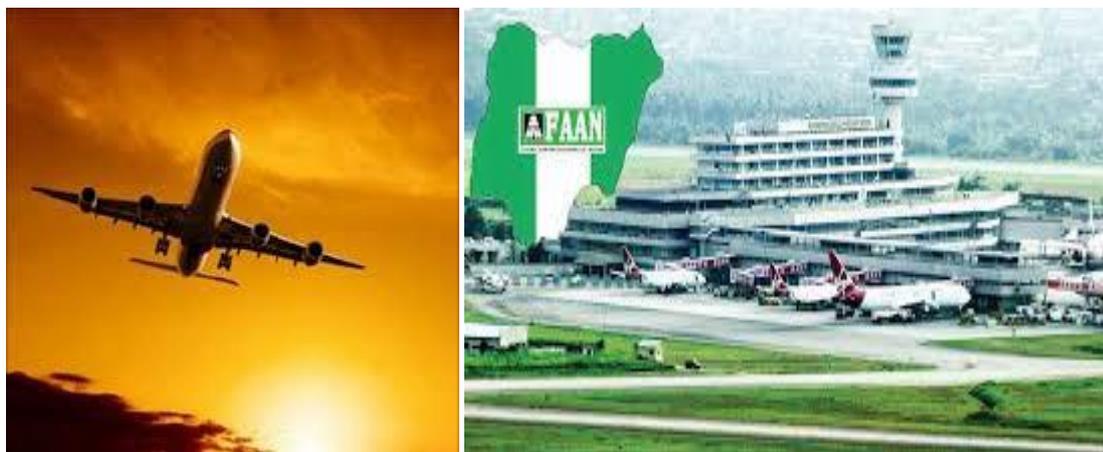


Nigerian Aviation Sector:

SUMMARY REPORT: Q1/Q2, 2016



NATIONAL BUREAU OF STATISTICS

25TH OCT 2016

Introduction

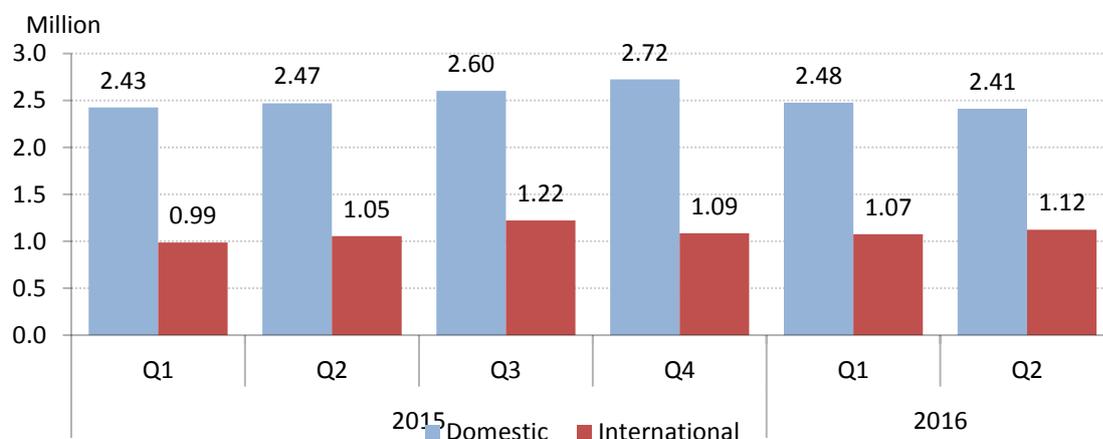
Nigerian Aviation recorded a decline in activity between the first half of 2016 and the second half of 2015, both in terms of the numbers of travelers and aircrafts and the weight of cargo and mail moved. Relative to the first half of 2015; both the total number of passengers and the number of aircrafts declined. In addition, although cargo remained relatively stable over this period, mail movement recorded a large decline. Murtala Muhammed Airport (MMA) in Lagos was the airport to record the most activity, accounted for 36.6% of domestic passengers, 70.3% of international passengers, 91.8% of cargo movement and 58.8% of mail movement.

Total Passenger Traffic

In the first quarter of 2016, the total number of passengers to travel through Nigerian airports was 3,549,360, which represents a decline of 261,398 (6.9%) relative to the final quarter of 2015, although it is still higher than the number in the first quarter of 2015 of 3,411,683. The second quarter saw very little movement in passenger numbers, recording a quarterly decrease of 0.5 and a year on year increase of 0.2%, resulting in a total of 3,532,775 passengers.

This total number hides differing trends in domestic and international travel. In both the first and second quarters of 2016, domestic travel recorded smaller growth rates than international travel, both compared to the previous quarter, and compared to the same quarter of the previous year. There were 2,475,448 domestic passengers in the first quarter of 2016, and 2,411,251 in the second, representing quarterly declines of 9.1% and 2.6% respectively. Year on year, this represents an increase of 2.1% in the first quarter and a decline of 2.4% in the second. By comparison, international passenger numbers declined by only 1.2% in the first quarter to reach 1,073,912, before increasing by 4.4% in the second to reach 1,121,524. Year on year, international passenger numbers grew in both quarters; by 8.9% in the first, and 6.4% in the second.

