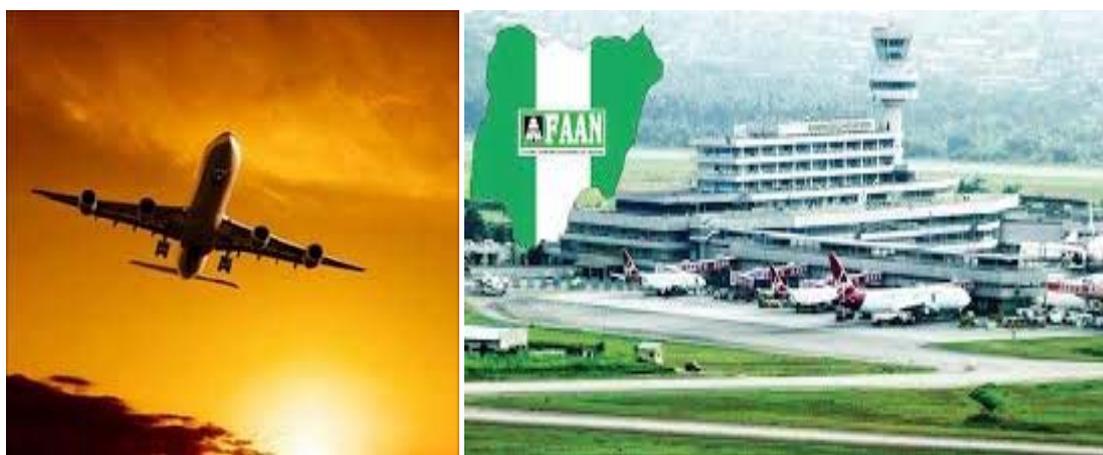


Nigerian Aviation Sector

SUMMARY REPORT: Q4, 2014 to Q1, 2015



NATIONAL BUREAU OF STATISTICS

19TH JUNE 2015

Aviation Data

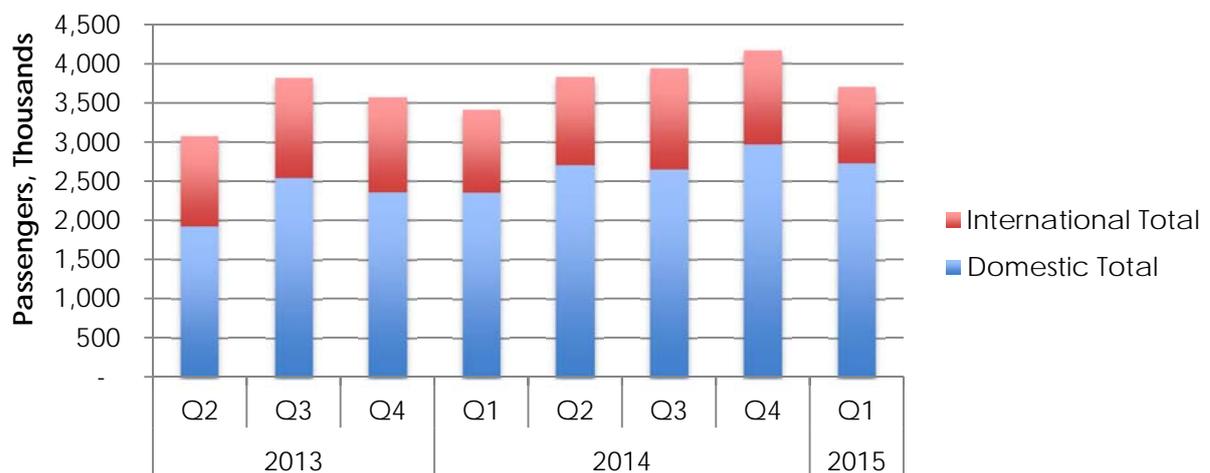
The aviation data used in this report were obtained from the Federal Aviation Authority of Nigeria (FAAN). Variables include the number of passengers carried on domestic and international flights by airport. All data are subject to amendments by FAAN and should be treated as preliminary.

Total Passenger Traffic

A total of 3,710,618 passengers travelled through Nigeria's airports in the opening quarter of 2015, representing a decline of 453,144 passengers or 10.88% from the preceding quarter, bucking the upward trend observed throughout 2014. The series peaked in Q4 of 2014, with 4,163,762 passengers travelling, up 227,744 or 5.59% from Q3 of the same year.

Year on year, the Q1 2015 value was still 294,011 passengers or 8.61% greater than that recorded in the corresponding quarter of 2014, whilst quarter four was 594,317 passengers or 16.65% greater than the number recorded in the closing quarter of 2013.

Total Domestic and International Passenger Travel



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FIGURE 1: TOTAL DOMESTIC AND INTERNATIONAL PASSENGER TRAVEL 2014

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Declines in total passengers in the first quarter were driven by lower numbers of domestically travelling passengers, at 708,092 fewer passengers or 23.84% below Q4 of 2014 values, whilst international passengers increased by 254,948 passengers or 21.35%. Similarly, the quarterly rise observed in Q4 of 2014 was also driven solely by higher domestic passenger numbers, increasing by 320,544 or 12.10% relative to the preceding quarter, whilst internationally bound travelers declined by 92,800 or 7.21%.

Of the passengers that traveled in Q1 of 2015, a total of 2,261,648 or 60.95% traveled domestically, whilst 71.32% of travel was domestic in the preceding quarter. The corresponding quarters recorded 68.84% and 65.90% domestic travel in Q1 of 2015 and Q4 of 2014 respectively.

