

Nigerian Aviation Sector

SUMMARY REPORT: Q2, 2015



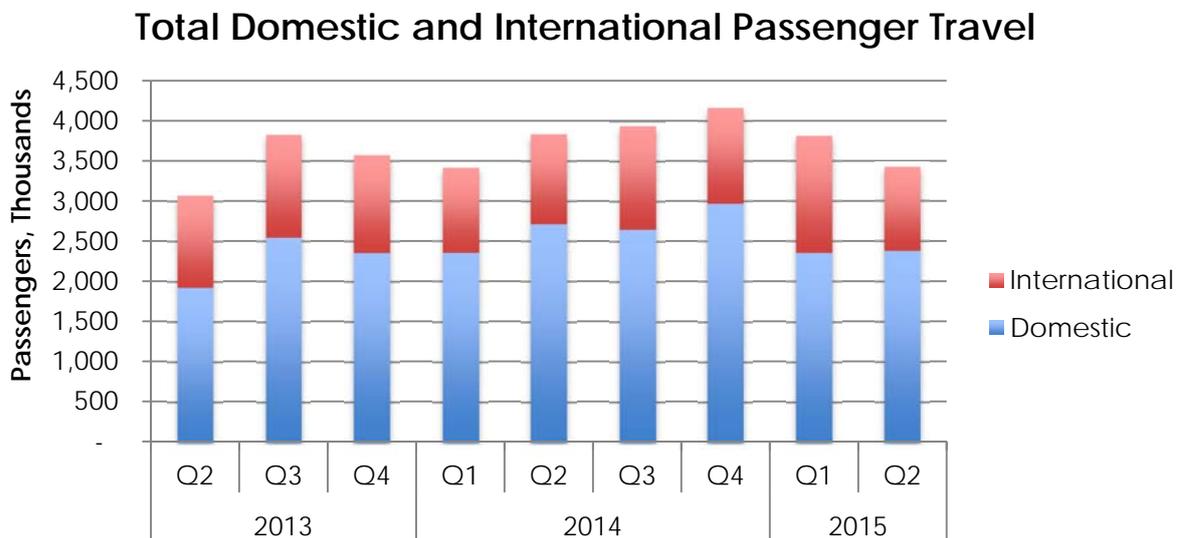
NATIONAL BUREAU OF STATISTICS

10TH SEPTEMBER 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, aircraft movements and the weight of cargo and post carried. All data are subject to amendments by FAAN and should be treated as preliminary.

Total Passenger Traffic



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FIGURE 1: TOTAL DOMESTIC AND INTERNATIONAL PASSENGER TRAVEL 2014

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The second quarter of 2015 saw declines in passenger travel in Nigeria, driven by lower numbers of Internationally travelling passengers, which declined by 406,369 passengers or 27.93% from quarter one to 1,048,598 passengers in quarter two. Yet Domestic travel showed a marginal rise quarter on quarter, with 16,752 or 0.71% more passengers travelling in Q2. The resultant 2,374,479 domestically bound passengers represented 69.37% of the total number of

passengers, up by 7.53% points from the preceding quarter, yet down 1.35% points from Q2 of 2014.

Year on year, both domestic and international passenger numbers were lower, with 73,492 or 6.55% fewer international passengers and 335,908 or 12.39% fewer domestic passengers relative to the corresponding quarter of the preceding year.

Domestic Passenger Traffic by Airport

Murtala Muhammed Airport in Lagos continued to dominate domestic passenger travel in the quarter, with the 936,029 passengers representing 39.42% of the Q2 2015 total. Despite still recording passenger numbers lower than in Q2 of 2014, with year on year growth of -70,758 passengers or -7.03%, quarterly numbers were up, with a rise of 39,505 passengers or 4.41% from the preceding quarter.

Abuja airport, with the second greatest portion of Q2 domestic passenger traffic at 33.15% of the total, showed a similar trend. The 787,067 domestically bound passengers traveling through the airport in Q2 represented a decline of 58,176 passengers or 6.88% year on year, yet a rise of 22,698 passengers or 2.97% from the preceding quarter.

