



CONNECTING AFRICA

UNLOCKING AFRICA'S
INTRA-REGIONAL CONNECTIVITY
POTENTIAL



2026 EDITION



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INTRODUCTION

Last year, in June 2025, Embraer presented the Africa Connectivity Report at the AviaDev conference in Zanzibar. This document is an update to the 2025 report and has been released in June 2026, during the AviaDev conference in Gaborone.

The objective of this edition is to provide an updated ranking of the top intra-African origin and destination pairs that are not served with direct flights, along with insights into the key changes observed over the past year, including route developments, demand evolution, and market dynamics.

In this second edition, no update has been made to the stimulation curve or hub benchmark analysis introduced in the 2025 report. The stimulation model is based on a rolling ten-year dataset, which inherently limits year-over-year volatility and ensures that no material changes would be expected within a single annual update. Similarly, the hub benchmark analysis remains unchanged, as there have been no significant structural developments in the hub strategies of major African airlines that would alter the overall competitive positioning of key African hubs. As such, both frameworks continue to provide a robust and relevant foundation for assessing intra-African connectivity.

The findings confirm that Africa's connectivity gap is not narrowing. The number of unserved origin and destination pairs increased compared to last year, while underlying demand remains strong, with multiple markets growing by more than 50% year-over-year. At the same time, the market is increasingly dynamic, with routes being launched, adjusted, and discontinued in short cycles. Taken together, these trends indicate that the challenge is not a lack of demand, but rather the need for the right aircraft and network strategies to sustainably unlock intra-African connectivity.





2026 O&Ds RANKING

This year's ranking features a total of 55 O&Ds that are not served with direct flights. This is 10 additional O&Ds when compared to last year.

#	ORIGIN	DESTINATION	DISTANCE (KM)	PDEW	PDEW STIMULATED
1	CPT	LOS	4786	70	94
2	CPT	LUN	2295	49	EXISTING WITH A STOP IN LVI (PO)
3	DSS	LBV	3312	48	69
4	BKO	LBV	2338	37	56
5	ABV	NBO	3481	31	49
6	DUR	MRU	2857	27	45
7	BKO	BZV	3170	26	44
8	ACC	DSS	2105	23	ROUTE OPERATED IN 2025
9	DSS	LOS	2401	22	ROUTE OPERATED IN 2025
10	MPM	NBO	2775	19	ROUTE OPERATED IN 2025
11	DAR	LLW	970	18	ROUTE OPERATED IN 2025
12	DLA	DSS	3164	18	34
13	ABV	DSS	2720	18	33
14	BZV	DSS	4138	18	33
15	ACC	EBB	3673	18	33
16	ABV	JNB	4517	17	32
17	CPT	EBB	4047	17	31
18	JNB	SLI	1566	15	30
19	ABJ	NKC	1934	15	30
20	JNB	MBA	2741	14	28
21	JNB	MWZ	2681	14	28
22	ACC	BJL	2000	14	EXISTING WITH A STOP IN FNA (KP)
23	GBE	NBO	2842	13	27
24	DLA	JNB	3901	13	27
25	ACC	CKY	1547	13	27
26	DUR	LUN	1611	13	ROUTE OPERATED IN 2025
27	HRE	WDH	1508	12	26
28	CPT	FIH	3306	12	26
29	HRE	MPM	901	12	ROUTE OPERATED IN 2025





#	ORIGIN	DESTINATION	DISTANCE (KM)	PDEW	PDEW STIMULATED
30	HRE	ZNZ	1572	11	25
31	LOS	ROB	1513	11	25
32	LUN	MPM	1252	11	24
33	HRE	PLZ	1867	11	24
34	CPT	FBM	2647	11	24
35	NBO	WDH	3156	11	24
36	DSS	NSI	3364	11	24
37	HAH	TNR	925	11	24
38	LUN	WDH	1402	11	ROUTE OPERATED IN 2025
39	DSS	NDJ	3481	10	23
40	BLZ	NBO	1611	10	23
41	HRE	MRU	2803	10	23
42	DUR	NBO	3206	10	23
43	DAR	MPM	2231	10	23
44	LFW	NDJ	1651	10	22
45	DUR	WDH	1576	10	22
46	ACC	BKO	1151	10	22
47	DSS	FIH	4163	10	22
48	RUN	SEZ	1802	10	22
49	LUN	ZNZ	1551	9	22
50	CPT	LLW	2715	9	21
51	ABV	FNA	2248	9	21
52	BJM	FIH	1543	9	21
53	ASM	NBO	1860	9	21
54	LOS	ZNZ	4231	9	21
55	KGL	MBA	1075	9	EXISTING WITH A STOP IN ZNZ (WB)