Domestic Passenger Traffic by Airport

In the fourth quarter of 2014, the airport with the greatest frequency of domestic passenger traffic was Murtala Muhammed Airport in Lagos, with 1,088,141 passengers, or 36.64% of the total. This was the peak of the airport's series, having increased by 74,225 passengers or 7.32% from the preceding quarter. The opening quarter of 2015 however, saw a sharp decline in MMA's domestic passenger traffic, with 191,617 or 17.61% fewer passengers than the preceding quarter. Nonetheless, this decline was lower, relative to the other airports, as MMA held a 3.00% point greater share of the total this quarter, at 39.64%. Year on year, Q1 of 2015, recorded a marginally lower volume of domestic passenger traffic, with 2,372 or 0.26% fewer passengers.

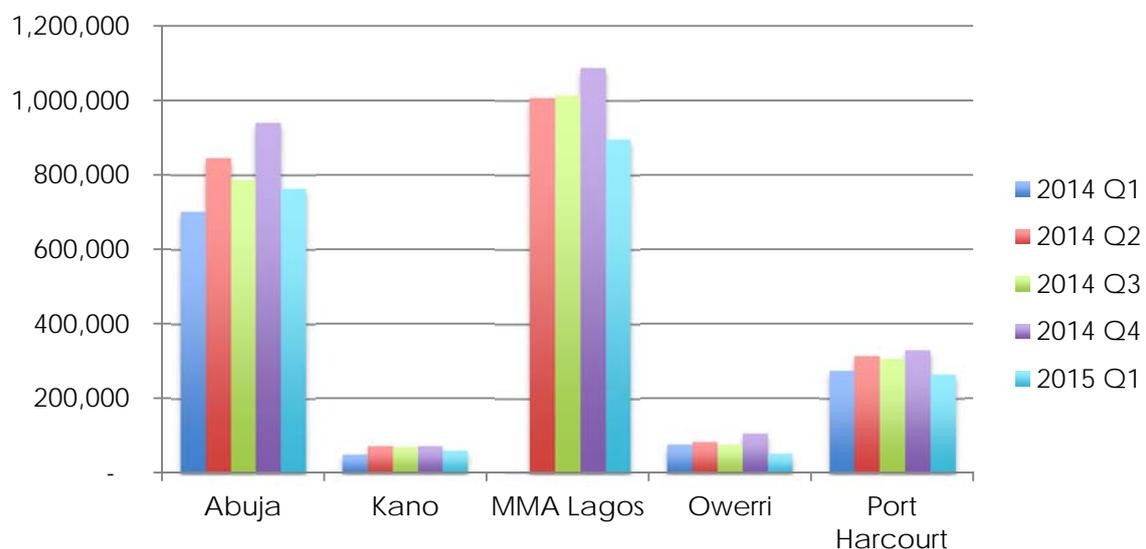


FIGURE 2: DOMESTIC PASSENGER TRAFFIC: SELECTED AIRPORTS

Abuja had the second highest number of passengers travelling domestically. Similarly to Lagos, the series peaked in Q4 of 2014, at 940,872 passengers, representing 31.68% of the total. Quarter on quarter, this was a rise of 153,250

passengers or 19.46% from Q3. However, Q1 of 2015 saw an almost equal decline, of 176,503 passengers or 18.76%. Yet this was still a rise year on year, of 63,120 passengers or 9.00% relative to the 701,249 passengers that travelled in Q1 of 2014. Abuja’s share of total domestic passenger traffic increased to 33.80% in the opening quarter.

Port Harcourt continued to hold the third highest volume of passenger traffic, with 329,499 passengers in Q4 of 2014, declining by 64,406 passengers or 19.55% in Q1 of 2015 to 265,093 passengers. Its share of the total however, increased only marginally, from 11.10% in Q4 of 2014 to 11.72% in Q1 of 2015. Relative to the corresponding quarter of 2014, the opening quarter of 2015 still recorded passenger traffic lower by 9,093 persons or 3.32%.

The only positive quarter on quarter passenger growth came from Makurdi airport in Q1 of 2015, with 87 or 16.29% more passengers than in Q4 of 2014. Year on year, Abuja, Ilorin and Kano saw positive growth in 2015’s opening quarter; Kano represented the greatest increase of 19.38%, representing 9,377 more passengers. For the closing quarter of 2014, highest quarterly growth was recorded in Makurdi again, with a 111.07% rise of 281 passengers from Q3 of 2014.

International Passenger Traffic

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The highest numbers of international passengers for both Q3 of 2014 and Q1 of 2015 were recorded in Lagos’ MMA airport. With 852,049 passengers or 71.36% of the total in Q4, passenger numbers declined by 153,320 or 17.99% in Q1, to 698,729 or 48.22% of the total. Year on year, MMA airport recorded declines in passenger numbers in both Q4 of 2014 and Q1 of 2015, of 29,733 or 3.37% and 85,750 or 10.93% in each quarter respectively.

