AFRICAN AIRLINES ASSOCIATION
ASSOCIATION DES COMPAGNIES AERIENNES AFRICAINES

AFRAA

ANNUAL REPORT 2012

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The CRJ900 NextGen will deliver industry-leading results to RwandAir as they expand their network and develop an efficient hub in the heart of Africa. Their new fleet of CRJs will provide them with up to 5% lower operating costs, up to 11% better fuel efficiency and dual class configuration. According to John Mirenge, CEO of RwandAir, "CRJ900 NextGen aircraft provide exceptional reliability that allow us to increase frequencies on some key routes." It's the right aircraft for today, and for the future.
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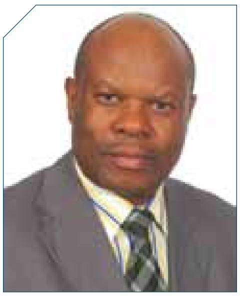
Foreword>



After a strong rebound in 2010, the world economy slowed in 2011 owing to increased risks and uncertainties that are expected to remain in 2012 and beyond. Although the negative effects of the triple crisis of 2007–2009, namely food, energy and finance still linger, the euro area sovereign debt crisis has further aggravated structural imbalances in the world economy and cast doubts on the prospects for sustained growth and a quick recovery. Turmoil in North Africa and the euro area crisis combined to slow growth in 2011, but despite uncertainties the economies of some African countries have grown at double digits rates, reflecting higher commodity prices, strong domestic demand as a result of a swelling middle class.

Global passenger air traffic improved by 4.4% in 2011 but less than the 7.5% increase in 2010 but better than the decline experienced in 2009. On the contrary, global Freight tonnes carried by all scheduled services decreased by 0.7% in 2011, after a significant 13.4% improvement in 2010. In Africa, passenger numbers increased to over 61 million in 2010 from 40 million in 2004; a cumulative growth of 52.5% in 7 years.

In 2011 however, the challenges posed by the economic and financial crisis in Europe and the political instability in North Africa following the Arab Spring negatively impacted traffic performance generally across the continent. Passengers carried dropped by 8.2% to 56 million from the 2010 figure of 61 million. Domestic and intercontinental passenger numbers decreased by 12.3% and 12.6% respectively while intra-Africa passengers carried increased by 10.4%

Air freight shipment in Africa is still very low though growing. In 2011 the continent accounted for about 705,000 tonnes of total global freight carried. In FTKs, this represents a growth of 2.7% compared to 23.8% experienced in 2010. In the last 4 years freight carried has seen consistent growth year-on-year, thanks to the growing appetite for fresh fruits, vegetables, flowers and other agricultural produce from Africa. On the inbound side, the fast development of many African economies is attracting huge imports of raw materials, manufactured goods, electronics, components and construction equipment from abroad.

A worrying trend observed in the last 10 years is the loss of market share by African airlines on intercontinental routes. Over the period African airlines lost 16% capacity while non-African airlines market share grew from 42% in 2002 to 58% in 2012. Middle East airlines since 2002 have more than doubled their capacity; growing by 125% in the last 10 years. European carriers' capacity inched up 18% in the same period.

Of significance though is the continuous development of new routes; and in particular the improvements in network connectivity, provided by African airlines. Travelling in Africa is now much easier and affordable than in the past. In 2011, 35 new routes were launched by 17 AFRAA member airlines to domestic, intra-Africa and intercontinental destinations. Of these 12 were intercontinental destinations, and 23 within Africa.

In response to growing demand for air services, African airlines are investing in new and modern fleet. The current fleet of 680 aircraft is forecasted to almost double to 1,210 by 2030. The continent expects to purchase 800 new aircraft to augment the current fleet in the next 20 years. 60% of the new fleet will be addition to the existing aircraft in operation while the other 40% will replace current old generation aircraft. The investment in new fleet will not only make African airlines competitive but also improve the continent's safety record which currently is unattractive, though significant improvements have been made in recent years. Africa currently has 38 airlines on the IOSA Register; 22 of which are AFRAA member airlines.

With improving safety standards, growing economies, expanding networks and investments in new, modern equipment and capacity building, African airlines seem to be on the right path to better performance in the years ahead. We congratulate all African operators for their resilience and dedication to the development of air transport on the continent and we wish them all success in their endeavours.

