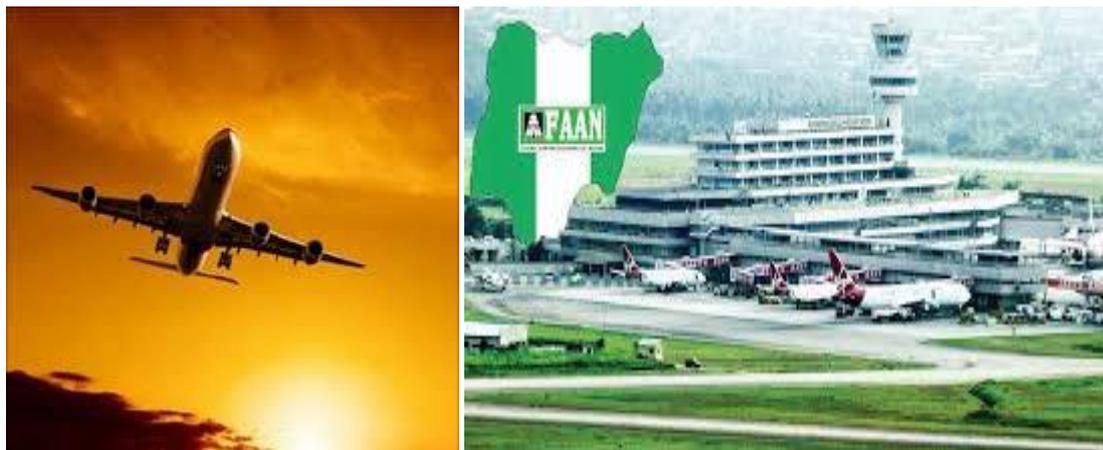


# Nigerian Aviation Sector

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*SUMMARY REPORT: Q3/Q4, 2015*



**NATIONAL BUREAU OF STATISTICS**

01st MAY 2016

## Introduction

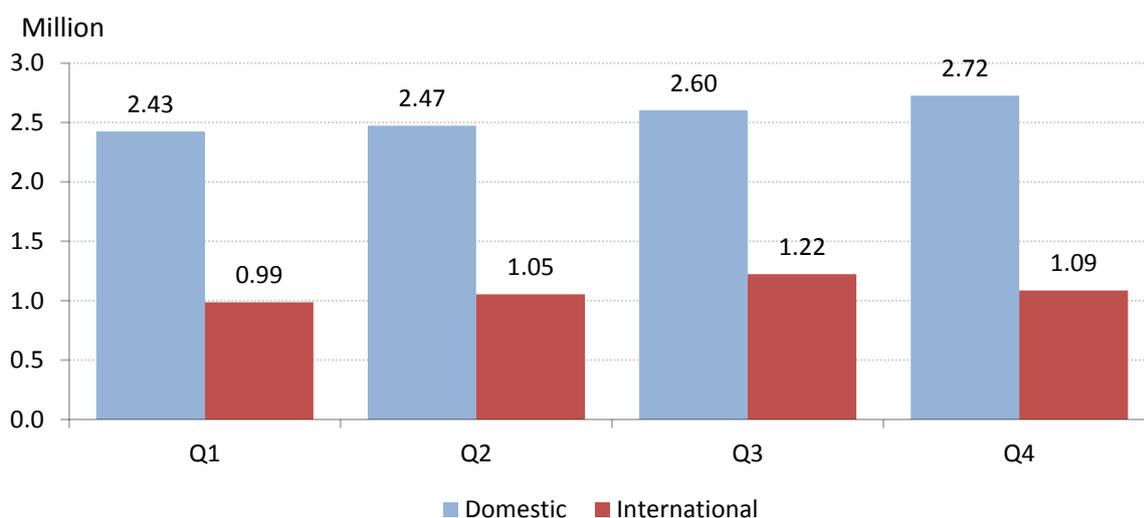
The Nigerian aviation saw a decline in activity between the second halves of 2014 and 2015, both in terms of the number of travelers and aircrafts, and the weight of cargo and mail moved. However, there was nevertheless a slight recovery in activity relative to the first half of 2015. Murtala Muhammed Airport in Lagos was the airport to record the most activity, accounted for 36.5% of domestic passengers, 69.2% of international passengers, 89.5% of cargo movement and 44.9% of mail movement.