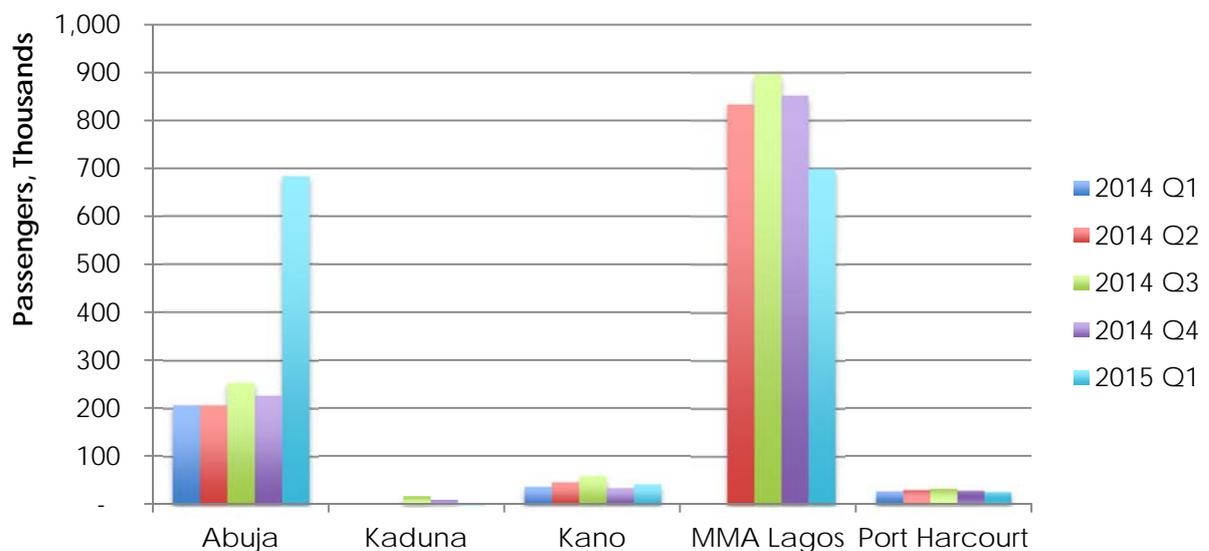


FIGURE 3: INTERNATIONAL PASSENGER TRAFFIC: SELECTED AIRPORTS

Abuja recorded some of the largest increases in international passenger numbers; from the 226,649 passengers travelling in Q4 of 2014, there was an influx of 456,809 additional passengers the following quarter, increasing the total by 201.55% in Q1, 2015 to 683,458 passengers. Its share of the total went from 18.98% in Q4 2014 to 47.17% in Q1, 2015. This cannot be explained by a usual seasonal fluctuation; year on year, the Q1 value was still 476,718 passengers or 230.59% greater, whilst the Q4, 2014 value was marginally lower, by 7,656 passengers or 3.27%.

Kano airport had the third highest number of international passengers, with 42,321 passengers in Q1 of 2014 and 33,578 in Q4 of 2014, representing 2.92% and 2.81% of the total respectively. However, Q4 of 2014 showed a sharp decline relative to the preceding quarter, of 25,351 passengers or 43.02%, after the steady growth in numbers observed throughout 2014. The opening quarter of 2015 saw some recovery, with an increase of 8,743 passengers or 26.04%, although the 42,321 passengers travelling internationally was still lower than the Q3 2014 peak of 58,929. Year on year, Q4 2014 and 2015 saw rises, of 3,470 passengers or 11.53% and 5,060 passengers or 13.58% respectively.

Total Aircraft Movement

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In keeping with the lower volumes of passenger travel observed in the opening quarter of 2015, total aircraft movement also declined. From a series peak of 71,414 aircraft in Q4 of 2014, there was a quarterly drop of 12,181 aircraft or 17.06% in the opening quarter of 2015. Nonetheless, a quarterly decline was also observed in the opening quarter of 2014, and year on year, this was actually an increase of 6,049 aircraft or 11.37%.

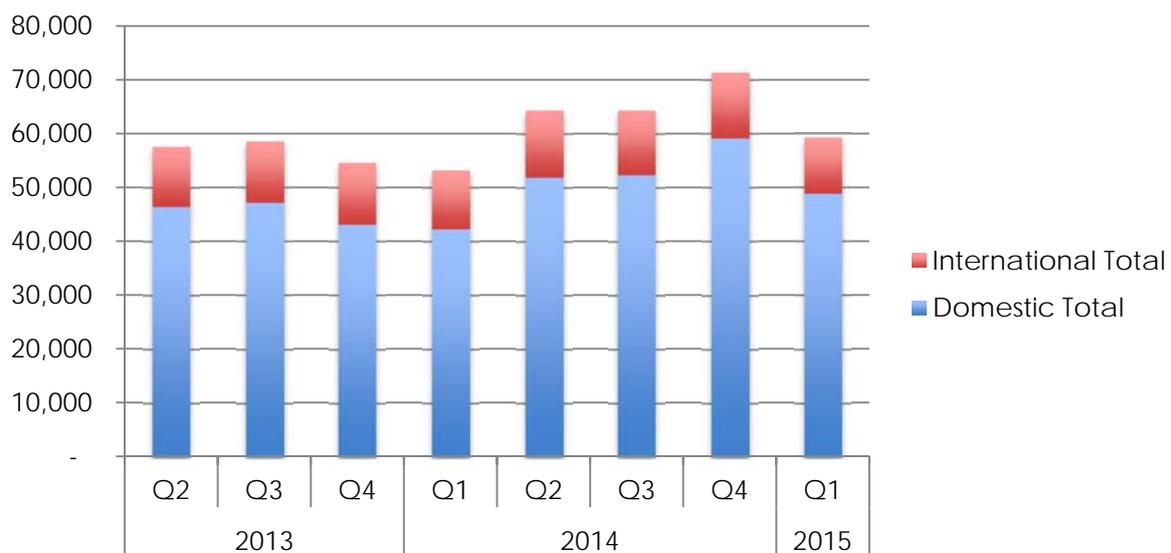


FIGURE 4: TOTAL DOMESTIC AND INTERNATIONAL AIRCRAFT MOVEMENT 2014

The portion of domestic and international aircraft traffic has remained relatively constant, with domestic aircraft holding 82.78% of the total in Q4 of 2014 and 82.43% in the opening quarter of 2015. In the corresponding quarters of the previous year, the ratios were 79.05% and 79.55% in quarters four and one respectively, showing a marginal increase in the number of domestic aircraft traveling, relative those internationally bound.

