Falls. Despite the lack of a non-stop air service, traffic surged to 20% above pre-pandemic levels by 2023, with Emirates and Qatar Airways capturing half the market.

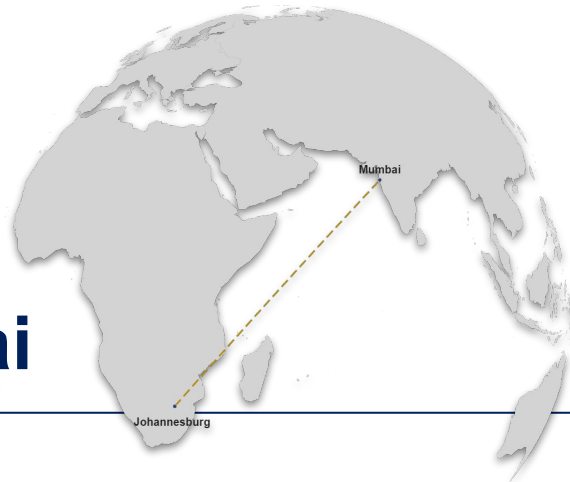
The second study (2023-2024) highlighted a pivotal shift in market dominance following Ethiopian Airlines’ launch of a non-stop flight between Addis Ababa and London Gatwick. By leveraging its Addis Ababa hub, ET successfully captured an important part of the high-volume VFR and leisure segments, overtaking Emirates as the primary carrier for this city pair. This period saw a 12% year-on-year traffic increase and a 5.5% CAGR since 2019.

This year’s analysis confirms that the Harare-London market has entered a phase of maturity. Demand remains present in the market even if total O&D passenger numbers on the city pair have not further increased.

Addis Ababa (ADD) has further solidified its position as the premier transit hub for the Harare-London city pair, fueled by a dramatic 59% year-on-year growth in traffic to and from London Gatwick (LGW) specifically. While London Heathrow (LHR) volumes slightly softened over the last 12 months, the preference for Gatwick among the Zimbabwean diaspora, VFR, and leisure segments has intensified.

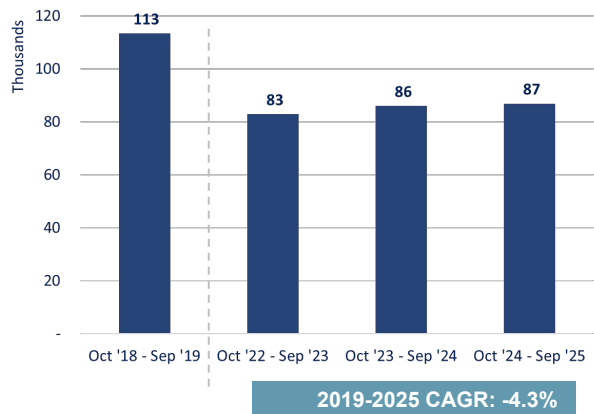
This growth in Gatwick-bound traffic via Ethiopia coincides with a shift in volumes through Kigali, including the traffic served by the partnership between Qatar Airways and RwandAir. This adjustment follows RwandAir’s tactical decision to refine its Harare schedule, which included frequency changes and the introduction of a transit via Lusaka on certain rotations. Simultaneously, the strong market preference for Gatwick on this city pair has further influenced these flows. Together, these developments suggest that even in leisure-heavy segments, travelers are mindful of routing and total travel time when making their choices.

While a non-stop service represents the natural evolution for this route, especially during the periods of peak demand, its long-term viability will depend on achieving and sustaining a consistent frequency. Given the corridor’s price-sensitive nature, the challenge for any operator lies in balancing the right product with a competitive fare structure, especially as strategic airport alignment remains a key driver of market preference. To successfully launch such non-stop flights, a medium-sized widebody aircraft, such as the A330, appears best suited for the task.

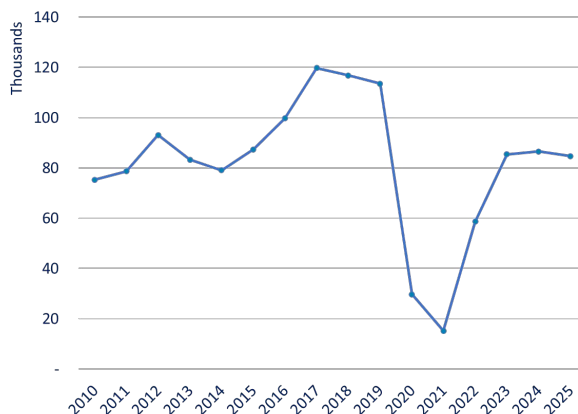


# Johannesburg-Mumbai

Non-directional O&D passengers (Rolling 12-Month Basis)

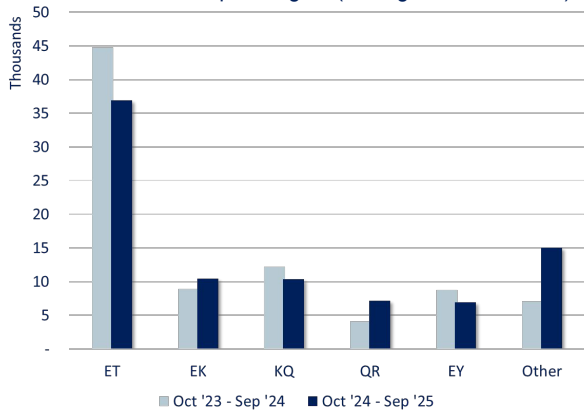


Annual non-directional O&D passengers

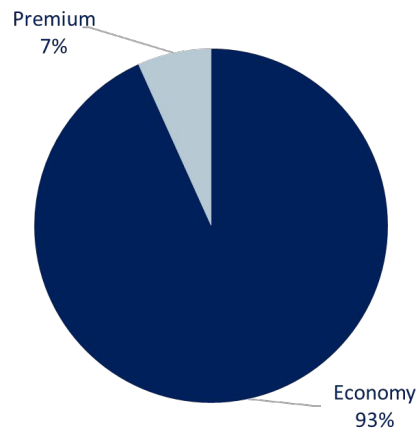


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)



Non-directional O&D passengers (Oct '24 - Sep '25)

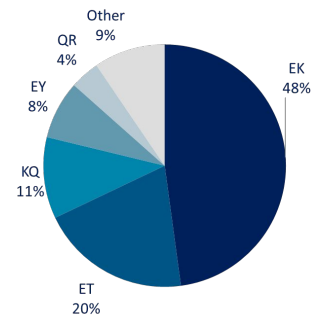
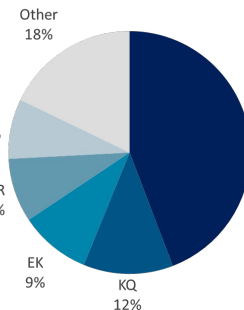
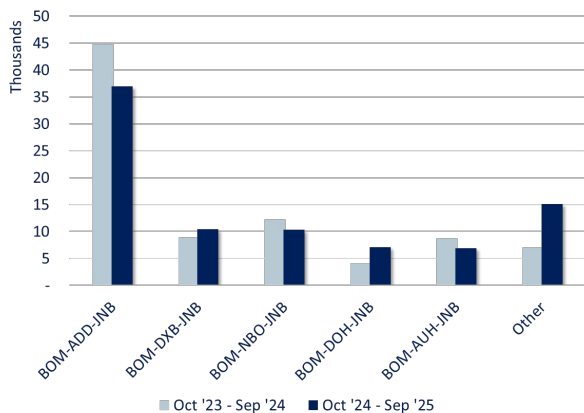


Economy

Premium

Top Routings with Transit

Non-directional O&D passengers (Rolling 12-Month Basis)



# Johannesburg-Mumbai

---

In previous issues of this report, the Johannesburg-Mumbai city pair was identified as the second most important unserved route to mainland Africa. Despite a growth rate of 2.3% between 2015 and 2019, O&D traffic levels were found to have recovered to only 75% of pre-pandemic volumes during the initial study period. Current passengers were observed to travel through hubs such as Addis Ababa, Nairobi, or Doha, with a small but surprising portion even travelling via London, incurring substantial detours. It was highlighted that the route was previously served by South African Airways and Jet Airways, reaching a peak of 11 weekly flights in 2010 before the service was discontinued.

Specific operational challenges were highlighted for the journey from Johannesburg to Mumbai, particularly the "hot and high" takeoff conditions that are frequently encountered at Johannesburg airport. This factor, alongside the 7,000 km distance, were found to require the use of efficient widebody aircraft. It was suggested that the viability of the route should be considered by operators on both sides of the connection, such as South African Airways or major Indian carriers like Air India and IndiGo. Additionally, the increasing influence of the BRICS alliance was cited as a key driver for future traffic growth between these nations.

In the subsequent evaluation period, detailed in Volume II of this report, it was recorded that a year-on-year growth of 4% was achieved between 2023 and 2024, although total passenger numbers remained below pre-pandemic highs. Long-term prospects were considered to be bolstered by the projected expansion of the Indian middle class and the introduction of the Trusted Tour Operator Scheme, which simplified visa requirements for Indian nationals traveling to South Africa. Furthermore, the expansion of the BRICS group of countries to include new member states was seen as a catalyst for establishing new direct air links and trade corridors. It was concluded that the launch of a non-stop service remains a strategic opportunity that is being closely monitored by operators to potentially restore or exceed historical traffic volumes.

In this year's evaluation, it was observed that O&D traffic on the Johannesburg–Mumbai city pair is more or less stagnating, with only minor recorded shifts in traffic flows. A notable development was identified involving Air Tanzania (TC), which successfully established a new traffic flow despite its smaller scale compared to leading carriers on the city pair. Having already established flights between Mumbai and Dar Es Salaam (DAR)—at times utilising the A220-300—the airline resumed its Johannesburg–Dar Es Salaam service in November 2024. With this latter sector also primarily operated by the A220-300, a new strategic connection from Johannesburg to Mumbai via the Dar es Salaam hub became available. Remarkably, during the evaluation period from October 2024 to September 2025, Air Tanzania was found to have captured 7% of the total O&D traffic on the city pair.

# Johannesburg-Mumbai

---

The air travel market between Johannesburg and Mumbai currently revolves around a complex balance between low immediate yields and substantial latent future demand. As mentioned above, traffic between these two cities is currently heavily fragmented across indirect routes. This reliance on detours and layovers effectively commoditises the route. Without non-stop options, passengers naturally prioritise price, creating a highly competitive, lower-yield market. However, this model overlooks a small but likely resilient premium segment of time-sensitive travellers whose needs are poorly met by existing options, anchoring a strong case for a direct, non-stop service that eliminates these significant geographic detours.

Looking to the future, deepening economic and political cooperation within the BRICS framework is expected to act as a catalyst for high-value corporate and governmental travel. When combined with India's rapidly expanding middle class and its increasingly affluent, highly educated global diaspora, there is at least some evidence of a latent demand that indirect offerings may fail to capture. By eliminating time-consuming detours and transits, a non-stop flight would not only capture existing premium traffic but also stimulate a new segment of travellers willing to pay a premium for efficiency. This shift has the potential to transform the route from a low-yield transit corridor into a highly strategic non-stop link.

To ensure the commercial success of such an operation, and to meet the expectations of these time-sensitive travellers, airlines must offer a reliable frequency. Given that initial demand may be modest, a viable way forward lies in operating smaller-capacity, long-range aircraft. The Airbus A321XLR, customised with a cabin layout tailored to this specific traffic profile, presents a compelling solution by combining long-range capabilities and advanced cabin comfort with single-aisle operating costs. Nonetheless, the challenging take-off conditions at Johannesburg on the eastbound leg to Mumbai pose a technical hurdle, meaning airlines and airports must look toward creative routing solutions.

One innovative approach involves leveraging the large population of Indian descent living in Durban and its surrounding region. A triangle routing connecting Mumbai and Johannesburg with a highly efficient transit stop in Durban could prove exceptionally advantageous. Since taking off from Durban is less challenging, a customised BOM-JNB-DUR-BOM routing becomes an interesting case to evaluate. Triangle flights are already extensively used in airline operations to, from, and within Sub-Saharan Africa today, so this solution would not be a standalone case.

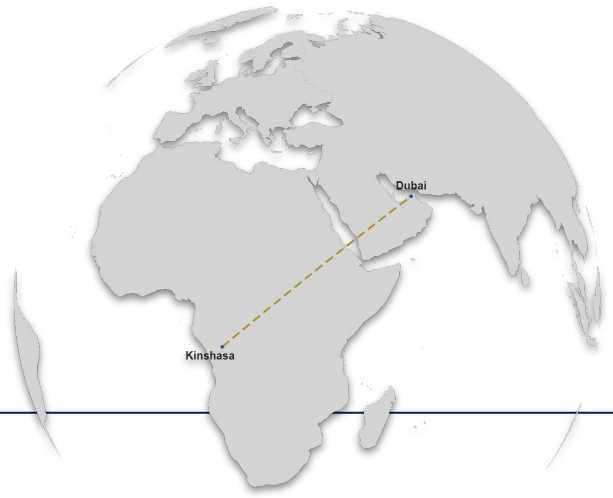
## Johannesburg-Mumbai

---

Moreover, by adopting this model, carriers could equally improve the service offering to (premium) traffic originating or ending in Durban. Whatever origin travellers have on this triangle routing, total travel times could be significantly shorter than current hub alternatives.

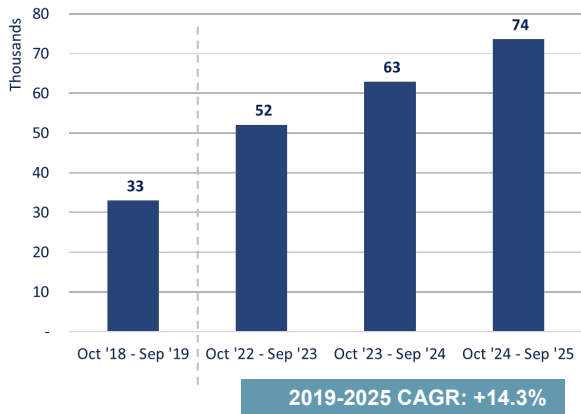
Alternatively, network planners could explore stopovers in Madagascar or the Seychelles, possibly even utilising fifth-freedom traffic rights to bolster the route's economic viability.

Ultimately, innovative solutions like these can unlock the true potential of the Johannesburg-Mumbai corridor. It demonstrates that airline and airport network planners must stay on top of continuously evolving aircraft capabilities and make their detailed, customised evaluations of all possible solutions.

