

# **Middle East & Africa Duty Free Association Conference**

## **Re-assessing Africa's airports**

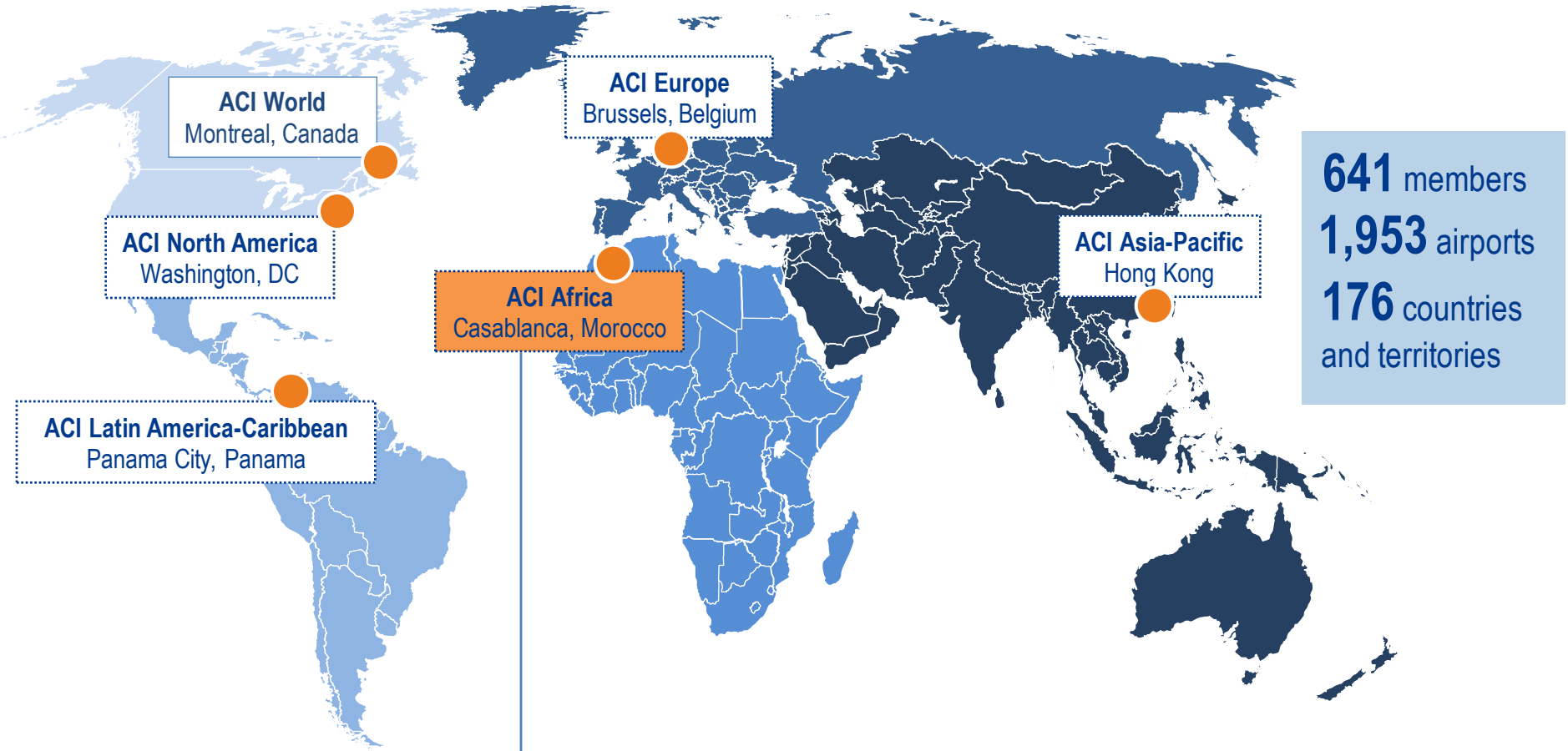
### **19 November 2018**

#### **Beirut, Lebanon**

#### **Ali Tounsi**



## About Airports Council International (ACI) Africa



**641** members  
**1,953** airports  
**176** countries  
and territories

ACI Africa was established as a region of ACI in 1991, in conformity with ACI by-laws.