Domestic Aircraft Movement by Airport

A total of 59,115 aircraft travelling domestically passed through Nigeria’s airports in Q4 of 2014. As figure 4 shows, this number declined in the opening quarter of 2015, by 10,292 aircraft or 17.41%.

The airport with the highest number of domestically traveling aircraft was MMA in Lagos, as would be expected given its high passenger volume. At 21,330 aircraft in Q4 of 2014, it held 36.08% of all domestic aircraft traffic. Despite dropping by 2,577 aircraft or 12.08% in Q1 of 2015, its share rose by 2.33% points, representing 38.41% of the quarterly total. Year on year, the airport showed higher values in both quarters, with Q4 of 2014 having 4,991 or 30.55% more aircraft, and Q1 of 2015 up by 1,724 aircraft or 10.12%.

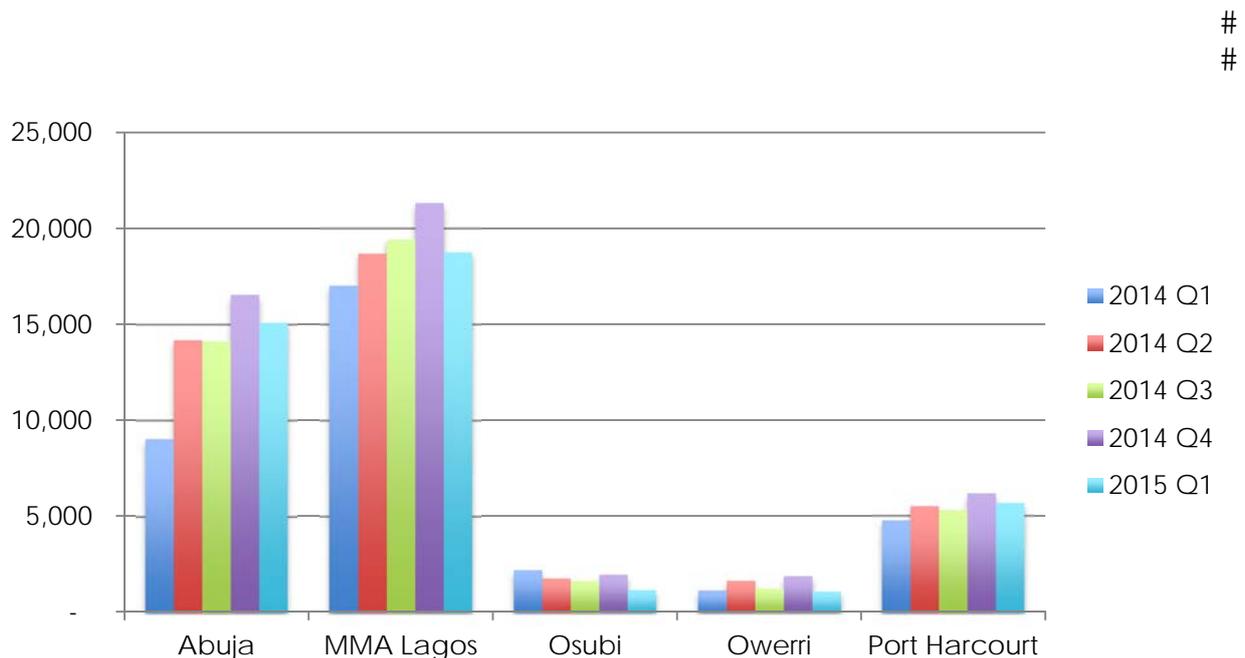


FIGURE 5: DOMESTIC AIRCRAFT MOVEMENT: SELECTED AIRPORTS

Abuja was the airport with the second greatest aircraft traffic; also peaking in Q4 of 2014 at 16,562 aircraft, it declined by 1,459 aircraft or 8.81% in Q1 of 2015 to reach 15,103 aircraft. Its share of the total increased however, from 28.02% in Q4 of 2014, to 30.93% the following quarter. Year on year, Abuja

saw some of the greatest increases in aircraft traffic, with 5,175 or 45.45% more aircraft in the closing quarter of 2014, and 6,075 or 67.29% more aircraft in Q1 of 2015.

Port Harcourt ranked third again for domestic travel, with 10.44% of the total in Q4 of 2014, increasing to 11.58% in 2014. For Port Harcourt, the quarterly decline in aircraft numbers was similar to MMA and Abuja; from 6,170 in Q4 of 2014, the Q1 2015 value was lower by just 517 aircraft or 8.38%. Year on year, numbers were also higher, by 588 aircraft or 10.53% in the closing quarter of 2014, and by 904 or 19.04% in Q1 of 2015.

In Q1 of 2015, the only two airports to experience positive quarterly growth in aircraft traffic were Sokoto and Jos, in which numbers increased by 69 or 11.79% and 12 or 3.90% respectively. Makurdi experienced the highest quarterly growth in Q4 of 2014, with 65 or 154.76% more aircraft than in the preceding quarter. Year on year, increases were generally larger, with Enugu experiencing growth of 1,162 aircraft or 337.79% in Q4 of 2014, and Minna's 80 additional aircraft in Q1 of 2015 representing a rise of 70.18%.

