

# Africa on the move

Boosting mobility  
and connectivity





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## 4 Key take-aways from the report

On 11-12<sup>th</sup> May 2026, Kenya and France are co-hosting the Africa Forward Summit in Nairobi. Clearly, there will be no moving forward without boosting mobility and connectivity within a continent of over 30 million km<sup>2</sup> – over seven times bigger than EU territory – and 1.3 billion people, comparable to the population of India.

This report provides a comprehensive overview of the current situation and hurdles to overcome, regarding both the “soft” mobility of persons, goods and services around the continent, and the “hard” physical connectivity infrastructures within the continent. It also highlights all commitments already taken at African level – though not all fully implemented, to address these challenges.

### **Enhanced mobility and connectivity are key**

- Enhanced mobility and connectivity are both key to accelerate continental integration and the swift implementation of the AfCFTA, as well as to facilitate and encourage regular migrations within the continent. And both are key to boost the mobilisation of domestic resources needed to effectively leverage Africa’s potential – be it demography or natural resources – and ensure the continent’s autonomy and sovereignty.
- The incentives are evident. Full implementation of the AfCFTA should boost intra-continental trade to 53% (from around 18% of Africa’s current trade), grow the manufacturing sector by \$1 trillion, generate income worth \$470 billion, and create 14 million jobs by 2035. Regarding migrations, the most recent data shows that over 72% of sub-Saharan migrants remain within their own continent, in search of better economic and social prospects.
- But there are still many hurdles to overcome, regarding both mobility and connectivity on this huge continent. All require enhanced and joint commitment from both Africa’s political and economic stakeholders and their partners.

### **“Soft” mobility: multiple hurdles to overcome**

- Regarding “soft” mobility, the ability of African citizens to freely travel around their own continent remains too limited. Only four countries – Mali, Niger, Rwanda, and São Tomé and Príncipe – have ratified the 2018 AU’s Free Movement of Persons Protocol, as concerns around security, public opinion and reciprocity limit political commitment. Only 28% of African citizens do not need a visa to travel to their fellow African countries. Moreover, their ability to study or work in another African country is hampered by limited educational and professional equivalence across the continent.
- The soft mobility of goods and services around the continent, key to facilitating intra-continental trade, is strangled not only by customs fees, but by numerous non-tariff barriers, often “behind the border”, such as sanitary and phytosanitary barriers, labelling and packaging standards. Finally, limited currency convertibility prevents swift trade operations, meaning that the continent loses approximately \$5 billion a year to currency conversion costs. Both the AfCFTA Secretariat and RECs are working on these challenges, which require strong political commitment at country level, and could also benefit from exchange of expertise and best practices from other economic unions.

**Connectivity: mostly outdated and outbound**

- Historically built to support an economic model based on the export of raw commodities outside the continent, connectivity within the continent remains mostly outdated and outbound, thus glaringly insufficient to cover the needs of a 30 million km<sup>2</sup> wide continent. Travel within the continent remains slower, more expensive and less direct than comparable journeys across any other world regions.
- Ground transport, especially by roads, remains by far the main mode of transport. But roads are too often discontinuous and dangerous, while railway travel suffers from limited interoperability, often obsolete systems with high maintenance costs, and low affordability for transport of people or goods. At least 13 countries, hosting around 17% of the continent's population, many of them landlocked, still have no direct rail access to seaports. Air transport within the continent is increasing, but from a very low base, and remains costly and mostly outbound. Africa's river network remains an under-utilised asset.

**Increased partner commitment**

- Aware of the demand, and the opportunities, Africa's partners have boosted their engagement in the continent's infrastructures. Notably China through the Belt and Road Initiative projects, though those remain essentially outbound – reproducing the former model of raw commodities exports, now focused on critical minerals. The EU Global Gateway represents a major investment and commitment to boost the continent's inbound infrastructures, around 55 "strategic corridors", out of which 12 are identified as "priority corridors", criss-crossing most of sub-Saharan Africa. This currently relies on high carbon industries, such as steel and cement, a major side effect to be addressed, as is the need to build infrastructures able to resist to climate-impact events. All this will increase costs.

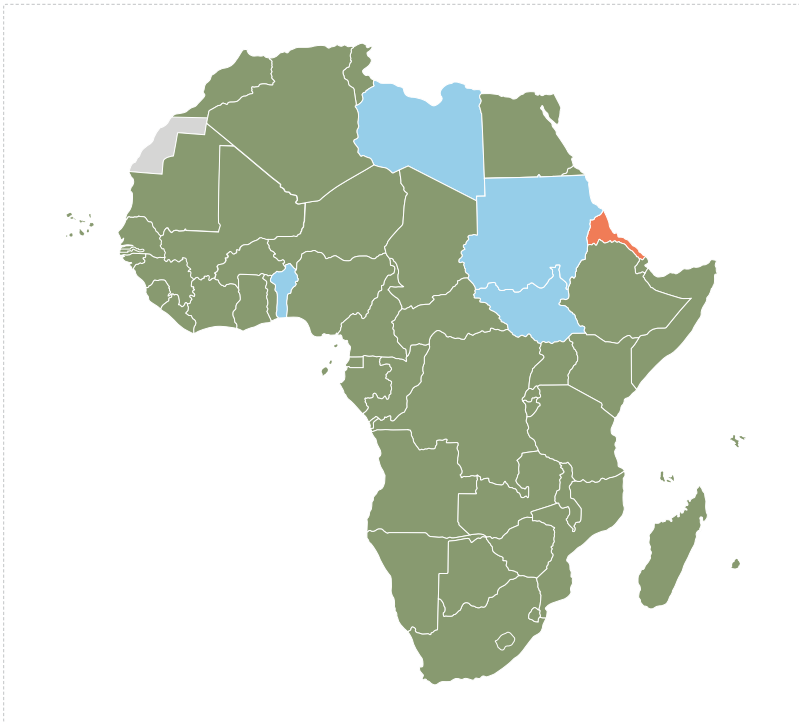
In conclusion, investing to boost both mobility and connectivity within the continent presents obvious opportunities given the demand, and evident positive impact on continental economic integration, jobs prospects for a growing youth population, and increased regular migrations within the continent. This requires joint actions from both African governments whose political commitment is still required on many key points, and from their partners – not only through financial pledges but also through exchange of expertise and best practices.

Setting the scene: free movement of people, goods and services is key to both economic integration of and regular migration within the continent



## 8 THE AfCFTA: HIGH PROMISES BUT SLOW IMPLEMENTATION

Africa: AfCFTA ratification status (2025)



AfCFTA promises: boosting intra-continental trade to 53% from around 18% of Africa's current trade, growing the manufacturing sector by \$1 trillion, generating income worth \$470 billion, creating 14 million jobs by 2035.<sup>2</sup>

### Key

- Signed
- Signed & ratified
- Not signed

Source: MIF based on Africa Visa Openness (2025) & Somalia National News Agency (2025)

The AfCFTA is one of the main flagships of the African Union's (AU) Agenda 2063. After being proposed by the 2012 AU Summit, the agreement entered into force in May 2019. It aims to create the world's largest single market by progressively eliminating tariffs on most goods, reducing non-tariff barriers, harmonising trade regulations, and improving trade-related infrastructure.<sup>1</sup>

### How the AfCFTA is using policy to improve mobility by addressing the cost and complexity of doing business in Africa

Focus area	AfCFTA policies	Impact on mobility
Tariffs	<ul style="list-style-type: none"> <li>• Eliminate 90% of tariffs.<sup>3</sup></li> <li>• For non-Least Developed Countries (LDCs) non-sensitive lines are to be eliminated over five years. For LDCs over ten years.</li> <li>• Of the remaining 10% of tariff lines, 7% are for "sensitive" products, to be phased out over a longer period, while 3% of lines may be excluded.<sup>4</sup></li> </ul>	<p>Lower tariffs on traded goods can reduce costs, potentially encouraging a transition from informal to formal trade but only if customs procedures, paperwork, market access and transport are also improved.</p> <p>Tariff removal impact on jobs depends on the production location.</p> <p>Labour market shifts can increase inter-regional migration (rural to urban migration, or between neighbouring countries) as workers move toward growth hubs.</p>



Focus area	AfCFTA policies	Impact on mobility
Non-Tariff Barriers (NTBs) including: regulatory environment, administrative procedures, health measures, quantitative restrictions, inconsistent regulations	<ul style="list-style-type: none"> <li>Prohibition of "unjustified" NTBs that inhibit intra-African trade.<sup>5</sup></li> <li>Dedicated NTB mechanism to lodge complaints against NTBs.<sup>6</sup></li> <li>Member States must notify the Secretariat of any changes to trade regulation, providing increasing transparency.<sup>7</sup></li> </ul>	<p>Eliminating NTBs is particularly important for small and medium-sized enterprises (SMEs), informal traders, and cross-border traders (who often lack capacity for costly compliance).<sup>8</sup></p> <p>Businesses can report barriers they meet (e.g. quarantine delays, non-recognition of certificates, licensing delays). If authorities act, this could significantly ease cross-border trade over time.</p>
Customs harmonisations/ Tax streamlining to help cross-border business	<ul style="list-style-type: none"> <li>A "single window" system: traders can submit standardised information and documents at one entry point (instead of through multiple agencies) to fulfil all import, export and transit formalities.<sup>9</sup></li> <li>The AfCFTA invites states to create "authorised operator" schemes: operators (importers/exporters/transporters) that meet compliance, solvency, supply-chain-security criteria can get preferential customs facilitation: fewer inspections, simplified documentation, deferred payment, reduced guarantees, clearance at operator premises.<sup>10</sup></li> </ul>	Improved mutual administrative assistance, sharing information, joint procedures, and coordinated enforcement between customs authorities help facilitate smoother cross-border flows and reduces opportunities for fraud and unnecessary complexity.
Trade facilitation measures/ Improved mobility for service providers	<ul style="list-style-type: none"> <li>Protocol on Trade in Services: Member States can liberalise certain services sectors, including financial services, logistics, telecommunications, professional services, and transport.</li> <li>The agreement also includes provisions for movement of natural persons, facilitating the temporary movement of professionals and technicians across borders for service provision.<sup>11</sup></li> </ul>	Lower costs for businesses accessing logistics, finance, and skilled labour, especially for SMEs and startups that need cross-border service inputs.
Rules of origin	<ul style="list-style-type: none"> <li>Product-specific origin criteria: products must meet defined thresholds such as percentage of local value added.</li> <li>Cumulation principle: products will be considered as a local output of the African country within which the final processing or manufacturing takes place.<sup>12</sup></li> </ul>	<p>Increases cross-border goods movement: businesses can source materials from different African countries yet still qualify for tariff benefits.</p> <p>Encourages regional value chain growth.</p>
Pan-African Payments and Settlement System (PAPSS)	<ul style="list-style-type: none"> <li>Local currency settlement framework: eliminates the need to convert to foreign currencies for intra-African trade.</li> <li>Real-time settlement: payments are processed instantly through participating banks.<sup>13</sup></li> </ul>	<p>Facilitates faster and cheaper cross-border transactions by reducing delays and costs.</p> <p>Supports SME trade mobility – traders who lack access to foreign currency can trade more easily.</p>
African Trade Observatory	<ul style="list-style-type: none"> <li>Centralised trade data access: provides information on tariffs and regulations across the continent.</li> <li>Transparency and information sharing network: reduces information asymmetry between traders and countries.<sup>14</sup></li> </ul>	<p>Improves the decision-making ability of traders, enabling them to identify where they could export goods.</p> <p>Reduces market entry barriers. Providing better information lowers uncertainty and encourages new traders to participate in cross-border activity.</p>

### Emerging industries in Africa: the perfect opportunity for mobility


Mobility is key for regional hubs such as Kenya in ICT and fintech,<sup>15</sup> Rwanda in digital governance<sup>16</sup> and Morocco's automotive industry.<sup>17</sup> New industries are emerging on the continent, particularly due to an increased demand for green technology and sustainable energy. Africa is best placed to leverage this global reorientation as the continent is in possession of many of the minerals and resources in demand by international markets – provided mobility hurdles, whether at the people, goods or services level, are lifted.