## Total Passenger Traffic

In the third quarter of 2015, the total number of passengers to travel through Nigeria airports was 3,824,319, which represents an increase of 299,533 (8.5%) relative to the number in the second quarter. However, the number was still 2.8% less than in the third quarter of 2014 when the total number of passengers was 3,936,018. The fourth quarter saw both a quarterly and a year on year decline, of 0.4% and 8.5% respectively, with a total of 3,810,758 passengers, compared to 4,163,762 passengers in the fourth quarter of 2014. As a result, the first quarter of 2015 was the only quarter not to see a year on year decline.

The total number hides differing trends in domestic and international travel. After falling between 2014 Q4 and 2015 Q1, the total number of domestic passengers increased every quarter in 2015, to reach 2,723,769 in the fourth quarter; 121,316 (4.7%) higher than in the 3<sup>rd</sup> quarter, but still 245,971 (8.3%) lower than in the fourth quarter of 2014.

**Figure 1: Total Number of Passengers in 2015, Domestic and International**



By contrast, the total number of international passengers recorded a quarterly fall of 11.0% in the fourth quarter, from 1,221,866 to 1,086,989, slightly outweighing the increase in domestic passengers. In the third quarter of 2015 the number of international passengers had increased by 16.0% relative to the second quarter, but was still less than the number in the same quarter of 2014 of 1,296,822.

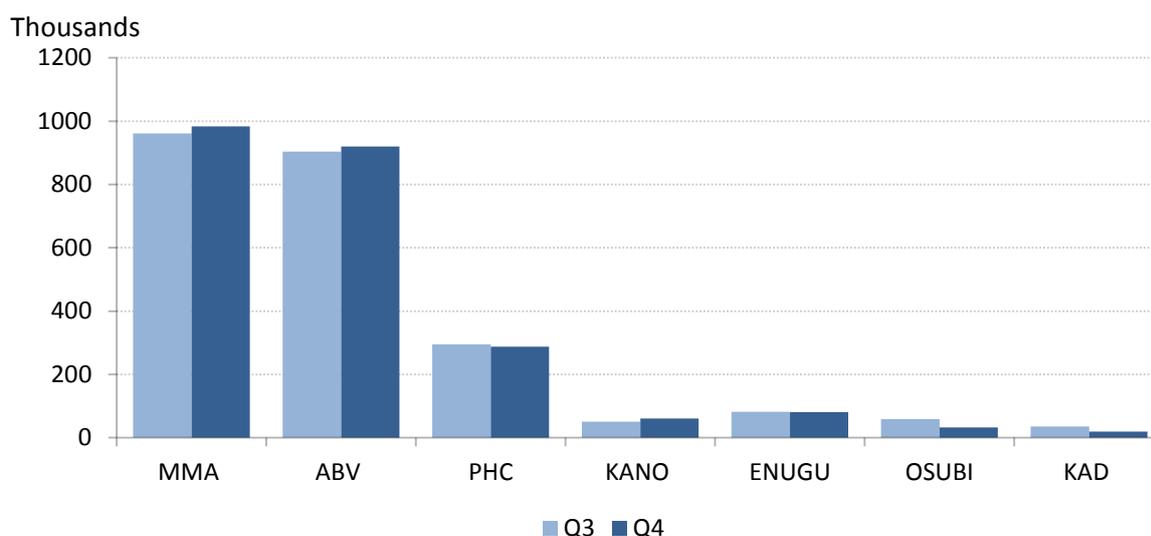
## Domestic Passenger Traffic

Murtala Muhammed Airport (MMA) in Lagos remained the busiest domestic airport in the second half of 2015, with 961,689 passengers travelling through in the third quarter, and 983,903 travelling through in the fourth. This represented 37.0% and 36.1% of passenger traffic respectively. However, in both quarters this represents a decline in the share relative to 2014, when MMA domestic accounted for 38.3% and 36.6% in the third and fourth quarters.

Contrastingly, Abuja Domestic airport, which is the second largest in terms of passenger traffic, increased its share of passenger travel relative to 2014, although the share declined between the third and fourth quarter of 2015. In the third quarter of 2015, 903,972 passengers travelled through Abuja Domestic Airport, and 920,415 travelled through in the fourth. This represents 34.7% and 33.8% respectively, compared to 29.7% and 31.7% in the third and fourth quarters of 2014.

In absolute terms, Abuja Domestic Airport recorded the largest year on year increase in passenger numbers in the third quarter of 2015, with an increase of 116,350 passengers. In the fourth quarter, Maiduguri Domestic Airport reported the largest increase in absolute terms, of 18,814, despite only accounting for 1,012 passengers in the fourth quarter, or 0.03% of the total. This represented an increase of 1859.1%.