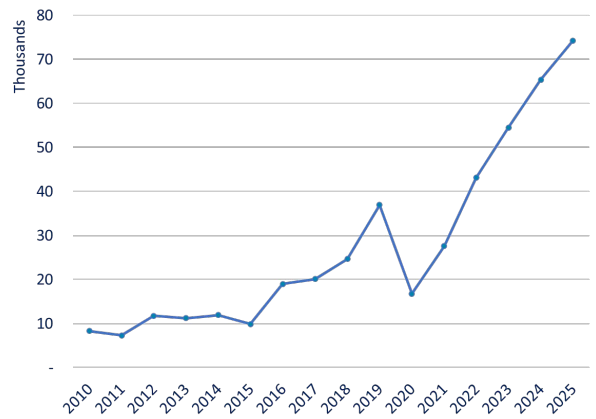


# Kinshasa-Dubai

Non-directional O&D passengers (Rolling 12-Month Basis)

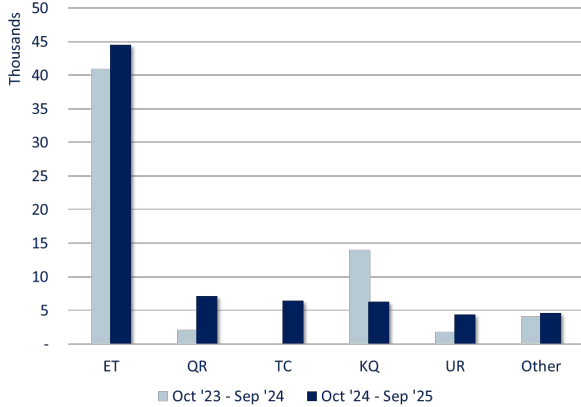


Annual non-directional O&D passengers

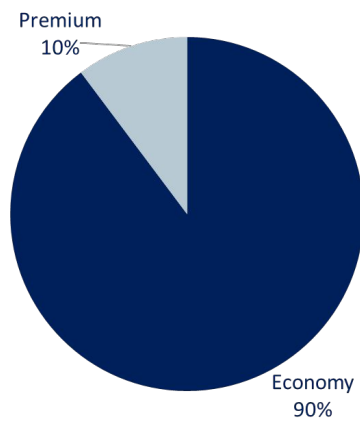


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

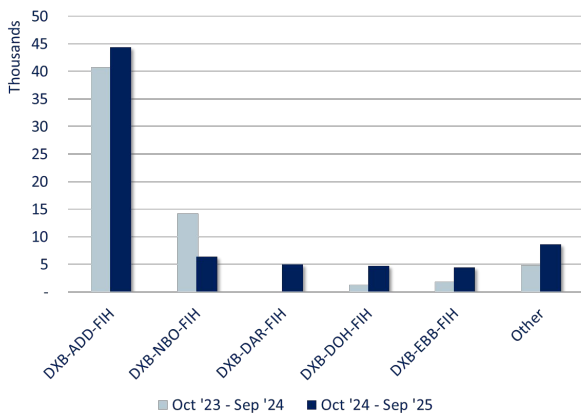


Non-directional O&D passengers (Oct '24 - Sep '25)

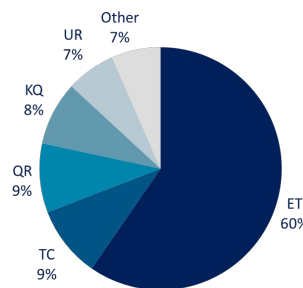


Top Routings with Transit

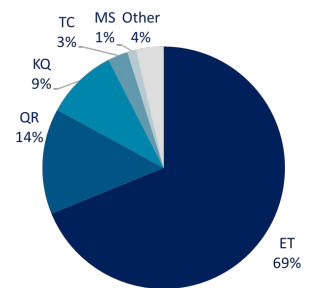
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Kinshasa-Dubai

---

The Kinshasa-Dubai city pair entered Sub-Saharan Africa's top 10 unserved city pairs in 2024, when it was first covered in Volume II of this report.

Research compiled for the 2023–2024 period noted that the Kinshasa–Dubai route has historically lacked non-stop service. flydubai briefly operated flights between April 2018 and February 2019, but these were routed via Entebbe as tag-end segments to the Dubai–Entebbe service. This setup required double crews and overnight stays in Entebbe, introducing operational complexities and extra costs that rendered the operation less rewarding. Furthermore, flydubai lacked 5th freedom traffic rights to transport passengers between Entebbe and Kinshasa. Broadly speaking, regular connectivity between Central Africa and the Middle East has been nearly non-existent since the middle of the previous decade, with a twice-weekly widebody service connecting Kinshasa to Doha—launched by Qatar Airways in June 2024—standing as the sole non-stop operation between the two regions.

Despite this limited direct access, a significant number of passengers travel between the Middle East and Central Africa, with the majority routing through hubs in Addis Ababa, Kigali, or Nairobi, and recently also via Dar es Salaam. Kinshasa–Dubai O&D traffic has grown impressively in recent years, averaging +14.3% annually since 2019 despite the pandemic, and surpassing 100 passengers per day each way on average. Consequently, a non-stop service holds substantial market potential. It is anticipated that a substantial share of current connecting traffic could be captured and new demand stimulated by a non-stop service, while additional connecting traffic from across Central Africa could also be drawn if a consistent feed to and from Kinshasa is secured. Despite considerable demand volatility throughout the year, the city pair's relatively strong share of premium traffic within an African context reinforces the commercial interest in evaluating a non-stop air service.

Due to the absence of a non-stop flight, traffic flows on this city pair remain highly dynamic. This was demonstrated in the latest evaluation period by Air Tanzania's launch of a regular non-stop service between Dar es Salaam and Kinshasa. By already operating flights from Dar es Salaam to Dubai, the airline now provides connectivity between Kinshasa and Dubai. Product consistency on the itinerary is ensured by mainly deploying Airbus A220s on both sectors. Air Tanzania captured a remarkable 9% of Kinshasa–Dubai O&D traffic during this latest period, despite other carriers' dominance on the city pair and despite the routing via Dar es Salaam not being the shortest option available.

From an operational standpoint and based on evaluation rules detailed above, the route could be effectively served by a widebody aircraft such as the Airbus A350-900, potentially operated

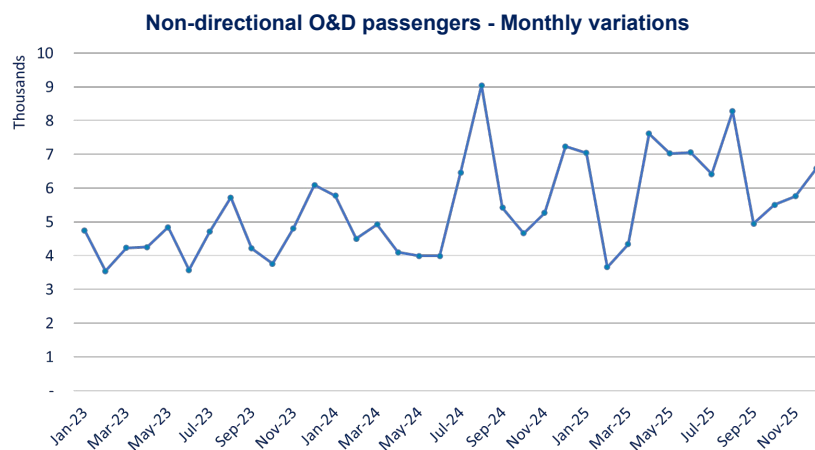
# Kinshasa-Dubai

by a major carrier like Emirates, through which significant cargo revenue could also be generated.

According to IATA's February 2026 global cargo market report, African airlines are leading the entire world in air freight growth, posting a 21% year-over-year increase in cargo-tonne kilometers. This is attributed to a significant growth in the Africa–Middle East and Africa–Asia trade corridors, where Dubai serves as the primary redistribution engine for electronics, pharmaceuticals, and manufacturing inputs bound for cities like Kinshasa.

This message is reinforced by Etihad's recent announcement of its new route between Abu Dhabi and Kinshasa. Antonoaldo Neves, Chief Executive Officer of Etihad Airways, stated: *"Demand for air connectivity across key African markets is outpacing existing supply, particularly in cargo and trade-linked sectors. This expansion is a direct response to that structural opportunity."* Further in the media release we read: Freight capacity will play a critical role, with Etihad Cargo offering belly-hold capacity across the new service, with dedicated freight products tailored to the specific export and import profiles.

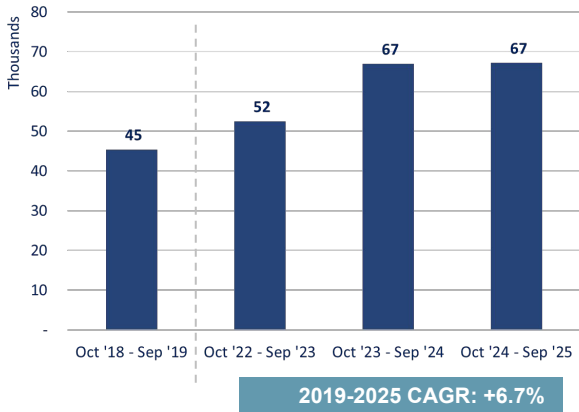
Alternatively, the Airbus A321XLR presents a compelling single-aisle option, providing the necessary range and allowing for a rapid build-up of flight frequencies without introducing vast capacity. Premium traffic, which averages around 10% of the total O&D traffic on the city pair, is typically attracted by high-frequency operations, thereby enhancing the route's lucrativeness and significantly improving Central Africa's accessibility. To address the route's inherent demand volatility, as illustrated in the graph below, an alternating operation utilising aircraft types such as the A321XLR, A330neo, or A350 could be worth evaluating. This setup effectively captures varying levels of passenger demand while still enabling cargo operations with the widebody aircraft, achieving full operational flexibility by using Airbus' mixed and single fleet flying capabilities.



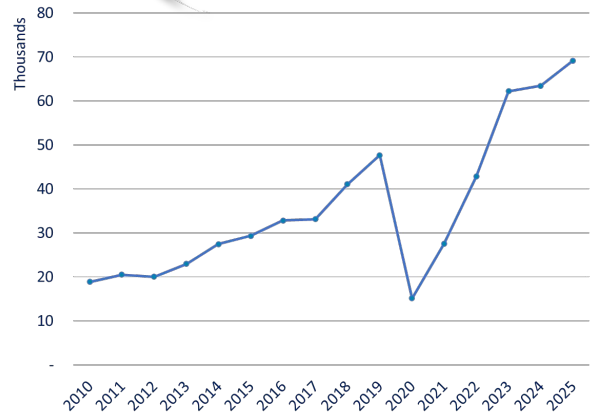
# Lagos-Toronto



Non-directional O&D passengers (Rolling 12-Month Basis)

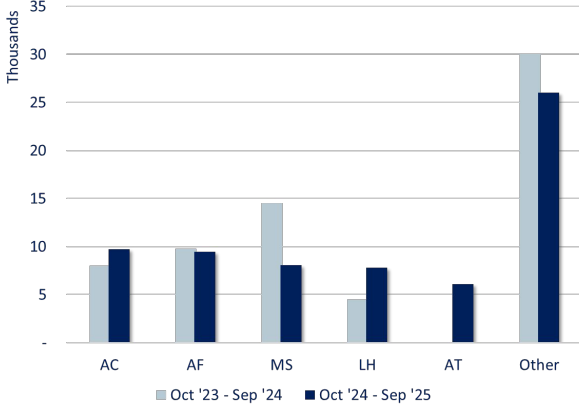


Annual non-directional O&D passengers

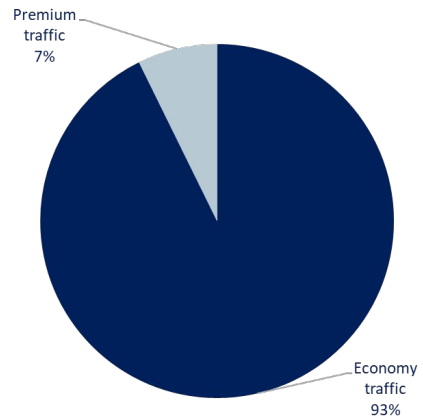


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

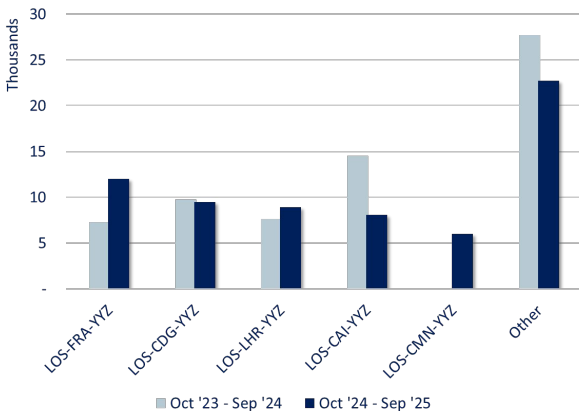


Non-directional O&D passengers (Oct '24 - Sep '25)

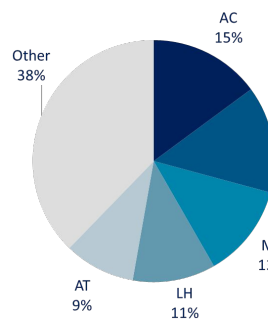


Top Routings with Transit

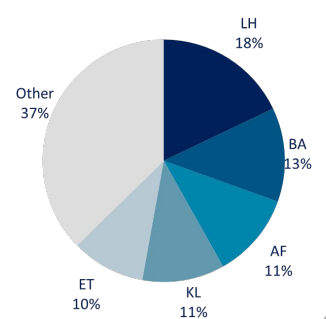
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Lagos-Toronto

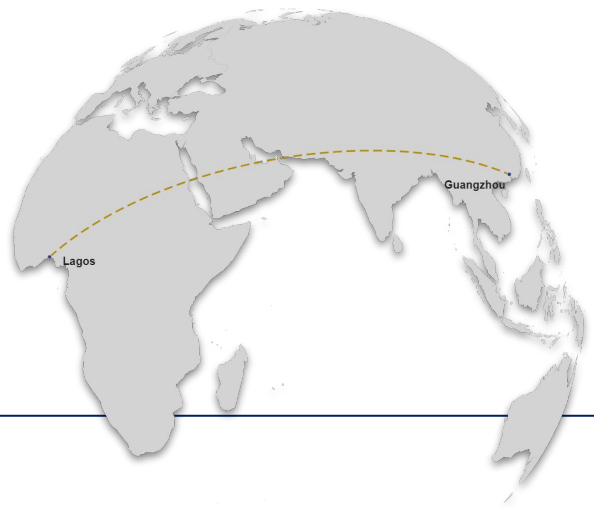
---

Historically, no regularly scheduled non-stop flights have operated between Lagos and Toronto, contrasting sharply with the high and steadily growing O&D traffic between the two cities. This upward trajectory has been continuously present since 2010, experiencing a temporary disruption only during the pandemic. Since the pandemic, traffic has robustly recovered and expanded significantly beyond pre-pandemic levels. A primary driver of this growth is the substantial Nigerian diaspora living in the Toronto region, coupled with Canada's ongoing popularity as an important destination for young Nigerian students.

In the absence of non-stop flights, passengers have traditionally made extensive detours through hubs like Cairo, Frankfurt, Paris and London. A portion of travelers also journeys with Ethiopian Airlines via Addis Ababa, a routing that introduces a significant geographic detour alongside a mandatory technical stop in either Dublin or Rome on the northbound leg from Addis Ababa to Toronto. In previous issues of this report, the market was commented to also feature a distinct traffic asymmetry, characterised by notably higher passenger volumes traveling from Lagos to Toronto than the reverse. This directional imbalance intensified post-pandemic, driven largely by the volume of young Nigerians moving to Canada for their academic studies.