Echingosho

Dr. Elijah Chingosho
Secretary General

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Appreciation>

AFRAA would like to express its appreciation to all members who contributed to the publication of this report by responding to our requests and availing data. We look forward to your continued support.

Our heartfelt thanks go to Bombardier for sponsoring the publication of this report. BOMBARDIER

We believe that airlines, partners and other stakeholders will find the content of this report useful and informative.

Your feedback and comments will be highly appreciated.

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Section One> Economic Perfomance

World Overview

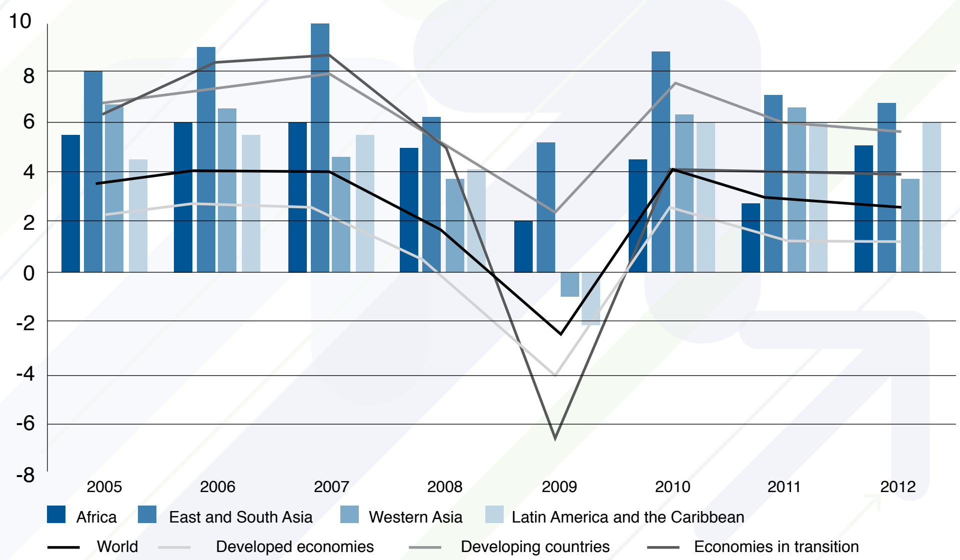
After a strong rebound in 2010, the world economy slowed in 2011 owing to increased risks and uncertainties that are expected to remain in 2012 and probably beyond. Although the negative effects of the triple crisis of 2007-2009: food, energy and finance, still linger, the euro area sovereign debt crisis has further aggravated structural imbalances in the world economy and cast a doubt on the prospects for sustained growth and a quick recovery according to a UN Economic Commission for Africa (UNECA) report, 2012.

The World Bank and UNECA estimate global growth in 2011 was 2.7% down from 4.0% in 2010. The economic slowdown was especially marked in developed countries, which saw growth slip to 1.6% in 2011. The sovereign debt crisis in Europe weighed heavily on growth in the Euro area (1.6%), while the United States saw a growth of 1.7%. Developing countries growth was estimated at 6.0% in 2011. Excluding China and India, the pace of output expansion was 4.4% (compared to 5.5% in 2010). China's economy grew by 9.1% in 2011, slipping from 10.4% in 2010. Export growth slowed reflecting weak conditions in major export markets of Europe and the United States. Growth slowed in several other major developing countries, such as Brazil and India.

African economies quickly rebounded from the 2008 financial crisis as commodity prices rose and export revenues returned to pre-crisis levels, enabling them to finance the needed investments. Turmoil in North Africa and the Euro area crisis combined to slow growth in 2011, but despite uncertainties some African countries have grown at double digits, reflecting higher commodity prices and strong domestic demand.