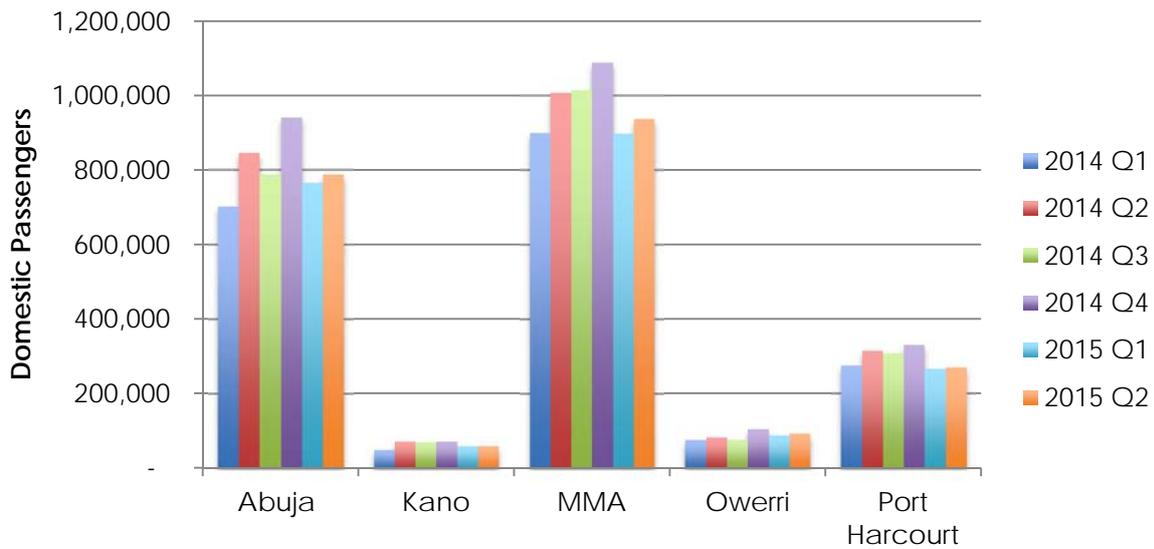


FIGURE 2: DOMESTIC PASSENGER TRAFFIC: SELECTED AIRPORTS

The only airports to record positive year on year growth were Katsina, increasing by 668 passengers or 319.62%, Owerri, which increased by 9,243 passengers or 11.12% and Yola, increasing by 1,121 passengers or 3.09%. The greatest quarterly passenger growth was recorded for Ibadan airport, in which an additional 10,249 or 222.08% more passengers traveled in Q2 against quarter one, increasing the total from 4,615 passengers to 14,864.

International Passenger Traffic

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At 728,064 passengers, 69.43% of all internationally bound passengers traveled through Lagos' Murtala Muhammed International Airport in Q2 of 2015. From the preceding quarter, this was a marginal rise of 29,335 passengers or 4.20%, whilst year on year it represented a decline of 106,003 passengers or 12.71%.