**Figure 2: Domestic Passengers by Main Airport, 2015 Q3 and Q4**



## International Passenger Traffic

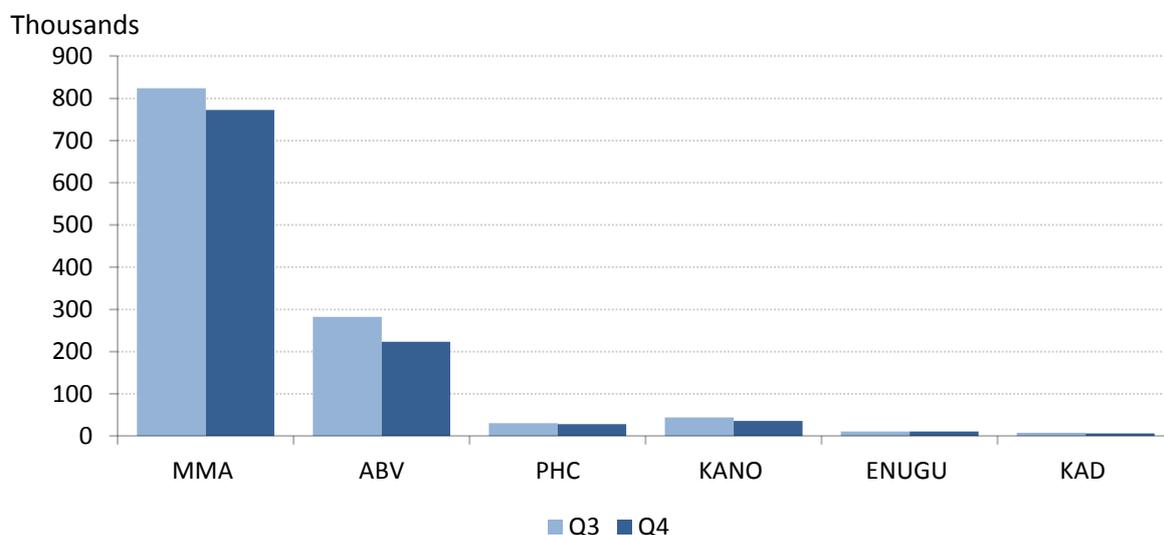
As with domestic travel, Murtala Muhammed Airport continued to account for the largest share of international passengers. Whereas with domestic air travel, MMA's share of passengers was only slightly higher than for Abuja Airport, in the case of international travel MMA dominated in the second half of 2015, accounting for 67.4% of international passengers in the third quarter, and 71.1% in the fourth. This is perhaps unsurprising given Lagos's status as the business centre of Nigeria, and the location of the vast majority of foreign investment. Nevertheless these shares were slightly less than in 2014, when in the third and fourth quarter MMA's share of total international passengers was 69.6% and 71.4% respectively. In total, 823,951 international passengers travelled through

MMA in the third quarter of 2015 and 772,734 in the fourth, a quarterly decline of 51,217, or 6.2%. This followed an increase of 13.2% in the third quarter.

Abuja International Airport was the second busiest international airport in the second half of 2015, as in previous quarters. In the third quarter 282,028 international passengers travelled through the airport, and 223,211 travelled through in the fourth. This represented a quarterly decline of 20.9%, considerably higher than the fall for the total number of international passengers, meaning that Abuja's share fell from 23.1% to 20.5% between these quarters. However these shares are still above those in the third and fourth quarters of 2014, of 19.8% and 19.0% respectively.

Whereas Port Harcourt was the third largest domestic airport, Kano was the third largest international airport in each period considered. In the third and fourth quarter of 2015, Kano International Airport accounted for 3.3% and 3.6% of passenger movement respectively, compared to 2.5% and 2.6% for Port Harcourt.

**Figure 3: International Passengers by Main Airport, 2015 Q3 and Q4**



As with domestic passengers, the airport to record the largest year on year increase in passengers in the fourth quarter of 2015 was Maiduguri, which recorded an increase of 4,659 international passengers in this quarter despite having recorded no passengers in Q3, or in the second half of 2014. Abuja recorded the largest absolute increase in the third quarter, of 27,639 passengers, or 10.9%.