Emerging industry	Intra-Africa migration opportunity
Renewable energy & clean power	Renewable energy sector to generate around 70% of all jobs in Africa by 2030. <sup>18</sup>
Critical minerals & processing	Africa holds 30% of the world critical mineral reserves crucial for green technologies such as electric vehicle (EV) batteries. DR Congo alone accounts for about 70% of the world's cobalt mining. For the continent to level up in value chains and expand its processing sector, it will require a group effort and continental talent. <sup>19</sup>
Circular economy	By 2030, 11 million jobs could be unlocked in Africa through the circular economy with recycling, repairing and reusing for different sectors, it could also unlock \$546 billion in market opportunities. <sup>20</sup>
Agriculture & agro-processing	With around 60% <sup>21</sup> of the world's remaining arable land, policies aimed at improving low productivity will likely require more labour. Green economy forecasts include jobs in climate smart agriculture which is projected to create between 90,000-370,000 jobs by 2030. <sup>22</sup>
Digital economy & e-commerce	Digital systems like mobile money and e-commerce growth are transforming the payments industry in Africa, which could facilitate better cross-border payments. The digital payments economy in Africa is expected to reach \$1.5 trillion by 2030. <sup>23</sup>
Automotive manufacturing	In South Africa in particular, automotive sectors aim to double employment to 224,000 by 2035. <sup>24</sup>
Trade, logistics & transport	The AfCFTA predicts a 28% increase intra-Africa freight demand. <sup>25</sup>

## MIGRATIONS: AFRICAN MIGRANTS MOVE MOSTLY WITHIN THEIR OWN CONTINENT

Africa is not a continent of mass exodus. The 2019 Ibrahim Forum Report “Africa’s Youth: Jobs or Migration?” already highlighted that over half of Africa’s migrant stock remained on their own continent. From ongoing work to update this report, latest data show that this trend is not only confirmed, but increasing.<sup>26</sup>

In 2024, 54% of Africa’s migrant stock remain on their own continent, while 23% are located in Europe and 15% in Asia. Those moving to Europe are in fact overwhelmingly coming from North Africa, representing 76.4% of Africa’s migrant stock in Europe in 2024. In contrast, 72.4% of sub-Saharan migrants remain within their own continent.<sup>27</sup>



According to latest data, 72.4% of sub-Saharan migrants remain within their own continent

### Major migration corridors within Africa

Region, development group, country or area of origin	Region, development group, country or area of destination	2024	Population
Burkina Faso	Côte d'Ivoire	1,820,882	> 1 million
South Sudan	Sudan	1,507,976	
Zimbabwe	South Africa	1,072,620	
Sudan	Chad	1,071,034	
South Sudan	Uganda	923,658	500,000 to 1 million
DR Congo	Uganda	637,206	
Sudan	South Sudan	608,817	
Côte d'Ivoire	Burkina Faso	574,409	
Sudan	Egypt	500,000	
South Sudan	Ethiopia	443,743	200,000 to 500,000
Mozambique	South Africa	412,058	
Benin	Nigeria	404,468	
Mali	Côte d'Ivoire	403,646	
Somalia	Kenya	401,953	
Somalia	Ethiopia	389,246	
Eritrea	Sudan	384,053	
Central African Republic	DR Congo	368,125	
Central African Republic	Cameroon	336,349	
Rwanda	DR Congo	286,208	
Uganda	Kenya	274,655	
Ghana	Nigeria	255,531	
Burundi	Tanzania	241,069	
Lesotho	South Africa	237,718	
DR Congo	Rwanda	236,385	
DR Congo	Burundi	224,091	
Malawi	South Africa	220,437	
Côte d'Ivoire	Mali	219,185	
Angola	DR Congo	201,592	

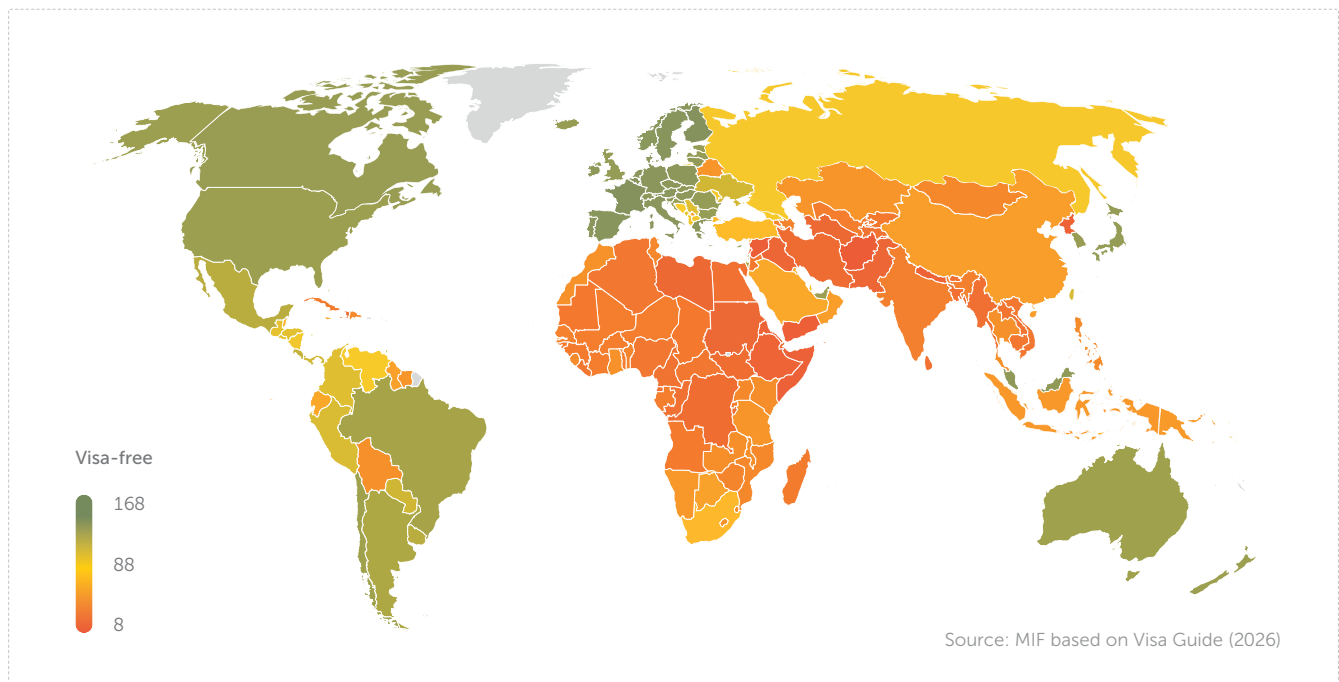
Mobility:  
multiple  
hurdles to  
overcome



African citizens ability to travel, to live in or to work in non-African countries is the most limited at world level. But travelling within their own continent is also constrained by multiple hurdles.

### Strong barriers to movement outside the continent

World: Number of visa-free countries passport grants access to (2025)



At world level, Africa is the region with the weakest passport strength, as measured by how many countries a passport will grant visa-free or visa-on-arrival entry into.

The strongest African passport as of 2026 is Seychelles, allowing visa-free access to 127 countries worldwide, followed by Mauritius with 119 and then, with a large drop, South Africa with 75 countries worldwide.<sup>28</sup>

Compared to some of the strongest international passports, such as Singapore's, which grants access to 168 countries visa-free and Finland with 162 countries, the disparity in passport strength is striking.

For 21 African countries, their national passports grant visa-free access to fewer than 30 countries worldwide. Of the bottom-ranked 30 countries by passport strength at the global level, African countries account for 16 of them: Burundi, Cameroon, Chad, Djibouti, DR Congo, Egypt, Eritrea, Ethiopia, Guinea-Bissau, Libya, Mali, Nigeria, Republic of Congo, Somalia, South Sudan, Sudan.<sup>29</sup>

At world level,  
Africa is the region  
with the weakest  
passport strength

## African countries: ranked by visa-free access worldwide

Country	Visa-free	Visa-on-arrival
Seychelles	127	28
Mauritius	119	26
South Africa	75	26
Botswana	60	21
Namibia	53	23
Tanzania	50	16
Gambia	49	22
Ghana	49	17
Lesotho	49	25
Morocco	48	23
Eswatini	46	22
Malawi	46	24
Zambia	46	22
Kenya	45	24
Sierra Leone	44	18
Mozambique	41	22
Uganda	41	24
Cabo Verde	40	25
Tunisia	40	29
Benin	39	25
Zimbabwe	39	24
Senegal	36	21
Burkina Faso	33	23
Gabon	33	28
Mali	33	19
Niger	33	22
Côte d'Ivoire	32	21
Rwanda	32	31
Togo	32	25
Madagascar	31	26
Angola	30	20
Guinea	30	24
São Tomé and Príncipe	30	28
Chad	29	25
Guinea-Bissau	29	20
Mauritania	29	25
Nigeria	28	15
Algeria	27	26
Central African Republic	27	26
Liberia	27	19
Cameroon	25	26
Egypt	24	28
Equatorial Guinea	24	29
Comoros	22	28
DRC	21	22
South Sudan	21	22
Burundi	20	23
Libya	17	22
Djibouti	16	28
Sudan	16	23
Ethiopia	14	30
Eritrea	13	22
Somalia	12	19

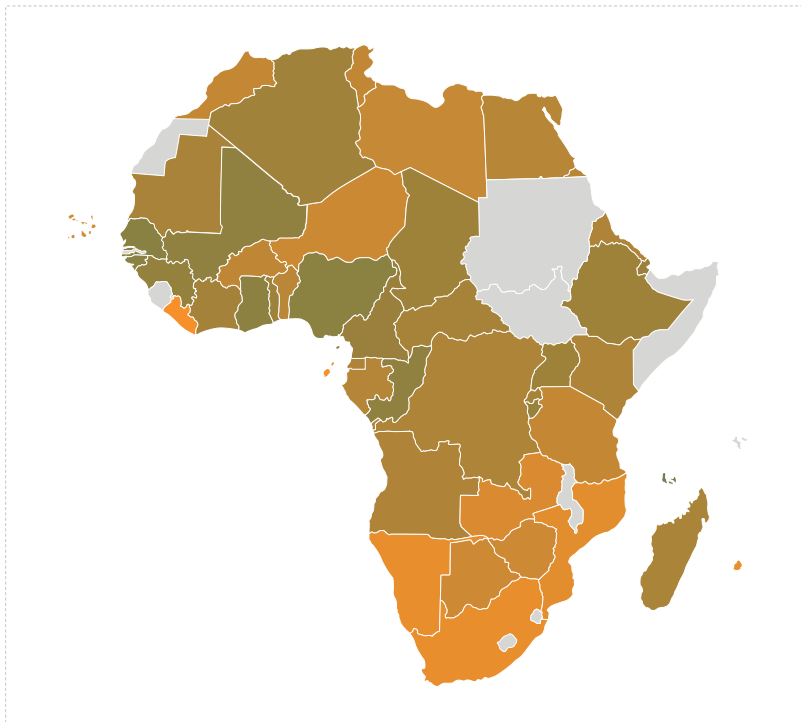
## Rejected visa applications cost Africa €60 million every year

The cost of travel outside of the continent is high for Africans. According to the European Commission, rejected Schengen visa applications cost African citizens a combined €60 million every year on average. While Asia bears the highest cost at €70.7 million, Africa places a close second.<sup>30</sup>

Rejection figures for Schengen visas are especially high across Africa. In total, more than 706,000 applications were rejected across the continent in 2024 alone.

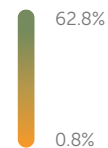
Algeria, Morocco and Egypt have the highest number of Schengen refusals, linked to the high number of applications. The highest rates of refusal as a share of total applications go to applications from Comoros, Senegal, Guinea-Bissau and Nigeria.

### African countries: rejected Schengen visa applications as a % of total applications (2024)



North African countries, particularly Algeria, Morocco and Egypt, represent half of rejected Schengen applications from Africa<sup>31</sup>

% Rejected

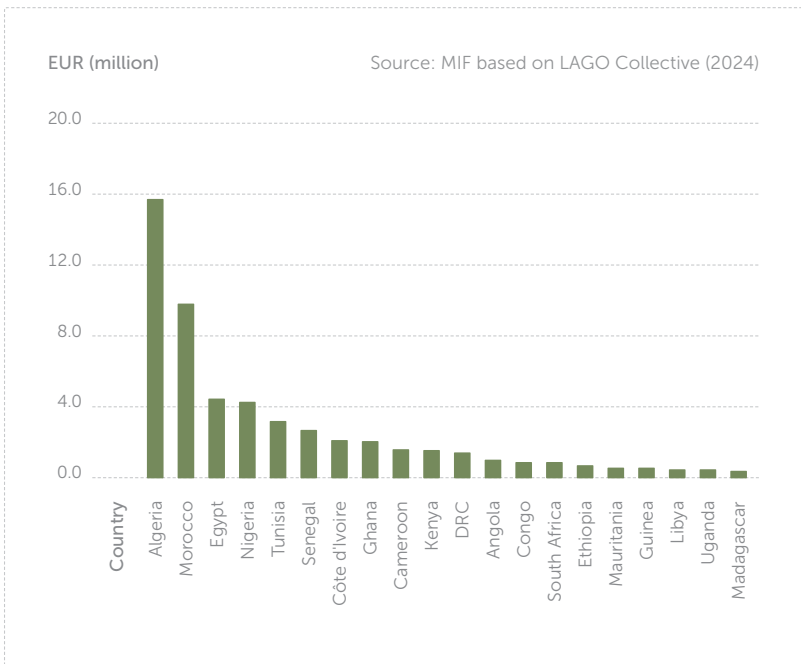


Source: MIF based on Africa Visa Openness (2025)

In 2024, seven of the ten countries with the highest Schengen refusal rates were African: Comoros at 62.8%, Senegal at 46.8%, Guinea-Bissau at 46.4% and Nigeria at 45.6%.<sup>32</sup> These refusal rates tower over the global average of 16%.<sup>33</sup>

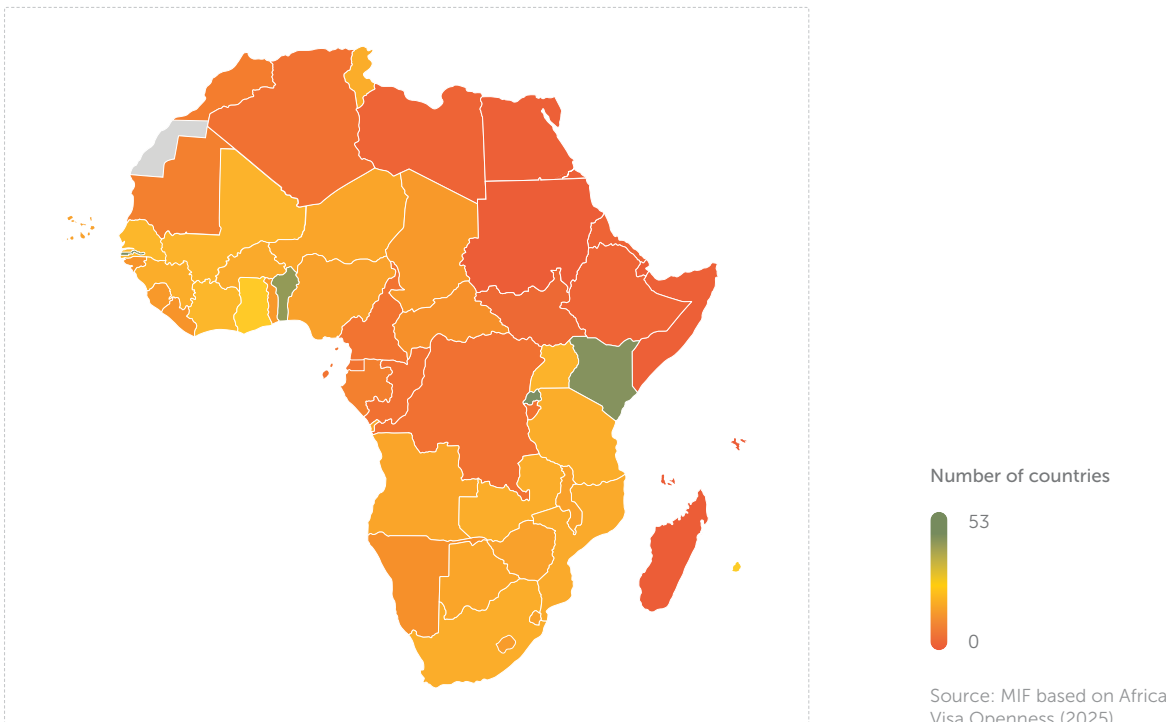
In 2024, more than a quarter of this cost was paid by Algeria (€15 million) as a result of the country's roughly 530,000 Schengen visa applications. Morocco and Egypt follow closely behind with respective losses of €9.8 million and €4.5 million, respectively.<sup>34</sup> In fact, Algeria tops the list of countries worldwide who lost the largest amount of money from rejected Schengen visa applications, followed by Turkey and India.<sup>35</sup>