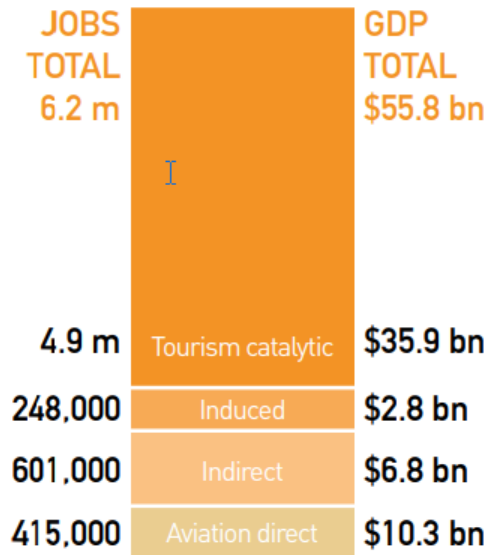
## Mission



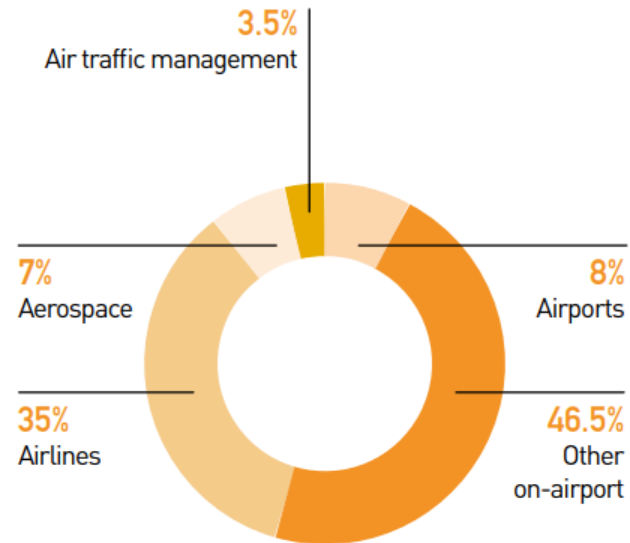
To advance the collective interests, and act as the voice of the African airports and the communities they serve, and promote professional