Interestingly, Kano airport does not feature in the top 5 airports by aircraft traffic, yet it had the fourth greatest number of passengers in Q1 of 2015. Osubi also features, despite having relatively lower numbers of passengers.

International Aircraft Movement by Airport

In the opening quarter of 2015, a total of 10,410 aircraft traveled internationally from Nigeria's airports, representing a decline of 1,889 aircraft or 15.36% from the preceding quarter and 465 aircraft or 4.28% from the corresponding quarter of 2014. For Q4 however, there was both a quarterly and year on year rise, of 362 aircraft or 3.03% and 866 aircraft or 7.57% respectively.

For international aircraft traffic, MMA in Lagos again has the highest level, with 6,627 aircraft passing through in Q1, representing 63.66% of the total. As has been the case with passenger numbers and domestic aircraft movement, this represented a quarterly decline, this time of 1,554 aircraft or 19.00% and a year on year decline of 823 aircraft or 11.05%. Quarter 4 of 2014 however, saw marginal increases, by 116 aircraft or 1.44% from Q3 2014, and by 156 aircraft or 1.94% year on year.

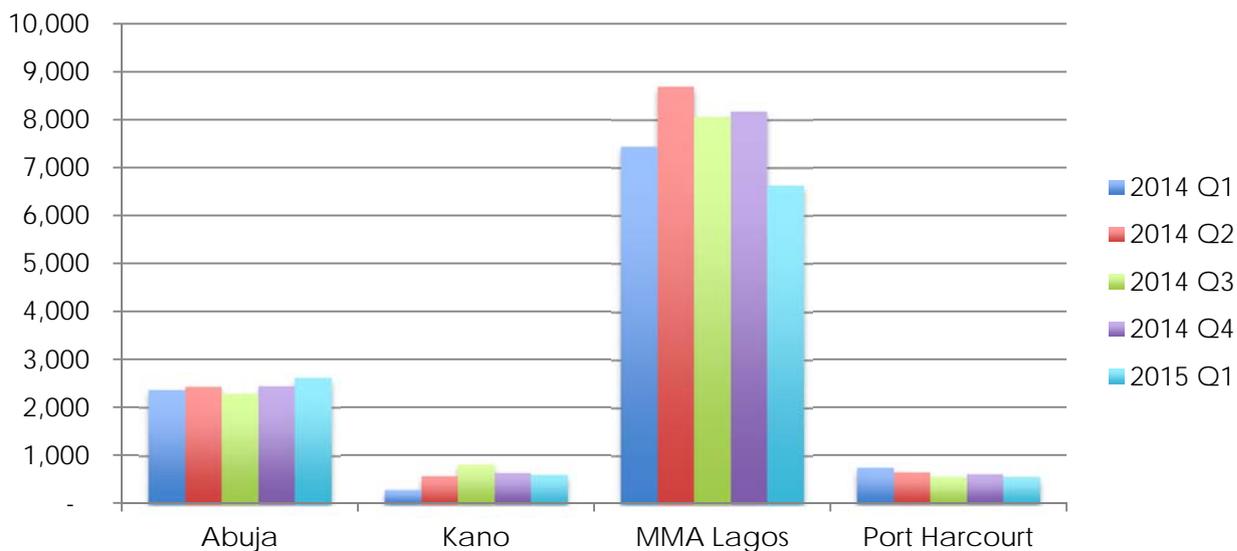


FIGURE 6: INTERNATIONAL AIRCRAFT MOVEMENT: SELECTED AIRPORTS

Abuja, having the second highest volume of aircraft traffic, demonstrated a far more consistent number of aircraft travelling internationally; even showing slight rises in numbers in the quarters of review. The Q4 2014 value was up by 162 aircraft or 7.08% from the preceding quarter, the only airport to show a rise this quarter, whilst Q1 was higher by 172 aircraft or 7.02%. Its respective share of the total increased from 19.92% to 25.19% in each quarter. Rises in aircraft traffic were higher year on year, with Q4 2014 growing by 400 aircraft, or 19.51% and Q1 2015 higher by 258 aircraft or 10.91%.

Port Harcourt had the third highest volume of international aircraft traffic at 557 aircraft in Q1 of 2015, 5.35% of the total. However, although a moderate quarterly rise was recorded in Q4 of 2014, of 43 aircraft or 7.66%, international flights have generally shown a downward trend. The Q1 2015 value was 47 aircraft or 7.78% lower than that of the preceding quarter, and year on year was 185 aircraft or 24.93% lower. Quarter four, 2014 was lower by 81 aircraft or 11.82% from that recorded a year previous.

Kano, on the other hand, showed a more consistent rise. Despite quarterly declines, of 178 aircraft or 22.03% in Q4 2014 and 32 aircraft or 5.08% in Q1 of 2015, the year on year rise from Q1 of 2014 was sharp at 306 aircraft or 104.79%, representing the highest year on year rise.

Cargo Movement by Airport

International Cargo data is available for the four airports of Abuja, MMIA, Kano and Port Harcourt. Aggregating the weight of cargo transported through all airports, quarter four of 2014 recorded a total of 48,027,611 Kgs of cargo. This represented a quarterly decline of 5,155,443 Kgs or 9.69% and an

annual decline of 2,773,229 Kgs or 5.46%. The opening quarter of 2015 saw a marginal decline, of 190,919 Kgs or 0.40%, yet, year on year this was a rise of 5,184,727 Kgs or 13.84%.