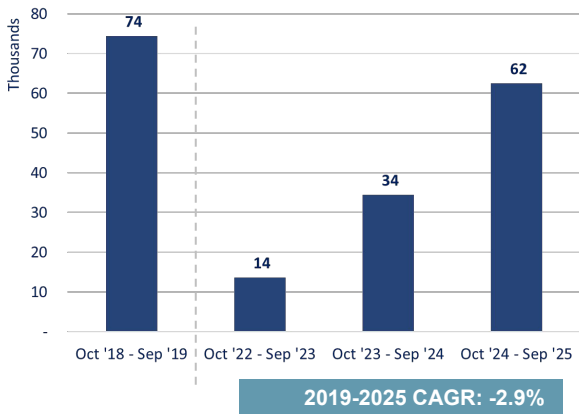
While passengers have consistently demonstrated a willingness to endure these major detours—historically cementing Egyptair's strong position on the route via Cairo—market dynamics shifted during the 12-month period from October 2024 to September 2025. During this window, Egyptair lost market share on the city pair despite maintaining its flight frequencies and overall seat capacity. This shift occurred because Royal Air Maroc introduced new operations between Casablanca and Toronto in late 2024, successfully capturing traffic by offering a shorter transit trajectory. In contrast, Lufthansa successfully increased its volume of O&D passengers via Frankfurt without significantly altering its capacity or flight frequencies. This development is highly attributable to its Star Alliance membership and the strategic trans-Atlantic cooperation between Air Canada and Lufthansa. Ultimately, the relatively balanced market share among the top five carriers, alongside the volume carried by the remaining “other” airlines, demonstrates that healthy competition exists, dictated primarily by fares and operational readiness.

A noteworthy change occurred in March 2025, when the federal governments of Nigeria and Canada formally signed an updated Bilateral Air Services Agreement (BASA). This agreement removed hurdles required to establish direct flights, explicitly opening up access to non-stop flights and code-sharing frameworks. While this allows a Canadian or Nigerian operator to technically launch the route, current OAG schedule data does not yet reflect any such upcoming operations. If a non-stop service is introduced, it will likely mirror Delta's operational model on the Lagos–New York route by launching seasonal, temporary flights to capture peak demand around the end of the year. For this specific market, deploying an Airbus A330—similar to Delta's New York strategy—would serve as the ideal aircraft match.

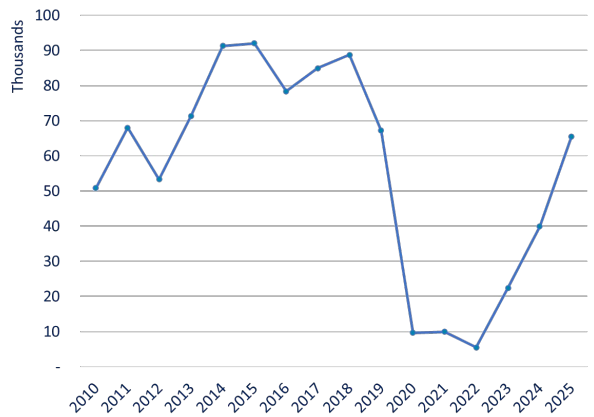


# Lagos-Guangzhou

Non-directional O&D passengers (Rolling 12-Month Basis)

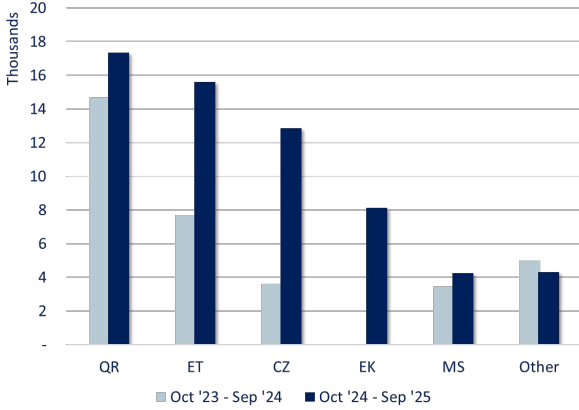


Annual non-directional O&D passengers

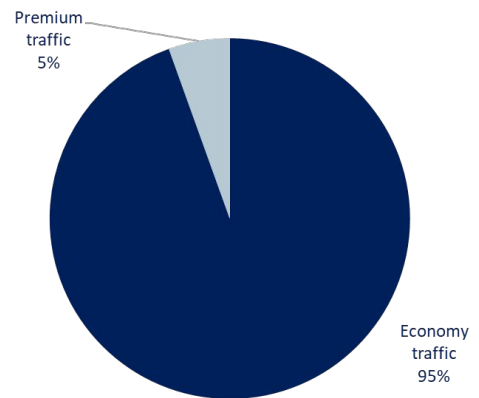


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

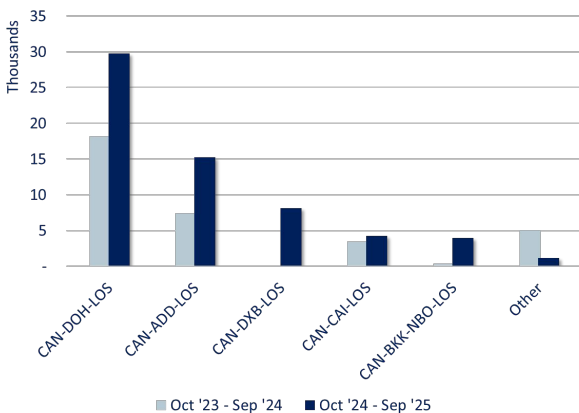


Non-directional O&D passengers (Oct '24 - Sep '25)

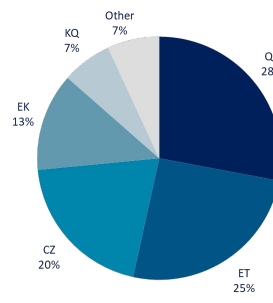


Top Routings with Transit

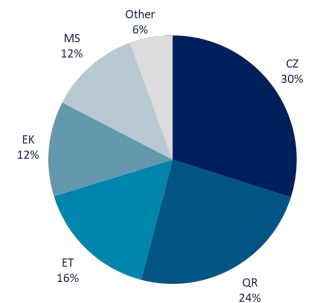
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Lagos-Guangzhou

---

Lagos-Guangzhou has joined this year's top 10 list of unserved city pairs to and from Sub-Saharan Africa. This entry is not driven by major structural shifts; in fact, pre-pandemic traffic levels on this city pair were significantly higher. Instead, the inclusion reflects a steady post-pandemic recovery. The traffic volume recorded in the evaluated period from October 2024 to September 2025 has rebounded sufficiently to secure its place in the top 10.

Historical OAG data available during the compilation of this report confirms that no non-stop flights have ever operated between Lagos and Guangzhou, and none are scheduled for the immediate future—at least through the end of November 2026.

The flow of O&D traffic between Guangzhou and Lagos heavily favors routing through Doha, a dynamic shaped by both geography and alliance networks. Doha sits almost directly on the great circle route between Guangzhou and Lagos, creating virtually no detour. Furthermore, Qatar Airways and China Southern Airlines share a strategic partnership established in April 2024. Under this agreement, Qatar Airways places its QR code on China Southern-operated flights between Guangzhou (China Southern's primary mega-hub) and Doha. In turn, China Southern places its CZ code on some specific Qatar Airways flights operating beyond Doha into Africa and other regions.

While traffic flows on the Lagos - Guangzhou city pair continue their recovery toward pre-COVID levels, connecting passengers are distributed across several major hubs. The market is characterised by particularly high levels of economy traffic, with flow patterns showing distinct regional preferences: when traveling via the Middle East, traffic heavily funnels through Doha and Dubai. When transiting in Africa, both Addis Ababa and Cairo are the most preferred transit airports. A notable secondary routing featuring a transit within Africa is operated by Kenya Airways. The airline connects Guangzhou with Lagos through a flight service that introduces a stopover in Bangkok and Nairobi. Although this double-transit journey is inherently less attractive given the volume of more efficient, single-hub connections in the market, Kenya Airways still manages to capture a slice of the traffic. This demand, however, is almost exclusively limited to price-sensitive economy passengers prioritising budget over travel time.

Despite a longer travel time via Cairo, Egyptair attracts substantial traffic—particularly traders—by offering generous baggage allowances. Industry sources indicate Egyptair is highly permissive with irregular baggage and routinely runs excess-baggage promotions.

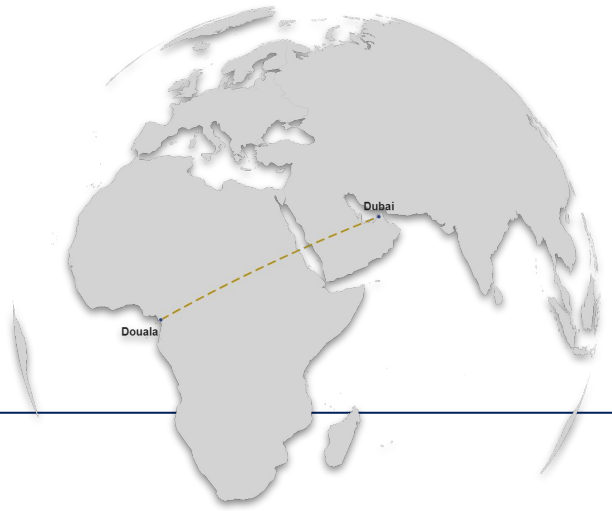
A key dynamic in this market—and a major factor in the strong position of the Qatar Airways/China Southern partnership—stemmed from Emirates' temporary service suspension to Lagos. OAG data shows Emirates did not operate the Dubai-Lagos route from November 2022 to October 2024.

# Lagos-Guangzhou

---

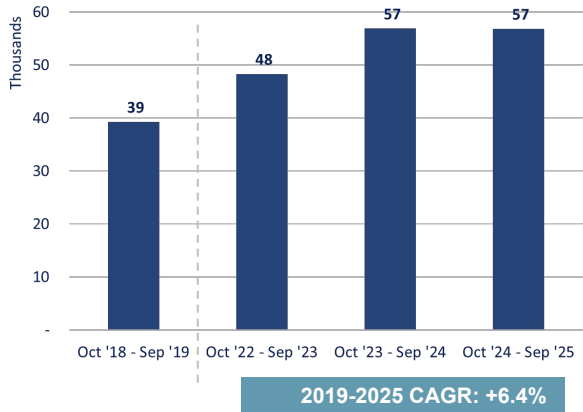
While this temporary exit left Qatar Airways and China Southern with clear skies to capture traffic and mature their operations, Emirates has staged a rapid return during the studied period.

Launching a direct, non-stop flight on this route faces a steep uphill battle given China Southern's dominance in Guangzhou, their well-established cooperation with Qatar Airways, and Emirates' aggressive capacity re-entry via its Dubai hub. Despite these competitive headwinds, top-level performance assessments (using the same methodology as in previous report editions) indicate that the city pair is operationally viable for non-stop service. Suitable aircraft types include the Airbus A330-200/-800 or the A350-900/-1000. Given the predominantly price-sensitive, trader-heavy profile of the market, a high-density cabin layout would be the most economically viable configuration.

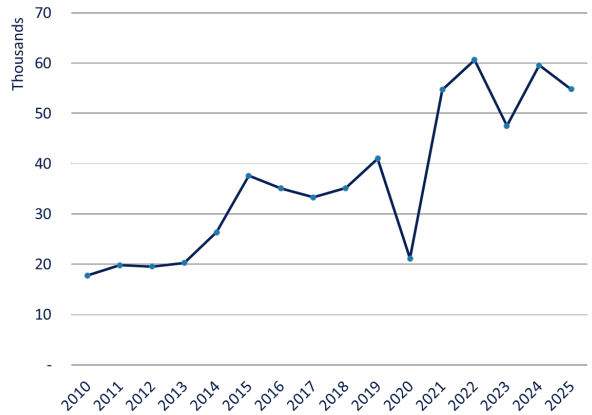


# Douala-Dubai

Non-directional O&D passengers (Rolling 12-Month Basis)

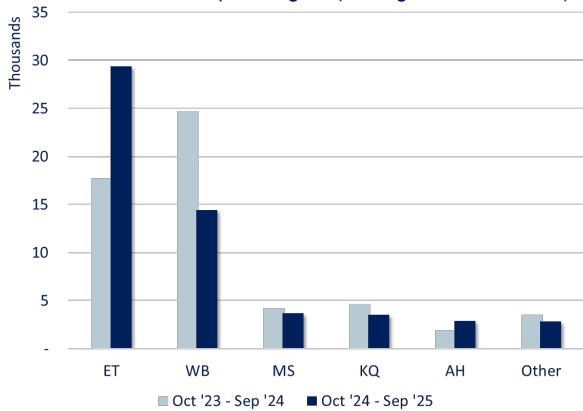


Annual non-directional O&D passengers

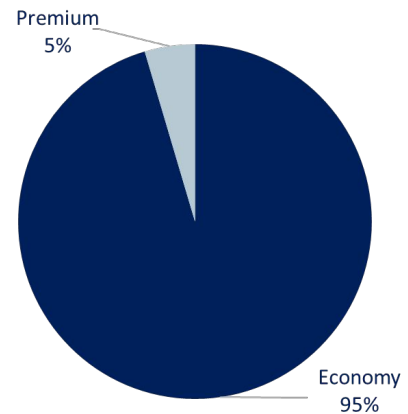


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

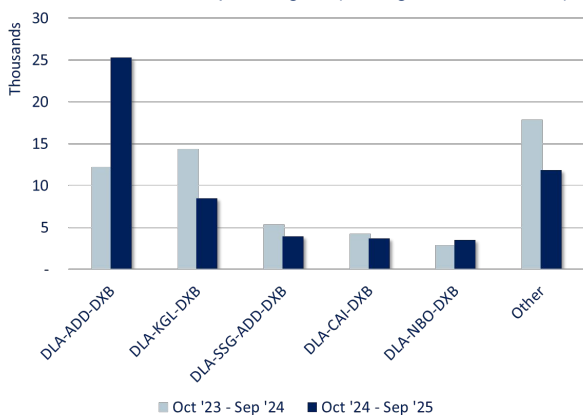


Non-directional O&D passengers (Oct '24 - Sep '25)

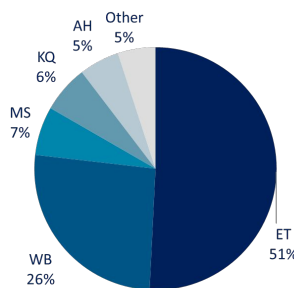


Top Routings with Transit

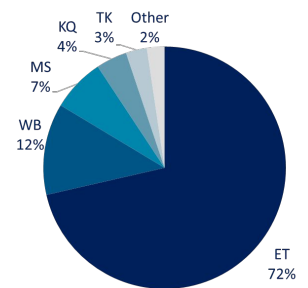
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Douala-Dubai

---

During the evaluation period from October 2023 to September 2024, the Douala–Dubai city pair entered the top 10 unserved air routes to and from Sub-Saharan Africa. Historical OAG schedule data dating back to 2005 reveals that a non-stop service was previously operated on this route by Cameroon Airlines, which utilised a Boeing 757-200 aircraft to provide an average of two directional flights per week until September 2008. Despite this prolonged absence of direct connectivity, origin and destination traffic has largely surpassed pre-pandemic levels, bolstered by an 18 per cent year-on-year growth rate recorded between 2023 and 2024. In contrast to the Kinshasa–Dubai route—where traffic was dominated by Ethiopian Airlines via its Addis Ababa hub—Douala–Dubai passengers were predominantly routed through Kigali by RwandAir, whilst Egyptair and Royal Air Maroc served as the third and fifth largest operators via Cairo and Casablanca respectively, despite both routings representing considerable geographical detours.