**Various African countries: estimated cost of rejected Schengen visa applications**



**Visa-free travel for Africans within their own continent remains limited**

Africa: number of African countries which do not require a visa to enter (2025)



Only 15 African countries allow African citizens originating from 20 or more African countries to enter visa-free in 2025. Conversely, 27 African countries have visa restrictions for at least 34 African countries. As of 2025, only two countries, Rwanda and Gambia, extend visa-free travel to all 53 of their fellow African countries. Following these is Kenya, which allows visa-free movement for 51 countries and then Benin, which allows visa-free movement for 48 African countries.<sup>36</sup>

#### Top 20 African countries: intra-African, visa-free travel (August 2025)

Country <sup>38</sup>	No visa	Visa on arrival	Visa required
The Gambia	53	0	0
Rwanda	53	0	0
Kenya	51	0	2
Benin	48	0	5
Ghana	26	25	2
Cabo Verde	17	36	0
Mozambique	19	32	2
Mauritius	27	21	5
Burundi	6	47	0
Sierra Leone	15	35	3
Eritrea	2	51	0
Djibouti	0	53	0
Comoros	0	53	0
Senegal	22	25	6
Madagascar	0	52	1
Ethiopia	2	46	5
Tanzania	20	22	11
Namibia	13	27	13
Zambia	20	7	26
Zimbabwe	17	10	26
Malawi	17	10	26

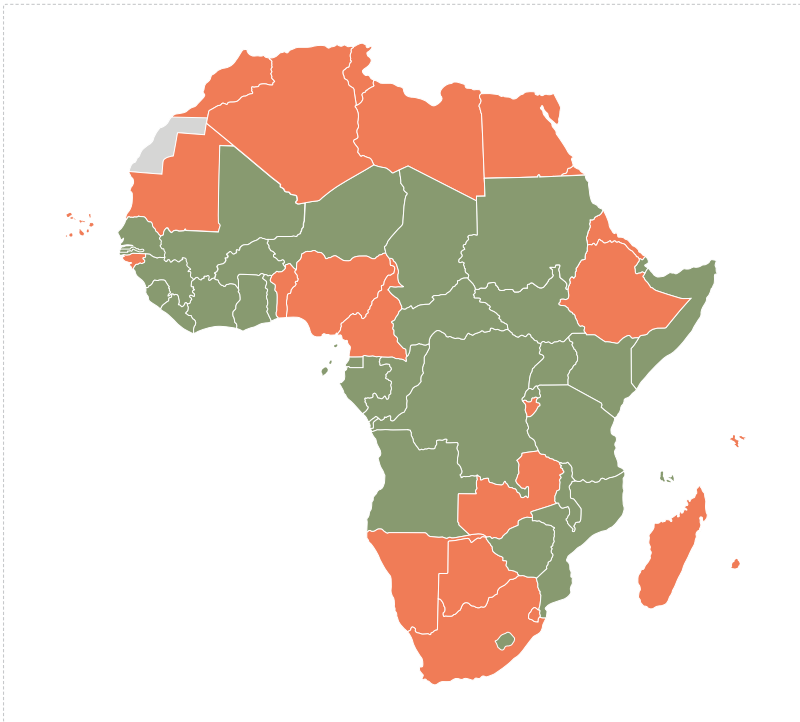
Source: MIF based on Africa Visa Openness (2025)

Only two countries, Rwanda and Gambia, allow visa-free travel for African citizens from all 53 fellow countries, followed by Benin which permits 52<sup>37</sup>

#### At continental level: slow implementation of the Free Movement of Persons Protocol (FMPP)

Adopted in 2018, the FMPP allows African citizens to travel, live, and work freely across Member States.<sup>39</sup> It aims to boost integration, economic growth, and social cohesion by removing visa requirements, facilitating mutual recognition of rights, and enabling citizens to relocate or establish businesses in other African countries. The Protocol envisions a phased approach: visa-free entry, the right to reside, and finally the right to establish a business or profession. Although many countries have signed it, few have yet ratified it.<sup>40</sup>

Africa: country status on the Free Movement of Persons Protocol (2025)



Only four countries, Mali, Niger, Rwanda and São Tomé and Príncipe, have ratified the FMPP, with no further ratifications since July 2022<sup>42</sup>

Key  
 ● Signed  
 ● Not signed

Source: MIF based on Africa Visa Openness (2025)

Steps taken <sup>41</sup>	Number of African countries
Signed FMPP	32
Offers e-visa	31
Ratified FMPP	4

Concerns around security, public opinion, reciprocity and administrative capacity massively limit the ratification of the FMPP

Limited improvements in visa processing and FMPP implementation

Only 28% of African citizens do not need a visa to travel to their fellow African countries. In ten years, this figure has only increased by 8%.<sup>43</sup> In 2025, 49 out of 54 African countries offer visa-free entry privileges to the citizens of at least one other African country. As of 2025, 33 of 54 African countries offer visa-free travel to at least 10 other African countries, while 40 offer it to more than five countries.<sup>44</sup>

These figures remain low. Only 32 countries have signed the FMPP. As only four countries – Mali, Niger, Rwanda and São Tomé and Príncipe – have so far ratified it, the initiative remains 11 countries short of the 15 required to bring the Protocol into law.<sup>45</sup>

Only 28% of African citizens do not need a visa to travel to their fellow African countries

**No progress since 2019: why is ratification of the FMPP so slow?**

1. Security concerns: Governments fear that fully open borders could make it harder to control cross-border crime, trafficking, terrorism, or arms flows, especially in states that border fragile regions.
2. Economic and labour market fears: Some countries are concerned that free movement could lead to an influx of workers that might strain job markets, depress wages, or create competition for limited public services, a concern more pronounced in wealthier or more stable states.
3. Political sensitivity and public opinion: Political leaders fear domestic backlash if citizens believe free movement could increase irregular migration or reduce employment opportunities for locals.
4. Concerns about reciprocity and uneven implementation: Countries are reluctant to open their borders if they are not confident that their neighbours will implement the same standards and respect the rights of their citizens.
5. Overlapping regional commitments: Some regional economic communities (RECs), like ECOWAS, already have their own free-movement frameworks. States in other regions may be slower because they have less experience with mobility agreements or see technical conflicts between regional and continental rules.
6. Weak administrative and legal capacity: Implementing the protocol requires harmonised immigration systems, biometric IDs, data-sharing mechanisms, and updated national laws.

Sierra Leone and Angola only have made some progress. Sierra Leone has implemented visa-free access privileges for 20 countries since 2024 and only three countries are subject to a visa requirement ahead of travel. While most African countries still require a visa to enter Sierra Leone, 35 countries can now do this on arrival.<sup>46</sup> Angola now offers visa-free access to 18 African countries, an increase from just 10 in 2023. It has also announced simplified bureaucratic procedures in the granting of visas at its consular facilities as well as its e-visa portal, guaranteeing processing in under three working days for both.<sup>47</sup>

### Best practices to improve intra-African travel

1. Extend visa-free travel policies to all AU Member States, if necessary, in increments (moving from a visa-before-travel to a visa-on-arrival or visa-free entry; moving from a visa-on-arrival to visa-free entry).
2. Where African citizens are still required to obtain a visa ahead of travel, offer the option of an e-visa based on a secure, reliable, mobile user-friendly platform with a guaranteed response time
3. Consider regional visa systems that apply within an entire REC, or at a minimum, covers travel to several REC Member States.
4. Offer longer-term and multiple-entry visas to repeat travellers.
5. Keep government websites updated with reliable information on different categories of visas – tourism, business, study – and visa exemptions.
6. Present visa-related information in different languages and in an accessible format.

### The AU passport: limited ratification is slowing down the process

As part of Agenda 2063, continent-wide issuance of an AU passport will allow visa-free movement of African citizens between all Member States. Formally launched in 2016 at the Kigali AU Summit,<sup>48</sup> the AU passport implementation remains slow. Though the AU has made strong progress creating technical, design and security guidelines for the rollout of the passport and Member States have received guidance on how to integrate the AU passport into their systems, the lack of political will appears to be limiting the project. Countries cite security concerns, sovereignty worries and lack of technical capacity as key barriers to overcome.<sup>49</sup> The new AU's Second Ten-Year Implementation Plan (STYIP 2025-2034) highlights fast-tracking AU Passport rollout as a priority. Several public statements have emphasised that the passport will be available for all Africans when technical and legal frameworks are aligned.<sup>50</sup>

#### Three main hurdles remain:

1. Ensuring full ratification of the Free Movement of Persons Protocol (FMPP).
2. Improving Member State alignment on passport production.
3. Upgrading Member States' border and biometric systems.

## At sub-regional level: slow but steady progress within the RECs

Most of the eight RECs have some form of policy related to people mobility, at various stages of implementation and ratification. Some RECs are more advanced: ECOWAS and EAC have protocols granting free movement (albeit with certain conditions) between Member States for most citizens. Others, such as CEN-SAD offer reduced visa requirements but not fully fledged free mobility.



Free movement  
of people is most  
advanced in  
ECOWAS and EAC

## What are Africa's RECs doing to improve migration and mobility across the continent

Regional Economic Community	Key migration policies & initiatives for people mobility
ECOWAS (Economic Community of West African States)	<ul style="list-style-type: none"> <li>• ECOWAS Free Movement Protocol granting visa-free entry for up to 90 days.<sup>51</sup></li> <li>• ECOWAS National Biometric ID Card for cross-border travel.<sup>52</sup></li> <li>• ECOWAS Travel Certificate, a regional travel document designed to ease movement within ECOWAS member states.<sup>53</sup></li> </ul>
EAC (East African Community)	<ul style="list-style-type: none"> <li>• EAC Common Market Protocol guaranteeing free movement of persons and labour.<sup>54</sup></li> <li>• EAC e-passport.<sup>55</sup></li> </ul>
SADC (Southern African Development Community)	<ul style="list-style-type: none"> <li>• SADC Protocol on Facilitation of Movement (not fully in force but influences policy).<sup>56</sup></li> <li>• Bilateral work-permit easing among some SADC states.<sup>57</sup></li> <li>• Regional tourism visa discussions ("Univisa" initiatives in Zambia–Zimbabwe).<sup>58</sup></li> </ul>
COMESA (Common Market for Eastern and Southern Africa)	<ul style="list-style-type: none"> <li>• COMESA Protocol on Free Movement (not fully ratified but guiding).<sup>59</sup></li> </ul>
IGAD (Intergovernmental Authority on Development)	<ul style="list-style-type: none"> <li>• IGAD Free Movement Protocol (2021, adoption ongoing).<sup>60</sup></li> <li>• Refugee-freedom of movement policies encouraged across member states.<sup>61</sup></li> <li>• Pastoral mobility corridors agreements.<sup>62</sup></li> </ul>
ECCAS (Economic Community of Central African States)	<ul style="list-style-type: none"> <li>• ECCAS Free Movement initiative (visa-free travel adopted by CEMAC members, a sub-group).<sup>63</sup></li> <li>• Economic and Monetary Community of Central Africa (CEMAC) passport allowing freer mobility.</li> <li>• Attempts to harmonise residency and work regulations.<sup>64</sup></li> </ul>
CEN-SAD (Community of Sahel–Saharan States)	<ul style="list-style-type: none"> <li>• Reduced visa requirements between certain member states.<sup>65</sup></li> </ul>
AMU/UMU (Arab Maghreb Union)	<ul style="list-style-type: none"> <li>• Agreements in principle for free movement among Maghreb states.<sup>66</sup></li> <li>• Some bilateral labour and mobility agreements (e.g., Tunisia–Morocco).</li> </ul>

## Best mobility practices in language-based communities

Language-based Community	Language	African Member States	Migration and mobility policies
<b>Community of Portuguese Language Countries (CPLP)</b> Africa's population covered: 5.1%	Portuguese	Angola, Cabo Verde, Equatorial Guinea, Guinea-Bissau, Mozambique, São Tomé and Príncipe <sup>67</sup>	The CPLP Mobility Agreement facilitates the movement of citizens of Member States within the CPLP space, including mechanisms for short stay, temporary stay, and residence. <sup>68</sup>
<b>League of Arab States</b> Africa's population covered: 19.5%	Arabic	Algeria, Comoros, Djibouti, Egypt, Libya, Mauritania, Morocco, Somalia, Sudan, Tunisia <sup>69</sup>	There has been increasing regional collaboration among Arab states aimed at improving migration governance, refugee and migrant-worker protection, and supporting development-oriented labour migration.
<b>Organisation Internationale de la Francophonie (OIF)</b> Africa's population covered: 28%	French	Benin, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Côte d'Ivoire, Comoros, Republic of Congo, DR Congo, Djibouti, Eswatini, Equatorial Guinea, Egypt, Gabon, Guinea, Guinea-Bissau, Madagascar, Mali, Mauritania, Mauritius, Niger, Rwanda, São Tomé and Príncipe, Senegal, Seychelles, Togo, Tunisia <sup>70</sup>	The OIF supports educational and academic mobility via programmes through one of its operators, Agence Universitaire de la Francophonie (AUF). <sup>71</sup>
<b>Commonwealth</b> Africa's population covered: 43%	English	Botswana, Cameroon, Gabon, Gambia, Ghana, Kenya, Eswatini, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Nigeria, Rwanda, Seychelles, Sierra Leone, South Africa, Togo, Uganda, Tanzania, Zambia <sup>72</sup>	The Commonwealth has occasionally issued joint statements advocating for addressing migration challenges among its Member States, including support for frameworks covering legal migration, mobility, refugee protection, and prevention of smuggling and trafficking. <sup>73</sup>

## Mobility for students and professionals: uneven progress

African governments are slowly implementing various frameworks to improve both educational and professional equivalences across the continent. At the continental level, Africa is moving from fragmented national recognition systems towards a multi-layered regional architecture combining continental frameworks (ACQF, AfCFTA), sub-regional mutual recognition agreements (MRAs) in RECs such as EAC, SADC and sector-specific agreements (engineering, health, accounting). However, implementation remains uneven and politically constrained.