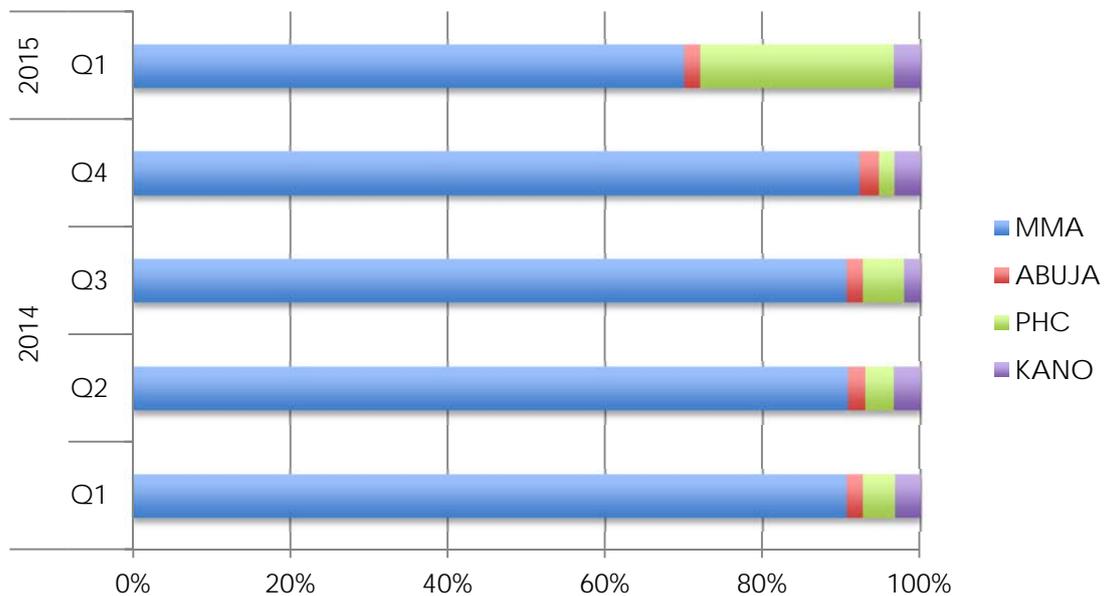


FIGURE 7: CARGO TRANSPORTED BY AIRPORT

By airport, MMIA consistently recorded the greatest weight of cargo, dominating over 90% of the weight in most quarters, with the 44,301,040 Kgs in Q4 of 2014 representing 92.24% of the total. The airport saw a sharp quarterly decline thereafter, of 10,824,254 Kgs or 24.43%, so that its share of the total dropped to 69.98%. Year on year, the decline was less great, at 4,601,478 Kgs or 12.08% suggesting a partial seasonal effect.

Despite consistently recording the lowest cargo weights in quarters prior to this, in Q1 of 2015, Port Harcourt held the second greatest weight. From the 943,869 Kgs of Cargo recorded in Q4 of 2014, there was an influx of 10,832,549 Kgs or 1,147.68% in Q1 of 2015, so that the 11,776,418 Kgs represented 24.62% of the total, up from 1.97% in Q4. Year on year, the absolute rise was similar, at 10,038,432 Kgs or 577.59%.

Kano airport continued to transport the third greatest weight of Cargo, showing higher levels in the period of review. In Q4 of 2014, there was a quarterly increase of 476,303 Kgs or 42.23% to 1,604,225 Kgs or 3.34% of the total. This higher level was maintained the following quarter, with a marginal rise of 11,667 Kgs or 0.73%. Year on year, the values were 659,006 Kgs or 69.72% and 269,610 Kgs or 20.03% greater in Q4 and Q1 respectively.