Figure 1: Total Number of Passengers in 2015-2016 Q2, Domestic and International



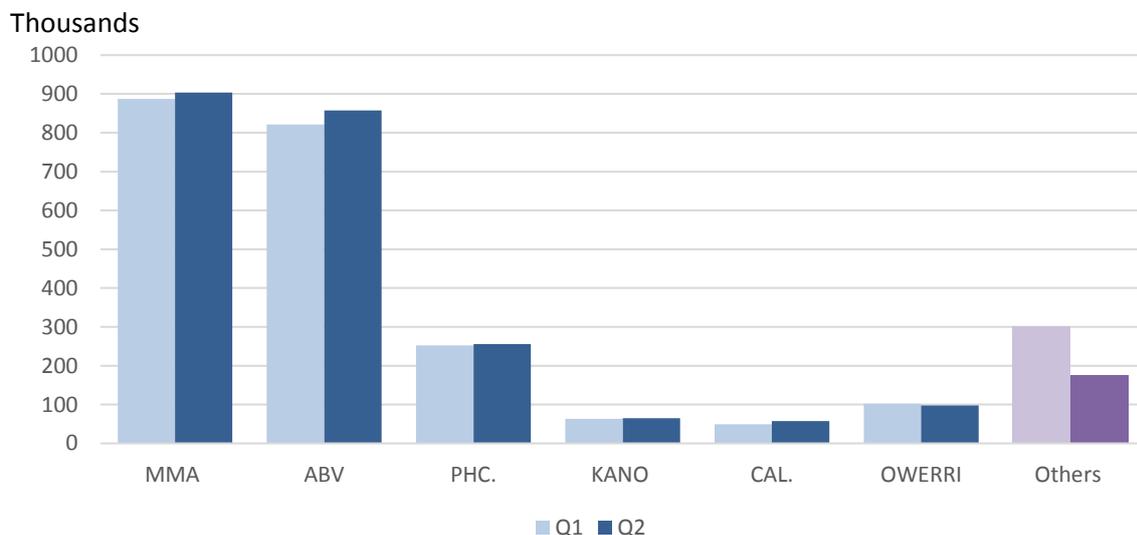
Domestic Passenger Traffic

Murtala Muhammed Airport (MMA) in Lagos remained the busiest domestic airport in the first half of 2016, with 886,869 passengers travelling through in the first quarter, and 903,605 travelling through in the second. This represented 35.8% and 37.5% of passenger traffic respectively. However, in both quarters this represents a slight decline in the share relative to 2015, when MMA domestic accounted for 37.0% and 37.9% in the first and second quarters.

Contrastingly, Abuja Domestic airport, which is the second largest in terms of passenger traffic, increased its share of passenger travel relative to the first half of 2015, although the share declined slightly relative to the second half. In the first quarter of 2016, 821,101 passengers travelled through Abuja Domestic Airport, and 857,915 travelled through in the second. This represents 33.2% and 35.6% of domestic passengers respectively, compared to 31.5% and 31.9% in the first and second quarters of 2015.

In absolute terms, Abuja Domestic Airport recorded the largest year on year increases in passenger numbers in the first and second quarters of 2016, of 56,732 and 70,848 passengers respectively. The largest decreases in absolute terms were recorded by Kaduna Domestic airport in the first quarter, of 19,850 passengers, and by Enugu airport in the second quarter, which recorded a decline of 49,288.

Figure 2: Domestic Passengers by Main Airport, 2016 Q1 and Q2



International Passenger Traffic

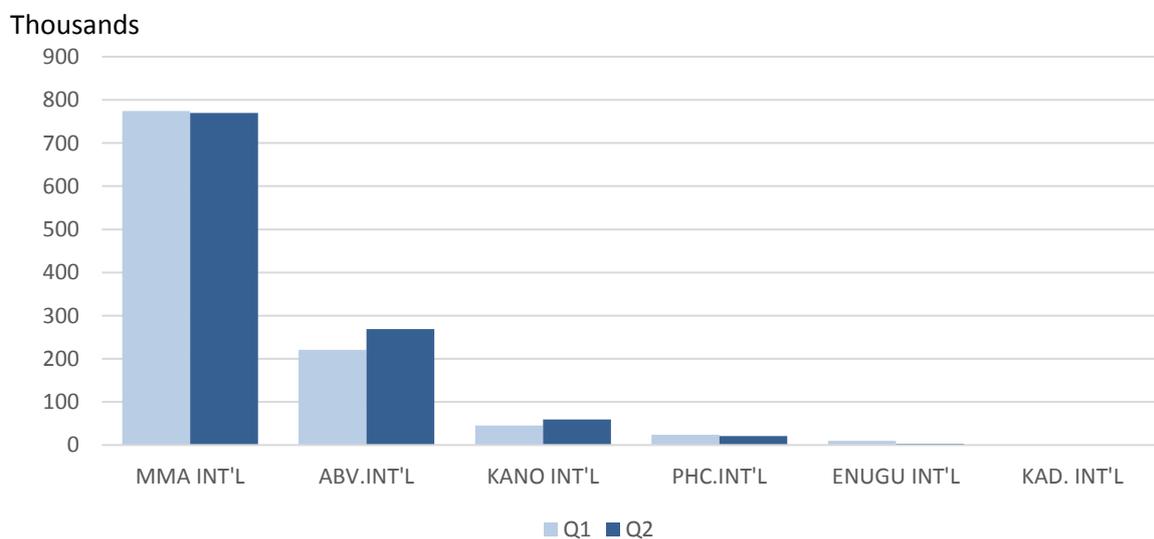
As with domestic travel, MMA in Lagos continued to account for the largest share of international passengers. Whereas with domestic air travel, MMA's share of passengers was only slightly higher than for Abuja Airport, in the case of international travel MMA dominated in the first half of 2016, as in previous periods, accounting for 72.1% of international passengers in the first, and 68.6% in the second. This is perhaps unsurprising given Lagos's status as the business centre of Nigeria, and the location of the vast majority of foreign