### Students and qualifications equivalence

#### African Continental Qualifications Framework (ACQF)

This AU flagship initiative, launched in 2019 to harmonise qualification systems across the continent, works by referencing national qualifications frameworks (NQFs) to a common continental standard. So far, it includes levels for comparing diplomas, degrees, and vocational qualifications and a continental qualifications database/platform. The ACQF has been heavily influenced by the EU's European Qualifications Framework (EQF) which endeavours to provide the same level of harmonisations within qualifications.<sup>74</sup>

### **Addis Convention (2014, updated 2019)**

The AU's main legal tool for academic and higher education qualification recognition across the continent, it currently covers diplomas, degrees and certificates. Specifically, this affects secondary school certificates (for university entry) and university degrees (for postgraduate study). It is based on fair and transparent assessment procedures, linked to UNESCO's global recognition frameworks and is grounded in the fundamental principle that recognition of educational qualifications should be the default, unless substantial differences are proven. This marks an important shift away from "case-by-case suspicion" toward presumptive recognition.<sup>75</sup>

#### **OIF support to educational and academic mobility**

The OIF supports educational and academic mobility via programmes through the Agence Universitaire de la Francophonie (AUF). It also runs a volunteer-mobility initiative, the Volontariat international de la Francophonie (VIF), for young people from Francophone countries, which offers placements abroad for a year working on projects, promoting South-South mobility among Francophone countries.<sup>76</sup>

### **Professional Equivalence**

#### **Joint Labour Migration Programme (JLMP)**

Formally adopted in 2015, this AU and partners initiative focuses on skills portability and labour mobility through the mutual recognition of qualifications and alignment between education systems and labour markets.<sup>77</sup>

#### **Professional Mutual Recognition Agreements (MRAs)**

These crucial agreements between domestic professional regulatory bodies are commonly used in regulated professions such as health, engineering, accounting and law. They often require additional exams or supervised practice and specific language or local law requirements. The EAC has advanced MRAs for several professional services like engineering and accounting. Similarly, the SADC states are developing MRAs across education, financial services and engineering.<sup>78</sup>

### **Improving educational and professional equivalence across the continent: five key hurdles to overcome**

1. Regulatory fragmentation creates a need to harmonise different: curricula, accreditation systems and licensing rules.
2. Professional protectionism: where domestic bodies may restrict entry and require local exams or partnerships.
3. Weak enforcement: agreements exist but are not fully implemented and often lack monitoring mechanisms.
4. Capacity: not all countries have National Qualifications Frameworks (NQFs) or strong accreditation institutions.
5. Language and legal systems differences: Anglophone, Francophone, Lusophone, Arabic all add extra steps to harmonisation and common law versus civil law systems diverge between countries.

**Non-tariff barriers: as limiting as tariffs**

While the AfCFTA is making progress reducing tariff barriers across the continent, trade and mobility are often still blocked by NTBs such as custom procedures, regulatory divergences and border management issues. The AfCFTA is implementing several protocols to address these challenges.

The Trade in Goods Protocol focuses on tariff reduction primarily but also customs cooperation and trade facilitation.

The Trade in Services Protocol pushes for mutual recognition of standards and covers financial services, transport, communications and tourism amongst others.

The AfCFTA also aligns with the World Trade Organization (WTO) through its annexes on trade facilitation which are developing transparency, customs digitalisation and better risk management systems for cross-border trade.

**Key continental initiatives to improve customs harmonisation**

Initiative	Objective
<p><b>AU Boosting Intra-African Trade (BIAT)</b></p>	<p>The boosting of intra-African trade and the deepening of Africa’s market integration, by fostering competition among African countries, will assist in enhancing their capacity and prepare them to compete more effectively on the global market.<sup>79</sup></p>
<p><b>One-Stop Border Posts (OSBPs)</b></p>	<p>OSBPs act as joint-border facilities between countries, replacing two separate customs checks into a single integrated process, such as the Kenya/Uganda OSBP and the Chirundu OSBP in Zambia/Zimbabwe.<sup>80</sup></p>
<p><b>Single Window Systems</b></p>	<p>Digital platforms where traders can submit documents to one single platform for harmonisation and are able to access all regulatory agencies relevant to their trade. These reduce corruption opportunities, bureaucracy and delays.<sup>81</sup></p>
<p><b>Authorised Economic Operator (AEO) Agreements</b></p>	<p>Inspired by the EU, these practices create trusted trader schemes that result in fewer inspections and faster clearances at borders. South Africa has already implemented several AEO protocols.<sup>82</sup></p>

**Key RECs initiatives for goods and services mobility**

Regional Economic Community	Key Policies & Initiatives for mobility of goods and services
<p><b>ECOWAS</b></p>	<ul style="list-style-type: none"> <li>• Harmonised vehicle insurance (ECOWAS Brown Card).<sup>83</sup></li> <li>• Introduction of a Common External Tariff (CET).<sup>84</sup></li> </ul>
<p><b>EAC</b></p>	<ul style="list-style-type: none"> <li>• Efforts toward integrated OSBPs.<sup>85</sup></li> </ul>
<p><b>COMESA</b></p>	<ul style="list-style-type: none"> <li>• OSBPs and simplified trade regimes aiding small-scale cross-border traders.<sup>86</sup></li> <li>• Transport corridor agreements improving mobility.<sup>87</sup></li> </ul>
<p><b>ECCAS</b></p>	<ul style="list-style-type: none"> <li>• Attempts to harmonise residency and work regulations.<sup>88</sup></li> </ul>
<p><b>AMU / UMU</b></p>	<ul style="list-style-type: none"> <li>• Plans for harmonised transport and trade procedures, though integration remains slow.<sup>89</sup></li> </ul>

Addressing regulatory norms that limit and stifle the goods trade remains a crucial challenge in Africa. Different standards, conformity assessments and certification bodies between countries require harmonisation and mutual recognition to speed up trade. Other factors like sanitary and phytosanitary measures, critical in the agriculture and food trades, act as hidden barriers if they are not standardised across borders. More broadly, these and other technical barriers to trade (TBT) like labelling rules, packaging standards and safety requirements all function as disincentives to the cross-border goods trade and regional integration when not collectively harmonised.

For services, many of the obstacles are "behind-the-border" as opposed to "at-the-border." Key barriers include licensing requirements, nationality restrictions, limits on foreign ownership and differing regulatory frameworks. All of which are areas which the AfCFTA is attempting to harmonise through MRAs and other licensing standardisation policies. But changes remain slow and limited by a lack of political commitment.

Finally, as informal trade represents a significant portion of cross-border activity, it is often met with harassment at borders as well as corruption and bribery, further disincentivising trade.



## Multiple regulatory norms limit the movement of goods between African countries

### **Goods and services mobility: best practices in other economic unions**

#### **EU**

Customs Union: tariff elimination and absence of internal borders, powered by mutual recognition and standards harmonisation, all within an integrated digital customs system.<sup>90</sup>

#### **MERCOSUR**

Partial customs union: focussed on tariff alignment and trade facilitation.<sup>91</sup>

#### **ASEAN**

ASEAN single window (ASW): integrates the national single windows (NSWs) of all ASEAN Member States to expedite cross-border clearance and facilitate paperless trade.<sup>92</sup>

#### **WTO**

Trade Facilitation Agreement principles centre on transparency, predictability, and the simplification of border procedures to harmonise import/export processes. Its unique "special and differential treatment" framework links implementation obligations to a country's capacity.<sup>93</sup>

### US tariffs war: a welcome incentive to boost intra-African exports

On 30 September 2025, the African Growth and Opportunity Act (AGOA) expired, marking an end to the defining duty-free framework of the US-Africa trade relationship, covering over 1,800 products.<sup>94</sup> Alongside this, US President Trump's administration has pursued an aggressive, often complicated and generally volatile tariff regime towards approximately half of African countries. Looking at the data, African exports to the US are not substantial, accounting for only 1.5% of the continent's collective GDP (at around \$10 billion in 2024).<sup>95</sup> Africa's \$34 billion of exports to the US represent just 1.2% of total US imports and appear miniscule when juxtaposed with Washington's \$3.2 trillion global trade volume.<sup>96</sup>


Following this upheaval, many African countries are reevaluating their relationship with the US. Some countries, like Kenya,<sup>97</sup> are pursuing comprehensive bilateral agreements with the US,<sup>98</sup> whereas many others are interested in actively consolidating African continental integration under the AfCFTA to diversify away from dependence on larger, more volatile economies like the US.

Additionally, the US tariffs could push African countries to increase their trade with other partners, specifically China. Over the past 25 years, China has risen to become Africa's largest trading partner. In 2024, trade with China was valued at approximately \$294.3 billion, a significant increase from \$13.9 billion in 2000.<sup>99</sup>

Finally, this could act as a welcome booster to accelerate intra-continental trade. This would reduce the asymmetric obligations many African countries find themselves under when entering trade deals with large partners, often at the expense of regional cohesion. Additionally, the AfCFTA potentially offers the option for African countries to negotiate collectively, like the European Union, meaning Africa could leverage its growing economic capacity to secure fairer trade deals, ensuring that its trade deals are in-keeping with value addition and intra-African trade.

### Limited currency convertibility: a strong deterrent

Africans pay a premium, especially those who live in countries whose currencies are not easily convertible into major international currencies such as the US Dollar or the Euro. African citizens must often convert several times from their home currencies into intermediate currencies and then finally their desired currency, losing out on the exchange rate at each stage.



Africa loses approximately \$5 billion per year to currency conversion costs<sup>100</sup>

### **Towards a Pan-African Currency? The Afro and the 2028 deadline**

The 1991 Abuja Treaty (which began as the Treaty Establishing the African Economic Community) is a foundational agreement of the African Union that laid out a long-term roadmap for deep continental integration. It envisioned creating a fully integrated African Economic Community through six sequential stages over roughly 34 years, culminating in a single African market with free movement of people, goods and services, a central bank, and eventually a continental monetary union with a single currency by 2028. The treaty's logic was that strong regional economic communities (like ECOWAS, SADC and COMESA.) would first integrate internally, then gradually merge to form continent-wide institutions.<sup>101</sup>

#### **6 Stages of the Abuja Treaty<sup>102</sup>**

1. 1994-1999: Establishment and strengthening of existing RECs
2. 2000-2007: Elimination of tariff and non-tariff barriers
3. 2008-2017: Inter-REC free trade area and customs union
4. 2018-2020: continental customs union
5. 2020-20205: African common market
6. 2024-2028: Pan-African monetary and economic union

The Pan-African currency goal is part of the final stages, requiring macroeconomic convergence, harmonised fiscal policies, and the establishment of an African Central Bank. Although the treaty defined 2028 as the target year, progress has been slower than envisioned and achieving a single currency by that deadline is now widely considered unrealistic.<sup>103</sup>

### **The Pan-African Payment and Settlement System (PAPSS): crucial to improving continental financial integration**

Announced in 2019 at an AU Summit, as a key enabler of the AfCTA implementation, PAPSS was launched in 2022 by the AU and the African Export-Import Bank (Afreximbank). It is a key instrument to resolve the long-standing issue of African countries trading with one another using foreign currencies and has become a core part of Africa's current financial architecture.

PAPSS is a centralised payment and settlement platform that allows business to pay and for recipients to receive funds in their own local currencies through an African institution, rather than a foreign bank. This process removes the need for full currency convertibility by handling conversion within a dedicated system and using central banks as settlement anchors. Even if a currency is not internationally traded, if it is recognised within PAPSS, it can be traded with at a fairer rate.

Overall, this system reduces US Dollar dependence, improves monetary sovereignty as countries and boost the continent's financial integration by moving it closer to a single payments market without requiring an intermediary currency or even a single Pan-African currency.<sup>104</sup>

In June 2025, at Afreximbank annual meetings in Abuja, a further step has been reached with the launch of PASSCARD, the continent's first Pan-African card scheme, aimed at boosting further people travel and trade integration, by enabling fast, secure and affordable retail payments across African borders.