The passenger profile for the Douala–Dubai route was heavily skewed towards economy travel, with premium traffic accounting for a mere 4 percent of the total—the lowest proportion observed among all top-tier unserved Sub-Saharan African routes, and notably less balanced than the Kinshasa–Dubai market. Nevertheless, this lower passenger yield was expected to be offset by a robust and rapidly expanding trade relationship between Cameroon and the United Arab Emirates. This commercial momentum has the outlook to become a major driver for air cargo demand, underpinned by Douala's pivotal role as a port and economic centre, as well as the starting point of the vital Douala–N'Djamena economic corridor. To support this growing regional connectivity and strengthen Cameroon's position as a Central African transport hub, major rehabilitation works were reported to be underway at Douala International Airport.

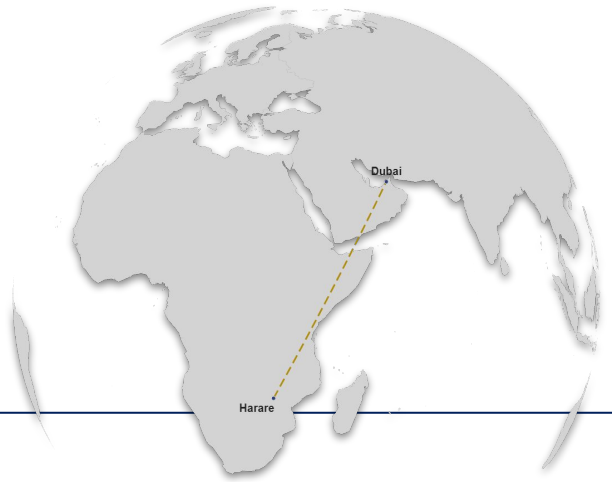
In contrast to these historical patterns, the latest evaluation of this city pair presents a completely different picture. While traffic flows on the Douala–Dubai city pair were previously routed primarily through Kigali by RwandAir, the current assessment shows that Ethiopian Airlines has aggressively captured a major share of this traffic at RwandAir's expense. Douala has become a challenging destination for RwandAir to serve due to the conflictual situation with the DRC. The DRC officially closed its entire airspace to all Rwandan-registered and Rwandan-based aircraft on 11 February 2025, falling midway through the evaluation period covered in this report. Consequently, although RwandAir still serves Douala, the travel time required to route around the DRC has become quite long, a development that is estimated to be directly linked to the impact on passengers carried by RwandAir on the Douala–Dubai city pair. Meanwhile, Ethiopian Airlines significantly increased its number of flights and total capacity in the market on the Douala–Addis Ababa sector, further improving connections to flights from Addis Ababa to Dubai through its primary hub.

## Douala-Dubai

---

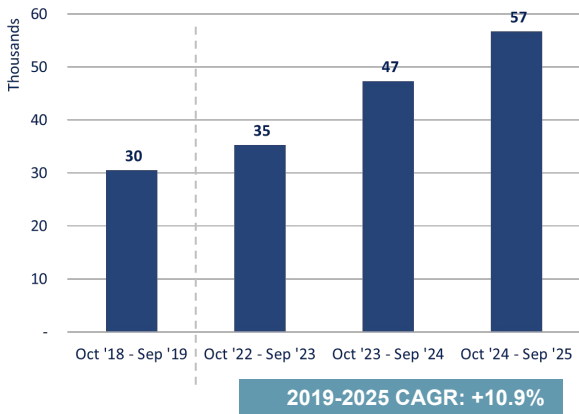
Just as with the Kinshasa–Dubai route, air cargo can play a significant role in evaluating the Douala–Dubai city pair. Here too, Dubai acts as an important global transit hub where consumer goods such as electronics, smartphones, and textiles originating in China and India are transferred into air freight bound for Central Africa. As an economic capital and gateway for Cameroon and several landlocked neighbours, like the Central African Republic, Douala can play a central role to handle these high-value consumer goods.

Based on the established methodology and performance assessments already applied in previous reports, it was determined that a non-stop passenger service could be sustainably maintained on this city pair. Specifically, operating more than three directional flights per week was deemed feasible utilising Airbus A330-200, A330-300, or A330neo variants. Such operations were projected not only to accommodate passenger demand but also to stimulate and develop lucrative air cargo revenues, thereby effectively bolstering the business case and compensating for the lower passenger yield profile.

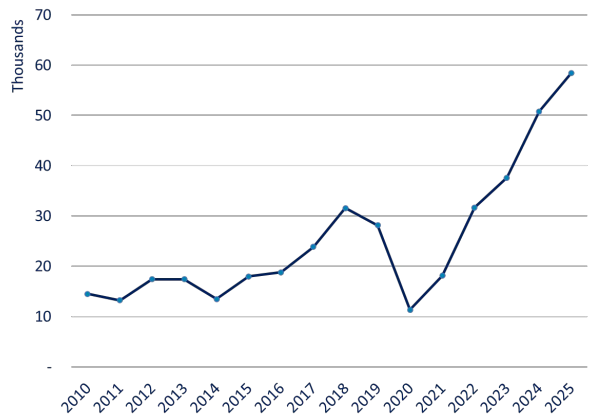


# Harare-Dubai

Non-directional O&D passengers (Rolling 12-Month Basis)

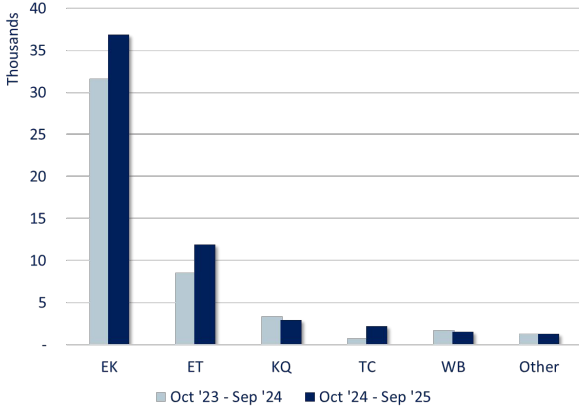


Annual non-directional O&D passengers

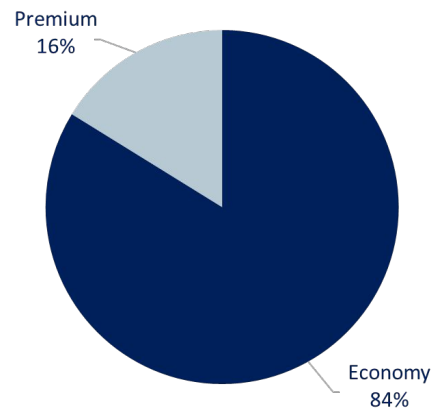


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

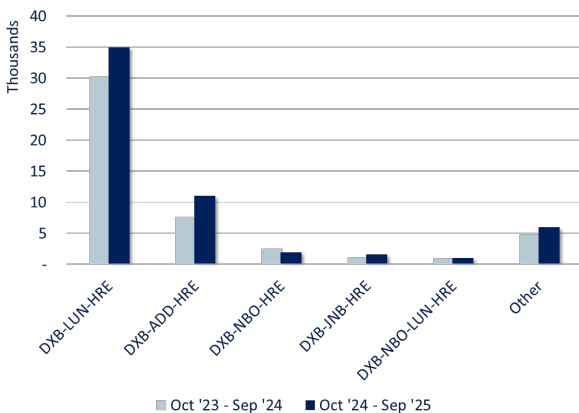


Non-directional O&D passengers (Oct '24 - Sep '25)

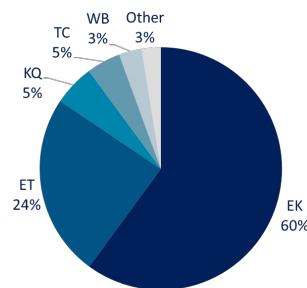


Top Routings with Transit

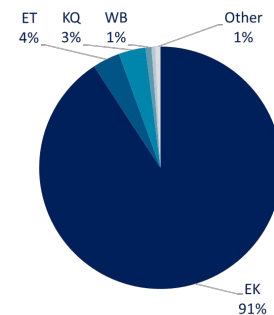
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Harare-Dubai

---

The Harare–Dubai corridor is an unserved city pair that newly enters the top 10 of unserved markets to or from Sub-Saharan Africa this year. Traffic on this city pair has demonstrated an impressive performance, growing at an average rate of approximately 11 per cent per annum since 2019 despite the disruptions caused by the pandemic. Furthermore, a remarkable year-on-year growth of 34 per cent has been recorded between the current evaluation period and the corresponding previous period. The volume total of roughly 57,000 non-directional O&D passengers recorded for the evaluation-period translates into an average of about 80 passengers travelling each way every day, or approximately 550 passengers each way per week, all occurring in the complete absence of a direct, non-stop flight.

Emirates stands out as the clearly dominant player in this market, dispatching a 777-300ER from Dubai to Harare every day via an intermediate stop in Lusaka. The carrier originally initiated operations on this routing in February 2012, effectively ending a period without direct service to Dubai that began when Air Zimbabwe halted its 767 operations on the city pair in July 2009. Over the years, Emirates initially deployed the Airbus A330-200, followed later by the Airbus A340-300, before permanently dispatching the 777-300ER since February 2016. This daily service has remained consistent, with the only notable exception occurring during the pandemic. Emirates is able to undertake these flights to Harare via Lusaka because it holds 5th freedom traffic rights between Lusaka and Harare, rendering the Harare leg a tag-end flight to its non-stop Dubai–Lusaka service. The volume of passengers carried on this specific Lusaka–Harare sector is non-negligible, averaging around 1,000 passengers each way every month during the evaluated period, which establishes Emirates as the most important carrier on the Lusaka–Harare city pair by total passenger volume.

An analysis of the traffic composition reveals that the share of premium traffic on the Harare–Dubai route stands at a remarkably high 16 per cent, which sits significantly above the 6 per cent average typical for the Sub-Saharan region. Given this lucrative passenger profile, the ongoing lack of a non-stop flight between Dubai and Harare is particularly striking.

Even with Emirates maintaining its dominant market position, Ethiopian Airlines has also been successfully increasing its traffic on the city pair by connecting passengers between Harare and Dubai via its primary hub in Addis Ababa. During the evaluation period, Ethiopian Airlines captured 24 percent of all economy passengers; however, it secured a mere 4 percent of the premium traffic. This clear disparity indicates that premium travellers strongly prefer flying with Emirates. This dynamic is especially interesting when paired with Sabre point-of-sale data, which shows that about 50 per cent of all tickets and up to 60 per cent of all premium tickets on the city pair are purchased directly within Zimbabwe.

# Harare-Dubai

---

Significant changes may be on the horizon for this market, driven by two immediate developments.

Firstly, Etihad Airways announced in April 2026 that it will begin serving Harare from Abu Dhabi, a move that will further reinforce connectivity between the United Arab Emirates and Zimbabwe while introducing a non-stop flight option between Harare and the UAE.

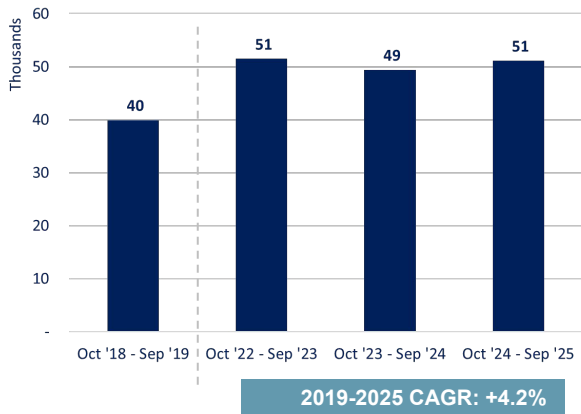
Secondly, Emirates is currently taking delivery of its new Airbus A350-900 fleet. With a customised cabin configuration featuring 312 seats—comprising 32 in business, 21 in premium economy, and 259 in economy—this aircraft offers a lower capacity than the 360-seat average deployed on the route today. Although such a modification is not on the radar today, an out-of-the-box approach could leverage the introduction of this highly efficient aircraft type to provide Emirates with the operational flexibility to split its schedule. This would allow the airline to offer a non-stop Dubai–Harare flight a few times a week while still maintaining its tagged service via Lusaka. Implementing this non-stop service would make distinct commercial sense during the short but intense period of peak demand that recurs in the Harare–Dubai corridor every year between December and January.

As new aircraft types and airline entrants could disrupt the current dynamics on the city pair, the Harare–Dubai route remains a key market to monitor for future non-stop developments.