investment. The share in the first quarter was higher than at any point in 2015, although, and represents an increase of 1.3% points relative to the first quarter of 2015. However, in the second quarter of 2016 the share was slightly lower than the 69.1% recorded in the same quarter of 2015.

Abuja International Airport was the second busiest international airport in the first half of 2016, as in previous periods. In the first quarter, 220,592 international passengers travelled through the airport, and 268,638 travelled through in the second, representing shares of 20.5% and 24.0% respectively. The increase in the share in the second quarter was a result of an increase in passenger numbers of 21.8%, or 48,046 passengers; this increase is larger than the overall increase in international passenger numbers of 47,612 indicating that on average, passenger numbers decreased across other international airports. This follows a slight quarterly decrease in passengers to travel through Abuja International in the first quarter, of 1.2%.

Whereas Port Harcourt was the third largest domestic airport, Kano was the third largest international airport in each period considered. In the first and second quarter of 2016, Kano International Airport accounted for 4.2% and 5.3% of international passenger movement respectively, compared to 2.2% and 1.8% for Port Harcourt. This difference has widened in the first half of 2016, as Kano International has recorded quarterly increases of 26.7% and 29.7%, whereas Port Harcourt has recorded decreases of 15.5% and 13.4% in the first and second quarters of 2016.

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



Total Aircraft Movement

A total of 59,808 aircrafts arrived at, or departed from Nigerian airports in the first quarter of 2016, a decrease of 6.6% relative to the previous quarter, and of 7.7% relative to the first quarter of 2015. This decrease then continued into the second quarter, when the number was 54,405 aircrafts, a decrease of 9.0% relative to the first quarter, and of 12.9% relative to the second quarter of 2015. The year on year growth rates were considerably lower than

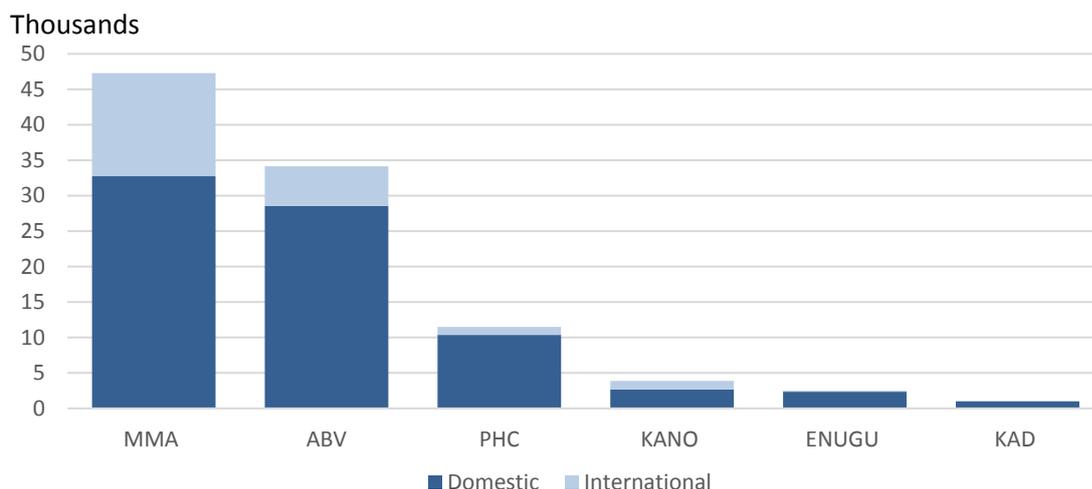
those for passenger numbers of 4.0% and 0.2% in the first and second quarters. As a result, the number of passengers per flight increased from 53 and 56 in the first and second quarters of 2015, to 59 and 65 in the first and second quarters of 2016.

As with passenger numbers, there was a clear divide between changes in domestic aircraft movements and international aircraft movements. The quarterly growth in international aircraft movement was considerably higher than the growth in domestic aircraft movement in each quarter. The former declined by 2.2% in the first quarter, before increasing by 10.7% in the second, while the latter declined by 7.5% in the first quarter, before declining by a further 13.4% in the second.