## Mobility of people, goods and services: best practices in regional unions around the world

### CARICOM (established in 1973)

- Under the CARICOM Single Market and Economy (CSME),<sup>105</sup> CARICOM nationals within certain categories can move to other CSME Member States for work without needing a work permit, provided they obtain a CARICOM Skills Certificate. This certificate acts as the authorisation that replaces the usual work permit in the host state.<sup>106</sup> However, free movement under the traditional CSME framework does not automatically grant permanent residency or citizenship; these require separate procedures.
- From 1 October 2025, four CARICOM states – Barbados, Belize, Dominica, and Saint Vincent and the Grenadines – expanded full free movement among themselves. This change removed the requirement for a CSME Skills Certificate.<sup>107</sup>

### MERCOSUR (established in 1991)

- Guarantees a two-year temporary residence to citizens of South American countries (except for suspended Venezuela). These temporary residents are entitled to work and access many social and civil rights on very similar terms to nationals. They can decide to become permanent residents towards the end of the initial two years. However, implementations have varied across Member States. As of 2017, there were about 3,986,756 intra-regional migrants in South America (70% of the region's total migrant stock), the bulk of these movements being between neighbours like Argentina, Brazil, Paraguay and Uruguay.<sup>108</sup>
- Since the MERCOSUR Residence Agreement entered into force, intra-regional migratory flows reportedly increased by over 30%, and approximately 5.8 million people reside in a MERCOSUR country different from their birth country (including associated states).<sup>109</sup>
- Unlike the EU, a professional in the MERCOSUR region may have their university degree recognised across the region more smoothly than their licence to practise: the latter commonly still needs sectoral MRAs, professional-body approvals or national regulatory steps. Regional initiatives and sectoral MRAs have existed and expanded over time, but a patchwork remains.<sup>110</sup>

### EU (established in 1993)

- Border management is coordinated via the Schengen Agreement and integrated systems, with control limited to external borders while internal borders permit free movement. It includes a common visa policy, joint police operations, and real-time information sharing between law enforcement agencies. Over 450 million citizens and residents across Schengen countries travel seamlessly across 29 nations, with no stops at internal borders, enabling them to work, study, visit family, and engage in tourism easily. In the EU, over 3.5 million people cross internal borders daily, 1.7 million reside in one Schengen country and work in another, and 1.25 billion journeys are made annually.<sup>111</sup>
- Mutual recognition of professional qualifications: To facilitate labour mobility within the EU, professional qualifications (e.g., for doctors, architects, nurses) obtained in one Member State must be recognised in others. This reduces barriers for professionals moving to work in different EU countries, as governed by the Treaty on the Functioning of the European Union and the Professional Qualifications Directive (Directive 2005/36/EC).<sup>112</sup> Tools like the European Professional Card (EPC) are employed to streamline recognition for certain professionals.

- Erasmus+: The EU Erasmus Scheme is a flagship program that promotes education, training, youth, and sport across Europe. It enables students to study, train, or gain work experience in another European country, typically for a period ranging from a few months to a year. By providing financial support and fostering partnerships between universities, Erasmus+ reduces barriers such as cost and administrative complexity, making international mobility more accessible.<sup>113</sup>

#### ASEAN (established in 2015)

- Unlike the EU's free movement system (where EU citizens can live, work, and reside across Member States without visas or work permits), the ASEAN Economic Community (AEC) does not yet allow such freedom of movement.<sup>114</sup>
- Under the ASEAN Framework Agreement on Services (AFAS), MRAs, Agreement on the Movement of Natural Persons (AMNP), and the ASEAN Qualifications Reference Framework (AQRf), a licensed and certified professional from one ASEAN Member State is assured recognition in another Member State.<sup>115</sup>
- Between 2005 and 2012, MRAs were signed for the following professions: engineering services, nursing services, architectural services, surveying qualifications, accountancy services, medical professionals, dental practitioners, and tourism professionals.<sup>116</sup>
- Unlike in the EU, where employment is open to individuals from Member States without restrictions, many ASEAN Member States require proof that positions cannot be filled by nationals before hiring foreigners.<sup>117</sup>

#### The way forward

- **Build regional residence pathways to unlock labour mobility and rights:** MERCOSUR's two-year temporary residence route, with work rights and access to social protections, has expanded intra-regional mobility and helped regularise movement. Simple residence regimes could reduce irregular migration, protect workers, and stimulate talent circulation.
- **Prioritise integration policy, not just border control:** The EU Action Plan on Integration and Inclusion highlights how education, labour markets, health care, and housing are core to successful migration outcomes. African states can invest in long-term inclusion strategies to boost productivity, cohesion, and public confidence.
- **Accelerate mutual recognition of qualifications to drive skilled mobility:** Both the EU and ASEAN demonstrate that portable qualifications unlock labour market efficiency. Clear, region-wide recognition systems, supported by digital verification, would reduce skills underutilisation and strengthen professional standards across African economies.
- **Adopt phased, sector-specific reforms rather than all-at-once integration:** ASEAN and CARICOM show that gradual, profession- or category-based mobility reforms can build trust and capacity over time. Africa can tailor mobility for priority professions, industries, or demographic groups as legal and administrative systems mature.

### **Strong improvements in digital connectivity, still limited by unequal access to energy**

Digital connectivity in Africa has made significant progress in recent years. According to the latest Ibrahim Index of African Governance (2024 IIAG), over the decade 2014-2023, at continental level, *Mobile Communications* was the most improved indicator out of 96, while *Internet & Computers* was the third most improved indicator. However, this very positive trend started from a very low basis, especially concerning *Internet & Computers*. In 2023, mobile penetration remained at 44% and mobile internet penetration as low as 27% in sub-Saharan Africa.<sup>118</sup>

Only slightly over one third of the continent's population used the internet in 2023, with high costs cited as the main barrier to usage, especially in low-income and rural areas. As Africa's fixed broadband access rates are the highest globally, mobile connectivity remains the primary means of accessing internet on the continent. Low affordability, lack of digital skills, language barriers and, most of all, lack of access to electricity continue to feed a digital divide that, left unaddressed, could become a concerning challenge.

Various initiatives aim to improve digital access and cybersecurity. Launched in 2018 in support of the AU Digital Transformation Strategy for Africa, the World Bank-led Digital Economy for Africa (DE4A) aims for universal digital access by 2030 by expanding broadband and digital services. The World Bank estimates funding requirements of between \$62-79 billion to establish the foundation for an Africa-wide digital economy.<sup>119</sup>

In 2025, the World Bank has also joined the AfDB and Mastercard in the Mobilising Access to the Digital Economy (MADE) Alliance: Africa, which aims to provide digital access to critical services for 100 million individuals and businesses across Africa by 2034.<sup>120</sup>

Connectivity:  
mostly dated  
and outbound  
networks still  
limit mobility  
within the  
continent




Historically, most infrastructure on the continent was built to serve the former development model of exporting raw commodities from port to pit. Most existing roads and railways were designed to move goods from the commodity-rich areas of a country towards the main ports, rather than inter-connecting regional hubs or well-populated areas.

As a result, travel within the continent remains slower, more expensive and less direct than comparable journeys in all other world regions.

Compared to similar distances:

- Travel times are often 2 or 3 times longer.
- Costs are frequently 40 to 60% higher than comparable routes in Europe.<sup>121</sup>
- Journeys commonly require indirect routing via distant hubs outside Africa such as Dubai, Istanbul, Doha, or Paris.



**Travel within the continent remains slower, more expensive and less direct than comparable journeys across other world regions**

**Comparing cost, distance, and time of African travel routes and other world regions**

Route	Distance (km) as the crow flies	Air time	Cost (return)*	Likely layovers	Rail option	Road option
Johannesburg - Mombasa	~2,700	4-12h	\$450-\$750	Nairobi, Addis Ababa	None (disconnected networks)	~60 hours (multiple borders, infrastructure gaps)
London - Athens	~2,400	3.5-4h	\$80-\$200	None	2-3 days (continuous rail network)	~34 hours (high-quality highways)
Dakar - Addis Ababa	~6,100	13-18h	\$800-\$1,200+	Casablanca, Istanbul, Addis Ababa	None	~140 hours (logistically complex, visa barriers)
New York - London	~5,600	7-8h	\$300-\$700	None	N/A	N/A
Kinshasa - Marrakech	~4,800	10-20h	\$700-\$1,200+	Paris, Brussels, Addis Ababa	None	~118 hours (extreme difficulty, security and logistical issues)

\* Prices based on web searches as of April 2026.

Travelling between Johannesburg and Mombasa – approximately 2,700 km – takes up to 12 hours depending on flight times and other connections and can cost up to \$750 per trip. A route of comparable distance like London to Athens – around 2,400 km – costs around \$200 and takes less than four hours to complete. Travelling from New York to London – about 5,600 km – takes around 8 hours and can cost around \$500 while travelling directly. Yet, the shorter distance between Kinshasa and Marrakech, linking two major economic powers, Morocco and DR Congo, takes up to 20 hours, costs at least \$1000 and can involve several layovers outside of Africa.

## Multiple challenges

1. Air travel is mostly indirect, generally inefficient and expensive
  - Many African air routes lack direct flights and passengers are often routed outside the continent.
  - This dramatically increases expense and time and disincentivises regional integration and travel.
  - Intra-African fares are at least 40% higher on average than comparable European routes.<sup>122</sup>
  - In some cases, even short regional flights (such as Abidjan to Accra) in Africa cost more than international ones in Europe.<sup>123</sup>
  - High taxes and airport fees, the rising cost of jet fuel, and limited competition all hinder the African aviation market.
2. Railway alternatives remain limited
  - Africa lacks an inter-connected cross-border railway system.
  - Existing railways are fragmented, freight-focussed, and at times not interoperable because of gauge diversity.
3. Road alternatives face multiple hurdles
  - Long-distance road travel in Africa is complicated by multiple border crossings, visa restrictions, varying road quality and other logistical constraints.

## GROUND TRANSPORT: STILL THE MAIN MODE OF TRANSPORT ON A CONTINENT OF OVER 30 MILLION KM<sup>2</sup>

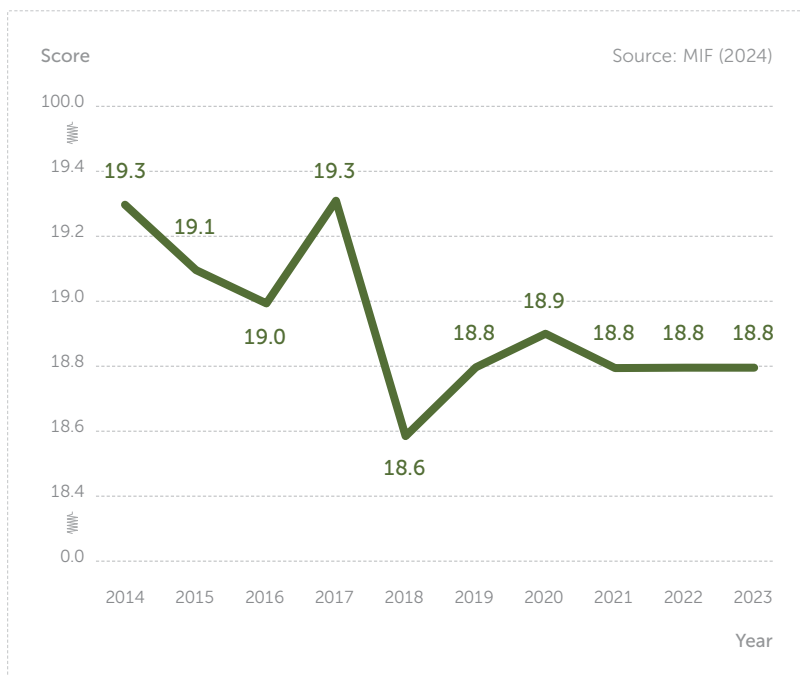
Ground infrastructure density in Africa<sup>124</sup>

Infrastructure type	Density	Unit range	Example countries	Unit cost
Roads	Low density	0.4 to 2 km per 100 km <sup>2</sup>	Angola, Chad, Sudan, Niger, DR Congo	662,771 per km
Railways	Low density	0 to 0.2 km per 100 km <sup>2</sup>	Burundi, Equatorial Guinea, Mauritius, Rwanda	1,348,000 per km
Roads	Medium density	2 to 5 km per 100 km <sup>2</sup>	Ghana, Benin, Djibouti, Uganda, Mauritania, South Africa	662,771 per km
Railways	Medium density	0.2 to 2 km per 100 km <sup>2</sup>	Algeria, Côte d'Ivoire, Ethiopia, Mozambique, Zambia	1,348,000 per km
Roads	High density	5 to 63 km per 100 km <sup>2</sup>	Morocco, Gambia, Mauritius, Seychelles, Rwanda, Tunisia	662,771 per km
Railways	High density	2 to 24 km per 100 km <sup>2</sup>	Egypt, Eswatini, Kenya, Nigeria, Tanzania, Zimbabwe	1,348,000 per km

### Roads: the main mode of transport within the continent, but too often discontinuous

While roads remain the main mode of transport on the continent, carrying 90%<sup>125</sup> of passenger and freight traffic, Africa has a significant road infrastructure deficit. The last Ibrahim Index of African Governance (2024 IIAG) showed that over the decade 2014-2023, the *Road Infrastructure* sub-indicator declined by -0.5 points at the continental level, driven by deteriorations at the bottom of the table in Zambia (-6.7), Uganda (-4.0) and Namibia (-4.0).

Africa: *Road Infrastructure* sub-indicator score (2014-2023)<sup>126</sup>



While roads remain the main mode of transport on the continent, carrying 90% of passenger and freight traffic, they are often discontinuous

### The Trans-African Highways Network (TAH)

Conceived in the early 1970s, developed under UNECA, and supported by the AU and the AfDB, the Trans-African Highways Network (TAH) aims to connect capitals and major production and consumption centres through “all-weather” routes.