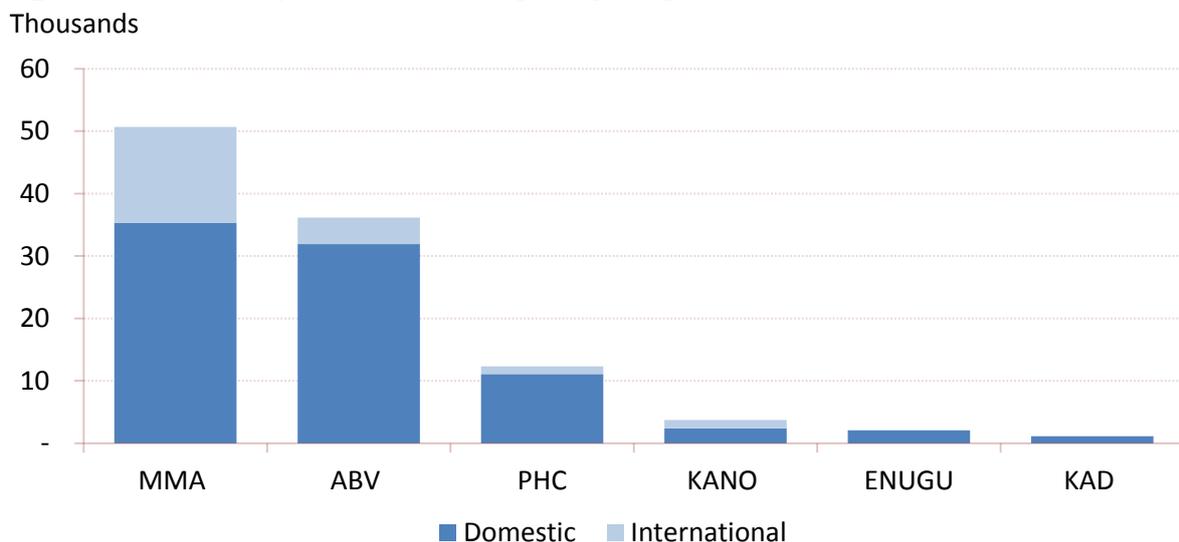
## Total Aircraft Movement

A total of 57,704 aircrafts arrived at, or departed from Nigerian airports in the third quarter of 2015, a decrease of 1.1% relative to the second quarter. However, the number then increased by 3,988, or 6.9% to reach 61,692 aircrafts in the fourth quarter. This increase may be a sign of flight providers anticipating higher demand in the final quarter, as a result of the festive period. In both quarters this represents a notable decline relative to the same quarters of the previous year, of 10.3% in the third quarter and 13.6% in the fourth quarter. These declines were both larger than the corresponding year on year declines in passenger numbers, indicating that passengers per flight increased over this period.

In contrast with the number of passengers, the year on year fall in the number of domestic flights was larger than the fall in the number of international flights. In the third and fourth quarters of 2015, there were 11.3% and 14.3% fewer domestic flights than in the same quarter of 2014 respectively, which resulted in a total of 46,157 and 50,686 flights in the third and fourth quarter.

The year on year declines in the number of international flights were 3.3% and 10.5% in the third and fourth quarter of 2015 respectively, which resulted in a total of 11,547 international flights in third quarter of 2015 and 11,006 in the fourth. Whereas there was a large quarterly increase in domestic flights in the fourth quarter of 2015 (of 9.8%) international flights saw a decline of 541 flights, or 4.7%, reversing the increase of 344 flights (3.1%) recorded in the third quarter. The difference between the number of domestic and international aircraft to pass through Nigeria airports tends to be smaller than the difference between the number of domestic and international passengers, reflecting the fact that international aircraft tend to be larger, and therefore carry more passengers.

**Figure 4: Domestic/International Split by Airport, Second Half of 2015**



### Domestic Aircraft Movement

The shares of domestic flights accounted for by each airport are similar to the shares of passengers accounted for by each airport, as would be expected. MMA airport accounted for the largest share of domestic flights in each quarter considered, accounting for 37.3% in the third quarter of 2015 and 35.6% in the fourth, compared with domestic passenger shares of 37.0% and 36.1% respectively. Similarly, Abuja Domestic Airport accounted for 32.0% and 33.8% of domestic flights in the third and fourth quarter, compared to passenger shares of 34.7% and 33.8%.