As a result of these changes there were 49,044 aircrafts to pass through domestic airports within Nigeria in the first quarter of 2016, and 42,489 to pass through in the second. These numbers represent year on year declines of 8.6% and 17.2% respectively. In comparison, there were 10,764 aircrafts to pass through international airports in the first quarter, and 11,916 in the second, representing a decline of 3.7% in the first quarter and an increase of 6.7% in the second.

Aircrafts to fly through international airports were generally larger over the period. In the first quarter of 2016, there were on average 50 passengers on each domestic flight, compared to an average of 100 on each international flight. The gap narrowed slightly in the second quarter, when there were 57 passengers on each domestic flight on average, and 94 passengers on average on each international flight.

Figure 4: Domestic/International Split of Aircraft 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 34.3% in the first quarter of 2016 and 37.4% in the second, compared with domestic passenger shares of

35.8% and 37.5% respectively. Similarly, Abuja Domestic Airport accounted for 31.0% and 31.4% of domestic flights in the first and second quarter, compared to passenger shares of 33.2% and 35.6%.

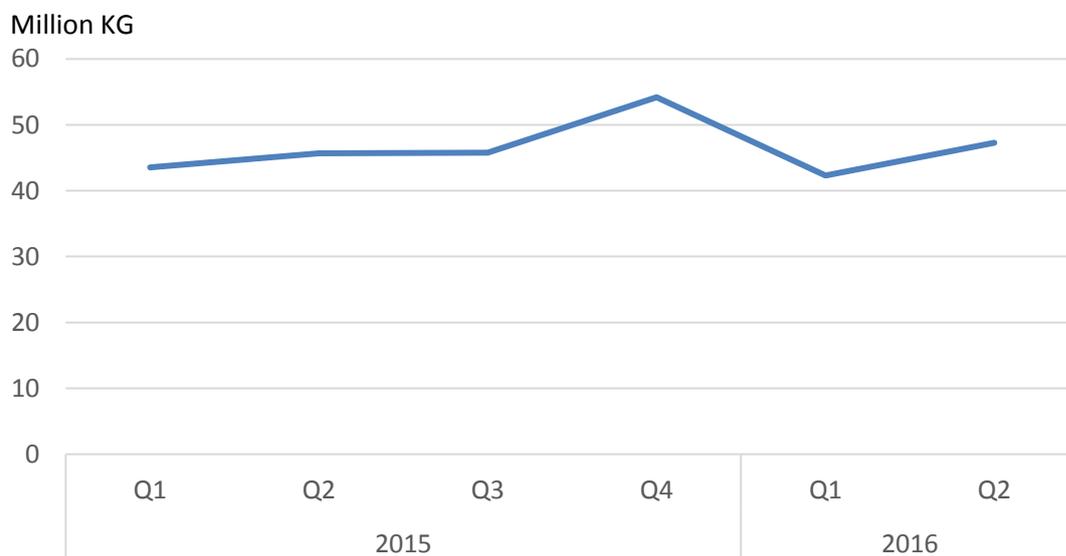
International Aircraft Movement

Murtala Muhammed Airport accounted for a slightly lower share of international aircrafts than of international passengers; its share was 65.8% in the first quarter and 62.7% in the second, compared with shares of 72.1% and 68.6% for international passengers in the same quarters. Abuja International was the second largest airport in terms of aircrafts, and accounted for 23.1% in the first quarter and 26.1% in the second. In contrast to MMA, these shares are slightly higher than for passenger numbers, of 20.5% and 24.0% respectively.

Cargo Movement by Airport

In the first quarter of 2016, cargo movement saw a year on year decline of 2.8% and a quarterly decline of 21.9%. Consequently, the total volume of cargo movement for the first quarter of the year was 42,311,777 kilograms. The second quarter of the year saw a 3.6% year on year increase when compared to the second quarter of 2015 and a quarterly jump of 11.8% when compared to the first quarter of 2016. Thus, the total volume of cargo movement in the second quarter of 2016 was 47,293,487 kilograms and a total of 89,605,264 kilograms for the first half of 2016.