#### Current state of implementation<sup>127</sup>

Route number	Route	Length (km) <sup>128</sup>	Implementation status (2026)
TAH 1	Cairo – Dakar	8,636	Largely complete physically; functionally constrained through the Algeria-Morocco border.
TAH 2	Algiers – Lagos	4,504	Substantially complete overall; sensitive to security controls. <sup>129</sup>
TAH 3	Tripoli – Windhoek – Cape Town	9,610	Discontinuous or considered high risk in Central Africa. The central section is however a 'missing link', and the planned alignment between CAR and ROC would pass through some of the most remote and difficult terrain and rainforests of the Sangha River basin. This alignment has the potential for an enormous environmental impact on relatively untouched forest within a number of nature reserves. <sup>130</sup>
TAH 4	Cairo – Gaborone – Cape Town	8,860	Under construction with significant delays in specific regions. <sup>131</sup>
TAH 5	Dakar – N'Djamena	4,500	Considered completed. <sup>132, 133</sup>
TAH 6	N'Djamena – Djibouti	4,220	Partially complete; constraint historically in Chad–Sudan sections. <sup>134</sup>
TAH 7	Dakar – Lagos	4,760	Almost complete. <sup>135</sup>
TAH 8	Lagos – Mombasa	6,260	Discontinuous in Central Africa. <sup>136</sup>
TAH 9	Beira – Lobito	3,520	Substantially complete in baseline with operational and policy challenges such as transport costs and geopolitical tensions. <sup>137</sup>
TAH 10	Djibouti – Libreville – Bata	7,000	Planned/in development, overlaps with other corridor systems. <sup>138</sup>

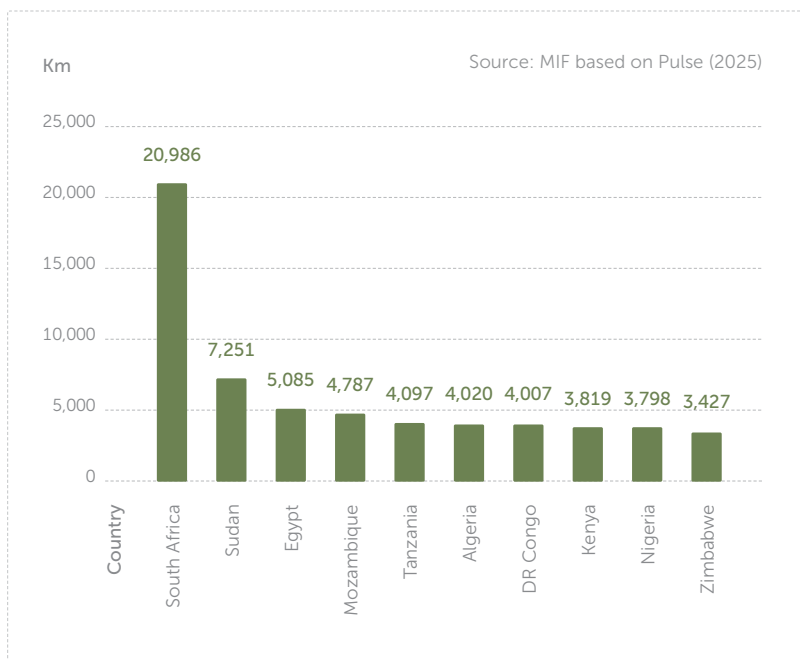
## Railways: limited interoperability and coverage

Mostly established during the colonial era to facilitate the export of minerals and agricultural products to seaports, rails are currently undergoing renewed interest and modernisation. Between 2015 and 2024, approximately 2,000 kilometres of new railway lines were added across the continent.<sup>139</sup> However, the sector continues to face significant challenges related to interoperability, coverage, and financial sustainability of passenger services.

Railway density varies significantly across the continent. Some countries have relatively high levels of density, such as Egypt, Eswatini, Kenya, Nigeria, Tanzania, Zimbabwe while others such as Burundi, Equatorial Guinea, Mauritius, Rwanda have relatively low levels.<sup>140</sup>

Low railway density in Burundi, Equatorial Guinea, Mauritius and Rwanda

### Top 10 African countries: rail length in km (2025)



At least 13 African countries, many of them landlocked, still have no direct rail access to seaports, severely limiting their participation and access to regional mobility.<sup>141</sup> Countries with no access at all include Niger, Chad, Central African Republic and South Sudan. Countries with indirect port access potentially dependent on neighbours include Uganda, Rwanda, Burundi, Zambia, Zimbabwe and Botswana. Other countries like Malawi do have rail links to Mozambique's ports but connections are indirect. Ethiopia has sea access via a modern railway line to the Port of Djibouti but remains dependent on its neighbour's permission and political good will.

At least 13 African countries, hosting approximately 17% of the continent's population, many of them landlocked, still have no direct rail access to seaports

## Multiple hurdles to overcome to ensure railway interoperability

Rail infrastructure remains unevenly distributed across the continent, with the highest concentrations found in Northern and Southern Africa. The SADC has the most interconnected regional system, primarily utilising the Cape gauge.<sup>142</sup> At continental level, regional interconnectivity remains limited by several factors:

### 1. Lack of technical interoperability

- Gauge diversity: African railways utilise several different track gauges, including the Cape gauge (1,067 mm), Meter gauge (1,000 mm), and Standard gauge (1,435 mm).<sup>143</sup>
- Incompatible networks: Most regional integration is limited to specific pockets, such as the interconnected Cape gauge system used in sub-Saharan African countries more broadly, but specifically in Southern Africa, where railways are relatively more interconnected. Outside of these areas, true regional integration remains scarce.<sup>144</sup>

### 2. Limited affordability and high maintenance costs

- Declining quality: Ageing tracks, obsolete signalling, and inadequate maintenance lead to poor service quality and unreliability.<sup>145</sup>
- A vicious cycle: Where passenger traffic is low, governments are not incentivised to properly maintain the infrastructure to enable high-speed rail travel which in turn makes rail travel less appealing to travellers.
- Limited affordability: Average unit revenues (US cents per ton-km) in sub-Saharan Africa are significantly higher than those in other regions like North America or Europe. This higher cost structure relative to global benchmarks affects the sector's overall affordability and competitiveness.<sup>146</sup>
- High maintenance costs: As the gauges across the continent are not uniform, transitioning to new (uniform) gauges would have a significant impact on the investment costs of replacing all existing infrastructure (track, bridges, tunnels, shops, depots, stations, loops).<sup>147</sup>

### 3. Mixed construction and ownership

- Building capacity: Recent major projects have largely been state-led, often with international financing or partnerships. For example, the TAZARA railway was built with Chinese assistance while more recent standard-gauge projects in Kenya and Ethiopia have involved significant government investment alongside Chinese construction firms, raising long-term questions around the stability and transparency of the financing.<sup>148</sup>
- Ownership and management: While governments typically own the fixed infrastructure, more than 70%<sup>149</sup> of railway activities in sub-Saharan Africa are managed by private operators through concessions. This public-private partnership model is currently the preferred solution for restructuring the sector.<sup>150</sup> Notable concessions include Sitarail (Côte d'Ivoire/Burkina Faso), Camrail (Cameroon), and Madarail (Madagascar). In these arrangements, the government typically retains ownership of the assets while a private company handles operations.<sup>151</sup>

## Major railway development initiatives

### 1. National expansion projects

- I. Ethiopia and Djibouti: Djibouti-Addis Ababa Standard Gauge Railway (SGR) to connect the landlocked country to a major seaport, in operation since 2018.<sup>152</sup>
- II. Morocco: Tangiers-Kenitra high-speed line, the first in Africa of its kind, inaugurated in 2018.<sup>153</sup>
- III. Tanzania: Finished the first phase of its new SGR linking Dar es Salaam to Dodoma in 2024, with more linkages further into the country to follow until 2027.<sup>154</sup>
- IV. Gabon: The French Development Agency (AFD) and the EU are providing €200 million for Gabon's Transgabonais Railway from Libreville to Franceville.<sup>155</sup>
- V. South Africa: The BRICS New Development Bank has provided a \$278 million loan, joining the African Development Bank's \$1 billion loan to modernise South Africa's logistics backbone.<sup>156</sup>

### 2. At continental level

- I. SSATP: The Sub-Saharan Africa Transport Policy Program (SSATP), launched in 1987, involves 38 countries, eight RECs, the AU (via NEPAD), and UNECA. It facilitates policy development and capacity building to create reliable and cost-effective transport.<sup>157</sup> Although recent data is unavailable, between launching and 2007, the SSATP's policy support has contributed significantly to the establishment of road funds in at least 27 countries and created road agencies/authorities in 18 countries in sub-Saharan Africa.<sup>158</sup>
- II. AICD: The Africa Infrastructure Country Diagnostic (AICD), commissioned by the Infrastructure Consortium for Africa in 2005, works to expand knowledge of physical infrastructure and provide an empirical foundation for prioritising investments and donor support.<sup>159</sup>
- III. PIDA-PAP2 Flagship projects: Among the ten biggest projects selected by the PIDA-PAP2 initiative are: the construction of the Standard Gauge railway from Mombasa to Kigali (through Nairobi, Malaba, Kampala), the LAPSET Railway (through Ethiopia, Kenya, South Sudan), the Abidjan-Ouagadougou-Niamey-Cotonou-Lome Regional Rail Loop Project and the construction of the SGR through Burundi, DR Congo, Rwanda, and Tanzania.

## The EU's Global Gateway connectivity projects in Africa

Launched in 2021, the Global Gateway is “the EU’s strategy to boost smart, clean and secure connections in digital, energy and transport sectors, and to strengthen health, education and research systems around the world by bringing together the EU, European Member States and their financial and development institutions, as well as the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD), to mobilise the private sector to leverage investments.”<sup>160</sup>

Over 2021-2024, the EU’s Global Gateway has already mobilised €306.8 billion, out of which €80 billion for sub-Saharan Africa, and €77 billion for Middle East and North Africa.

The focus on infrastructure in Africa is implemented through 55 strategic corridors across the continent, based on the PIDA-PAP2 priorities and the development plans of different RECs. These corridors link major cities and rural areas around main axes.

Out of those, 12 have been identified as priority corridors: 1) Abidjan-Lagos, 2) Abidjan-Ouagadougou, 3) Dakar-Abidjan, 4) Cotonou-Niamey, 5) Libreville-Kribi-Douala-N’Djamena, 6) Douala-Kribi-Kampala, 7) Dar es Salaam-Nairobi-Addis Ababa-Berbera-Djibouti, 8) Mombasa-Kisangani, 9) Maputo-Gaborone-Walvis Bay, 10) Durban-Lusaka-Lubumbashi, 11) Cairo-Khartoum-Juba-Kampala, 12) Lobito-Kolwezi-Lubumbashi/Solwezi-Ndola. All these corridors are conceived with a systemic approach, that combines “hard” investments in railway construction or rehabilitation, and “soft” investments to support value chains in agriculture and critical raw materials, renewable energy, trade and transit facilitation.<sup>161</sup>

 **EU’s Global Gateway: 55 strategic corridors across the continent, of which 12 are identified as “priority corridors”**

Africa: EU Global Gateway strategic corridors



Source: MIF based on consultation with EU Global Gateway representatives in April 2026

### The Lobito Corridor: a multistakeholder partnership, key for continental mobility and integration

The Lobito Corridor is a major strategic railway and logistics project connecting the port of Lobito in Angola to the mineral-rich Katanga province in DR Congo and the Zambian Copperbelt. The project will rehabilitate and significantly expand the 1,300 km Lobito-Atlantic Railway (LAR) in Angola via an 800 km extension into DR Congo and Zambia, aiming at creating a fast, efficient, and open-access trade route, namely for copper and cobalt. As the first open-access transcontinental rail link in Africa, it has the potential to unlock the region's enormous economic potential, increase local transformation as well as export opportunities, and promote regional integration.

Through the work of the Africa Finance Corporation (AFC) and the AfDB, the Lobito Corridor project is also supported by the G7 Partnership for Global Infrastructure and Investment (PGII), with funding from the US and the EU via the Global Gateway initiative, with EU and its Member States mobilising over €2 billion worth of investment.

Benefits	Why it matters
Connects landlocked economies to global markets	Significantly reduces dependence on longer, costlier routes through southern or eastern Africa.
Reduces carbon-intensive transport costs and time	Shortens export routes for critical minerals. It should cut round-trip transit time to port from up to 16 days to Dar-es-Salaam to around seven days.
Strengthens regional integration	Supports cross-border trade and harmonisation of customs processes.
Catalyses economic development along the route	Infrastructure investment stimulates growth in logistics hubs, agriculture, and manufacturing in all the corridor regions, not just at endpoints.
Enhances mobility for people and goods	Improved rail and road networks facilitate movement of workers, traders, and services, increasing access to jobs.
Diversifies trade routes and improves resilience	Reducing reliance on a few congested corridors (such as routes via South Africa or Tanzania) strengthens regional resilience to disruptions.

Over the recent years, the project has seen a significant increase in both capital and international attention. The US is now seeking to fund the Lobito Corridor to facilitate the supply of minerals, particularly copper, coltan, manganese, zinc, and lithium, to US companies by connecting the Central African Copperbelt to the Atlantic Ocean. As part of the US administration's ongoing Project Vault policy program (a series of policies and financing instruments designed to counter China's global dominance across the critical mineral sector) the US Development Finance Corporation (DFC) has already granted a \$553 million loan to the Lobito Atlantic Railway, the consortium responsible for the project.

The Lobito Corridor is also envisioned as a platform for broader economic transformation. Infrastructure planners anticipate the emergence of

numerous logistics hubs and industrial zones along the corridor as mineral flows increase outward, driving job creation and development. Additional to critical minerals, the Lobito corridor will also facilitate fuel, agricultural, and fertiliser flows.

**Going forward, to fully realise Lobito corridor's benefits for mobility and development, several key challenges remain<sup>162</sup>**

**Funding:** The project's total cost for 830 km greenfield rail, 30 bridges, 33 stations, and seven depots is estimated at \$5-7 billion by the AFC. As the project gains momentum, more funding partners have entered the agreement, particularly the US and the EU, likely improving the funding stability. However, large infrastructure projects are often more costly and more time-consuming than initial scoping predicts. Its capital structure is blended finance – sovereign equity, Development Finance Institution (DFI) senior debt, concessional and commercial tranches.<sup>163</sup>

**Cross-Border coordination:** Spanning three countries, the corridor faces various administrative, political, and legal obstacles when coordinating between them, e.g. the processing of shipments, which arrive in one country and must transit to another, requiring various harmonisation efforts.