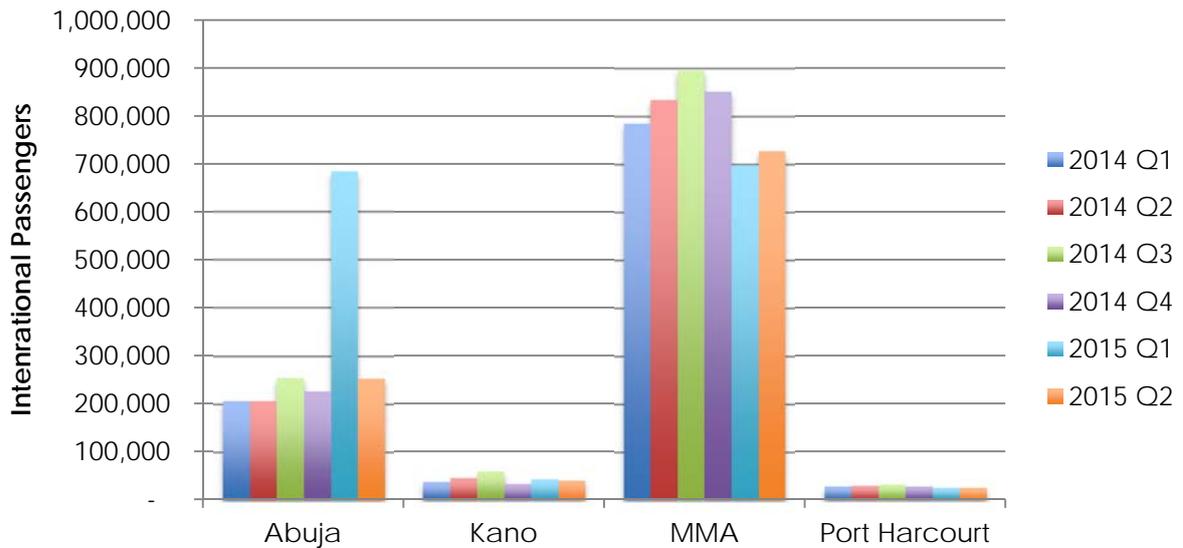


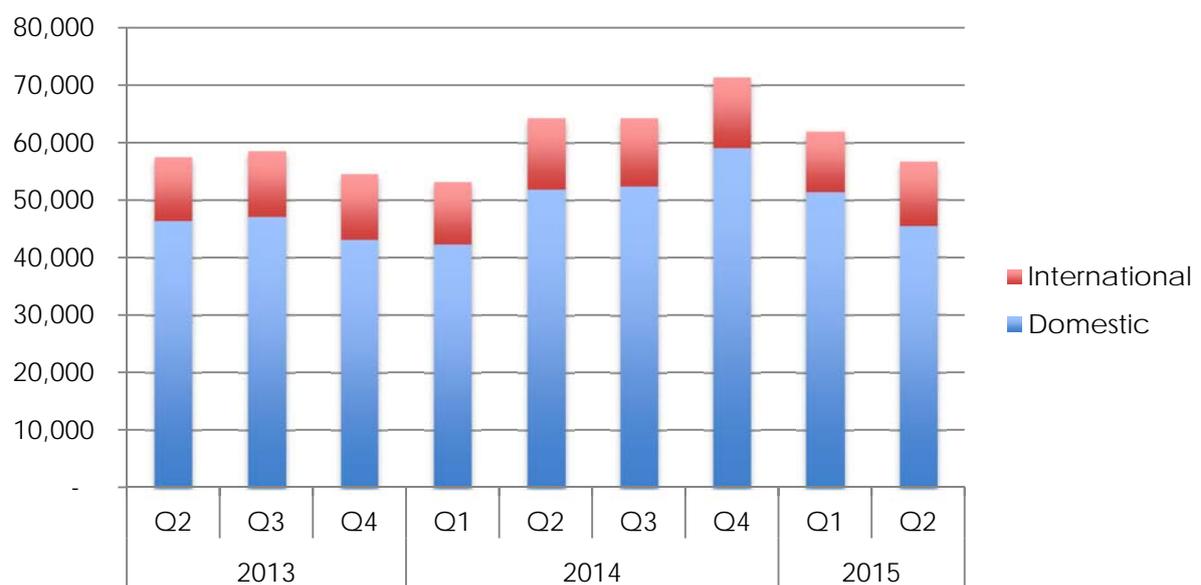
FIGURE 3: INTERNATIONAL PASSENGER TRAFFIC: SELECTED AIRPORTS

However, Abuja airport was the main driver of the quarterly declines in traffic observed; following its spike of 683,458 passengers recorded in the opening quarter of 2015, the 253,040 that traveled in Q2 represented a decline of 62.98%, reducing its share of international flights from 46.97% in Q1 to 24.13% in Q2. Yet year on year, this was still a significant overall rise, up by 46,128 passengers or 22.29%, representing the only positive annual growth in passenger numbers apart from Sokoto, which had 8 additional passengers from the corresponding quarter of 2014.

Kano continued to host the third greatest volume of international passengers, at 40,582 passengers or 3.87% of the total. Nonetheless, this was a decline both quarterly, of 1,739 passengers or 4.11%, and year on year, of 4,986 passengers or 10.94%.

Total Aircraft Movement

Aircraft movement was down again in Q2 of 2014, this time by 5,350 flights or 8.64% from the preceding quarter, and by 7,746 flights or 12.04% from the same quarter of 2014. The 56,599 aircraft that arrived and departed to and from Nigeria's airports were comprised of 45,452 domestically bound flights, making



up 80.31% of the total, whilst the remaining 11,147 flights or 19.69% were internationally bound.

FIGURE 4: TOTAL DOMESTIC AND INTERNATIONAL AIRCRAFT MOVEMENT 2014

Online declines in passenger numbers, declines in aircraft movements were driven by reductions in domestic flights, which were lower by 6,021 flights or 11.70% from Q1, and by 6,456 or 12.44% from Q2 of 2014. International flights even showed marginal quarterly growth, up by 671 flights or 6.41% from quarter one, despite their lower passenger numbers. Year on year, they contributed to 16.65% of the declines in aircraft movement observed, being lower by 1,290

aircraft of 10.37%; domestic flights were responsible for the remaining 83.35% of the overall decline.