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



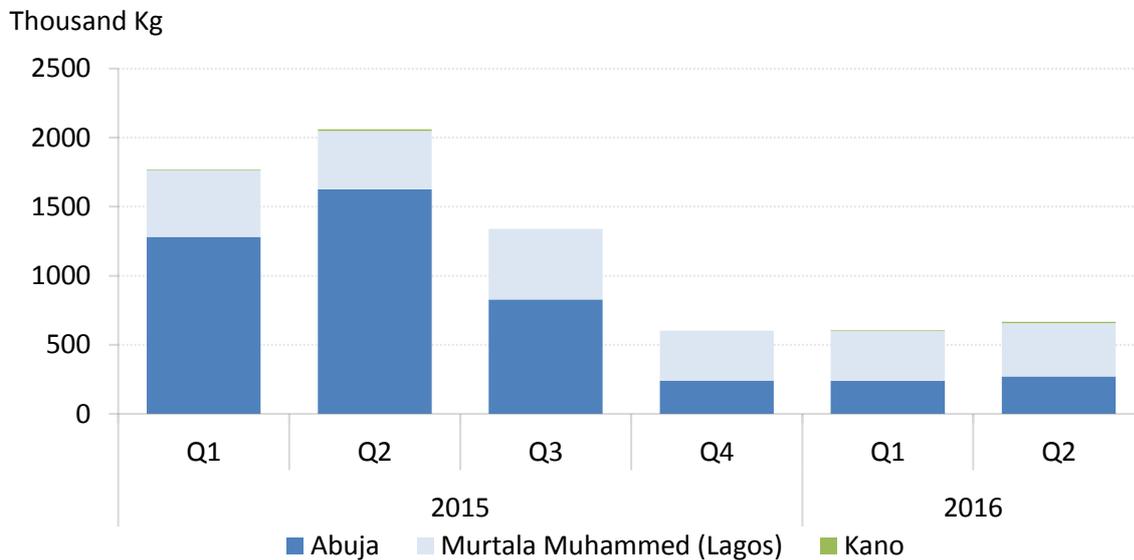
Just as in previous quarters, the bulk of the weight of cargo to move through Nigerian Airports went through MMA in Lagos in the first quarter of 2016, accounting for 91.1% (38,550,377). This was followed by Kano International Airport with 4.2% (1,772,842) of total cargo movement, then Port Harcourt International Airport with 2.7% (1,163,551) and Abuja International Airport with 1.9% (825,007) of total cargo movement in the first quarter of 2016. The same trend played out in the second quarter of the year, MMA in Lagos accounted for

92.5% (43,739,697). This was again followed by Kano International Airport with 3.1% (1,456,680) of total cargo movement, then Port Harcourt International Airport with 2.7% (1,253,292) and Abuja International Airport with 1.8% (843,818) of total cargo movement in the second quarter of 2016

Post Moved by Airport

The total weight of mail moved through Nigerian airports in the first quarter of the year declined significantly year on year by 65.8% to 605,572 kilograms, however recorded a slight increase of 0.5% over the fourth quarter of 2015. In the second quarter of the year, when compared to the same period in 2015, the figure declined by 82.3% to 666,396 but this was an increase of 10% when compared to the first quarter of 2016.

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

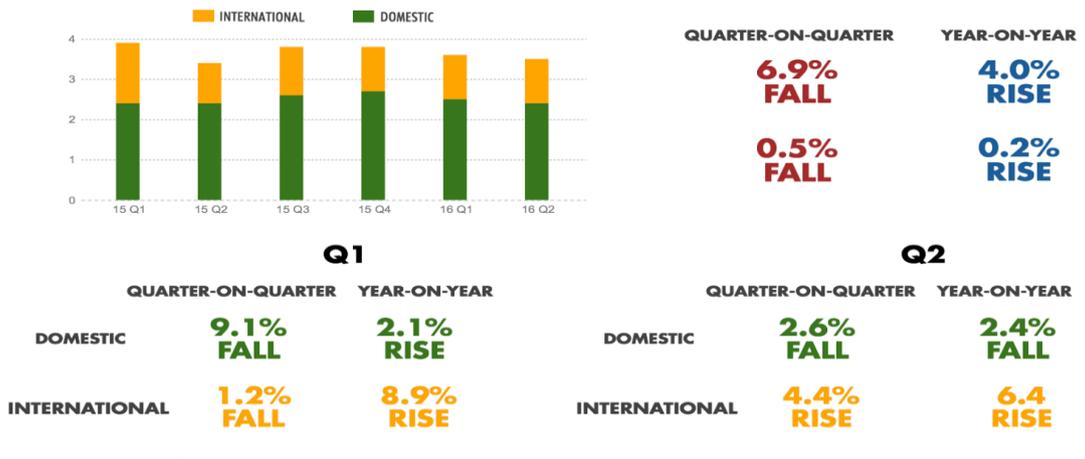


Just as in movement of cargo through the airports, Lagos airport recorded the highest movement of mail through it, accounting for 60% (363,228) of total mail movement in the first quarter of 2016. It was followed by Abuja airport, which recorded 39.3% (237,875) of mail movement and then Kano airport which reported 0.3% (4,469) of the total volume of mails through Nigerian airports for the first quarter of 2016. Similarly, in the second quarter of the year, Lagos airport recorded the highest volume of mails through the airport. It recorded 57.8% (385,298), followed by Abuja airport again 40.8% (272,078) of total mails through the airports. In the first half of the year, a total volume of 1,271,968 kilograms of mail has passed through the airport, with Lagos accounting for 58.8% of it, followed by Abuja airport with 40.1% and then Kano with 1.1%.