### International Aircraft Movement

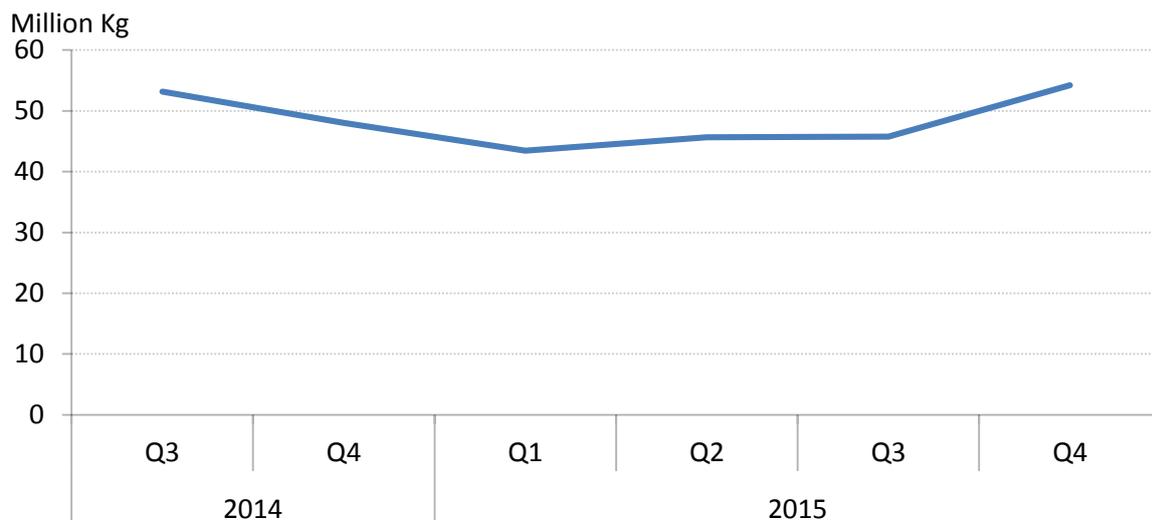
Murtala Muhammed Airport accounted for a slightly lower share of international aircrafts than of international passengers; its share was 67.1% in the third quarter and 69.8% in the fourth, compared with shares of 67.4% and 71.1% for international passengers in the

same quarters. However, it remained by far the largest international airport. Nearly four times as many international flights went through MMA than went through Abuja airport, which accounted for the second largest number of international flights, and accounted for 20.2% of international passengers in third quarter of 2015 and 17.6% in the fourth. As with MMA, these shares are slight lower than the respective shares of international passengers of 23.1% and 20.5%. This indicates that the international flights to pass through these airports tend to carry slightly more passengers the average for all airports.

## Cargo Movement by Airport

The third quarter of 2015 saw a quarterly increase in the weight of cargo to pass through Nigerian airports of 724,792Kg or 1.8%, to reach 41,636,713kg. This was followed by a larger quarterly increase of 6,169,663kg (14.8%) in the fourth quarter, to reach 47,805,737kg. This contrasts markedly with the previous year, in which there was a decline in the weight of cargo movement between the third and fourth quarter. As a consequence, whereas the third quarter of 2015 saw a year on year decline of 13.9%, the fourth quarter saw a year on year increase of 12.8%.