**Land acquisition:** Building the extension of the corridor into the Zambian Copperbelt and into DR Congo's Katanga mining region require land acquisition. Zambia has a dual land tenure system, incorporating both statutory (government) and customary (traditional) land rights.<sup>164</sup> Navigating these systems can be complex, especially with land held under customary rights and may necessitate relocating communities.

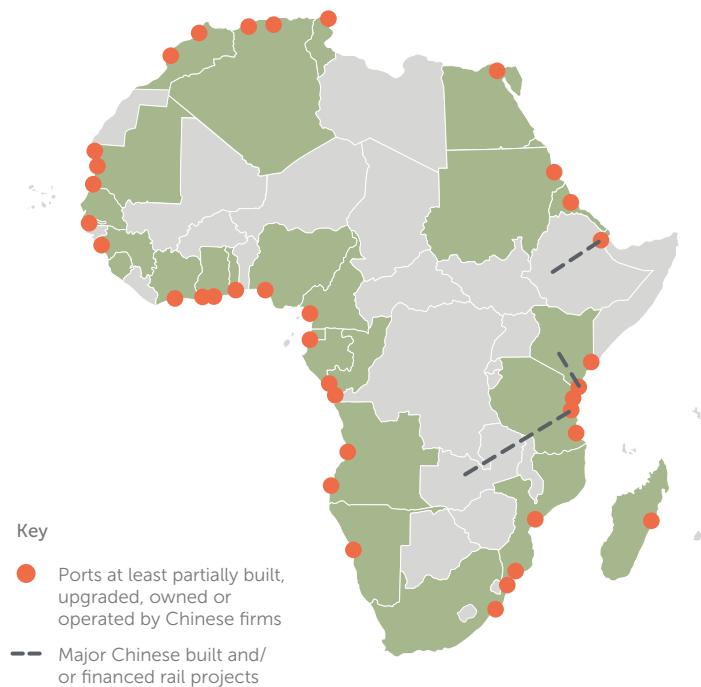
### China's investments in Africa's infrastructures

China has become the largest single financier of infrastructure in Africa, playing a central role through their Belt and Road Initiative (BRI) launched in 2013. Over the past two decades, Chinese lenders and firms have financed or built well over 200 projects, contributing to roughly one in five infrastructure projects on the continent. Annual lending averaged about \$11-20 billion in the mid-2010s,<sup>165</sup> while more recent commitments include a \$51 billion financing package announced in 2024 for new projects and development support.<sup>166</sup>

Flagship projects highlight this influence, particularly in transport and energy. These include the Mombasa-Nairobi Standard Gauge Railway in Kenya, the Addis Ababa-Djibouti Railway, and major port, highway, and power projects across countries like Nigeria and Angola. Chinese-backed initiatives have collectively delivered 30,000 km of roads, 2,000 km of railways, and around 20,000 MW of power capacity.<sup>167</sup>

Overall, China's involvement has helped address Africa's infrastructure gap and boost connectivity, though it also raises debates around debt sustainability and long-term economic dependence.

### Africa: major Chinese port and rail investments<sup>202</sup>



Source: MIF based on African Maps (2026)

53 out of 54 African countries have signed an MoU with China as part of their BRI development projects<sup>168</sup>

## AIR TRANSPORT: IMPROVING, BUT REMAINS COSTLY AND MOSTLY OUTBOUND

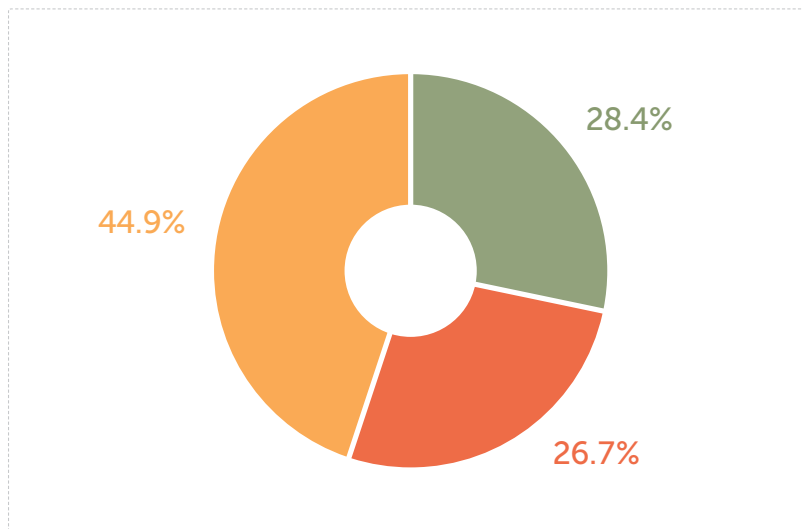
### Both demand and supply increase steadily, but outbound traffic remains the major driver

Africa’s air transport industry has seen a sharp increase in passenger demand, outpacing many other regions globally, though from a very low base. The revenue passenger-kilometres (RPK) is projected to grow by 6% in 2026 and outperform the global average (4.9%).<sup>169</sup> Coming from a low base, the sector’s market is projected to double by 2044.<sup>170</sup> In 2024 only, the capacity increased by 9.5% and traffic rose by 13.2%.<sup>171</sup> 98 million passengers travelled on African airlines, bettering the previous year by 15%.

However, the industry remains marred by structural and market challenges, and international routes remain the main growth engine.<sup>172</sup>

Intra-African flights account for only around 2% of global flights, while the continent hosts around 18% of the global population<sup>173</sup>

African air traffic: composition (2024)



Intra-African flights still only represent slightly over one quarter of African airlines traffic<sup>174</sup>

Key

- Domestic traffic
- Intra-African traffic
- Inter-continental traffic

Source: MIF based on AFRAA

Top 10 African airlines (number of scheduled passengers carried in 2024)<sup>175</sup>

Rank	Airline	Country	Scheduled passengers (millions)	Domestic passengers (millions)	Regional passengers (millions)	Intercontinental passengers (millions)	Intercontinental passengers as a share of scheduled passengers
1	Ethiopian Airlines	Ethiopia	17.5	3.8	6.8	6.9	39%
2	Egyptair	Egypt	10.5	1.3	1.4	7.8	74%
3	Air Algérie	Algeria	7.9	2.6	0.4	4.9	62%
4	Royal Air Maroc	Morocco	7.4	1.2	1.5	4.7	64%
5	Air Link	South Africa	4.1	2.3	1.7	0.0	
6	Kenya Airways	Kenya	4.0	0.6	2.2	1.1	28%
7	Tunisair	Tunisia	2.6	0.0	0.4	2.2	86%
8	Allied Air	Nigeria	2.6	1.3	0.0	1.3	50%
9	Air Mauritius	Mauritius	1.6	0.3	0.6	0.7	45%
10	Nile Air	Egypt	1.4	1.2	0.0	0.1	11%

Source: MIF based on African Airlines Association (2024)

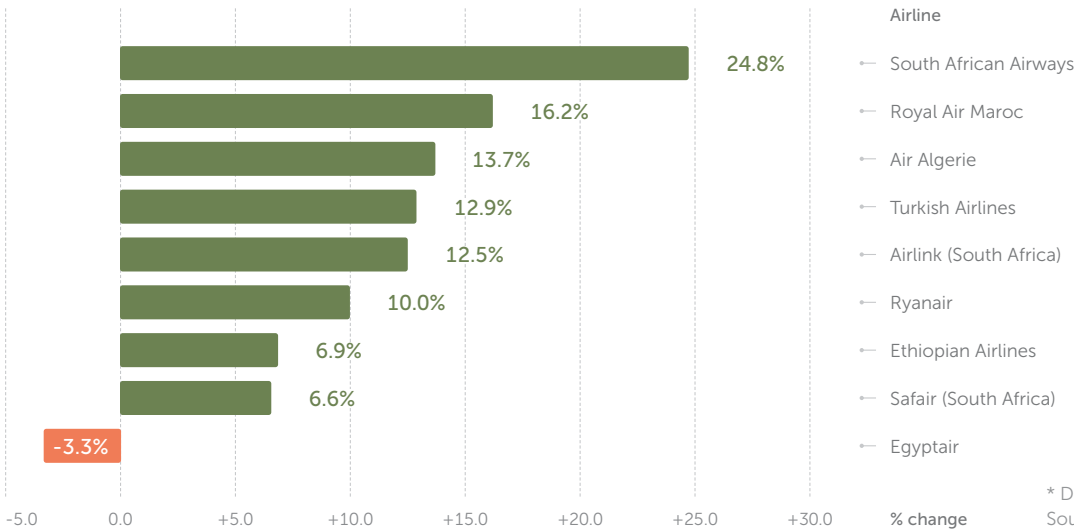
State-owned Ethiopian Airlines dominates the African market with 17 million passengers in 2024, accounting for over a third (33.6%) of the total traffic of the top ten African airlines.

Domestic and regional markets account for only slightly more than half of all scheduled passengers on average for the top ten African airlines. Ethiopian Airlines dominates in both domestic and regional scheduled passenger traffic, more than double that of second-placed Egyptair in both domestic and regional capacity.

All the top airlines have sustained growth, with South African Airways showing the largest growth at almost 30%. However, the company did cede operations in 2020, using a bankruptcy protection scheme to return several years later as a smaller entity, likely explaining some of their growth.<sup>176</sup> Royal Air Maroc and Safair have also made impressive gains, while Egyptair is losing ground.

The largest four African airlines, Ethiopian Airlines, Egyptair, Air Algérie, and Royal Air Maroc, each carried over 7 million passengers in 2024

African airlines: year-on-year seat growth variance (April 2025-April 2026)\*



\* Data is accurate as of April 2026  
Source: MIF based on OAG (2026)

### Steady year-on-year demand growth for African airports

African airports also experienced significant growth in passenger traffic and scheduled flights per day. Growth factors are driven by infrastructural development, fleet number increases, and rising passenger numbers.

South Africa's busiest airport (O.R. Tambo) is currently undergoing a significant improvement through a five-year R14.5 billion capital expansion programme<sup>177</sup> aimed at increasing efficiency, modernising the ageing infrastructure and improving passenger experience. To deepen intra-regional connectivity and boost tourism, Sierra Leone has established new

routes, including to the Gambian capital Banjul. The Banjul–London route is scheduled to be operational in February 2026. Ethiopia’s \$12.5 billion Bishoftu International Airport, implemented by the state-owned Ethiopian Airlines, is expected to be the largest aviation infrastructure on the continent, designed for an annual capacity of 110 million passengers and to accommodate 270 aircrafts when completed in 2030.<sup>178</sup>

#### Top 10 busiest airports by departing seats (April 2026)<sup>180</sup>

Airport name	Country	Seats
Cairo International	Egypt	1,615,021
Johannesburg O.R. Tambo International	South Africa	1,170,470
Addis Ababa Bole International	Ethiopia Africa	1,134,848
Casablanca Mohammed V	Morocco	667,644
Cape Town International	South Africa	605,805
Marrakech Menara	Morocco	571,026
Algiers Houari Boumediene	Algeria	518,260
Hurghada International	Egypt	513,998
Nairobi Jomo Kenyatta International	Kenya	455,403
Lagos Murtala Muhammed International	Nigeria	445,714

Source: MIF based on OAG (2026)\* and Flights From (2026)\*  
\* Data is accurate as of April 2026. Data is updated monthly.

Ethiopia’s \$12.5 billion Bishoftu International Airport, implemented by Ethiopian Airlines, is expected to be the largest on the continent, designed for an annual capacity of 110 million passengers

Africa’s three busiest airports are Cairo International, Johannesburg O.R. Tambo International, and Addis-Ababa Bole International<sup>179</sup>

#### Top 10 busiest airports in Africa measured by scheduled departures daily (April 2026)<sup>181</sup>

Airport name	Country	Number of flights
Johannesburg O.R. Tambo International	South Africa	277
Cairo International	Egypt	265
Addis Ababa Bole International	Ethiopia	207
Cape Town International	South Africa	124
Casablanca Mohammed V	Morocco	115
Nairobi Jomo Kenyatta International	Kenya	115
Algiers Houari Boumediene	Algeria	114
Lagos Murtala Muhammed International	Nigeria	110
Marrakech Menara	Morocco	93
Zanzibar Abeid Amani Karume International	Tanzania	90

Source: MIF based on OAG (2026)\* and Flights From (2026)\*  
\* Data is accurate as of April 2026. Data is updated monthly.

Cairo currently dominates as the busiest airport both in departing seats by month and daily scheduled departures. However, there is a considerable gap between the top three busiest airports (Cairo, Addis Ababa and Johannesburg) for both departing seats and number of flights and the following locations.


However, compared to the busiest airports globally, Africa remains far behind. Atlanta International Airport in the US is the busiest in the world with 63.1 million seats in 2025 (an average of 5.3 million per month), tripling that of Cairo International Airport.<sup>182</sup>

### Air freight industry growing slowly

Air freight traffic into Africa is growing steadily but still represents a small share of global volumes, at roughly 2-3% of global air cargo traffic. It is now expanding by between 8-10% annually, approximately double that of the global average, driven by rising trade, e-commerce, and changing supply chain practices.