Post Movement by Airport

Weight of Post by Airport

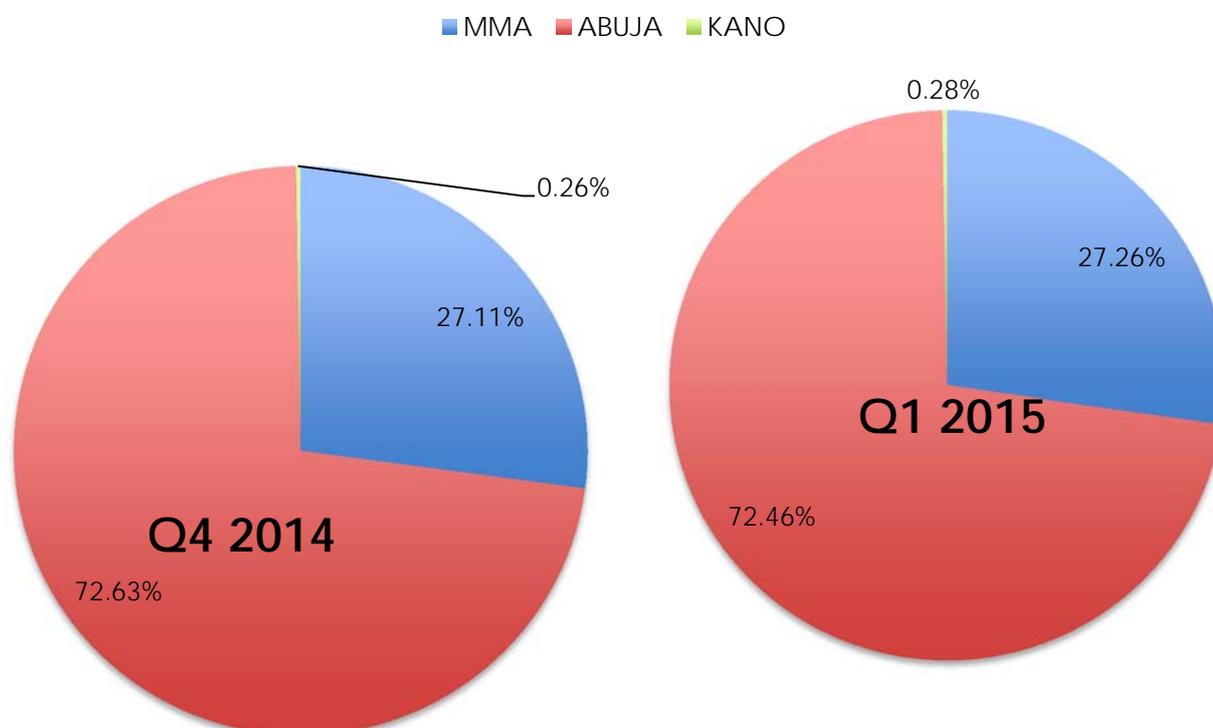


FIGURE 8: WEIGHT OF POST ARRIVING AND DEPARTING BY AIRPORT

The movement of Post, measured in Kg, is reported for the three airports of Abuja, MMA and Kano. The total weight of post that arrived and departed from these airports in Q4 of 2014 was 1,731,792Kg, which increased in the opening quarter of 2015, by 37,546Kg or 2.17% to 1,769,338 Kgs. Year on year, this represented a rise of 270,195Kgs or 18.02%.

Unlike in the case of Cargo, Abuja airport dominates in the post category, with the weight of post passing through showing an upward trend. In Q4 of 2014, a weight of 1,257,770 Kgs passed through, representing 72.63% of the total. This was a quarterly rise of 486,804 Kgs or 63.14%, which was maintained the following quarter, with a marginal rise of 24,333 Kgs or 1.93%, with a total weight of 1,282,103 Kgs in the opening quarter of 2015, 72.46% of the total. Year on year rises were also high, up by 300,812 Kgs or 31.43% in Q4 of 2014 and 274,573 Kgs or 27.25% in Q1 of 2015.

Lagos had the second greatest weight of post, with 469,535 Kgs or 27.11% of the total in Q4 2014. Having increased by 5,695 Kgs or 1.23% from the preceding quarter, it continued this quarterly growth in the opening quarter of 2015, rising by 12,712 Kgs or 2.71% to reach 482,246 Kgs or 27.26% of the total. However, relative to the corresponding quarters of the previous years,

these were declines, with Q4 showing a 1,064,798 Kg or 69.40% decline year on year, and Q1 of 2015 lower by 7,986Kgs or 1.63%.

Kano's share of the total remained low, with 4,488Kgs or 0.26% of the total in Q4 and 4,989 Kgs or 0.28% of the total in Q1 of 2015. Quarterly growth was mixed, declining by 571 Kgs or 11.29% in Q4, yet rising by a similar 501Kgs or 11.16% the following quarter. Year on year however, growth was consistently positive, rising by 841 Kgs or 23.06% in Q4 and a much greater 3,608 Kgs or 261.26% in Q1 of 2015.

APPENDIX I

Table 1.0 Total Passenger Arrivals and Departures by Airport

AIRPORTS	2013			2014				2015
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Abuja Dom	589,386	860,278	753,583	701,249	845,243	787,622	940,872	764,369
Abuja Int	127,645	230,452	234,305	206,740	206,912	254,389	226,649	683,458
Akure Dom	1,714	2,296	1,225	1,538	1,868	847	1,478	1,212
Benin Dom	54,784	57,404	57,835	51,320	53,621	59,699	63,256	48,371
Calabar Dom	42,411	31,710	46,286	46,142	45,285	47,478	64,939	45,974
Calabar Int	214	5	-	-	4	188	-	-
Enugu Dom	57,073	57,038	19,301	62,592	73,834	77,746	76,851	-
Enugu Int	-	-	-	8,912	7,424	11,501	18,670	-
Ibadan Dom	7,549	10,555	15,953	14,525	15,583	15,826	18,809	4,615
Ilorin Dom	7,098	9,276	14,822	14,360	16,489	15,496	19,860	15,490
Ilorin Int	-	-	-	-	-	539	3,357	-
Jos Dom	11,810	13,472	13,725	12,226	13,756	10,801	12,155	10,909
Kaduna Dom	31,758	40,664	32,842	33,321	39,485	50,912	50,498	25,743
Kaduna Int	170	7,357	15,105	-	-	17,235	9,245	5
Kano Dom	53,893	38,560	44,822	48,377	70,121	69,013	70,416	57,754
Kano Int	32,320	28,907	30,108	37,261	45,568	58,929	33,578	42,321
Katsina Dom	315	219	595	495	209	656	829	549
Katsina Int	-	4,143	236	12	13	4,559	4,503	-
Maidugary Dom	21,487	20,299	13,751	3,025	3,507	3,559	1,012	-
Maidugary Int	8	7,152	4,729	-	-	-	-	-
Minna Dom	833	3,631	3,938	3,131	4,502	3,129	1,111	739
Minna Int	-	-	4,366	-	-	-	3,332	-
Makurdi Dom	245	187	421	657	313	253	534	621
MMA Dom	829,283	931,639	920,297	898,896	1,006,787	1,013,916	1,088,141	896,524
MMA Int	785,306	954,070	881,782	784,479	834,067	896,172	852,049	698,729
Osubi Dom	67,943	44,181	36,119	56,508	60,886	47,464	56,392	29,998
Osubi Int	66,062	74,979	53,297	75,376	83,141	76,347	104,079	51,652
Port Harcourt Dom	29,269	304,881	282,956	274,186	314,176	307,274	329,499	265,093
Port Harcourt Int	201,926	33,217	35,064	26,314	28,098	30,813	27,117	24,457
Sokoto Dom	19,890	21,934	6,971	21,067	25,321	26,167	27,523	20,263
Sokoto Int	53	15,693	6,681	-	4	9,170	8,873	-
Yola Dom	30,743	21,765	33,508	32,851	36,260	34,991	41,486	21,772