**Figure 5: Weight of Cargo Moved Through Nigerian Airports, Million KG**

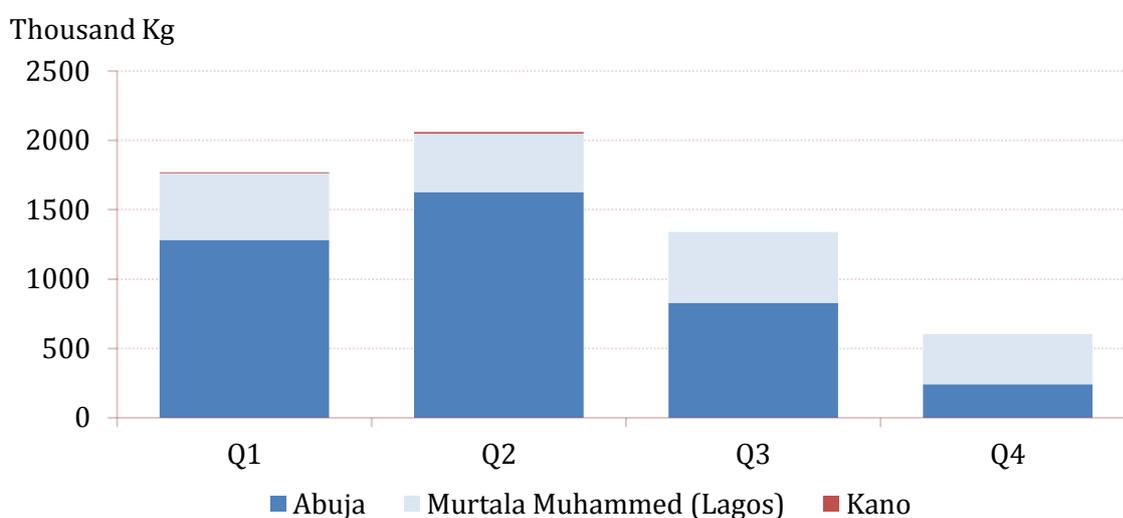


The bulk of the weight of cargo to move through Nigerian Airports went through MMA in Lagos in the second half of 2015. This airport accounted for 91.0% and 88.2% of the weight in the third and fourth quarters; the decline in the share between these two periods is in spite of an increase in the weight of cargo to move through MMA of 14.8%. The decline was mainly the result of a large increase in the weight of cargo to pass through Kano Airport between these periods. Whereas in the third quarter of 2015 the weight of cargo to pass through Kano was 1,681,772kg, this rose by 2,474,862kg (147.2%) to 4,156,634kg in the fourth quarter. As a result, Kano significantly increased its share of cargo between the fourth quarters of 2014 and 2015, from 3.3% to 7.7%. Port Harcourt also saw an increase over this period, from 2.0% to 2.7%, as despite a year on year decrease in the weight of cargo moved of 4.6%, this decrease was considerably less than for Abuja (16.3%) or Calabar (44.4%).

## Post Moved by Airport

The total weight of mail moved through Nigerian airports saw a remarkable decline throughout 2015. After peaking in the second quarter at a weight of 3,767,474kg, the weight first fell by 50.9% in the third quarter (quarter on quarter) and then by a further 55.0% in the fourth, to reach 602,501kg, or 84.0% less than the weight in the second quarter. While the weight recorded in the second quarter of 2015 was unusually high (134.0% higher than the value in the same quarter of the previous year) the decline throughout 2015 still resulted in a much lower weight of mail moved in the fourth quarter of 2015 than has been seen in recent quarters. Whereas the year on year change in the weight of mail moved was 8.1% in the third quarter of 2015, it was a decline of 65.2% in the fourth quarter.

**Figure 6: Weight of Post Moved Through Nigerian Airports, Thousand KG**



Whereas Lagos airport dominated in terms of cargo moved, the airport through which the most mail was moved was Abuja Airport in the third quarter of 2015, accounting for 829,022kg or 61.9% of the total. This was a slight decline relative to the same quarter of the previous year, when the share was 62.2%. However in the following quarter, the share to pass through Abuja fell sharply, to 40.0%. This compares with 72.6% of the total weight of mail in the fourth quarter of 2014. This was a result of the weight of mail to pass through Abuja falling by 587,728kg between the third and fourth quarters of 2015, a drop of 80.8%. This fall accounted 79.7% of the total fall in mail moved between these periods. As a result, Lagos became the largest airport in terms of mail moved, accounting for 60.0%. No other airports were recorded as moving any mail in this period.

	Table 1: Number of Domestic Passengers				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2014		2015		2015		2015		2015	
	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4
MMA DOM	1,013,916	1,088,141	961,689	983,903	2.7	2.3	-5.2	-9.6	37.0	36.1
ABV. DOM	787,622	940,872	903,972	920,415	14.9	1.8	14.8	-2.2	34.7	33.8
PHC.DOM	307,274	329,499	295,020	287,952	9.7	-2.4	-4.0	-12.6	11.3	10.6
KANO DOM	69,013	70,416	50,794	60,861	-11.9	19.8	-26.4	-13.6	2.0	2.2
ENUGU	77,746	76,851	82,038	80,506	8.5	-1.9	5.5	4.8	3.2	3.0
OSUBI	47,464	56,392	58,523	32,093	13.4	-45.2	23.3	-43.1	2.2	1.2
KAD. DOM	50,912	50,498	35,231	19,511	22.2	-44.6	-30.8	-61.4	1.4	0.7
CAL.DOM	47,478	64,939	47,824	54,243	14.2	13.4	0.7	-16.5	1.8	2.0
SOK.DOM	26,167	27,523	22,225	21,144	7.3	-4.9	-15.1	-23.2	0.9	0.8
BENIN	59,699	63,256	8,116	44,014	-68.4	442.3	-86.4	-30.4	0.3	1.6
MAID. DOM	3,559	1,012	17,826	19,826	450.0	11.2	400.9	1859.1	0.7	0.7
JOS	10,801	12,155	14,091	11,605	21.5	-17.6	30.5	-4.5	0.5	0.4
OWERRI	76,347	104,079	26,718	107,581	-71.1	302.7	-65.0	3.4	1.0	3.9
YOLA DOM	34,991	41,486	39,980	38,824	7.0	-2.9	14.3	-6.4	1.5	1.4
ILORIN DOM	15,496	19,860	17,770	18,523	13.5	4.2	14.7	-6.7	0.7	0.7
IBADAN	15,826	18,809	19,699	17,826	32.5	-9.5	24.5	-5.2	0.8	0.7
MINNA	3,129	1,111	243	3,907	-50.2	1507.8	-92.2	251.7	0.0	0.1
AKURE	847	1,478	321	646	-47.1	101.2	-62.1	-56.3	0.0	0.0
KAT	656	829	327	290	-62.7	-11.3	-50.2	-65.0	0.0	0.0
MKD	253	534	46	99	-58.2	115.2	-81.8	-81.5	0.0	0.0
<b>TOTAL DOM</b>	<b>2,649,196</b>	<b>2,969,740</b>	<b>2,602,453</b>	<b>2,723,769</b>	<b>5.3</b>	<b>4.7</b>	<b>-1.8</b>	<b>-8.3</b>	<b>100.0</b>	<b>100.0</b>