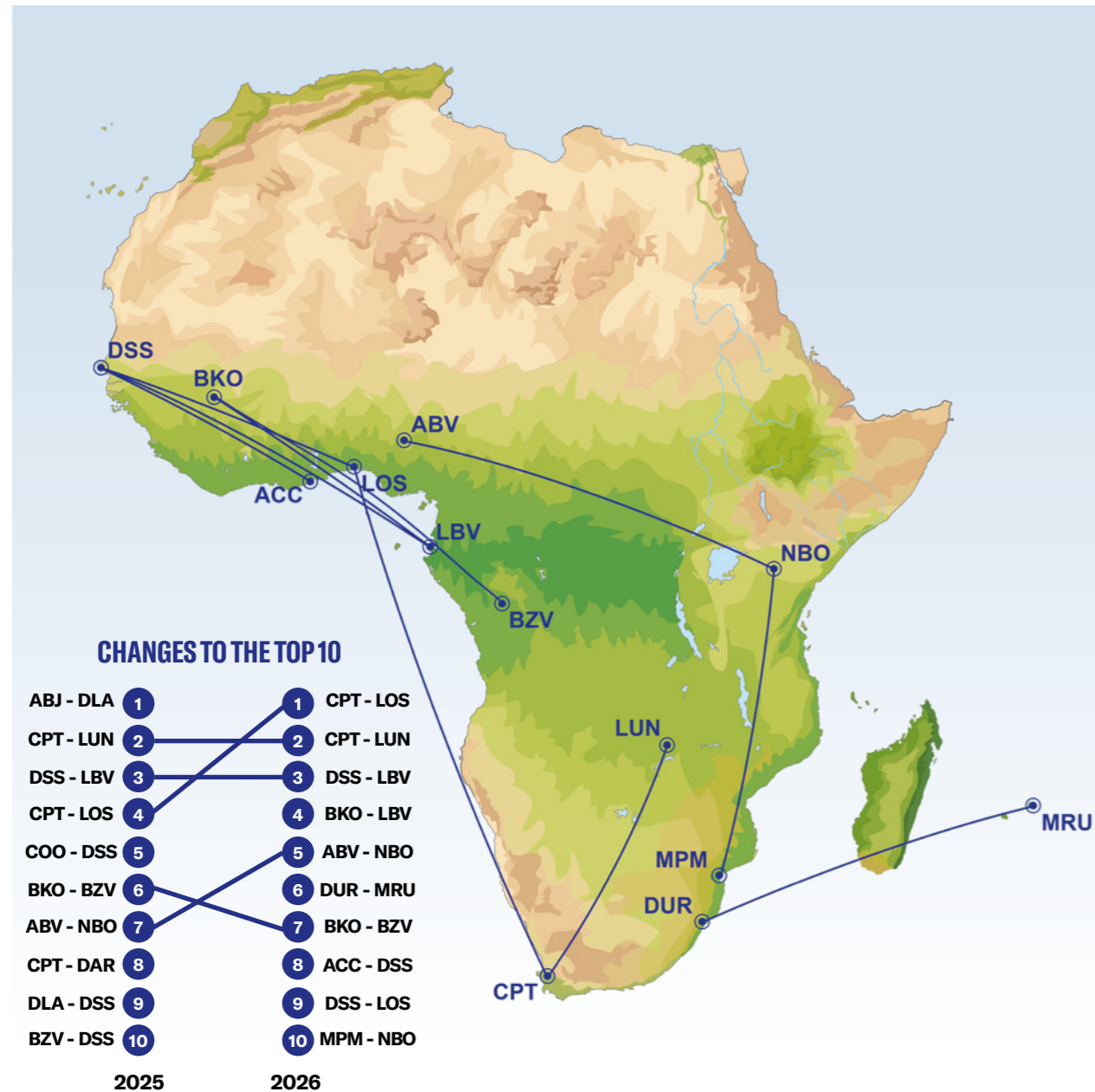
This update follows the same methodology as the 2025 edition, which is summarized below:

- April 2025 to March 2026, Sabre data, intra-African O&Ds only
- Excluding: domestic, from/to North Africa and O&Ds above 2600 nm
- Ranking shows top O&Ds with no scheduled flights in 2026
- Flights with a technical stop are not considered as non-stop
- Cut-off: minimum 9 PDEW, which after stimulation typically translates into 3 weekly flights with a regional jet



CHANGES TO THE TOP 10 RANKING

TOP 10 O&Ds IN 2026



O&Ds EXITING THE RANKING DUE TO ROUTE OPENING

Abidjan (ABJ) - Douala (DLA) - 1519 km

Currently operated by Air Côte d'Ivoire with a stop in NSI or ABV, this route is now operated non-stop by Kenya Airways (5th freedom) from May 2025. The flight is operated 3 times a week, with a mix of E190-E1 and B737-800.

Dakar (DSS) - Cotonou (COO) - 2317 km

Currently operated by Air Senegal with a stop in ABJ, this route is scheduled to be operated non-stop by Air Senegal from July 2026. The flight will be operated 4 times a week, with an A320.

Cape Town (CPT) - Dar-Es-Salaam (DAR) - 3681 km

This route was launched in December 2025 by Air Tanzania. The flight is operated 2 times a week with a B737.



O&Ds ENTERING THE RANKING

Bamako (BKO) - Libreville (LBV) - 2338 km

Route operated until February 2025 by Mauritania Airlines with a stop in COO. Currently, passengers fly with Air Côte d'Ivoire with a two-stop connection, ABJ and COO, or with ASKY through LFW. The market is dominated by VFR traffic, with additional demand from institutional-related travel between West and Central Africa. Based on the forecasted PDEW, this market could sustain 6 weekly flights on a 100-seater.

Durban (DUR) - Mauritius (MRU) - 2857 km

Moves from #13 to #6, reflecting an increase in PDEW from 18 to 27. Passengers predominantly connect via JNB with South African Airways, FlySafair, or domestic feeders connecting onto Air Mauritius. The market is largely leisure-driven. Based on the forecasted PDEW, this market could sustain 3 weekly flights on a 120-seater.

Accra (ACC) - Dakar (DSS) - 2105 km

Route operated until March 2025 by Kenya Airways. Currently, most passengers fly with ASKY through LFW or with Air Côte d'Ivoire through ABJ. This city pair connects two major West African capitals and shows strong government and corporate demand, reflecting growing political and economic ties between Ghana and Senegal. Based on the forecasted PDEW, this market could sustain 3 weekly flights on a 80-seater.

Lagos (LOS) - Dakar (DSS) - 2401 km

Route operated until May 2025 by Air Peace. It's now operated with a stop in ABJ, 5 times a week, with a mix of E195-E2 and B737. Currently, most passengers fly with ASKY through LFW, with Air Côte d'Ivoire through ABJ or with Air Peace with a two-stop connection, BJL and ABJ. Demand is driven by a mix of trade-related travel and VFR traffic, supported by strong commercial links between Nigeria and Senegal. Based on the forecasted PDEW, this market could sustain 3 weekly flights on a 80-seater.

Maputo (MPM) - Nairobi (NBO) - 2775 km

Route operated until August 2025 by Kenya Airways. Currently, most passengers fly through JNB with airlines such as Airlink, Airlink/Kenya Airways, LAM/South African Airways or LAM/Kenya Airways. Remaining passengers fly through ADD with Ethiopian Airlines. Demand is primarily corporate, including oil & gas and broader business travel. Based on the forecasted PDEW, this market could sustain 3 weekly flights on a 80-seater.

O&Ds EXITING THE RANKING DUE TO LOWER DEMAND

Douala (DLA) - Dakar (DSS) - 3164 km

Moves from #9 to #12
20 PDEW to 18 PDEW

Brazzaville (BZV) - Dakar (DSS) - 4138 km

Moves from #10 to #14
19 PDEW to 18 PDEW



OTHER ROUTE DEVELOPMENTS

ADDITIONAL ROUTE OPENINGS

Another 5 routes that are not in the top 10 have been opened since the last report.