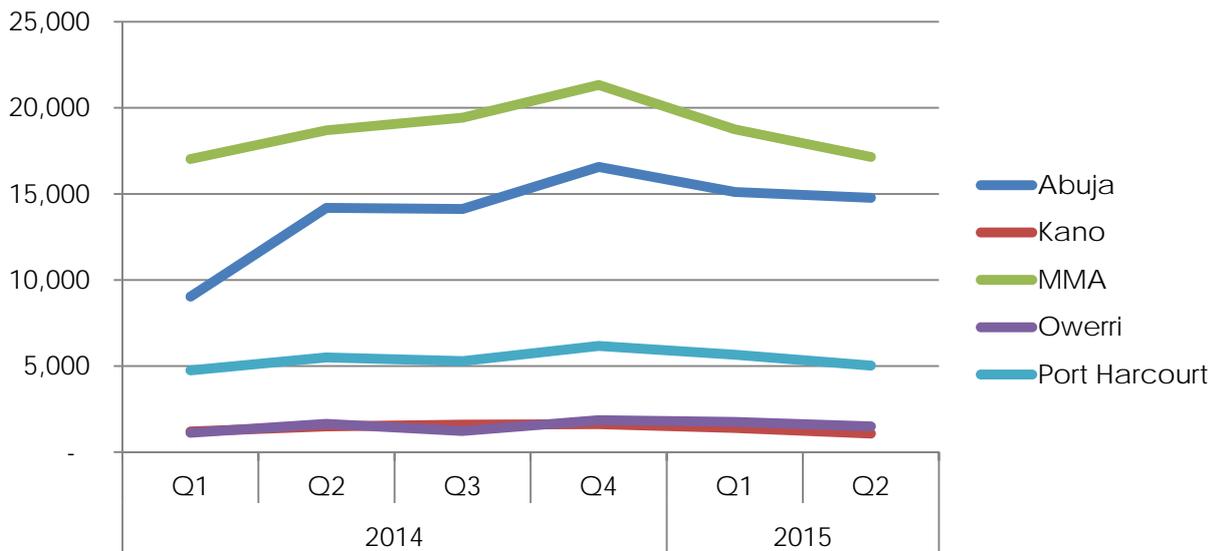
Domestic Aircraft Movement by Airport

Aircraft movement in Nigeria's domestic airports was dominated by Murtala Muhammed Airport in Lagos, which with 17,149 flights, represented 37.73% of the domestic total. Nonetheless, this was a decline of 1,604 aircraft or 8.55% from the preceding quarter, continuing the downward trend observed since Q4 of 2014. Year on year, the decline was similar, with 1,550 or 8.29% fewer flights.

Despite also showing a marginal quarterly decline in the number of aircraft moving through the airport, of 329 aircraft or 2.18%, Abuja airport actually showed an increase in the number year on year, of 588 aircraft or 4.14%. With a total of 14,774 domestic aircraft passing through the airport in the quarter, Abuja held 32.50% of all domestic aircraft, as against 29.34% in the preceding quarter, and 27.33% one year previous.

Aside from Abuja, the only other airports to show positive annual growth in domestic aircraft movement were Katsina, which had an additional 84 or 87.50% aircraft, and Maiduguri, which had 43 more aircraft, representing a rise of 9.41%. The greatest year on year declines were observed in Kaduna, with 904 or 79.16% fewer aircraft.

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FIGURE 5: DOMESTIC AIRCRAFT MOVEMENT: SELECTED AIRPORTS

International Aircraft Movement by Airport

As the largest airport in Nigeria, Murtala Muhammed International Airport in Lagos showed a slight recovery in international aircraft movement in the second quarter of 2015. From the low of 6,627 aircraft recorded in the opening quarter of 2015, there was a rise of 584 aircraft or 8.81% in Q2, despite aircraft numbers remaining below those in Q2 of 2014, by 1,490 aircraft of 17.12%.

In Q2, Abuja airport managed to maintain the slightly higher level of aircraft traffic achieved in Q1, with the 2,597 aircraft flying internationally just 25 aircraft or 0.95% below that of the preceding quarter. Year on year, this was a rise of 159 aircraft or 6.52%; Abuja's share of international aircraft movement has increased from 19.60% in Q2 of 2014 to 23.30% in Q2 of 2015.