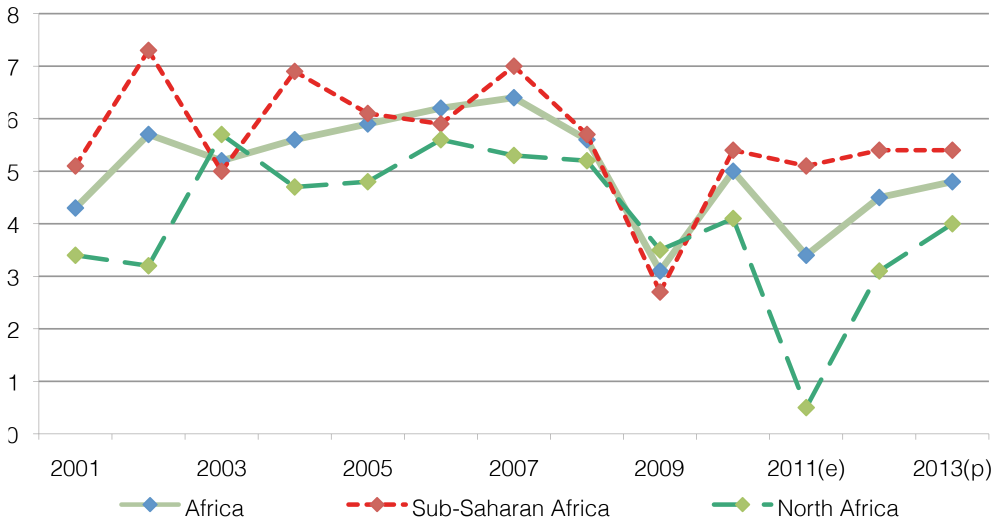
Africa is not immune to the global crisis, but it is in a much better position to deal with global exigencies than before. The expected slowdown of the world economy may reduce demand for its commodity exports, lower prices and thus reduce its export earnings. According to the AfDB, the slowing of the global economy adversely affected some African countries, notably those whose main export markets are in Europe and the United States. However, export diversification in recent years and in particular intra-African trade is helping the continent to withstand these external shocks. Shortfalls in official development assistance could threaten many aid-dependent African countries' social development programmes, but this could also encourage the continent to mobilize local resources and reduce overdependence on foreign financial assistance.

Fig 1.1: GDP growth rates of major global regions, 2005-2012 (%)



Source: UN-DESA (2011, 2012)

Fig 1.2: Africa's economic growth



Source: African Economic Outlook 2012 - OECD (2012)

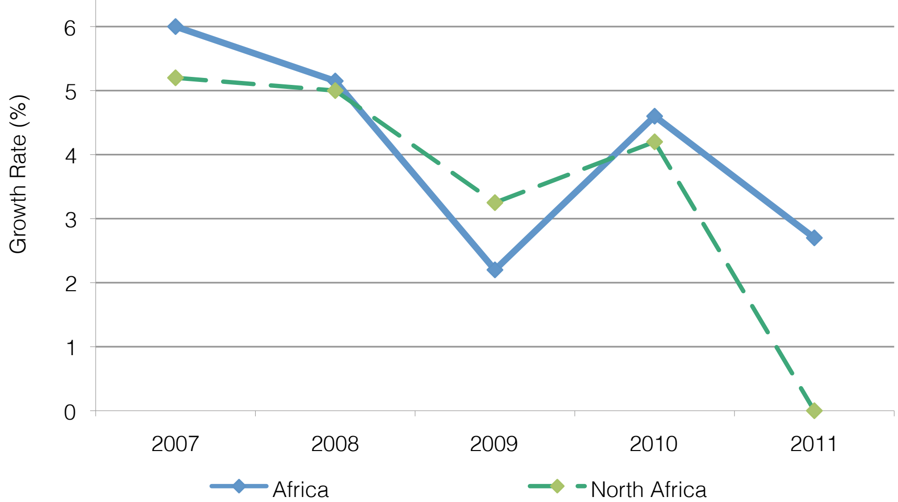
According to AfDB et al. (2012), Africa's economy should see a rebound in 2012 after popular uprisings and political unrest brought overall economic growth down in 2011. With the gradual recovery of North African economies, Africa´s average growth is expected to rebound to 4.5% in 2012 and to 4.8% in 2013.

Economic performance of Africa

Africa's economic growth slowed sharply in 2011, primarily because of political unrest in North Africa and the continued slump in the developed economies. According to UNECA and AU (2012), Africa's growth fell to 2.7% in 2011, down from 4.6% in 2010. This rate was far lower than had been seen before the 2007-2009 global financial and economic crises.

The intensity and persistence of the social and political turmoil in North Africa increased investor risk aversion sharply, prompting capital inflows and private investment to decline. Production and exports of oil – the mainstays of North Africa – were also disrupted severely (notably in Libya), and tourism collapsed. As a result, North Africa recorded zero growth in 2011, down from 4.2% in 2010, as Libya contracted by 22% and Tunisia by 0.6%.