Table 2: Number of International Passengers	2014				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2014		2015		2015		2015		2015	
	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4
MMA INT'L	896,172	852,049	823,951	772,734	13.2	-6.2	-8.1	-9.3	67.4	71.1
ABV.INT'L	254,389	226,649	282,028	223,211	11.5	-20.9	10.9	-1.5	23.1	20.5
PHC.INT'L	30,813	27,117	30,448	28,333	28.6	-6.9	-1.2	4.5	2.5	2.6
KANO INT'L	58,929	33,578	43,681	35,908	7.6	-17.8	-25.9	6.9	3.6	3.3
ENUGU INT'L	11,501	18,670	10,325	10,506	25.8	1.8	-10.2	-43.7	0.8	1.0
KAD. INT'L	17,235	9,245	7,815	6,193	14645.3	-20.8	-54.7	-33.0	0.6	0.6
CAL. INT'L	188	0	0	1	NA	NA	-100.0	NA	0.0	0.0
SOK. INT'L	9,170	8,873	11,879	0	98891.7	-100.0	29.5	-100.0	1.0	0.0
MAID. INT'L	0	0	0	4,659	-100.0	NA	NA	NA	0.0	0.4
YOLA INT'L	3,327	6,649	3,512	5,444	NA	55.0	5.6	-18.1	0.3	0.5
ILORIN INT'L	539	3,357	0	0	NA	NA	-100.0	-100.0	0.0	0.0
MINNA INT'L	0	3,332	3,237	0	NA	-100.0	NA	-100.0	0.3	0.0
KAT INT'L	4,559	4,503	4,990	0	NA	-100.0	9.5	-100.0	0.4	0.0
<b>TOTAL INT'L</b>	<b>1,286,822</b>	<b>1,194,022</b>	<b>1,221,866</b>	<b>1,086,989</b>	<b>16.0</b>	<b>-11.0</b>	<b>-5.0</b>	<b>-9.0</b>	<b>100.0</b>	<b>100.0</b>

Table 3: Number of Domestic Aircraft	2014				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2014		2015		2015		2015		2015	
	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4
MMA DOM	19,431	21,330	17,206	18,060	0.3	5.0	-11.5	-15.3	37.3	35.6
ABV. DOM	14,120	16,562	14,760	17,128	-0.1	16.0	4.5	3.4	32.0	33.8
PHC.DOM	5,284	6,170	5,443	5,642	8.4	3.7	3.0	-8.6	11.8	11.1
KANO DOM	1,592	1,618	1,188	1,221	10.8	2.8	-25.4	-24.5	2.6	2.4
ENUGU	1,074	1,506	766	1,245	-43.0	62.5	-28.7	-17.3	1.7	2.5
OSUBI	1,612	1,938	1,671	956	72.3	-42.8	3.7	-50.7	3.6	1.9
KAD. DOM	1,039	1,072	591	504	-12.7	-14.7	-43.1	-53.0	1.3	1.0
CAL.DOM	683	1,231	843	312	36.9	-63.0	23.4	-74.7	1.8	0.6
SOK.DOM	566	585	478	326	33.9	-31.8	-15.5	-44.3	1.0	0.6
BENIN	1,051	1,430	220	1,005	-62.1	356.8	-79.1	-29.7	0.5	2.0
MAID. DOM	1,669	440	580	365	-14.2	-37.1	-65.2	-17.0	1.3	0.7
JOS	242	308	200	244	-34.6	22.0	-17.4	-20.8	0.4	0.5
OWERRI	1,223	1,858	430	1,626	-71.1	278.1	-64.8	-12.5	0.9	3.2
YOLA DOM	917	607	453	732	-25.6	61.6	-50.6	20.6	1.0	1.4
ILORIN DOM	784	995	698	414	55.8	-40.7	-11.0	-58.4	1.5	0.8
IBADAN	596	712	382	407	-31.4	6.5	-35.9	-42.8	0.8	0.8
MINNA	231	202	92	215	-41.0	133.7	-60.2	6.4	0.2	0.4
AKURE	158	318	94	218	-33.8	131.9	-40.5	-31.4	0.2	0.4
KAT	104	126	44	40	-71.4	-9.1	-57.7	-68.3	0.1	0.1
MKD	42	107	18	26	-25.0	44.4	-57.1	-75.7	0.0	0.1
<b>TOTAL DOM</b>	<b>52,418</b>	<b>59,115</b>	<b>46,157</b>	<b>50,686</b>	<b>-2.1</b>	<b>9.8</b>	<b>-11.9</b>	<b>-14.3</b>	<b>100.0</b>	<b>100.0</b>