NIGERIAN AVIATION SECTOR
 Q1 & Q2 2016

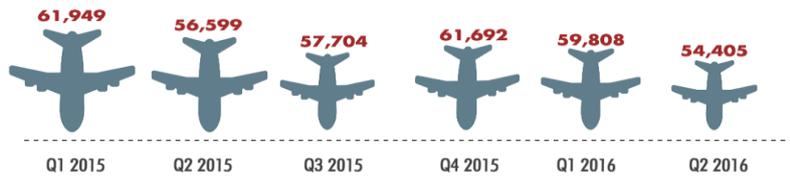
PASSENGER TRAFFIC for Q1 = 3.55mn PASSENGERS

PASSENGER TRAFFIC for Q2 = 3.53mn PASSENGERS

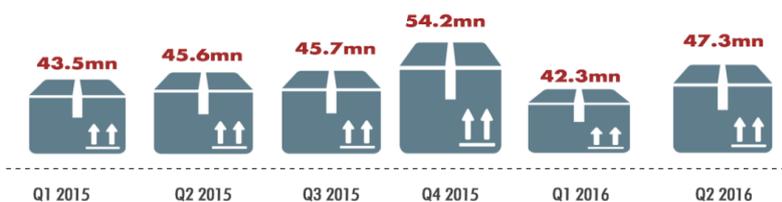



NIGERIAN AVIATION SECTOR
 Q1 & Q2 2016

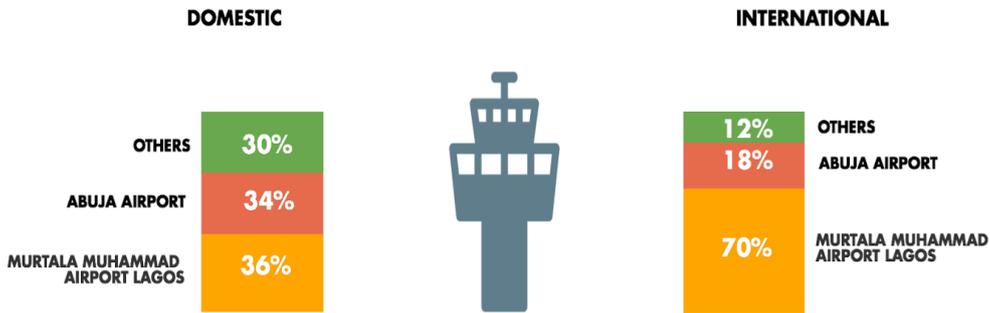
AIRCRAFT MOVEMENT



CARGO MOVEMENT



PASSENGER TRAFFIC BY AIRPORT Q1 & Q2 2016

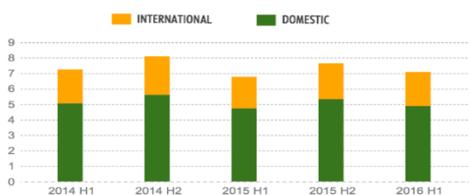


Murtala Muhammed Airport in Lagos was the airport to record the most activity, accounted for 36.5% of domestic passengers, 69.2% of international passengers, 89.5% of cargo movement and 44.9% of mail movement.

NIGERIAN AVIATION SECTOR H1 2016

PASSENGER TRAFFIC
7.1mn PASSENGERS

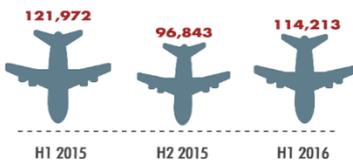
3.0% RISE YEAR-ON-YEAR



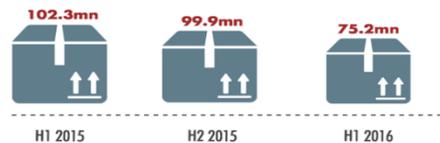
INTERNATIONAL
7.4% RISE
YEAR-ON-YEAR

DOMESTIC
0.4% RISE
YEAR-ON-YEAR

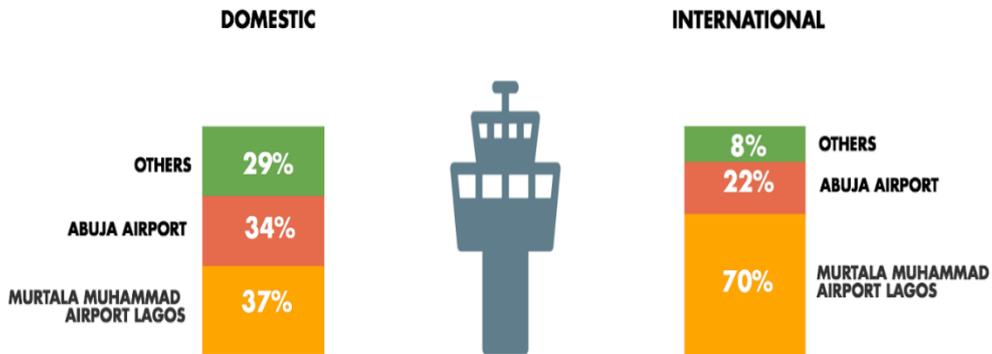
AIRCRAFT MOVEMENT



CARGO MOVEMENT



PASSENGER TRAFFIC BY AIRPORT H1 2016



Murtala Muhammed Airport in Lagos was the airport to record the most activity, accounted for 36.6% of domestic passengers, 70.3% of international passengers.