excellence in airport management and operations.

## Regional benefits of Aviation: Supporting economic development in Africa

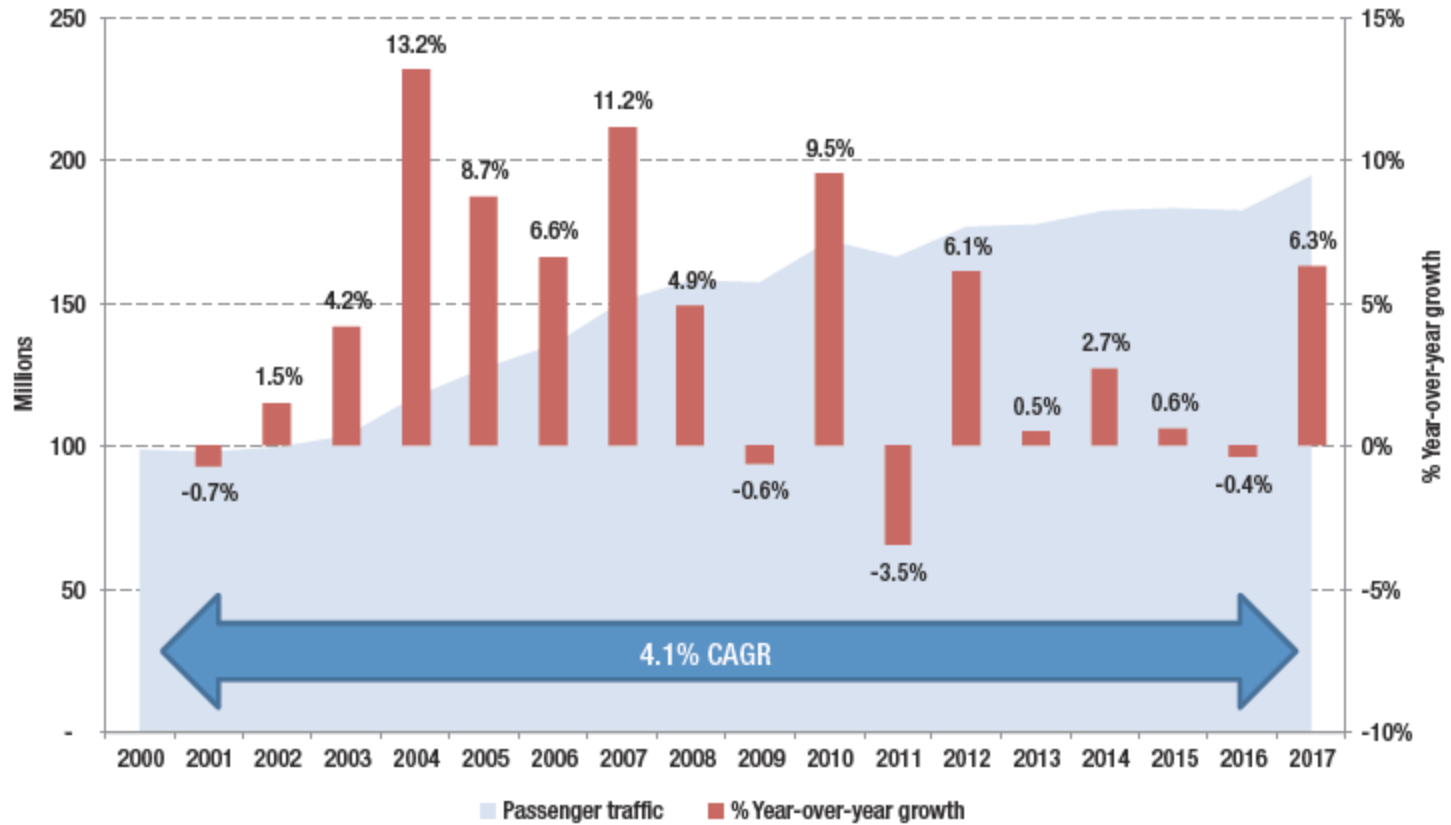
Total jobs and GDP supported by air transport in Africa