Table 4: Number of International Aircraft	2014				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2014		2015		2015		2015		2015	
	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4
MMA INT'L	8,065	8,181	7,752	7,683	7.5	-0.9	-3.9	-6.1	67.1	69.8
ABV.INT'L	2,288	2,450	2,338	1,940	-10.0	-17.0	2.2	-20.8	20.2	17.6
PHC.INT'L	561	604	633	603	-6.8	-4.7	12.8	-0.2	5.5	5.5
KANO INT'L	808	630	678	617	7.4	-9.0	-16.1	-2.1	5.9	5.6
ENUGU INT'L	74	140	54	82	-30.8	51.9	-27.0	-41.4	0.5	0.7
KAD. INT'L	45	77	45	28	1025.0	-37.8	0.0	-63.6	0.4	0.3
CAL. INT'L	8	56	0	2	NA	NA	-100.0	-96.4	0.0	0.0
SOK. INT'L	40	35	29	0	2800.0	-100.0	-27.5	-100.0	0.3	0.0
MAID. INT'L	0	0	0	25	NA	NA	NA	NA	0.0	0.2
YOLA INT'L	14	42	0	26	NA	NA	-100.0	-38.1	0.0	0.2
ILORIN INT'L	0	12	0	0	NA	NA	NA	-100.0	0.0	0.0
MINNA INT'L	12	40	18	0	NA	-100.0	50.0	-100.0	0.2	0.0
KAT INT'L	22	32	0	0	-100.0	NA	-100.0	-100.0	0.0	0.0
<b>TOTAL INT'L</b>	<b>11,937</b>	<b>12,299</b>	<b>11,547</b>	<b>11,006</b>	<b>3.1</b>	<b>-4.7</b>	<b>-3.3</b>	<b>-10.5</b>	<b>100.0</b>	<b>100.0</b>

Table 5: Weight of Cargo and Mail (KG)

A) Cargo	2014				2015				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2014		2015		2015		2015		2015		2015			
	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4		
MMA	48,215,396	44,301,040	41,636,073	47,805,737	1.8	14.8	-13.6	7.9	91.0	88.2				
ABUJA	1,060,486	1,178,477	939,392	786,417	-1.3	-16.3	-11.4	-33.3	2.1	1.5				
PHC	2,779,249	943,869	1,512,905	1,443,974	-14.3	-4.6	-45.6	53.0	3.3	2.7				
KANO	1,127,922	1,604,225	1,681,772	4,156,634	-17.3	147.2	49.1	159.1	3.7	7.7				
CALABAR			3,005	1,672	-0.6	-44.4	NA	NA	0.0	0.0				
<b>TOTAL</b>	<b>53,183,054</b>	<b>48,027,611</b>	<b>45,773,147</b>	<b>54,194,433</b>	<b>0.2</b>	<b>18.4</b>	<b>-13.9</b>	<b>12.8</b>	<b>100.0</b>	<b>100.0</b>				
B) Mail														
MMA	463,840	469,535	510,926	361,207	21.0	-29.3	10.2	-23.1	38.1	60.0				
ABUJA	770,966	1,257,770	829,022	241,295	-49.0	-70.9	7.5	-80.8	61.9	40.0				
PHC	0	0	0	0	-100.0	NA	NA	NA	0.0	0.0				
KANO	5,059	4,488	0	0	-100.0	NA	-100.0	-100.0	0.0	0.0				
<b>TOTAL</b>	<b>1,239,865</b>	<b>1,731,792</b>	<b>1,339,948</b>	<b>602,502</b>	<b>-50.9</b>	<b>-55.0</b>	<b>8.1</b>	<b>-65.2</b>	<b>100.0</b>	<b>100.0</b>				

**NOTE: Full Dataset can be downloaded from NBS WEBSITE**  
<http://nigerianstat.gov.ng>

## 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 revisions by FAAN and should be treated as preliminary.