Port Harcourt again overtook Kano airport in having the third greatest volume of aircraft frequenting its airports. With 679 aircraft in Q2, it had shown strong

quarterly growth, of an additional 122 or 21.90% flights. Year on year, this represented 28 additional aircraft or a 4.30% rise. Kano showed similar strong growth, with 33 or 5.52% more aircraft from the preceding quarter, and an additional 56 or 9.74% from the corresponding quarter of 2014.

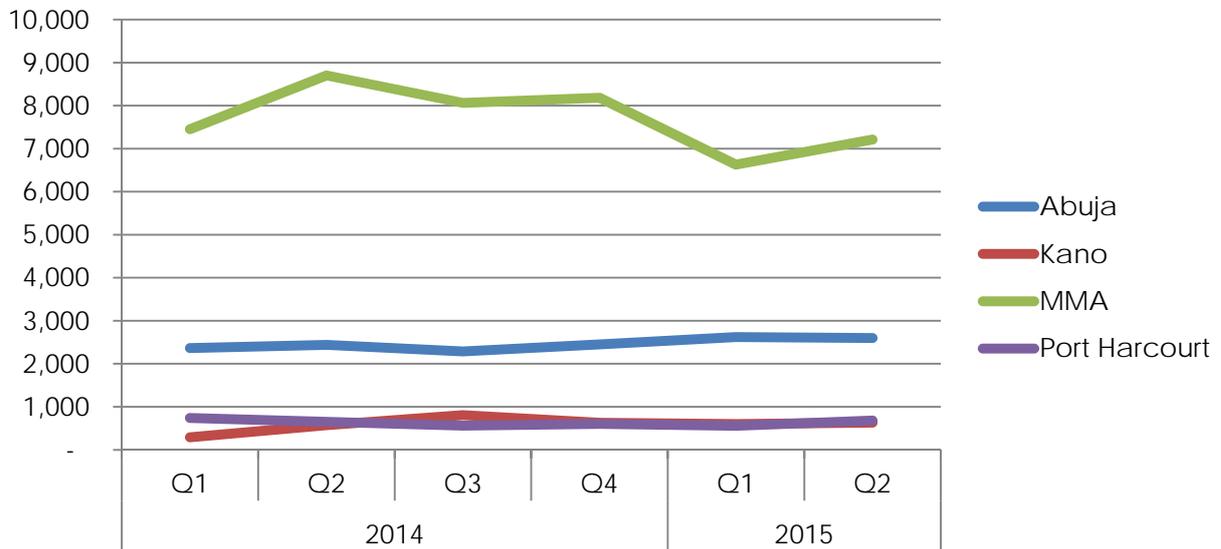


FIGURE 6: INTERNATIONAL AIRCRAFT MOVEMENT: SELECTED AIRPORTS

The greatest declines in international aircraft traffic were recorded for Enugu airport, which from a peak of 140 international flights in Q4 of 2014 has been declining steadily. The 26 international aircraft that arrived and departed from the airport in Q2 represented a decline of 34 or 56.67% from the preceding quarter, and was lower by 43 aircraft or 62.32% relative to the corresponding quarter of 2014.

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 two of 2015 recorded a total of 45,662,122Kgs of cargo,

representing a decline of 2,093,597Kgs or 4.38% from Q1 of 2015 and a lesser decline of 859,630Kgs or 1.85% from the corresponding quarter of 2014.

Murtala Muhammaed Airport in Lagos experienced strong quarterly growth in cargo received, of 7,434,496Kgs or 22.21%. The resultant total of 40,911,282Kgs brought its share of the total cargo transported to 89.60%, almost recovering from the dip recorded in Q1, in which it represented just 70.10% of the total; throughout 2014 it held over 90% of the share. In keeping with this, year on year, there was a decline in MMA's weight of cargo by 1,314,577Kgs or 3.11%.