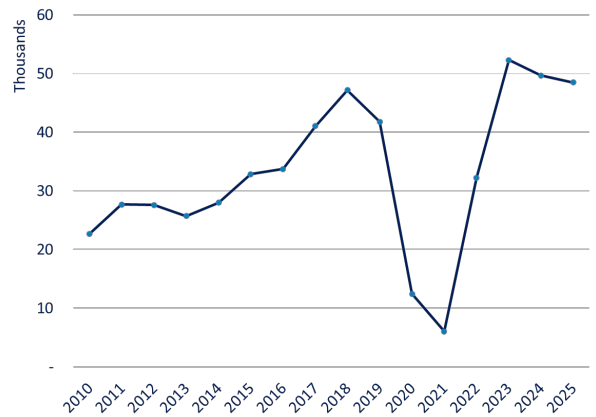


# Cape Town-Brussels

Non-directional O&D passengers (Rolling 12-Month Basis)

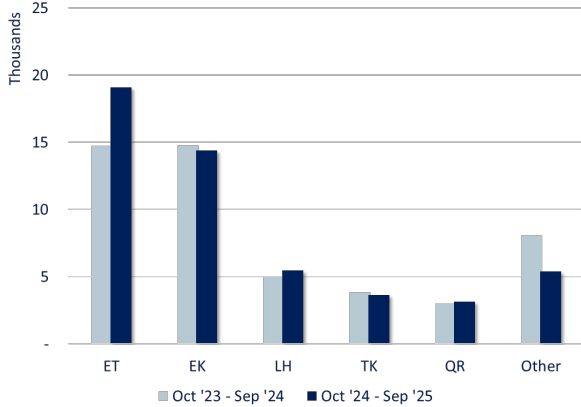


Annual non-directional O&D passengers

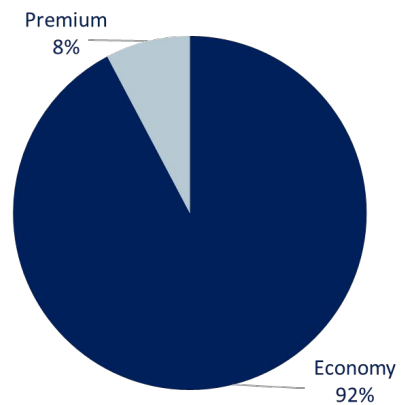


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

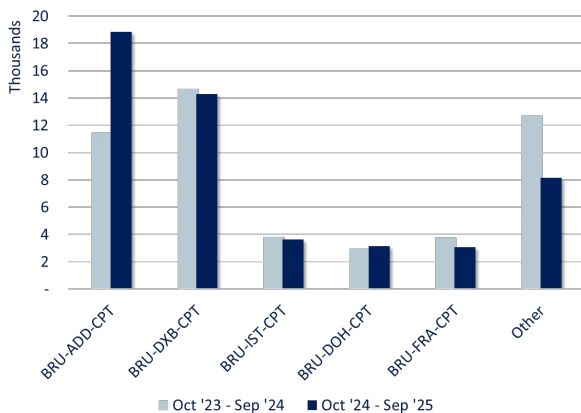


Non-directional O&D passengers (Oct '24 - Sep '25)

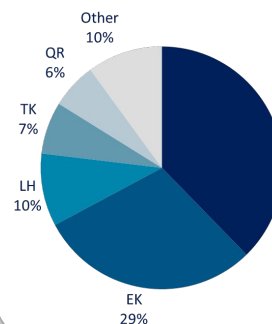


Top Routings with Transit

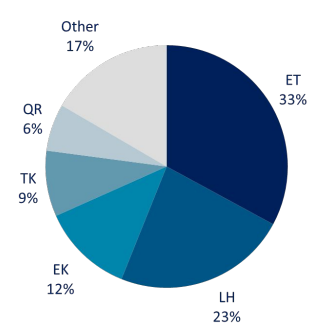
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



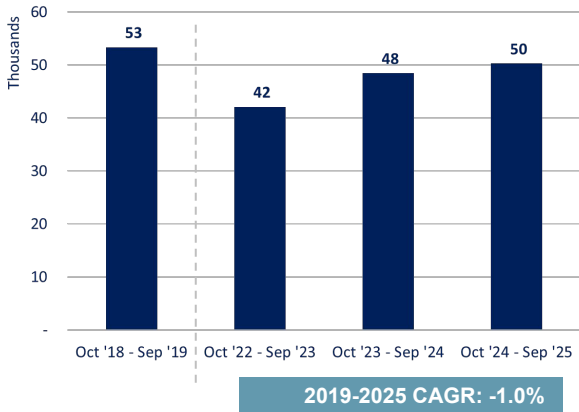
Premium



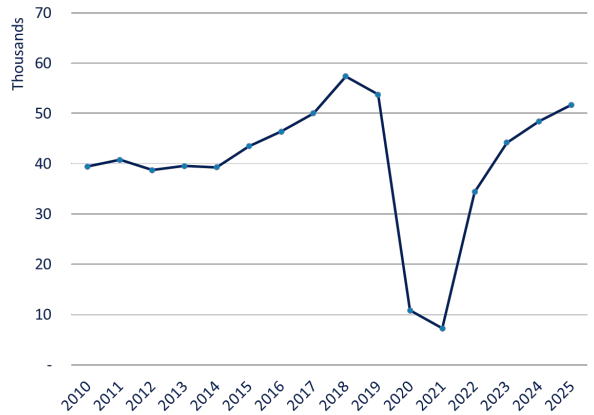


# Johannesburg-Brussels

Non-directional O&D passengers (Rolling 12-Month Basis)

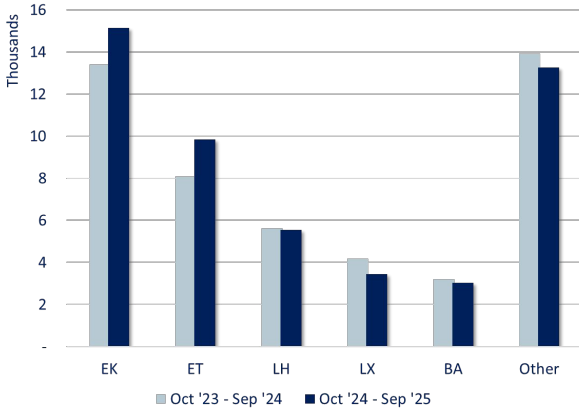


Annual non-directional O&D passengers

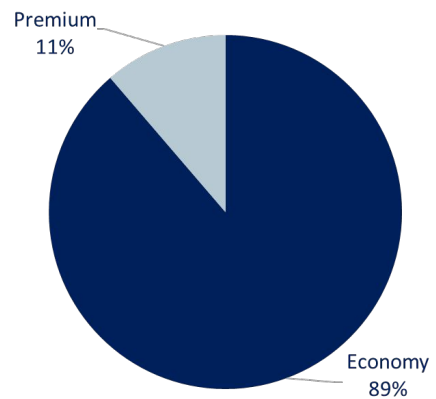


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

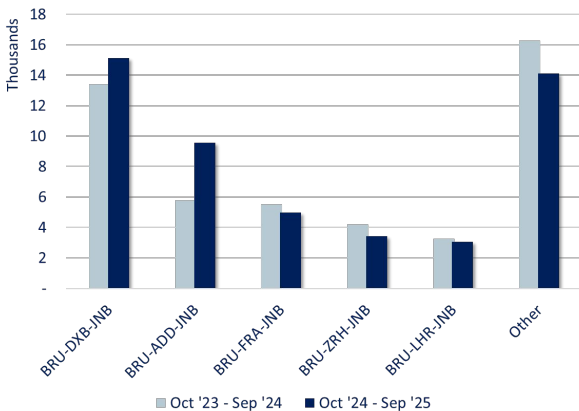


Non-directional O&D passengers (Oct '24 - Sep '25)

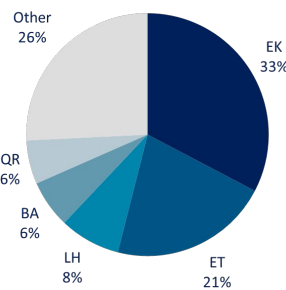


Top Routings with Transit

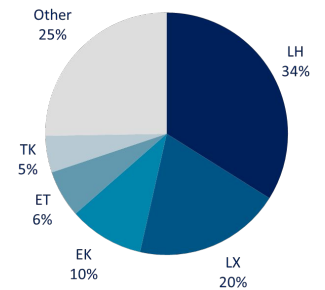
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Cape Town-Brussels & Johannesburg-Brussels

---

The initial market analysis for unserved air routes between Belgium and South Africa was built upon passenger data from October 2022 through September 2023. Whilst the Johannesburg–Brussels city pair was not initially ranked within the top ten unserved routes at that time, the Cape Town–Brussels route demonstrated immediate potential. It accounted for 48% of the total non-directional O&D traffic between the two countries, compared to 45% for Johannesburg and 7% for other regional destinations like Durban, Port Elizabeth, and George.

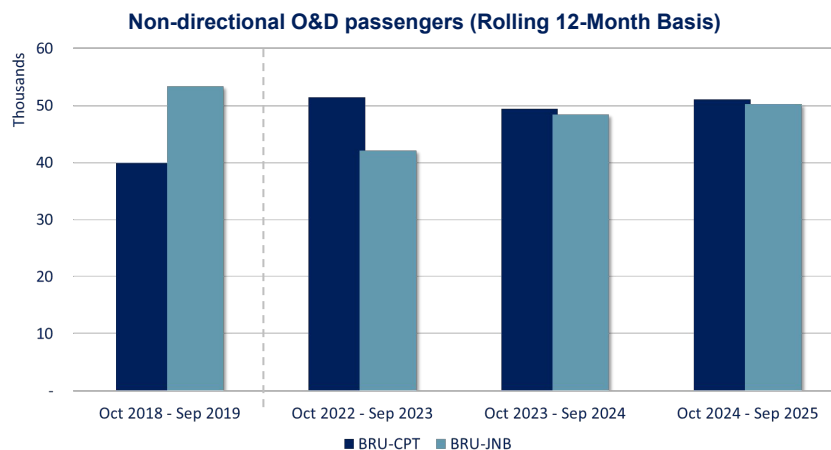
For the Cape Town–Brussels route, a robust pre-pandemic growth rate was recorded between 2015 and 2019 with a 5.4% CAGR, with post-pandemic traffic recovering swiftly to exceed 2018/2019 benchmarks by over 30% and averaging 2,250 monthly passengers each way by 2023. The post-pandemic market stimulation was accelerated by Air Belgium's twice-weekly A330-900 service via Johannesburg, which operated without eighth freedom rights between Johannesburg and Cape Town. However, a void was left in the market following Air Belgium's shift away from scheduled passenger operations and its withdrawal from serving both Johannesburg and Cape Town from Brussels in Q3 2023. In the wake of this move, traffic levelled off and slightly declined. The Brussels–Cape Town city pair registered an 8% premium traffic share—positioning it above the Sub-Saharan average—nevertheless, the route remained primarily a leisure and VFR market.

During the subsequent October 2023 to September 2024 period, the Johannesburg–Brussels route entered the top unserved rankings. The traffic displaced by Air Belgium's exit was successfully rechannelled onto alternative carriers. Emirates initially led this connectivity transition via an average double daily service to Cape Town that matched its double daily Brussels–Dubai link. Ethiopian Airlines also captured a significant share, offering flights via Addis Ababa and capitalising on its Star Alliance partnership with Lufthansa Group airlines, such as Brussels Airlines. Smaller increases in market presence were also recorded by Turkish Airlines, Qatar Airways, and Lufthansa.

Distinct demand profiles characterise the two city pairs. The Cape Town–Brussels route is highly seasonal, peaking at over 6,000 passengers in November and February–March—aligned with European school holidays and the Southern summer—but dropping to 1,500 passengers in June. Conversely, Johannesburg–Brussels traffic has a far more stable, year-round baseline driven by business, diplomatic, governmental, and VFR travel. This stability is reflected in a higher minimum monthly volume of 3,000 passengers in June and a peak month of approximately 5,500 passengers, alongside a notable 11% premium cabin share, again significantly above the Sub-Saharan average.

The strategic rationale for establishing non-stop services on both routes is further reinforced by a global traffic analysis between Belgium and South Africa. The chart on the following page shows that while Brussels-Cape Town was the strongest unserved city pair back in the 2023-period, Brussels–Johannesburg is the city pair that has been constantly growing since 2023. All in all, total traffic between Belgium and South Africa has in the meantime grown beyond pre-pandemic levels.

# Cape Town-Brussels & Johannesburg-Brussels

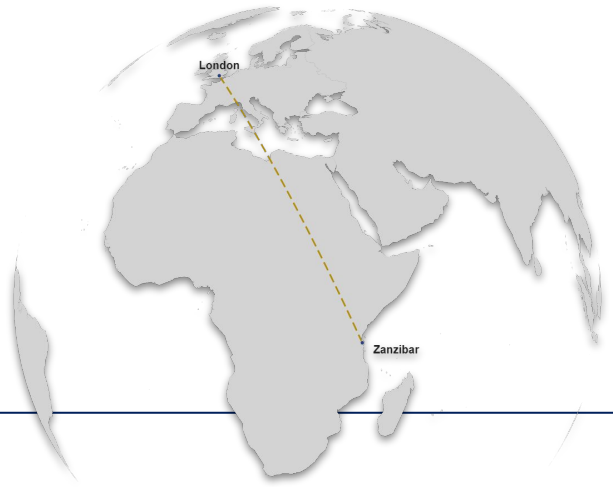


From an air cargo perspective, Ethiopian Airlines operates twice-weekly, non-stop freighter flights from Brussels to Johannesburg. While specific data is unavailable, these flights likely transport high-value pharmaceuticals, signaling strong potential for belly cargo integration if non-stop passenger operations are introduced. Furthermore, although Ethiopian Airlines does not operate non-stop freighters on the northbound return, South Africa’s robust export of perishables—such as fruit and meat—presents a clear opportunity to establish a northbound belly cargo stream.

The convergence of rising passenger demand and this cargo potential makes a non-stop service between Brussels and South Africa a highly compelling proposition. Brussels Airlines and South African Airways appear best positioned to serve this market, albeit through different operational strategies. Brussels Airlines could deploy a triangle routing or a non-stop service to Johannesburg with a tag-end flight to Cape Town, mirroring Air Belgium's former approach. Conversely, South African Airways could launch non-stop flights between Brussels and its Johannesburg hub, connecting passengers onward to Cape Town via its domestic network.

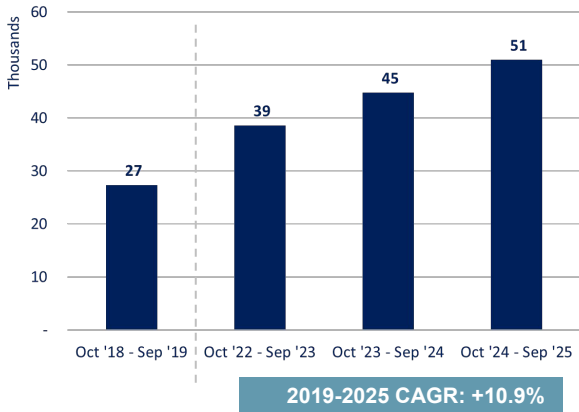
However, securing the appropriate fleet remains both airlines’ primary hurdle. Operating to Johannesburg and Cape Town—located roughly 4,800 and 5,200 nautical miles from Brussels, respectively—demands long-haul aircraft capable of enduring Johannesburg’s challenging high-altitude, hot-weather takeoff conditions.

The Airbus A330neo and A350 are both excellent candidates that fulfill these strict performance and range requirements.