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Table 1: Number of Domestic Passengers	2015				2016				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2015		2016		2016		2016		2016		2016			
	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2		
MMA DOM	896,524	936,029	886,869	903,605	-9.9	1.9	-1.1	-3.5	35.8	37.5				
ABV. DOM	764,369	787,067	821,101	857,915	-10.8	4.5	7.4	9.0	33.2	35.6				
PHC.DOM	265,093	268,820	252,260	255,398	-12.4	1.2	-4.8	-5.0	10.2	10.6				
KANO DOM	57,754	57,629	63,004	64,588	3.5	2.5	9.1	12.1	2.5	2.7				
ENUGU	72,404	75,610	89,554	26,322	11.2	-70.6	23.7	-65.2	3.6	1.1				
OSUBI	45,402	51,612	41,219	14,382	28.4	-65.1	-9.2	-72.1	1.7	0.6				
KAD. DOM	40,162	28,833	20,312	22,792	4.1	12.2	-49.4	-21.0	0.8	0.9				
CAL.DOM	45,974	41,866	49,445	57,399	-8.8	16.1	7.5	37.1	2.0	2.4				
SOK.DOM	20,263	20,706	20,970	8,378	-0.8	-60.0	3.5	-59.5	0.8	0.3				
BENIN	48,371	25,723	38,138	28,690	-13.4	-24.8	-21.2	11.5	1.5	1.2				
MAID. DOM	2,186	3,241	23,308	8,418	17.6	-63.9	966.2	159.7	0.9	0.3				
JOS	10,909	11,594	11,605	10,696	0.0	-7.8	6.4	-7.7	0.5	0.4				
OWERRI	86,660	92,384	101,744	97,634	-5.4	-4.0	17.4	5.7	4.1	4.0				
YOLA DOM	33,755	37,381	35,401	34,904	-8.8	-1.4	4.9	-6.6	1.4	1.4				
ILORIN DOM	15,490	15,656	18,323	12,079	-1.1	-34.1	18.3	-22.8	0.7	0.5				
IBADAN	15,522	14,864	0	5,508	-100.0	NA	-100.0	-62.9	0.0	0.2				
MINNA	739	488	1,280	467	-67.2	-63.5	73.2	-4.3	0.1	0.0				
AKURE	1,212	607	426	1,560	-34.1	266.2	-64.9	157.0	0.0	0.1				
KAT	1,820	877	405	322	39.7	-20.5	-77.7	-63.3	0.0	0.0				
MKD	621	110	84	194	-15.2	131.0	-86.5	76.4	0.0	0.0				
TOTAL DOM	2,425,230	2,471,097	2,475,448	2,411,251	-9.1	-2.6	2.1	-2.4	100.0	100.0				

Table 2: Number of International Passengers	2015				2016				Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2015		2016		2016		2016		2016		2016			
	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2		
MMA INT'L	698,729	728,064	774,306	769,808	0.2	-0.6	10.8	5.7	72.1	68.6				
ABV.INT'L	207,535	253,040	220,592	268,638	-1.2	21.8	6.3	6.2	20.5	24.0				
PHC.INT'L	24,457	23,684	23,943	20,743	-15.5	-13.4	-2.1	-12.4	2.2	1.8				
KANO INT'L	42,321	40,582	45,503	59,003	26.7	29.7	7.5	45.4	4.2	5.3				
ENUGU INT'L	13,224	8,207	9,391	3,329	-10.6	-64.6	-29.0	-59.4	0.9	0.3				
KAD. INT'L	187	53	177	3	-97.1	-98.3	-5.3	-94.3	0.0	0.0				
CAL. INT'L	0	0	0	0	-100.0	NA	NA	NA	0.0	0.0				
SOK. INT'L	0	12	0	0	NA	NA	NA	-100.0	0.0	0.0				
MAID. INT'L	0	47	0	0	-100.0	NA	NA	-100.0	0.0	0.0				
YOLA INT'L	0	0	0	0	-100.0	NA	NA	NA	0.0	0.0				
ILORIN INT'L	0	0	0	0	NA	NA	NA	NA	0.0	0.0				
MINNA INT'L	0	0	0	0	NA	NA	NA	NA	0.0	0.0				
KAT INT'L	0	0	0	0	NA	NA	NA	NA	0.0	0.0				
TOTAL INT'L	986,453	1,053,689	1,073,912	1,121,524	-1.2	4.4	8.9	6.4	100.0	100.0				