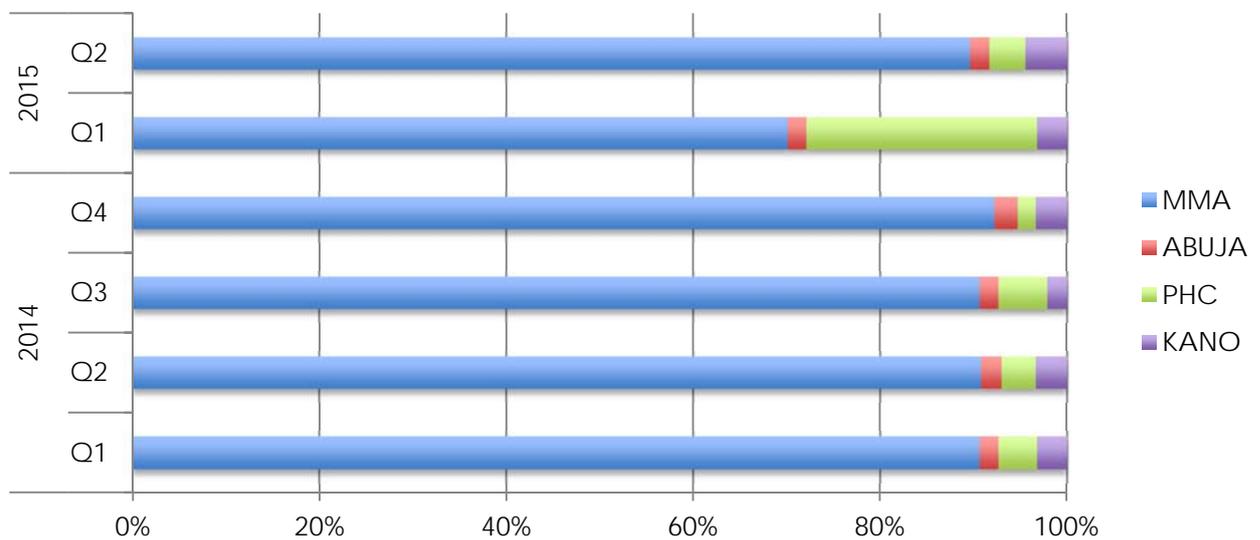


FIGURE 7: CARGO TRANSPORTED BY AIRPORT

Kano represented the second greatest share, with 2,034,164Kgs of cargo, 4.45% of the total. It was the only airport to show both strong quarterly and annual growth, with a rise of 499,244Kgs or 32.53% from Q1 of 2015 and 466,679Kgs or 29.77% from the corresponding quarter of 2014.

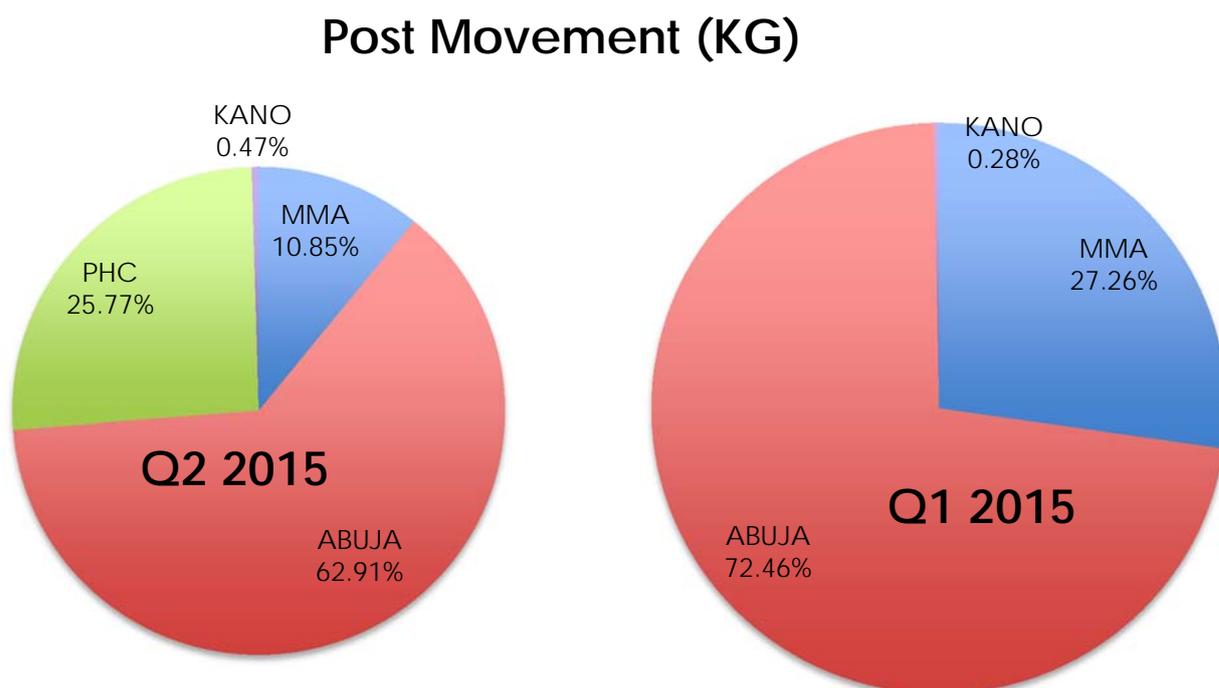
With a decline in cargo received of 10,011,225Kg or 85.01% from Q1 of 2015, Port Harcourt was the main driver of the overall quarterly decline in Cargo observed; its share of total cargo went from 24.66% in Q1 of 2015 to 3.87% in Q2. Nonetheless, the weight was still greater year on year, by 73,437Kg or 4.34%.