Air cargo remains mainly inbound, coming in from outside the continent, and dominated by high-value and time-sensitive goods such as pharmaceuticals, electronics, industrial components, spare parts, and luxury products.<sup>183</sup>

The sector continues to face persistent constraints. High operating costs, limited cargo infrastructure, and fragmented regulatory systems raise prices and reduce efficiency. Many shipments are still routed through external hubs such as Dubai, Istanbul, or European airports before reaching African destinations, adding time and cost.<sup>184</sup>



## Air cargo in Africa remains mainly inbound

### Ethiopian Airlines: Africa's air success story

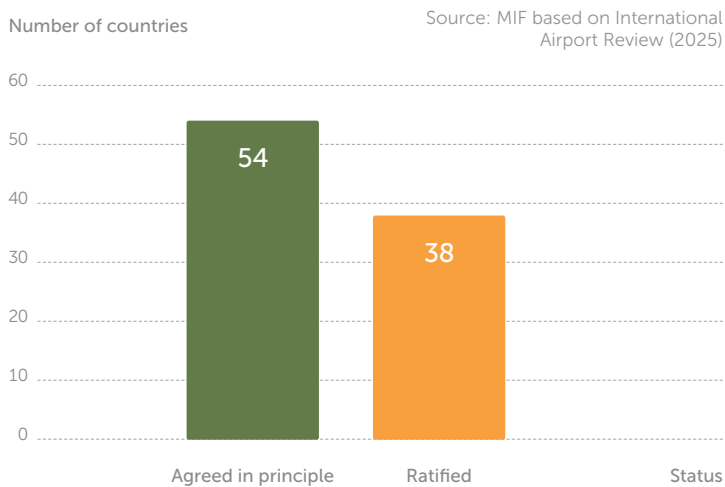
Founded in 1945, Ethiopian Airlines represents one of the continent's oldest and most successful aviation business and one of Africa's most successful businesses overall. It is fully owned by the Ethiopian government and employs nearly 20,000 people. Each year it transports around 6 million people between various African countries, a significant achievement and asset for continental integration.

Ownership	Government of Ethiopia (100%).
Passenger Airport Terminal	Addis Ababa Bole International Airport, capacity to serve 22 million passengers per annum.
Human Capital	Over 18,000 employees. <sup>185</sup>
Aircraft fleet	170 aircrafts. <sup>186</sup>
Revenues	Generated \$4.4 billion in revenue during the first half of the 2025-2026 financial year, marking a 14% year-on-year increase. <sup>187</sup>
Total passengers carried in 2024	17,483,000 - the most on the continent. <sup>188</sup>

### The Single African Air Transport Market (SAATM): critical for driving growth

Launched at the 2018 AU Summit, the SAATM is a flagship project of Agenda 2063. It aims to liberalise the continent's aviation industry, transforming it into a single market by deregulating air services and opening regional air markets to transnational competition. All 54 Member states have agreed in principle, and 38 have had ratified as of March 2025.<sup>189</sup>

#### African countries: SAATM Participation (2026)



The African continent is three times larger than Europe in area, and its population is 2.5 times greater. Yet, air transport activity in Europe is 11 times higher than in Africa. Shockingly, up to 22% of Africans travelling between two African cities must transit through non-African hubs, often in Europe or the Middle East.<sup>190</sup>

*A. Berthé, Secretary General of the African Airlines Association*

In order to stimulate demands and reduce travel barriers such as layovers and high-ticket costs, research from the IATA proposes several new direct routes such as Abidjan–Douala (serving over ten million residents across the two largest Francophone cities in West and Central Africa), Lusaka–Cape Town (serving a population of nearly 8 million), and Cape Town–Dar es Salaam.<sup>191</sup>

### Multiple challenges for Africa's aviation industry

Africa's air transport continues to lag behind other regions of the world, as it faces both structural and market structure challenges.<sup>192</sup>

1. High fuel costs: Driven by high logistics costs, low purchasing leverage and minimal competition among suppliers, fuel costs for African airlines are among the highest globally.
2. An ageing fleet: Africa's fleet is five times older than the global norm, which makes maintenance more difficult and increases fuel consumption.<sup>193</sup>
3. Market fragmentation: This remains a structural problem, as low traffic volumes make it difficult for airlines to scale.
4. Currency volatility.
5. High corporate tax: At 28%, this the highest in the world.<sup>194</sup>
6. Visa restrictions.

### **The current global fuel crisis: a disproportionate impact on the price of African air travel**

The destabilisation of international oil markets, driven by the Iran crisis has had a disproportionately severe impact on Africa. Approximately 70% of Africa's jet fuel imports pass through the Straits of Hormuz, highlighting the significant supply chain vulnerability, particularly exposed to regional geopolitical disruptions.

The lack of domestic refining capabilities intensifies the demand on imported fuel and forces African airlines to increase their fuel expenditure, already their largest operating expense, averaging between 30-40% of total costs.<sup>195</sup>

These spiralling baseline costs are compounded by the relatively low resilience of the African aviation industry. Jet fuel stockpiles are low across the continent, with estimates ranging between countries from 10 days of jet fuel in Zambia to around 50 days in Kenya.<sup>196</sup>




**South African carrier Safair estimates additional cost of approximately \$2,000 per flight hour at current 2026 jet fuel prices**

### **Africa's sea and fluvial transport networks**

With over 30,000km<sup>197</sup> of coastline, sea transport remains one of the dominant modes of international freight transport into and out of Africa. Major ports such as Durban, Mombasa, Lagos and Djibouti are key nodes linking trade heavily to global shipping routes and handling a large proportion of Africa's imports and exports.

Whilst critical, Africa's port infrastructure is often impacted by port congestion and high-shipping costs for landlocked countries. Additionally, the relatively small number of deep-water port infrastructure reduces the continent's capacity to accommodate more modern shipping and oversized containers and tankers. As of 2026, the largest port infrastructure in Africa are in Morocco (Tangier Med Port), Nigeria (Lekki Deep Sea Port), Egypt (Port Said) and South Africa (Port of Saldanha and Port of Durban).<sup>198</sup>

Similarly, Africa's river network remains an under-utilised asset. While countries such as DR Congo, Niger, Zambia, Mozambique and Egypt benefit domestically from river transport and trade, particularly within local communities, many rivers in Africa remain unnavigable due to geographic features like rapids and waterfalls that limit their use.



**Africa's huge river network remains an under-utilised asset**

## Africa's own infrastructure initiatives: the AU's PIDA-PAPs

The AU's Agenda 2063 call for "inclusive, sustainable and world class Infrastructure"<sup>199</sup> is implemented by PIDA, adopted in 2012 as the continental strategic infrastructure framework set to run until 2040. PIDA covers four sectors: transport, energy, transboundary water, and telecommunication/ICT.

Major outputs of the first PIDA study conducted in 2010-11 were the Infrastructure Development Plan to 2040, and the associated 2012-20 Priority Action Plan (PIDA-PAP 1).<sup>200</sup> PIDA-PAP2 now covers the 2021-2030 period.

### PIDA-PAP2 (2021-2030)

PIDA-PAP2 has introduced the Integrated Corridor Approach and a more rigorous, data-driven project selection and prioritisation framework.

Unlike PIDA-PAP1, which produced a very large portfolio (over 400 projects) based mainly on regional integration alignment with RECs, PIDA-PAP2 applies structured eligibility and scoring criteria to rank projects against economic impact, multi-sector corridor synergy, job creation, climate performance, gender inclusion, and financial attractiveness.

PIDA-PAP2 shifts from a broad inclusion model to a selective, high-impact portfolio model, targeting a limited and operational list of about 50 priority cross-border projects (around ten per African region, with sector balance). Project identification follows a bottom-up process led by Member States through RECs, then screened and scored using standardised tools and indicators, followed by regional consultations, and portfolio consolidation.

The PIDA-PAP2 portfolio is also designed as a rolling pipeline, allowing projects to enter as readiness and priorities evolve. These changes are intended to improve prioritisation, investor confidence, implementation rates, and measurable alignment with Agenda 2063 sustainability and inclusiveness goals.



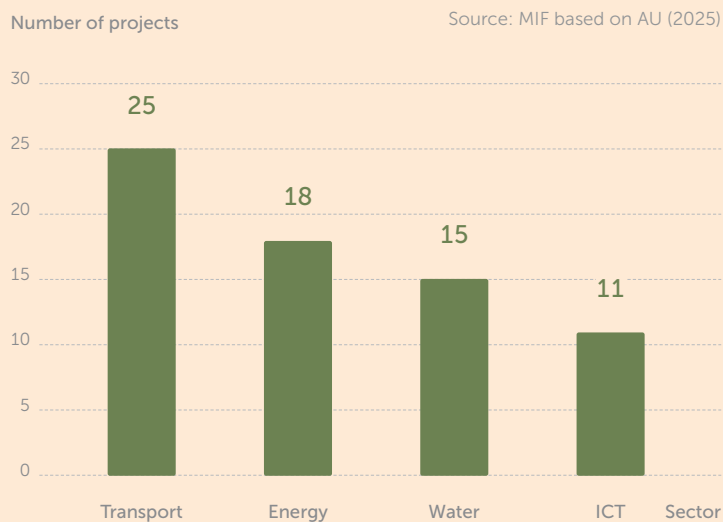
**PIDA-PAP1 (2012-2020) constructed 16,066 km of new highways and built 4,077 km of new railway lines connecting major economic centres**

### Top 10 PIDA-PAP2 flagship projects by cost<sup>201</sup>

Project name	Sector	Phase of project	REC	Total project cost (\$ billion)	Countries
Abidjan-Lagos Corridor Highway Development Project	Transport	Feasibility	ECOWAS	\$15.6	Benin, Côte d'Ivoire, Ghana, Nigeria, Togo
Grand INGA Phase 1	Energy	Transaction support	ECCAS	\$14.0	DR Congo
Construction of Standard Gauge Railway: Mombasa, Nairobi, Malaba, Kampala, Kigali line	Transport	Financial close	EAC	\$13.8	Kenya, Rwanda, South Sudan, Uganda
LAPSSET Railway Project	Transport	Feasibility	IGAD	\$12.0	Kenya, Ethiopia, South Sudan
Abidjan, Ouagadougou, Niamey, Cotonou, Lome Regional Rail Loop Project	Transport	Project definition	ECOWAS	\$9.6	Benin, Burkina Faso, Côte d'Ivoire, Niger, Togo
Construction of the Central Corridor Standard Gauge Railway	Transport	Financial close	EAC	\$7.5	Burundi, DR Congo, Rwanda, Tanzania
3,050 MW Mambilla Hydroelectric Power Project	Energy	Structuring	ECOWAS	\$5.8	Nigeria
Juba - Nairobi Fiber Optic Link	ICT	Feasibility	EAC, IGAD	\$4.5	Kenya, South Sudan
INGA 3 Transmission Interconnector	Energy	Initial assessment	SADC	\$3.6	Botswana, DR Congo, South Africa, Zambia, Zimbabwe
LAPSSET Crude Oil Pipeline	Energy	Project definition	EAC, IGAD	\$3.0	Kenya, South Sudan

Source: MIF based on AU-PIDA PAP2

### PIDA PAP2: number of projects by sector (2024)



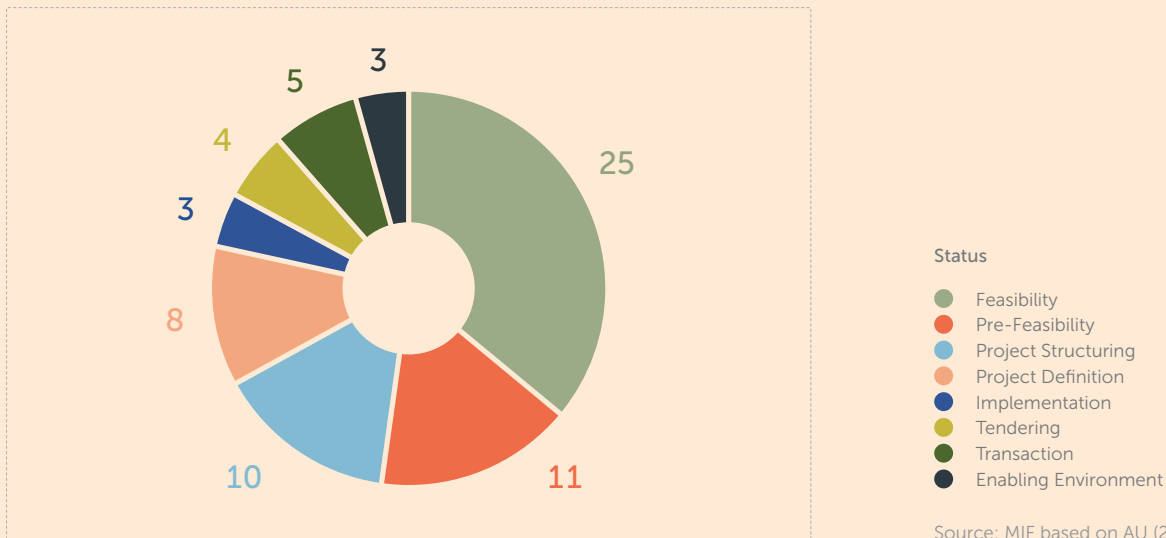
The current PIDA Infrastructure Prospectus lists 69 ongoing infrastructure projects, worth approximately \$125 billion. Most of these projects are classified as transport projects, with 25 currently in the pipeline, followed by 18 projects classed as energy. 25 projects are still in the feasibility stage.

Only three projects are in the construction phase:

1. Lesotho Highlands Water Phase II
2. Modernisation of the RN01 (Trans-Saharan) between Ghardaïa and Tamanrasset
3. Trans-Saharan Optic Fibre Broadband

**25 transport projects are in the pipeline of PIDA-PAP2, with 5 costing between \$7 and 16 billion**

PIDA: status update on all PAP2 projects (2024)



Source: MIF based on AU (2025)

**Conclusion**

In conclusion, investing to boost both mobility and connectivity within the continent presents obvious opportunities given the demand, and evident positive impact on continental economic integration, jobs prospects for a growing youth population, and increased regular migrations within the continent. This requires joint actions from both African governments whose political commitment is still required at many levels, and from their partners – not only through financial pledges but also through exchange of expertise and best practices.

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