Direct jobs generated by air transport in Africa



## Evolution of passenger traffic in Africa (2000-2017)



Source: ACI World Airport Traffic Database, 2018

## Future trends in passenger traffic (2017-2040)

### Africa

Metrics	Market share (%)			Contribution to growth (%)
	2017	...	2040	2017-2040
Total passengers	2.4	...	2.2	2.0
International passengers	3.6	...	3.0	2.6
Domestic passengers	1.4	...	1.3	1.3
Total air cargo	1.9	...	2.2	2.6
Total aircraft movements	3.2	...	3.1	3.1

**2022:** 256 million passengers  **2040:** 450 million passengers

## Revenues Vs. Costs

### AIRPORT ECONOMICS\* AT A GLANCE

\*in US\$

GLOBAL INDUSTRY REVENUES **\$161.3 billion**



GLOBAL AERONAUTICAL REVENUES per passenger

**\$10.15**



GLOBAL NON-AERONAUTICAL REVENUES per passenger

**\$7.12**

TOTAL COST per passenger **\$13.55**



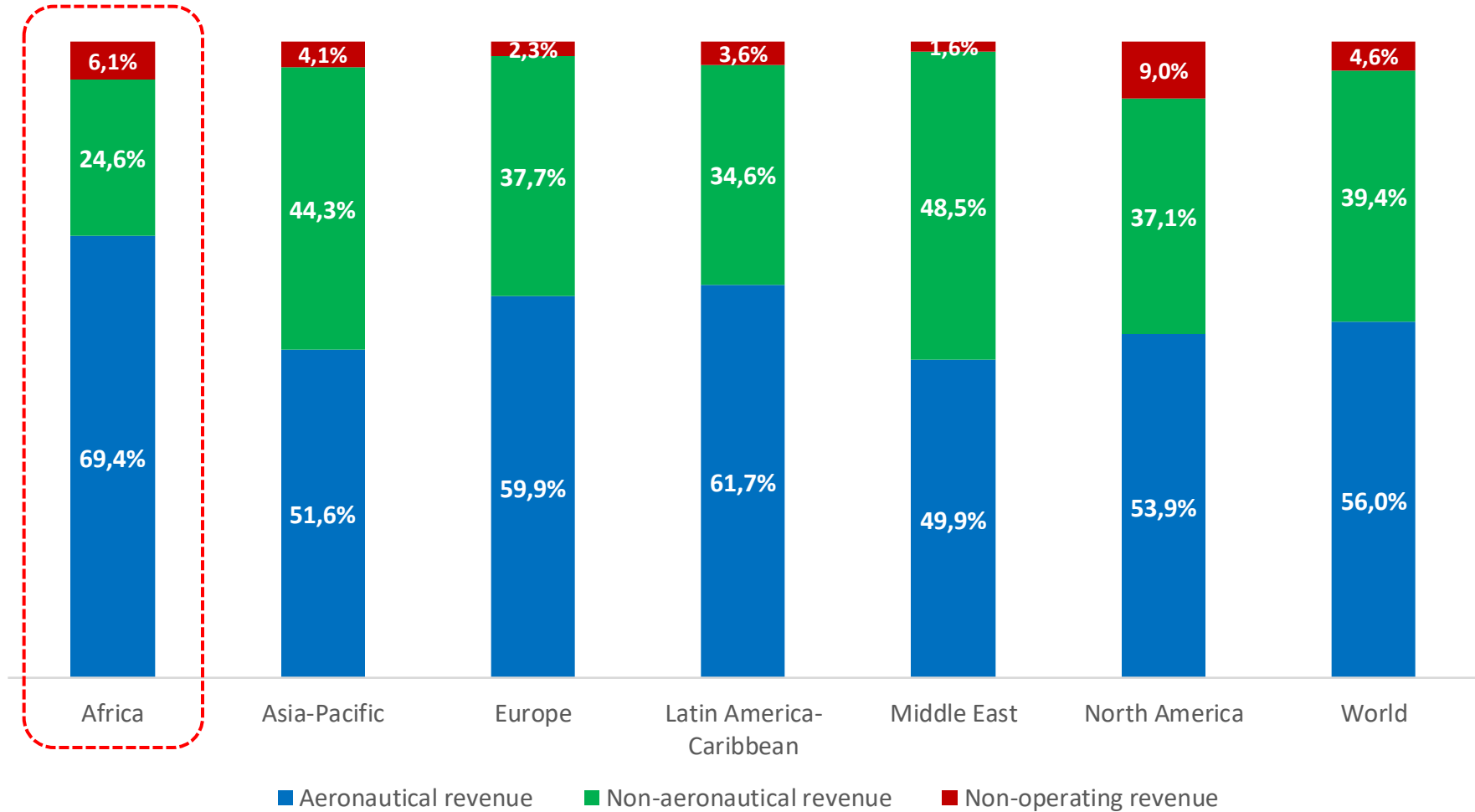
## Airport revenues and growth by region (2016)

	Total revenue	2016/2015 % change	Aeronautical revenue	2016/2015 % change	Non-aeronautical revenue	2016/2015 % change	Non-operating revenue	2016/2015 % change
<b>Africa</b>	3,500	12.6%	2,400	11.1%	900	7.0%	200	78.1%
<b>Asia-Pacific</b>	50,200	9.3%	25,200	9.3%	22,100	6.9%	2,900	61.8%
<b>Europe</b>	54,300	3.1%	32,500	3.6%	20,700	3.6%	1,100	-22.9%
<b>Latin America-Caribbean</b>	9,700	-2.6%	6,100	8.7%	3,300	-20.3%	300	53.1%
<b>Middle East</b>	13,400	9.2%	6,700	10.1%	6,500	7.7%	200	20.7%
<b>North America</b>	30,200	7.1%	16,400	4.5%	10,800	5.0%	3,000	38.6%
<b>World</b>	<b>161,300</b>	<b>5.8%</b>	<b>89,300</b>	<b>5.9%</b>	<b>64,300</b>	<b>3.6%</b>	<b>7,700</b>	<b>25.5%</b>