Table 3: Number of Domestic Aircraft	2015				2016		Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2015		2016		2016		2016		2016		2016	
	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2
MMA DOM	18753	17537	16834	15895	-6.8	-5.6	-10.2	-9.4	34.3	37.4		
ABV. DOM	15103	17068	15212	13352	-11.2	-12.2	0.7	-21.8	31.0	31.4		
PHC.DOM	5653	4984	5518	4844	-2.2	-12.2	-2.4	-2.8	11.3	11.4		
KANO DOM	1398	1023	1426	1223	16.8	-14.2	2.0	19.6	2.9	2.9		
ENUGU	1671	1352	1520	845	22.1	-44.4	-9.0	-37.5	3.1	2.0		
OSUBI	1630	1512	1388	404	-4.7	-70.9	-14.8	-73.3	2.8	1.0		
KAD. DOM	920	682	544	481	7.9	-11.6	-40.9	-29.5	1.1	1.1		
CAL.DOM	868	624	860	859	-9.9	-0.1	-0.9	37.7	1.8	2.0		
SOK.DOM	654	530	498	156	0.0	-68.7	-23.9	-70.6	1.0	0.4		
BENIN	1198	956	785	516	-21.9	-34.3	-34.5	-46.0	1.6	1.2		
MAID. DOM	496	688	887	328	-4.3	-63.0	78.8	-52.3	1.8	0.8		
JOS	320	274	246	240	0.8	-2.4	-23.1	-12.4	0.5	0.6		
OWERRI	1756	1718	1574	1372	-3.2	-12.8	-10.4	-20.1	3.2	3.2		
YOLA DOM	1080	587	690	718	-5.7	4.1	-36.1	22.3	1.4	1.7		
ILORIN DOM	832	759	648	668	-0.9	3.1	-22.1	-12.0	1.3	1.6		
IBADAN	646	576	0	160	-100.0	NA	-100.0	-72.2	0.0	0.4		
MINNA	194	124	130	70	-39.5	-46.2	-33.0	-43.5	0.3	0.2		
AKURE	258	134	126	232	-42.2	84.1	-51.2	73.1	0.3	0.5		
KAT	116	184	116	80	190.0	-31.0	0.0	-56.5	0.2	0.2		
MKD	98	20	42	46	61.5	9.5	-57.1	130.0	0.1	0.1		
TOTAL DOM	53644	51332	49044	42489	-7.5	-13.4	-8.6	-17.2	100.0	100.0		

Table 4: Number of International Aircraft					Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2015		2016		2016		2016		2016	
	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2
MMA INT'L	7,227	7,331	7,082	7,475	-7.8	5.5	-2.0	2.0	65.8	62.7
ABV.INT'L	2,622	2,540	2,486	3,108	28.1	25.0	-5.2	22.4	23.1	26.1
PHC.INT'L	557	583	560	585	-7.1	4.5	0.5	0.3	5.2	4.9
KANO INT'L	598	616	547	696	-11.3	27.2	-8.5	13.0	5.1	5.8
ENUGU INT'L	132	78	78	50	-4.9	-35.9	-40.9	-35.9	0.7	0.4
KAD. INT'L	34	10	11	2	-60.7	-81.8	-67.6	-80.0	0.1	0.0
CAL. INT'L	0	0	0	0	-100.0	NA	NA	NA	0.0	0.0
SOK. INT'L	0	2	0	0	NA	NA	NA	-100.0	0.0	0.0
MAID. INT'L	0	0	0	0	-100.0	NA	NA	NA	0.0	0.0
YOLA INT'L	4	2	0	0	-100.0	NA	-100.0	-100.0	0.0	0.0
ILORIN INT'L	0	0	0	0	NA	NA	NA	NA	0.0	0.0
MINNA INT'L	0	0	0	0	NA	NA	NA	NA	0.0	0.0
KAT INT'L	3	2	0	0	NA	NA	-100.0	-100.0	0.0	0.0
TOTAL INT'L	11,177	11,164	10,764	11,916	-2.2	10.7	-3.7	6.7	100.0	100.0

Table 5: Weight of Cargo and Mail (KG)

<i>A) Cargo</i>					Q on Q growth (%)		Y on Y growth (%)		Share of total (%)	
	2015		2016		2016		2016		2016	
	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2	Q1	Q2
MMA	37,451,758	40,911,282	38,550,377	43,739,696	-19.4	13.5	2.9	6.9	91.1	92.5
ABUJA	967,596	951,484	825,007	843,818	4.9	2.3	-14.7	-11.3	1.9	1.8
PHC	3,512,601	1,765,193	1,163,551	1,253,292	-19.4	7.7	-66.9	-29.0	2.7	2.7
KANO	1,615,892	2,034,164	1,772,842	1,456,680	-57.3	-17.8	9.7	-28.4	4.2	3.1
CALABAR	4,084	3,023	-	-	-100.0	NA	-100.0	-100.0	0.0	0.0
TOTAL	43,551,931	45,665,145	42,311,777	47,293,486	-21.9	11.8	-2.8	3.6	100.0	100.0
<i>B) Mail</i>										
MMA	482,246	415,232	363,228	385,298	0.6	6.1	-24.7	-7.2	60.0	57.8
ABUJA	1,282,103	2,010,372	237,875	272,078	-1.4	14.4	-81.4	-86.5	39.3	40.8
PHC	0	1,332,928	-	-	NA	NA	NA	-100.0	0.0	0.0
KANO	4,989	8,942	4,469	9,020	NA	101.8	-10.4	0.9	0.7	1.4
TOTAL	1,769,338	3,767,474	605,572	666,396	0.5	10.0	-65.8	-82.3	100.0	100.0