Abuja airport received the lowest weight of cargo. Continuing its downward trend, it was lower by 16,122Kgs or 1.67% from the preceding quarter and 85,169Kgs or 8.22% year on year.

Post Movement by Airport

The movement of Post, measured in Kg, has previously been reported for the four airports of Abuja, MMA, and Kano. In Q2 of 2015, data from Port Harcourt was added. The total weight of post that arrived and departed from the four airports in Q2 of 2015 therefore was 2,585,982Kgs, up by 816,644Kgs or 46.16% from Q1 and by 976,113Kgs or 60.63% from Q2 of 2014. When the addition of Port Harcourt is excluded, making the two quarters comparable, there are still rises, but of a less extreme 150,180Kgs or 8.49% quarter on quarter and 309,649Kg or 19.23% year on year.

FIGURE 8: WEIGHT OF POST ARRIVING AND DEPARTING BY AIRPORT



Nonetheless, Abuja remained dominant in receiving the highest weight of post in the quarter. At 1,626,777Kgs, it represented 62.91% of the total, having risen 344,675Kg or 26.88% from the preceding quarter, and 506,931Kgs or 45.27% year on year.

Port Harcourt overtook MMA in receiving the second highest amount, with the 666,464Kgs representing 25.77% of the total, against MMA's 10.85%. MMA recorded 280,674Kgs of post in the quarter, lower by 201,572Kgs or 41.80% from the preceding quarter, and 206,973Kgs or 42.44% from that of Q2 of 2014.

The highest growth was recorded for Kano, which despite having the lowest weight of post, at 12,067Kgs, had increased by 7,078Kgs or 141.87% relative to Q1 of 2015 and 9,691Kgs or 407.87% from Q2 of 2014.

APPENDIX I

Table 1.0 Total Passenger Arrivals and Departures by Airport

AIRPORTS	2014				2015	
	Q1	Q2	Q3	Q4	Q1	Q2
Abuja Dom	701,249	845,243	787,622	940,872	764,369	787,067
Abuja Int	206,740	206,912	254,389	226,649	683,458	253,040
Akure Dom	1,538	1,868	847	1,478	1,212	607
Benin Dom	51,320	53,621	59,699	63,256	48,371	25,723
Calabar Dom	46,142	45,285	47,478	64,939	45,974	41,866
Calabar Int	-	4	188	-	-	-
Enugu Dom	62,592	73,834	77,746	76,851	29,062	24,459
Enugu Int	8,912	7,424	11,501	18,670	5,995	3,216
Ibadan Dom	14,525	15,583	15,826	18,809	4,615	14,864
Ilorin Dom	14,360	16,489	15,496	19,860	15,490	9,641
Ilorin Int	-	-	539	3,357	-	-
Jos Dom	12,226	13,756	10,801	12,155	10,909	11,594
Kaduna Dom	33,321	39,485	50,912	50,498	40,162	17,761
Kaduna Int	-	-	17,235	9,245	7	-
Kano Dom	48,377	70,121	69,013	70,416	57,754	57,629
Kano Int	37,261	45,568	58,929	33,578	42,321	40,582
Katsina Dom	495	209	656	829	549	877
Katsina Int	12	13	4,559	4,503	-	-
Maidugary Dom	3,025	3,507	3,559	1,012	2,186	2,122
Maidugary Int	-	-	-	-	-	-
Minna Dom	3,131	4,502	3,129	1,111	739	488
Minna Int	-	-	-	3,332	-	-
Makurdi Dom	657	313	253	534	621	110
MMA Dom	898,896	1,006,787	1,013,916	1,088,141	896,524	936,029
MMA Int	784,479	834,067	896,172	852,049	698,729	728,064
Osubi Dom	56,508	60,886	47,464	56,392	45,402	31,486
Owerri Dom	75,376	83,141	76,347	104,079	86,660	92,384
Port Harcourt Dom	274,186	314,176	307,274	329,499	265,093	268,820
Port Harcourt Int	26,314	28,098	30,813	27,117	24,457	23,684
Sokoto Dom	21,067	25,321	26,167	27,523	20,263	13,571
Sokoto Int	-	4	9,170	8,873	-	12
Yola Dom	32,851	36,260	34,991	41,486	21,772	37,381
Yola Int	1,047	-	3,327	6,649	-	-
Domestic	2,351,842	2,710,387	2,649,196	2,969,740	2,357,727	2,374,479
International	1,064,765	1,122,090	1,286,822	1,194,022	1,454,967	1,048,598
TOTAL	3,416,607	3,832,477	3,936,018	4,163,762	3,812,694	3,423,077