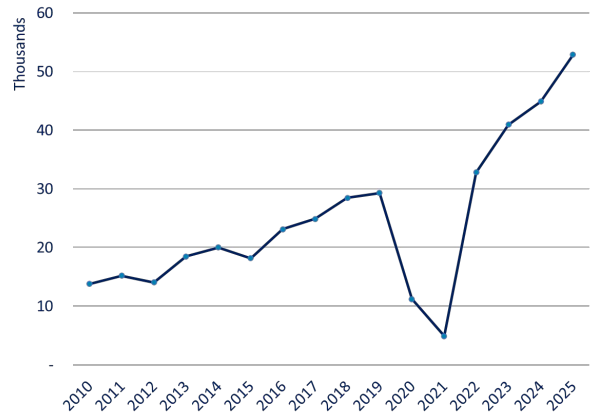


# Zanzibar-London

Non-directional O&D passengers (Rolling 12-Month Basis)

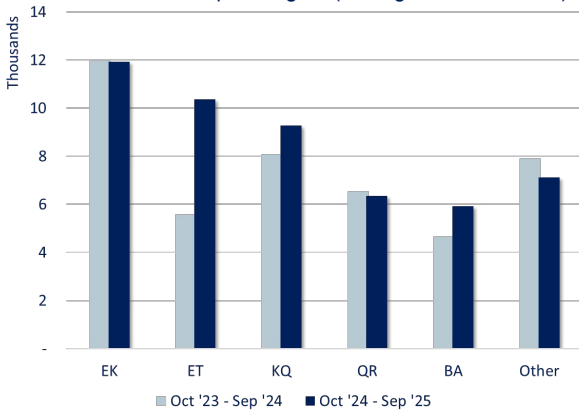


Annual non-directional O&D passengers

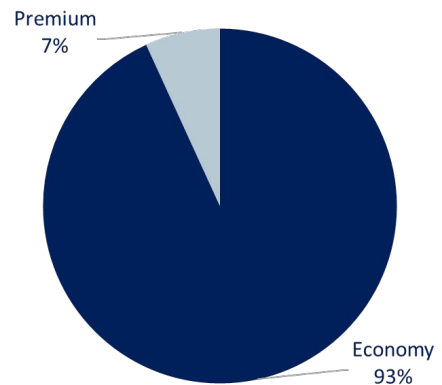


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

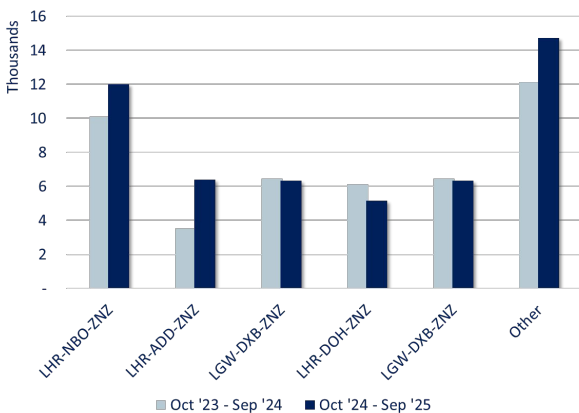


Non-directional O&D passengers (Oct '24 - Sep '25)

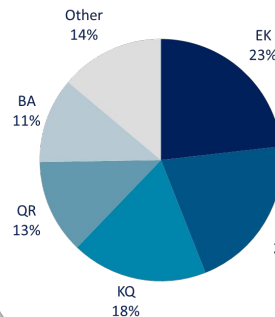


Top Routings with Transit

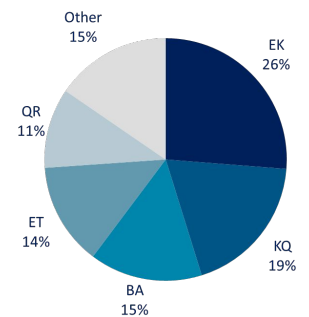
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Zanzibar-London

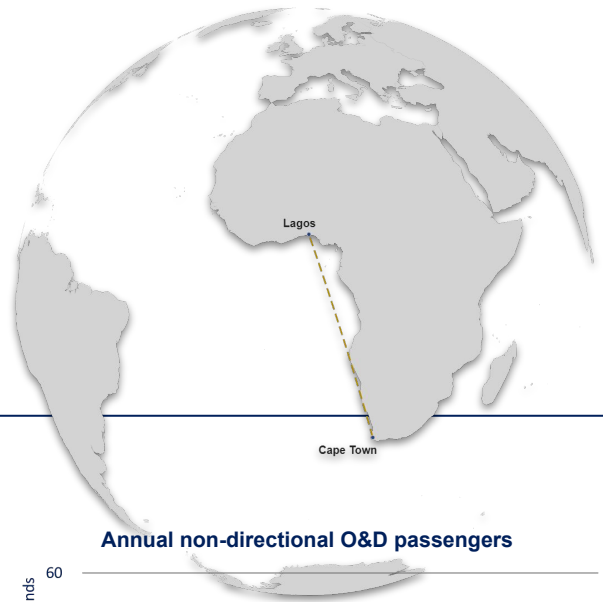
---

The unserved London–Zanzibar city pair has entered the top ten rankings this year, securing the 9th position. Although it was analysed last year within the framework of the AviaDev conference held in Zanzibar, the route remained outside the top ten at that time. It has since proven to be a major growth market, boasting a double-digit CAGR between 2019 and 2025, driven by an accelerated growth trajectory since the pandemic. Before COVID-19, Zanzibar was predominantly viewed by the United Kingdom market as a niche, secondary tag-on destination for travellers finishing a safari on the Tanzanian mainland. In the post-COVID landscape, however, the island has completely redefined itself as a primary, standalone heavyweight in the long-haul leisure sector. This structural evolution is underscored by a significant 16% Year-over-Year growth between previous evaluation periods, followed by a further 13.8% Year-over-Year growth between the previous and current evaluation periods.

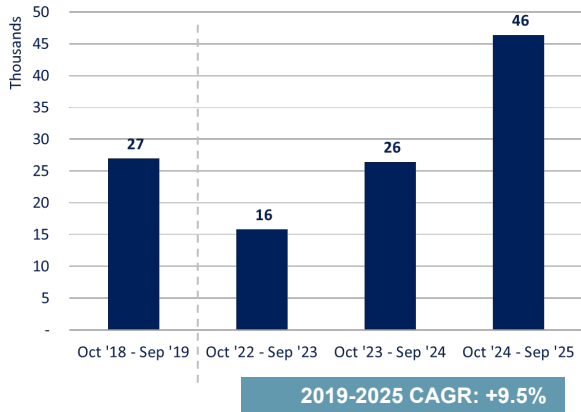
What is particularly notable for this market in comparison with other regional routes, such as London–Harare, is that there is no single dominant player or trajectory. While Ethiopian Airlines is the clearly dominant carrier on the unserved London–Harare city pair, London–Zanzibar maintains a much more balanced traffic share between different airlines connecting travellers via their respective hubs. These prominent operators include Emirates, Ethiopian Airlines, Kenya Airways, Qatar Airways, and British Airways, with the latter primarily connecting passengers through Nairobi and Doha. Once again, Ethiopian Airlines stands out as the fastest-growing airline on the city pair, routing traffic via its Addis Ababa hub and close to doubling its passenger volumes from both London Heathrow and London Gatwick between the successive evaluation periods. This route is predominantly a price-sensitive market composed of 93% economy traffic and 7% premium traffic, a demand split that places the city pair right around the average for Sub-Saharan traffic types.

The city pair is also characterised by highly seasonal demand patterns, where March to May represents the low-demand window and June to October marks the high-demand period. This seasonality aligns well operationally because it mirrors a close to opposite demand distribution found in the South African outbound tourism market to Zanzibar. Specifically, the low travel period from South Africa in August and September lines up with the peak demand originating from the United Kingdom during those same months. Given this leisure-centric profile, a non-stop London–Zanzibar service is considered highly viable, potentially introduced as a seasonal operation. Both the Airbus A330ceo and A330neo families are ideally positioned for this market. Their low unit cost aligns perfectly with a price-sensitive passenger base while still enabling airlines to capture the 7% premium demand. Based on current traffic modelling, this unserved market is projected to support at least three directional frequencies per week by 2027.

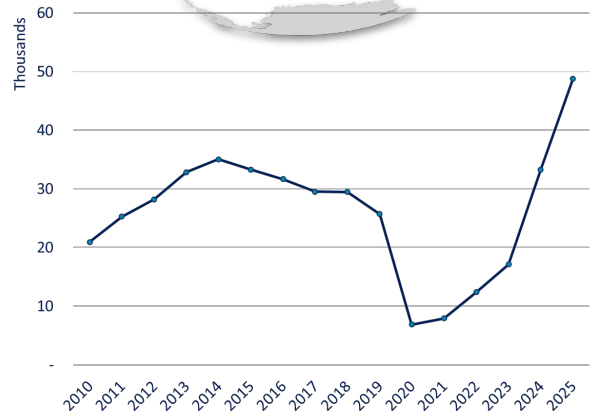
# Cape Town-Lagos



Non-directional O&D passengers (Rolling 12-Month Basis)

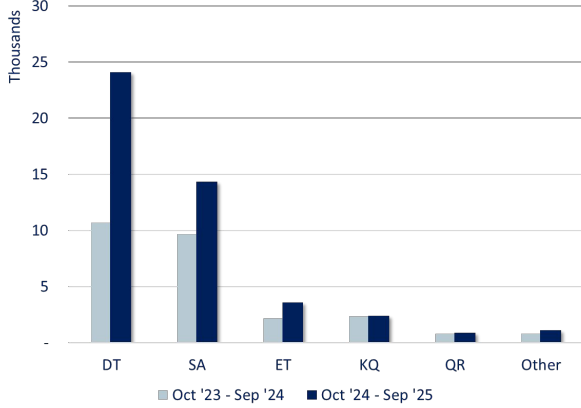


Annual non-directional O&D passengers

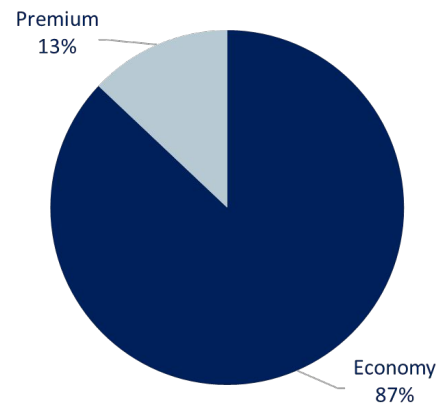


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

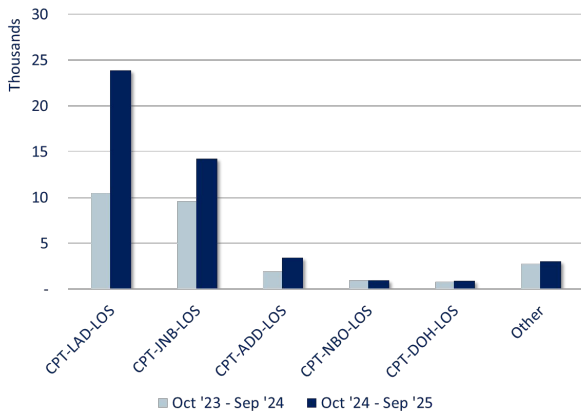


Non-directional O&D passengers (Oct '24 - Sep '25)

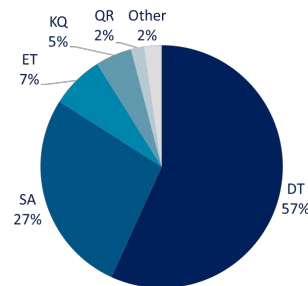


Top Routings with Transit

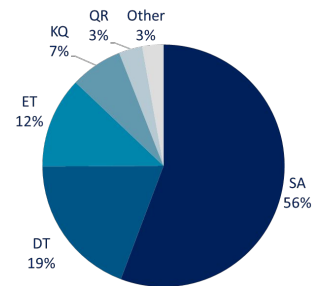
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Cape Town-Lagos

---

Within the Sub-Saharan region, Cape Town to Lagos has become the most important unserved city pair. Having entered the market ranking from the very beginning, this specific route has continuously moved upward to finally secure the number one position. This rise is fueled by explosive growth, boasting a 2019-2025 CAGR of 9.5%, which is nearly double what Airbus' Global Market Forecast (GMF) projects for average intra-African growth over the next 20 years. Even more spectacular is the recent Year-over-Year growth of 75%, which propelled the 26.5k non-directional O&D passengers recorded in the previous evaluation period to a record-breaking 46.4k passengers. To put this in historical context, the city pair previously peaked around 34k passengers in 2014, and annual traffic volumes higher than that had never been seen since detailed full-year data became available in 2010.

Despite this surging demand, Cape Town–Lagos remains a challenging, unserved sector. Separated by approximately 2,600 nautical miles in great circle distance—roughly equivalent to flying from Dubai to Copenhagen or from Boston to Dublin—this route demands a flight time of about 6.5 to 7 hours. Operating over such a distance necessitates a highly comfortable cabin experience, particularly in the front section where full-flat premium seats have become the baseline expectation, a trend already highlighted under the “*Africa Specifics*” portion of the trends analysis section above. The premium segment is incredibly vital here; the route features an exceptionally high premium class portion of 13% of all travellers, a figure that stands out even within the Sub-Saharan context. For these passengers, regular frequency, choice, service, and comfort are paramount. Furthermore, any operator must account for unique cultural dynamics: Nigerian travelers are highly entrepreneurial, culturally disinclined to return home empty-handed, and widely known to travel with substantial amounts of luggage.

Currently, in the absence of a direct flight, TAAG Angola Airlines has capitalised on this vacuum. By connecting passengers between Cape Town and Lagos via their hub in Luanda, and often dispatching their A220s, TAAG has significantly strengthened its position, capturing more than 50% market share based on the number of O&D passengers carried. Yet, the opportunity for a non-stop connection remains completely untapped.

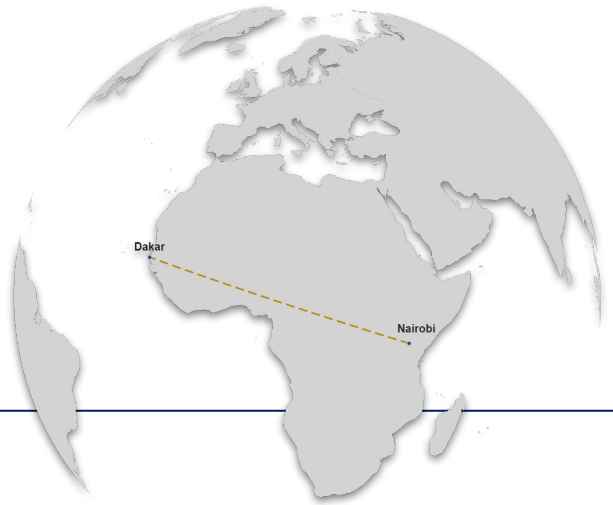
South African Airways (SAA) has also steadily built its presence on the city pair, successfully carrying 15k non-directional passengers during this reference period. While this upward trend marks an encouraging recovery, current traffic volumes remain roughly 5k passengers short of the airline's pre-pandemic benchmarks. In such a dynamic, high-growth market, this variance highlights an excellent foundation for further optimisation, presenting a timely opportunity for the carrier to strategically enhance its approach and fully capitalise on the route's expanding demand.