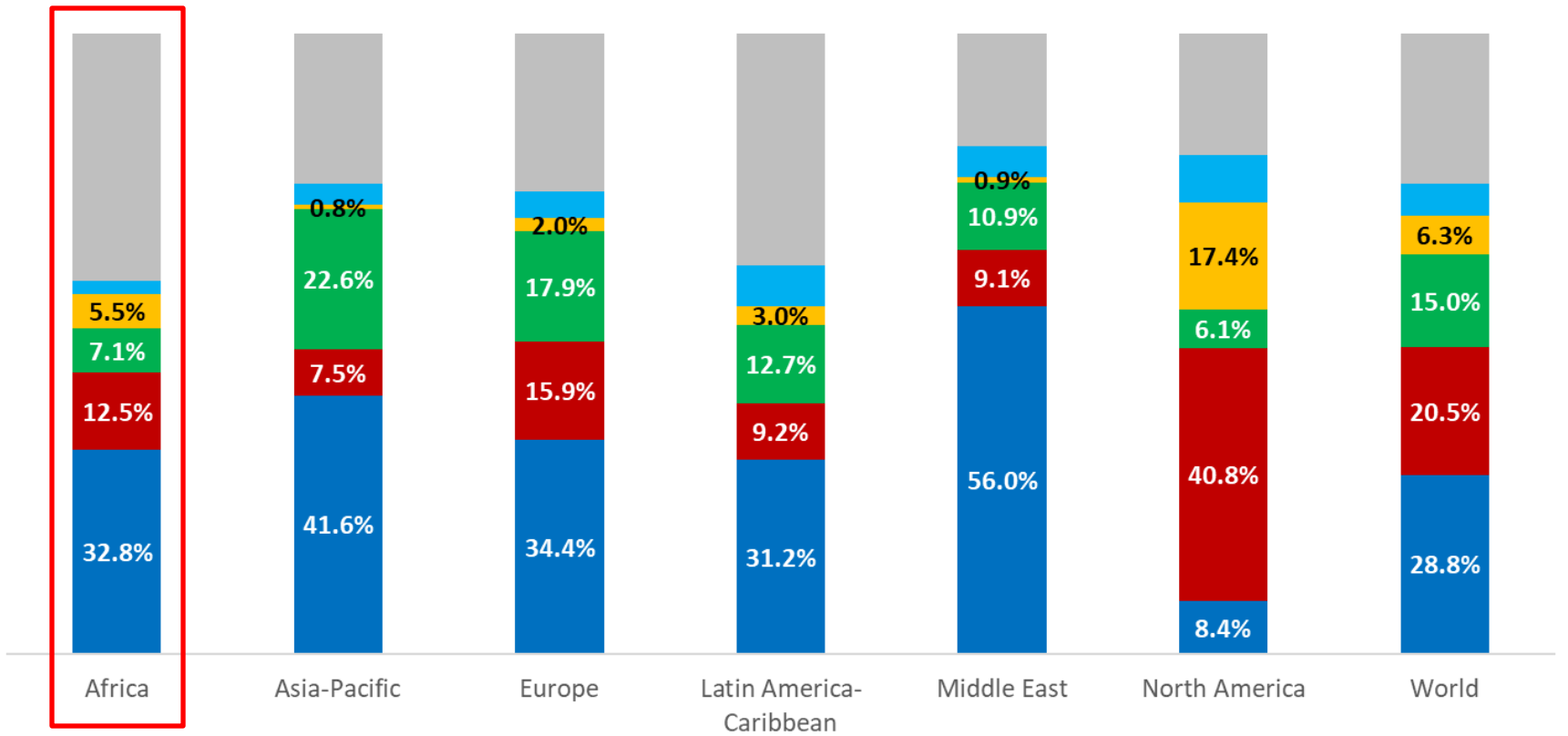
Source: 2018 ACI Airport Economics Report