Yola Int	-	900	4,822	1,047	-	3,327	6,649	-
TOTAL DOM	1,923,546	2,544,968	2,352,247	2,351,842	2,710,387	2,649,196	2,969,740	2,261,648
TOTAL INT	1,147,642	1,281,896	1,217,198	1,064,765	1,122,090	1,286,822	1,194,022	1,448,970
TOTAL	3,071,188	3,826,864	3,569,445	3,416,607	3,832,477	3,936,018	4,163,762	3,710,618

Table 2.0 Total Aircraft Arrivals and Departures

	2013			2014				2015
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Abuja Dom	13,240	14,906	11,387	9,028	14,186	14,120	16,562	15,103
Abuja Int	2,044	2,134	2,050	2,364	2,438	2,288	2,450	2,622
Akure Dom	482	258	256	220	432	158	318	258
Benin Dom	1,188	1,060	1,172	1,084	987	1,051	1,430	1,198
Calabar Dom	768	246	882	970	753	683	1,231	868
Calabar Int	3	2	-	2	2	8	56	-
Enugu Dom	739	983	344	674	1,112	1,074	1,506	-
Enugu Int	-	-	-	-	69	74	140	-
Ibadan Dom	598	364	625	546	709	596	712	190
Ilorin Dom	621	604	648	609	824	784	995	832
Ilorin Int	1	-	-	-	-	-	12	-
Jos Dom	320	308	268	306	320	242	308	320
Kaduna Dom	791	951	825	904	1,142	1,039	1,072	622
Kaduna Int	34	24	76	4	-	45	77	6
Kano Dom	1,434	992	976	1,195	1,492	1,592	1,618	1,398
Kano Int	362	427	522	292	575	808	630	598
Katsina Dom	72	98	102	97	96	104	126	92
Katsina Int	6	-	2	1	-	22	32	-
Maidugary Dom	364	346	224	346	457	1,669	440	-
Maidugary Int	9	39	21	11	-	-	-	-
Minna Dom	172	116	144	114	266	231	202	194
Minna Int	-	-	-	-	-	12	40	-
Makurdi Dom	84	48	92	65	72	42	107	98
MMA Dom	15,777	16,810	16,339	17,029	18,699	19,431	21,330	18,753
MMA Int	7,932	8,106	8,025	7,450	8,701	8,065	8,181	6,627
Osubi Dom	2,201	1,576	1,226	2,168	1,734	1,612	1,938	1,126
Osubi Int	1,150	1,080	812	1,122	1,637	1,223	1,858	1,052
Port Harcourt Dom	5,296	5,106	5,582	4,749	5,496	5,284	6,170	5,653
Port Harcourt Int	730	688	685	742	651	561	604	557
Sokoto Dom	531	603	220	437	614	566	585	654

Sokoto Int	11	45	22	5	1	40	35	-
Yola Dom	578	668	1,021	646	880	917	607	412
Yola Int	-	4	30	4	-	14	42	-
TOTAL DOM	46,406	47,123	43,145	42,309	51,908	52,418	59,115	48,823
TOTAL INT	11,132	11,469	11,433	10,875	12,437	11,937	12,299	10,410
TOTAL	57,538	58,592	54,578	53,184	64,345	64,355	71,414	59,233

Table 3.0 Cargo Arrivals and Departures in KG

AIRPORTS	2013			2014				2015
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
MMA	46,833,681	48,979,220	45,760,616	38,078,264	42,225,858	48,215,396	44,301,040	33,476,786
Abuja	799,165	1,556,578	810,611	859,434	1,036,653	1,060,486	1,178,477	967,596
Port Harcourt	885,831	1,155,634	3,284,394	1,737,986	1,691,756	2,779,249	943,869	11,776,418
Kano	1,103,732	899,321	945,219	1,346,282	1,567,485	1,127,922	1,604,225	1,615,892
TOTAL	49,622,408	52,590,753	50,800,840	42,021,965	46,521,752	53,183,054	48,027,611	47,836,692

Table 4.0 Post Arrivals and Departures in KG

AIRPORTS	2013			2014				2015
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
MMA	211,855	435,397	1,534,333	490,233	487,647	463,840	469,535	482,246
Abuja	391,913	1,283,085	956,958	1,007,530	1,119,846	770,966	1,257,770	1,282,103
Kano	1,683	-	3,647	1,381	2,376	5,059	4,488	4,989
TOTAL	605,451	1,718,481	2,494,937	1,499,143	1,609,869	1,239,865	1,731,792	1,769,338

NOTE: Full Dataset can be downloaded from NBS eLibrary at:
<http://nigerianstat.gov.ng/pages/NBS%20eLibrary>