# Cape Town-Lagos

---

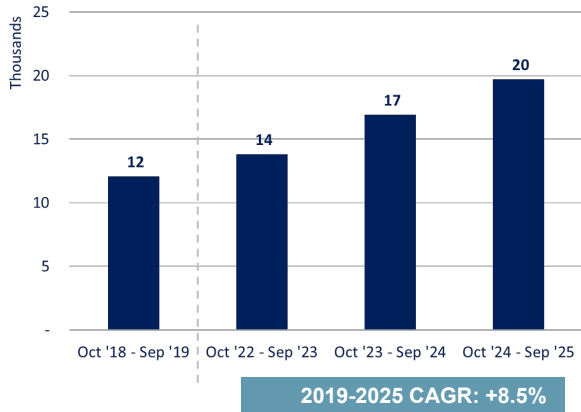
The Airbus A321XLR emerges as an aircraft type exceptionally well-suited to pioneer this route, directly addressing the city pair's unique operational and market challenges through several distinct capabilities:

- **Optimised range and capacity:** The aircraft possesses the range capability required for this 2,600 nm sector, offering an ideal capacity of 172 seats configured in a premium-heavy, 3-class layout featuring Business, Premium Economy, and Economy Class sections.
- **Utilisation potential:** Based on the methodology applied in section 3 of this document, the market could easily support more than 5 flights per week by 2028.
- **Premium cabin alignment:** It offers the capability to install full-flat seats in the front of the cabin, matching the evolving industry norm for airlines operating this aircraft type on multi-hour sectors.
- **Superior cargo and baggage capability:** The A321XLR can handle the large amounts of passenger luggage characteristic of this market or offer the capability to carry containerised cargo.
- **Seamless fleet integration:** The aircraft can be easily integrated into existing Airbus single-aisle fleets, utilising the same pool of pilots, same cabin crew, same maintenance procedures, and identical spare engines and parts.
- **Operational flexibility:** It enables Mixed Fleet Flying (MFF) alongside Airbus widebody aircraft (such as the A330 and A350). This provides operators with fantastic operational flexibility, unlocking the potential for serious dynamic capacity management to scale up or down in function of varying demand throughout the year, season, or week.

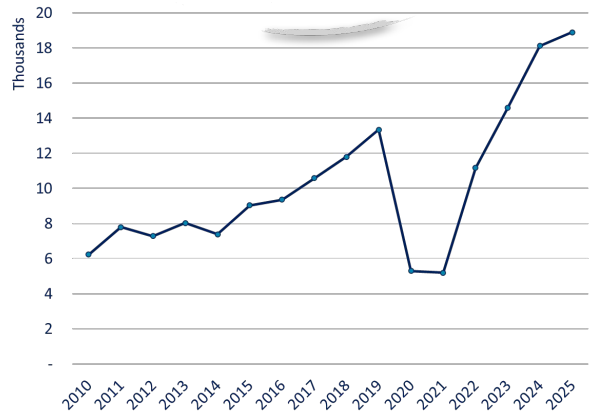


# Dakar-Nairobi

Non-directional O&D passengers (Rolling 12-Month Basis)

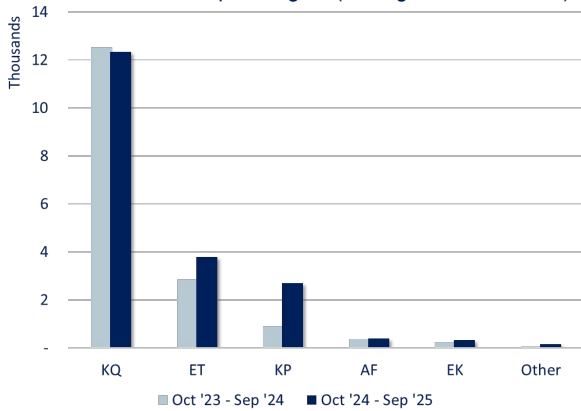


Annual non-directional O&D passengers

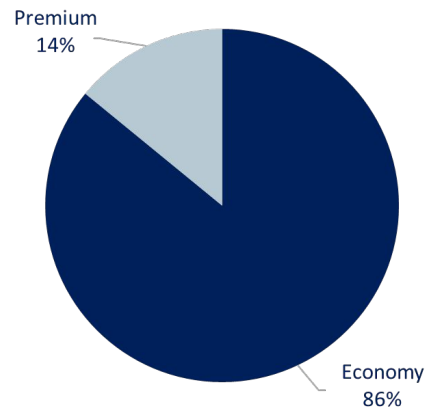


Top carriers

Non-directional O&D passengers (Rolling 12-Month Basis)

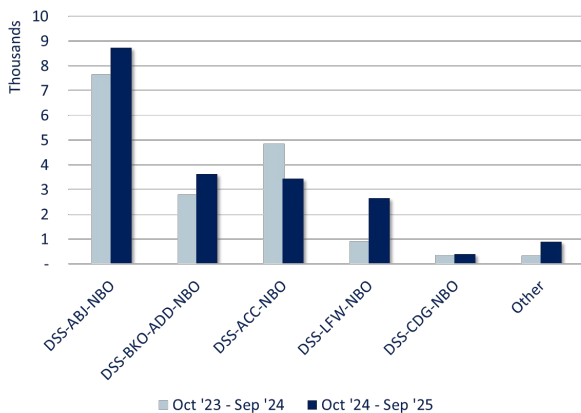


Non-directional O&D passengers (Oct '24 - Sep '25)

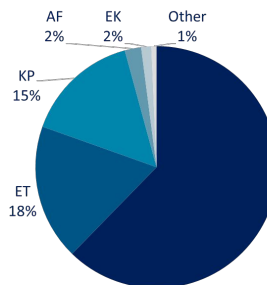


Top Routings with Transit

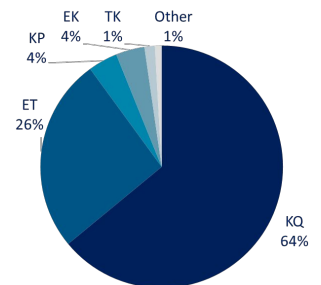
Non-directional O&D passengers (Rolling 12-Month Basis)



Economy



Premium



# Dakar-Nairobi

---

The Dakar-Nairobi city pair entered last year's list of top unserved routes and has since only continued to grow. This pair holds significant appeal, primarily due to the current scarcity of non-stop flights between East and West Africa, as existing routings across this vast continental divide typically involve one or more intermediate stops. .

When examining the details of non-stop routes between East Africa and West Africa (using the AU definition of the subregions), only 10 routes existed during the studied period with a minimum average frequency of 3 weekly flights. Digging further, each of these routes originates or ends in just two cities in East Africa: Addis Ababa and Nairobi.

In terms of Origin and Destination (O&D) traffic from East Africa to West Africa, the leading traffic generators during the evaluated 12-month period are the following:

- Kenya: The clear top traffic generator with more than 111k directional passengers traveling to West Africa. The Kenya-Nigeria corridor is the most important, followed by Kenya-Ghana. Kenya-Senegal ranks third, where notably, no non-stop flights currently exist.
- Ethiopia: Ranks second for O&D traffic originating in East Africa and traveling to West Africa, but follows far behind with only about 38k directional passengers. While Ethiopian Airlines carries a lot more total traffic between Ethiopia and West Africa, the absolute majority of these travelers does not originate in Ethiopia and is just transiting through ADD on their way to West Africa.
- Rwanda: Follows in the third position with a bit more than 36k O&D passengers.

With the critical importance of the Kenya-West Africa O&D traffic flow in mind, it makes sense to further reinforce this traffic flow and consider expanding non-stop flight options. Beyond pure O&D traffic, and given existing feeding networks, a unique non-stop flight between Nairobi and Dakar could certainly capture new connecting traffic on top of the O&D traffic.

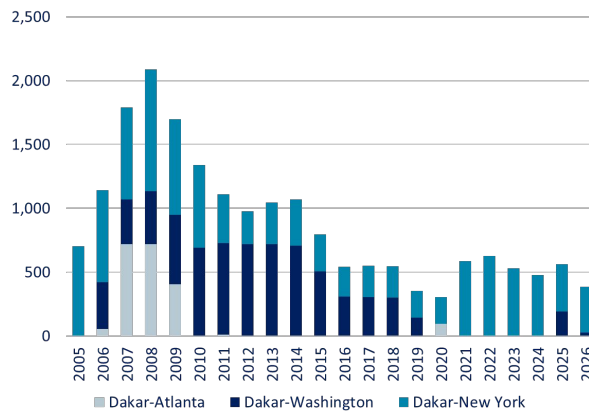
There is more to it.

The connectivity between Dakar and the US has significantly decreased over time. In the past, non-stop flights existed between Dakar and three different entry points in the US: Atlanta, Washington, and New York.

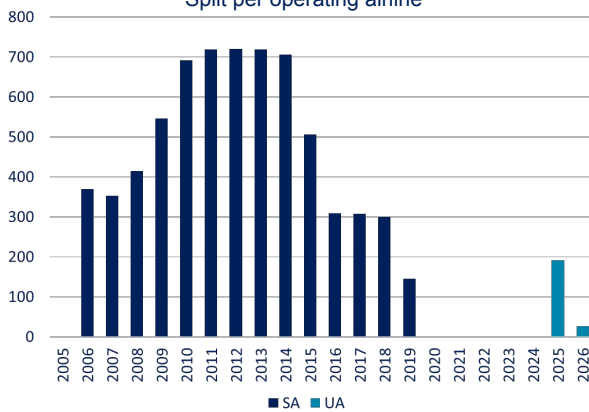
- In 2008 (Peak): More than 2,000 non-directional flights were performed, averaging around 20 directional flights each week.
- In 2025: This number dwindled to only 5 directional flights per week on average, with Delta Air Lines operating between New York and Dakar, and United Airlines operating between Washington and Dakar.

# Dakar-Nairobi

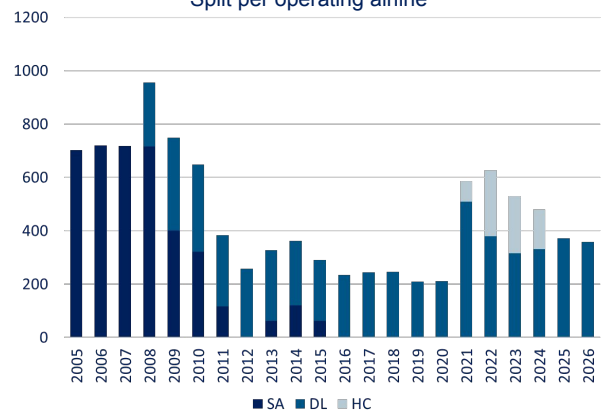
Non-directional flights between Senegal and the USA



Non-directional flights between Dakar and Washington  
Split per operating airline



Non-directional flights between Dakar and New York  
Split per operating airline



With South African Airways (SA) in the process of rebuilding its network and—for the time being—having halted its 5th freedom flights between Dakar and the USA, and with Air Senegal having reorganised its network and halted its transatlantic flights, no African carrier connects Dakar non-stop to the USA any longer. Only United Airlines (UA) and Delta Air Lines (DL) currently perform such flights, each on separate routes. As a result, both airlines hold a monopoly on their respective non-stop routings. Schedule data until the end of 2026 were not fully available at the moment this report was published; nevertheless, no change can be signaled based on the data available up until the end of November 2026.

This landscape actually presents a unique opportunity. Nairobi-Washington appeared in the top 10 unserved routes to or from Sub-Saharan Africa in the two previous editions of this report and still is an important unserved city pair to or from Sub-Saharan Africa today, while Nairobi-Dakar is one of the top unserved routes within Sub-Saharan Africa.

# Dakar-Nairobi

---

Operating Nairobi-Dakar is a major performance challenge, as it combines a demanding takeoff from Nairobi's high and often hot airport with a long-haul flight featuring a great circle distance of approximately 3,350 nm. Combining both markets offers a compelling solution: connecting NBO with Washington via an efficient stop in Dakar.

The Opportunity: If 5th freedom traffic rights could be granted for the sector between Dakar and Washington, at least three different O&D markets would be served, or at least better served, by this single routing: Nairobi-Dakar, Nairobi-Washington, and Dakar-Washington. Beyond that, connecting traffic before or beyond Washington on one end, and Dakar or Nairobi on the other, would also be accounted for.

While operating this routing, traffic will be stimulated due to the significantly improved connectivity. It will equally grow further on the Nairobi-Dakar, Nairobi-Washington, and Dakar-Washington city pairs for all the reasons highlighted across the different sections of this report and its previous two editions. This foundational growth opens the door to potentially moving into dedicated and stand-alone non-stop flights between Nairobi and Dakar and between Nairobi and Washington in the future. This latter non-stop flight is a mission for which the A350-900 would be exceptionally well-placed due to its specific takeoff performance in Nairobi and its unique capacity-range capability.



# 05

---

**From small to very large capacity,  
from short-haul to ultra long range,  
every route has its Airbus aircraft**

---

**AIRBUS**



**A220-100**



**A220-300**

	<b>A220-100</b>	<b>A220-300</b>
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**

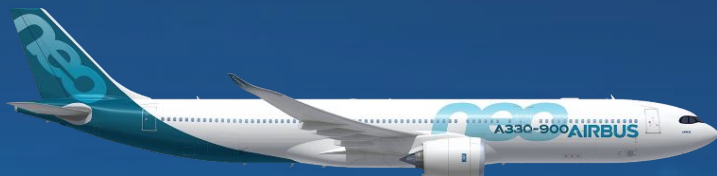


**A321XLR**

	<b>A319neo</b>	<b>A320neo</b>	<b>A321neo</b>	<b>A321XLR</b>
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			



**A330-800**



**A330-900**

	<b>A330-800</b>	<b>A330-900</b>
Maximum seating	406	465
Typical cabin configuration	220 - 260	260 - 300
Range	8 100 nm 15 000 km	7 350 nm 13 600 km
Powerplants	RR Trent 7000	



**A350-900**



**A350-1000**



**A350F**

	<b>A350-900</b>	<b>A350-1000</b>	<b>A350F</b>
Maximum seating / Payload	440	480	111t
Typical cabin configuration	332 - 352	375 - 400	-
Range	8 500 nm 15 750 km	9 000 nm 16 700 km	4 700 nm 8 700 km
Powerplants	RR Trent XWB-84	RR Trent XWB-97	RR Trent XWB-97