Table 2.0 Total Aircraft Arrivals and Departures

	2014				2015	
	Q1	Q2	Q3	Q4	Q1	Q2
Abuja Dom	9,028	14,186	14,120	16,562	15,103	14,774
Abuja Int	2,364	2,438	2,288	2,450	2,622	2,597
Akure Dom	220	432	158	318	258	142
Benin Dom	1,084	987	1,051	1,430	1,198	580
Calabar Dom	970	753	683	1,231	868	616
Calabar Int	2	2	8	56	-	-
Enugu Dom	674	1,112	1,074	1,506	648	453
Enugu Int	-	69	74	140	60	26
Ibadan Dom	546	709	596	712	190	365
Ilorin Dom	609	824	784	995	832	448
Ilorin Int	-	-	-	12	-	-
Jos Dom	306	320	242	308	320	306
Kaduna Dom	904	1,142	1,039	1,072	920	238
Kaduna Int	4	-	45	77	12	-
Kano Dom	1,195	1,492	1,592	1,618	1,398	1,072
Kano Int	292	575	808	630	598	631
Katsina Dom	97	96	104	126	92	180
Katsina Int	1	-	22	32	-	2
Maidugary Dom	346	457	1,669	440	496	500
Maidugary Int	11	-	-	-	-	-
Minna Dom	114	266	231	202	194	156
Minna Int	-	-	12	40	-	-
Makurdi Dom	65	72	42	107	98	24
MMA Dom	17,029	18,699	19,431	21,330	18,753	17,149
MMA Int	7,450	8,701	8,065	8,181	6,627	7,211
Osubi Dom	2,168	1,734	1,612	1,938	1,630	970
Owerri Dom	1,122	1,637	1,223	1,858	1,756	1,490
Port Harcourt Dom	4,749	5,496	5,284	6,170	5,653	5,023
Port Harcourt Int	742	651	561	604	557	679
Sokoto Dom	437	614	566	585	654	357
Sokoto Int	5	1	40	35	-	1
Yola Dom	646	880	917	607	412	609
Yola Int	4	-	14	42	-	-
Domestic	42,309	51,908	52,418	59,115	51,473	45,452
International	10,875	12,437	11,937	12,299	10,476	11,147
TOTAL	53,184	64,345	64,355	71,414	61,949	56,599

Table 3.0 Cargo Arrivals and Departures in KG

	2014				2015	
	Q1	Q2	Q3	Q4	Q1	Q2
MMA	38,078,264	42,225,858	48,215,396	44301039.65	33,476,786	40,911,282
ABUJA	859,434	1,036,653	1,060,486	1178477	967,596	951,484
PHC	1,737,986	1,691,756	2,779,249	943869	11,776,418	1,765,193
KANO	1,346,282	1,567,485	1,127,922	1604225	1,534,920	2,034,164
TOTAL	42,021,965	46,521,752	53,183,054	48027610.65	47,755,720	45,662,122

Table 4.0 Post Arrivals and Departures in KG

	2014				2015	
	Q1	Q2	Q3	Q4	Q1	Q2
MMA	490,233	487,647	463,840	469,535	482,246	280,674
ABUJA	1,007,530	1,119,846	770,966	1,257,770	1,282,103	1,626,777
PHC					-	666,464
KANO	1,381	2,376	5,059	4,488	4,989	12,067
TOTAL	1,499,143	1,609,869	1,239,865	1,731,792	1,769,338	2,585,982

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