## Distribution of airport revenues by region (2016)

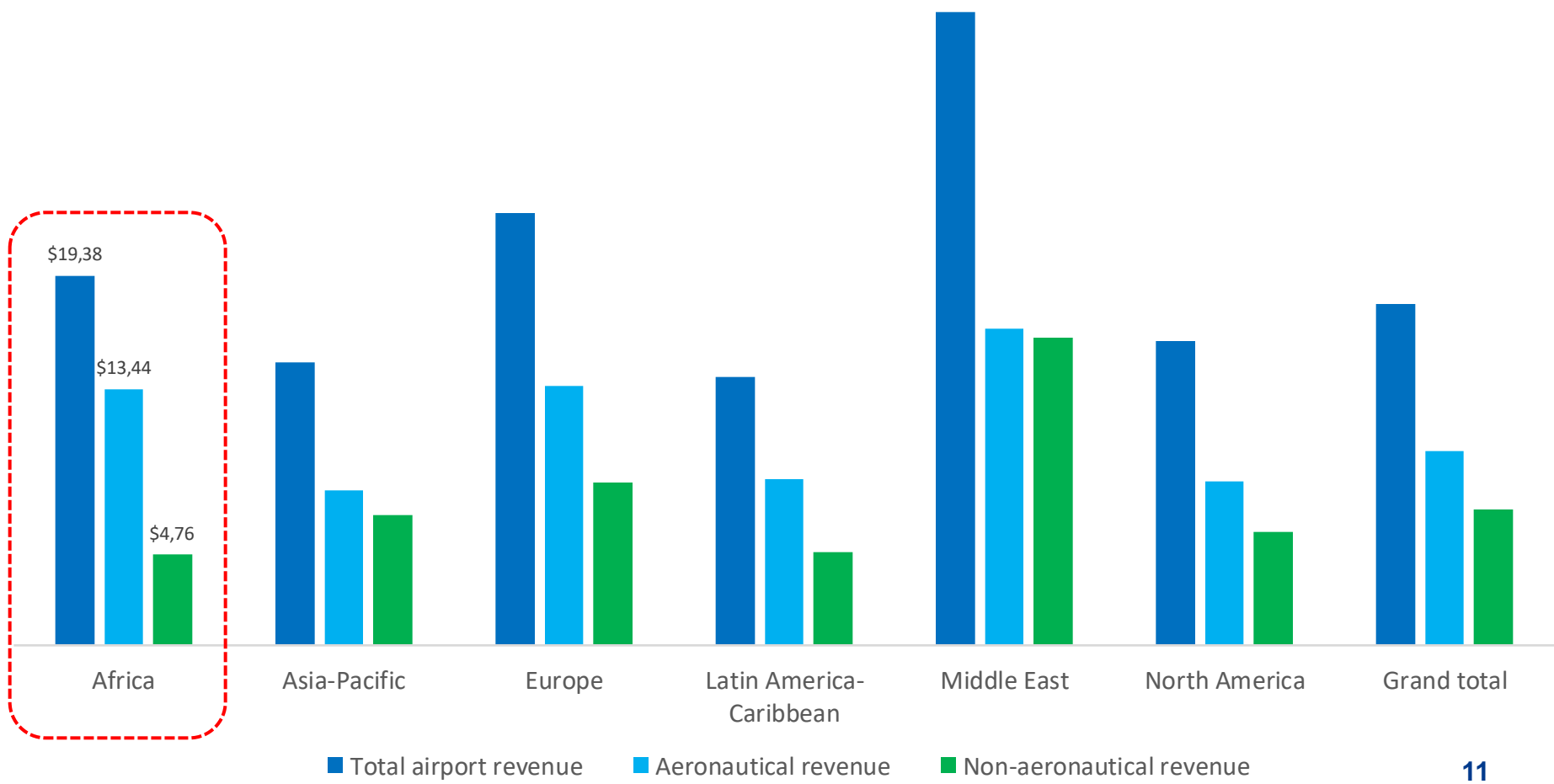


## Distribution of non-aeronautical revenues by type (2016)



■ Retail concessions 
 ■ Car parking 
 ■ Property and real estate revenue or rent 
 ■ Rental car concessions 
 ■ Food and beverage 
 ■ Other

## Airport revenues per passenger by region (2016)



## Non-aeronautical revenues – An essential factor for cost recovery



## Strategy towards a sustainable African airport industry



## Fostering more partnerships crucial for growth



## ACI's position on Duty-Free sales at airports

Protocol to Eliminate Illicit Trade in Tobacco Products



**PROTOCOL**  
TO ELIMINATE ILLICIT TRADE  
IN TOBACCO PRODUCTS



### **ARTICLE 13** **Duty free sales**

1. Each Party shall implement effective measures to subject any duty free sales to all relevant provisions of this Protocol, taking into consideration Article 6 of the WHO Framework Convention on Tobacco Control.
2. No later than five years following the entry into force of this Protocol, the Meeting of the Parties shall ensure at its next session that evidence-based research is conducted to ascertain the extent of illicit trade in tobacco products related to duty free sales of such products. On the basis of such research, the Meeting of the Parties shall consider appropriate further action.

## Conclusion







The  
**voice** of the  
world's  
**airports**