Accra (ACC) - Ouagadougou (OUA) - 764 km

Previously ranked #11, now operated by Africa World Airlines since July 2025. The route is now operated 3 times a week with an ERJ.

Bujumbura (BJM) - Dar-Es-Salaam (DAR) - 1164 km

Previously ranked #29, now operated by Air Tanzania since October 2025. The route is now operated 3 times a week with a Q400.

Accra (ACC) - Dar-Es-Salaam (DAR) - 4583 km

Previously ranked #33, now operated by Air Tanzania since December 2025. The route is now operated 3 times a week with a B737MAX. Currently a triangular route so the return flight, DAR-ACC, is operated via LOS.

Dar-Es-Salaam (DAR) - Lagos (LOS) - 4252 km

Previously ranked #38, now operated by Air Tanzania since December 2025. The route is now operated 3 times a week with a B737MAX. Currently a triangular route so the return flight, LOS-DAR, is operated via ACC.

Cape Town (CPT) - Zanzibar (ZNZ) - 3745 km

Previously ranked #44, this route will be operated by Airlink from October 2026, 1 time a week with an E195-E2.

“The introduction of our new flagship aircraft, the E195-E2, with its innovative business class and comfortable economy seats, enables Airlink to bring destinations such as Zanzibar within convenient non-stop reach of Cape Town, which is an important source market for travel to the island.”

de Villiers Engelbrecht, Airlink CEO

FASTEST GROWING O&Ds

Air traffic growth across the African market remains highly dynamic, with several O&D pairs recording year-over-year increases above 50%. Despite the absence of non-stop services, these city pairs are recording strong year-over-year growth, driven by a combination of leisure, corporate, diplomatic, and VFR traffic. This trend underscores the reliance on one-stop itineraries via regional hubs, particularly in Southern and West Africa, where passengers are willing to accept longer journey times due to limited direct options. At the same time, it points to clear opportunities for network development, as sustained demand growth on these unserved routes could justify the introduction of direct services and stimulate further traffic expansion across the continent.

ORIGIN	DESTINATION	PDEW	GROWTH RATE	REMARKS
CPT	LOS	70	54%	POS PRIMARILY IN NIGERIA. LEISURE AND BUSINESS TRAFFIC.
DUR	MRU	27	70%	POS PRIMARILY IN SOUTH AFRICA. LEISURE TRAFFIC.
ABV	DSS	18	52%	GROWTH DRIVEN BY DIPLOMATIC AND CORPORATE TRAFFIC.
CPT	ZNZ	15	72%	POS PRIMARILY IN SOUTH AFRICA. LEISURE TRAFFIC. OPENING IN Q4 2026.
JNB	MWZ	14	272%	POS PRIMARILY IN SOUTH AFRICA. LEISURE TRAFFIC (GATEWAY TO SERENGETI)
HRE	PLZ	11	137%	POS PRIMARILY IN SOUTH AFRICA. VFR TRAFFIC.
CPT	FBM	11	71%	POS PRIMARILY IN DRC. LEISURE TRAFFIC. FBM IS THE MINING CAPITAL OF DRC.
ASM	NBO	9	100%	POS PRIMARILY IN KENYA. VFR TRAFFIC.
LOS	ZNZ	9	92%	POS PRIMARILY IN NIGERIA. LEISURE TRAFFIC.

Note: POS means Point of Sale

WHAT DOES THIS MEAN FOR AIRLINES?

RIGHT-SIZE CAPACITY TO CAPTURE NEW OPPORTUNITIES

As highlighted in the 2025 report and further reinforced in 2026, a large share of unserved routes remains in the 10-70 PDEW range, confirming that many African markets continue to sit below narrowbody thresholds but are well suited to regional or small narrowbody aircraft.

PRIORITIZE FREQUENCY OVER GAUGE TO SUSTAIN ROUTES

While the 2025 report identified significant unserved demand, the 2026 edition shows that even when routes are launched, some struggle to sustain operations. Frequency, schedule quality, and right-sized capacity are critical to long-term viability.

ACT NOW ON A GROWING AND DYNAMIC OPPORTUNITY SET

The increase to 55 unserved O&Ds, an additional 10 compared to 2025, demonstrates that the connectivity gap is not closing despite new route launches, meaning that airlines have an expanding pipeline of route opportunities to grow intra-African networks.