# 06

---

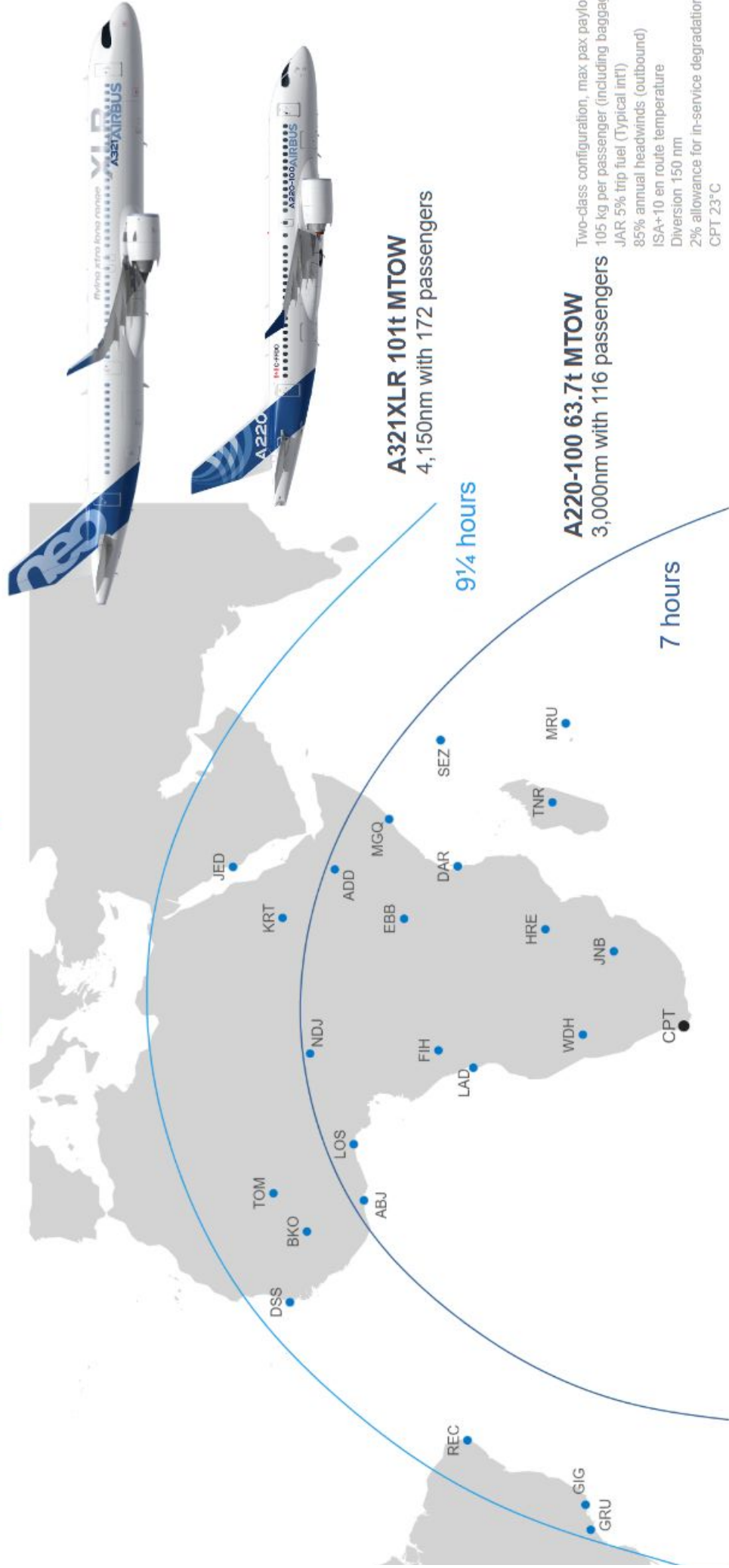
## Standard Range Circles

Based on typical African airline evaluation rules

---

# CAPE TOWN

# A220-100 / A321XLR range from Cape Town



# A330-900 / A350-900 range from Cape Town



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

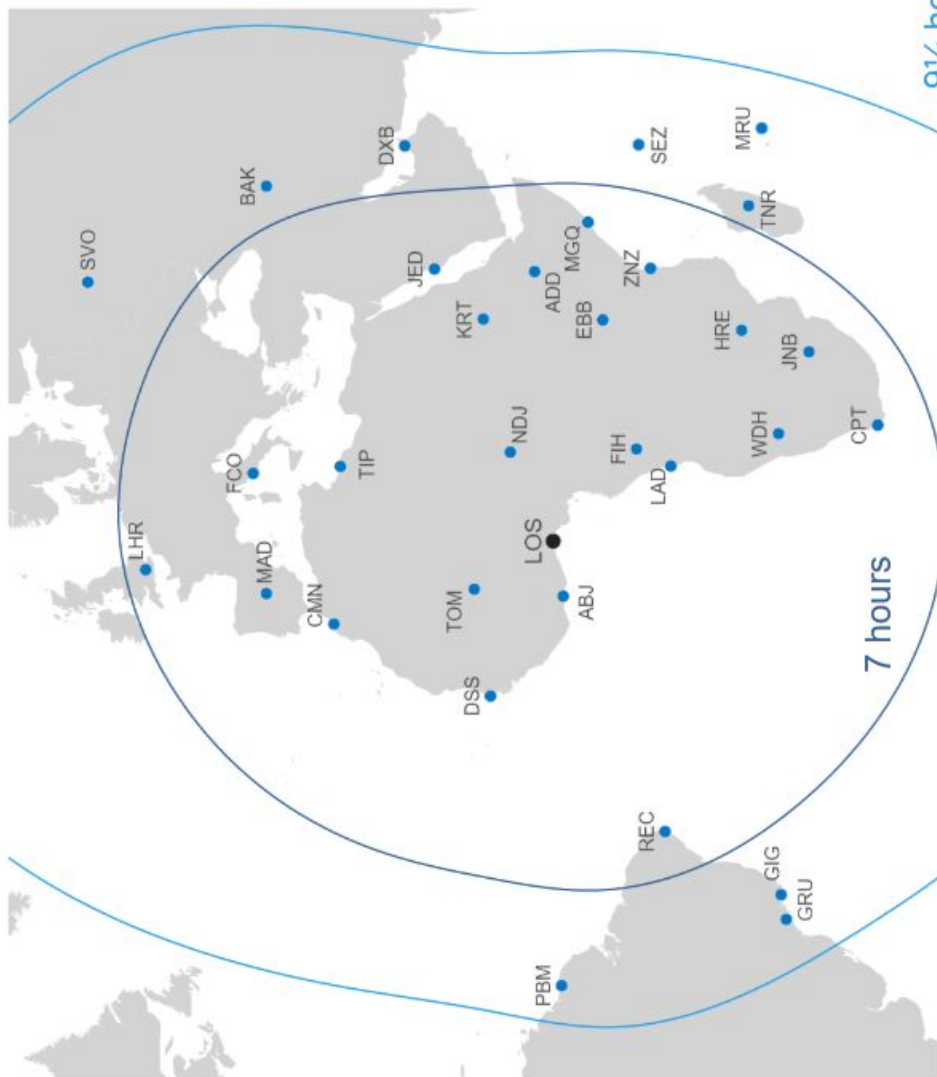
**A330-900 251t MTOW**  
6,550nm with 287 passengers

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



# LAGOS

# A220-100 / A321XLR range from Lagos



**A321XLR 101t MTOW**  
4,150nm 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 intl)
- 85% annual headwinds (outbound)
- ISA+10 en route temperature
- Diversion 150 nm
- 2% allowance for in-service degradation
- LOS 30°C



# A330-900 / A350-900 range from Lagos



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

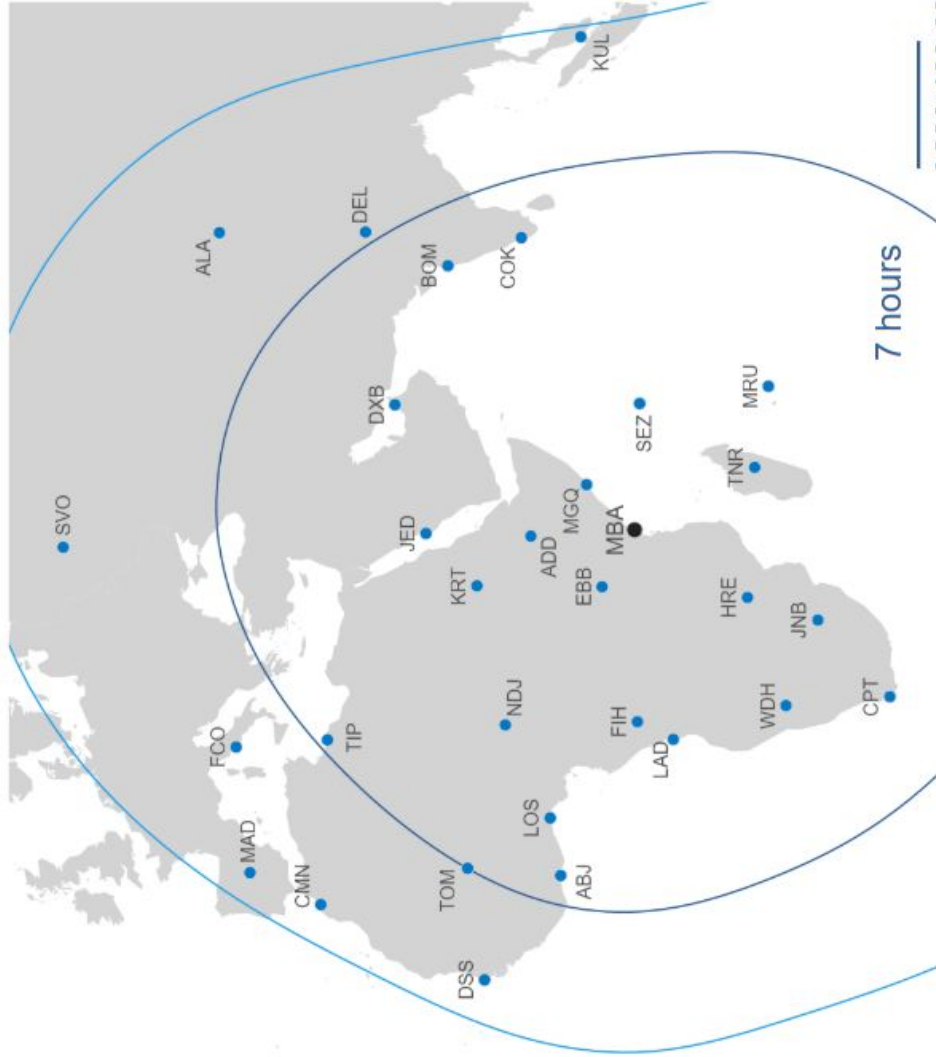
**A350-900 283t MTOW**  
7,900nm with 332 passengers

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



# Mombasa

# A220-100 / A321XLR range from Mombasa



9 1/4 hours

## A321XLR 101t MTOW

4,150nm with 172 passengers



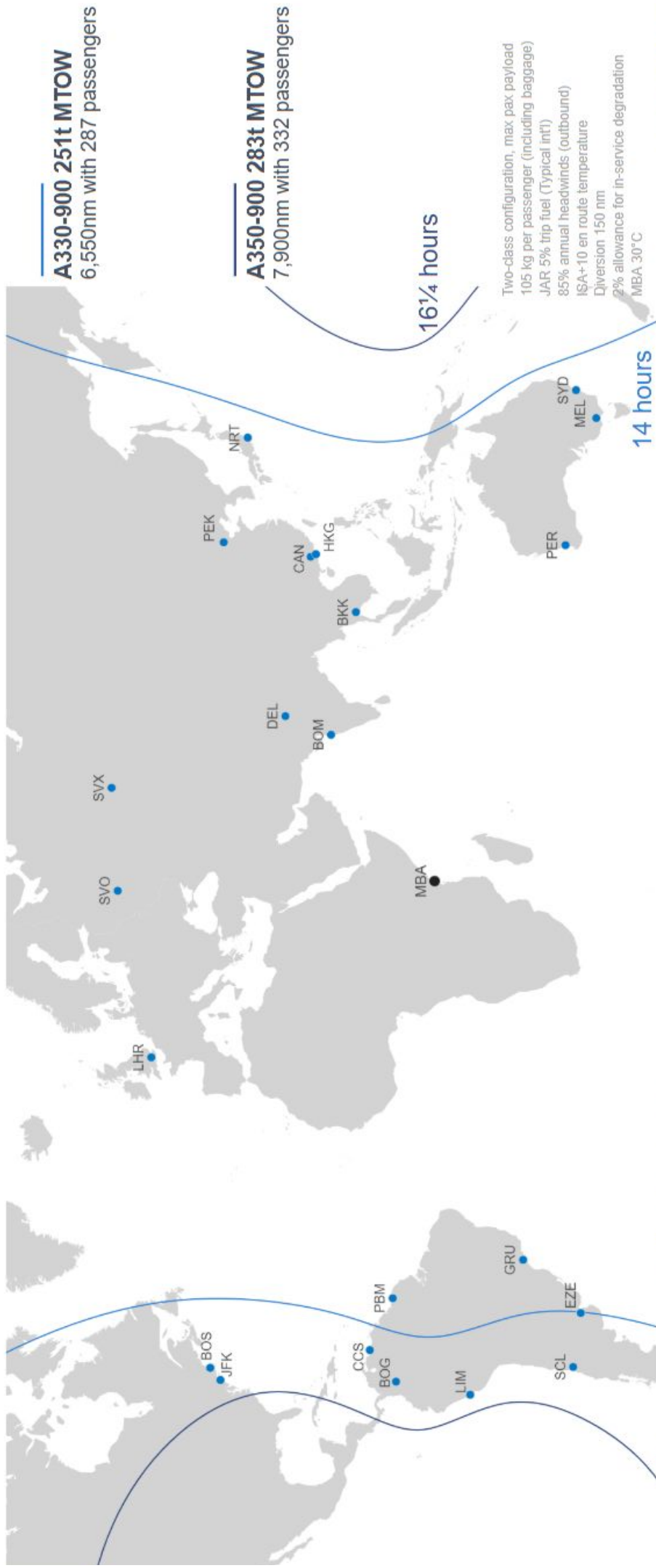
- Two-class configuration, max pax payload
- 105 kg per passenger (including baggage)
- JAR 5% trip fuel (Typical int'l)
- 85% annual headwinds (outbound)
- ISA+10 en route temperature
- Diversion 150 nm
- 2% allowance for in-service degradation
- MBA 30°C

## A220-100 63.7t MTOW

3,000nm with 116 passengers

**AIRBUS**

# A330-900 / A350-900 range from Mombasa



© AIRBUS (Airbus S.A.S., Airbus Operations S.A.S., Airbus Operations GmbH, Airbus Operations LTD, Airbus Operations SL, Airbus China LTD, Airbus (Tianjin) Final Assembly Company LTD, Airbus (Tianjin) Delivery Centre LTD). All rights reserved. Confidential and proprietary document. This document and all information contained herein is the sole property of AIRBUS. No intellectual property rights are granted by the delivery of this document or the disclosure of its content. This document shall not be reproduced or disclosed to a third party without the express written consent of AIRBUS S.A.S. This document and its content shall not be used for any purpose other than that for which it is supplied. The statements made herein do not constitute an offer. They are based on the mentioned assumptions and are expressed in good faith. Where the supporting grounds for these statements are not shown, AIRBUS S.A.S. will be pleased to explain the basis thereof. AIRBUS, its logo, A220, A300, A310, A318, A319, A320, A321, A330, A340, A350, A380, A400M are registered trademarks.

This report presents an analysis produced by Airbus' Fleet and Network Planning Marketing team (Airbus CE - MCMAM). All results, insights, interpretations, and opinions shared in this document are exclusively the outcome of Airbus' analysis and interpretation, formulated solely by the Airbus Fleet and Network Planning Marketing team. This analysis relies on data either purchased by Airbus, collected by Airbus from publicly available sources, or produced in-house. This interpretation and opinion are entirely independent and disconnected from any past, ongoing, or future exchanges between Airbus and any external parties. Any resemblance to evaluations performed by third parties is unintentional and purely coincidental.

Airbus S.A.S.  
Fleet and Network Planning Marketing  
MCMAM  
2, rond-Point Emile Dewoitine  
31703 BLAGNAC CEDEX  
FRANCE

© 2026

**AIRBUS**