Fig 1.3: Growth in Africa's real gross domestic product (GDP), 2007-2011 (%): North Africa slowed down Africa's economic growth

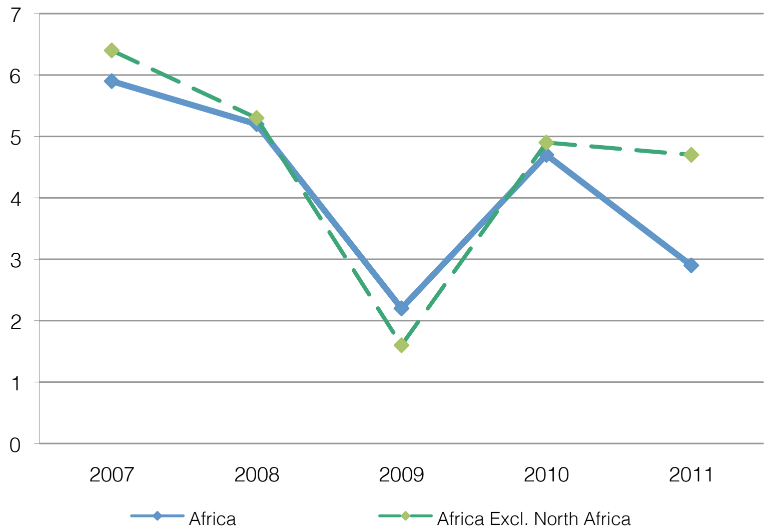


Source: UN-DESA (2011)

Many African economies sustained strong growth

Outside North Africa, however, economic activity was buoyant, with solid growth of 4.5% in 2011 (figure 1.4) reinforcing the recovery of 4.8% in 2010. Per capita real GDP increased by 2.2% outside North Africa, similar to the growth rate of 2.5% in 2010 (UNECA, 2012). Growth outside North Africa was largely driven by increased receipts from commodity exports, stemming from higher prices on international markets and rising demand for commodities, particularly from emerging markets in Asia (IMF, 2011b). Improved terms of trade and higher returns from commodity exports allowed many African commodity-exporting countries to build strong foreign exchange reserve buffers. Several countries also continued to diversify their export production by building local capacity in processing and value addition, helping them to capture new markets for high-valued products in the fast-growing emerging markets of East Asia and Latin America (IMF, 2011b).

Fig 1.4: Africa's economic growth, 2007-2011 (change in real GDP, %)



Source: UN-DESA (2011)

Africa's outlook in the medium term

African economies are set to sustain the current growth momentum in the medium term. Growth is expected to recover to 5.1% in 2012 and 5.2% in 2013 (table 1.1), underpinned by strong export demand, rising commodity prices and firm domestic demand (buttressed by government infrastructure spending).

In the medium term, North Africa is poised to follow a recovery path, as political stability is restored to the troubled countries. The sub-region is projected to grow by 4.7% and 5.4% in 2012 and 2013 respectively. Growth in West Africa is forecast to pick up to 6.3% and 6.5% in the next two years. Growth in Central Africa will be 4.7 % in 2012 and 3.7% in 2013. East Africa is expected to also post stronger growth of 6.3% in 2012 and 5.8% in 2013. Growth in Southern Africa is similarly projected to be strong, at 4.5% in 2012 and 4.2% in 2013.

This positive outlook partly depends on the health of the global economy. Failure by euro area governments to resolve their sovereign debt crisis will affect Africa on many fronts. A global downturn would therefore negatively affect Africa's economies especially the tourism and air transportation sectors.

Table 1.1: Africa's growth rates: Poised for a strong recovery in the medium term

	Projections			
	2010	2011	2012	2013
Africa	4.6	2.7	5.1	5.2
Africa excluding North Africa	4.8	4.5	5.3	5.1
North Africa	4.2	0.0	4.7	5.4
West Africa	6.9	5.6	6.3	6.5
Central Africa	4.7	4.2	4.7	3.7
Eastern Africa	5.8	5.8	6.3	5.8
Southern Africa	3.2	3.5	4.5	4.2
Oil-exporting countries	5.1	1.5	5.6	5.8
Oil-importing countries	4.0	4.2	4.5	4.5
Mineral-rich countries	3.8	4.1	4.5	4.1
Non-mineral, non-oil rich countries	4.5	4.5	4.6	5.3

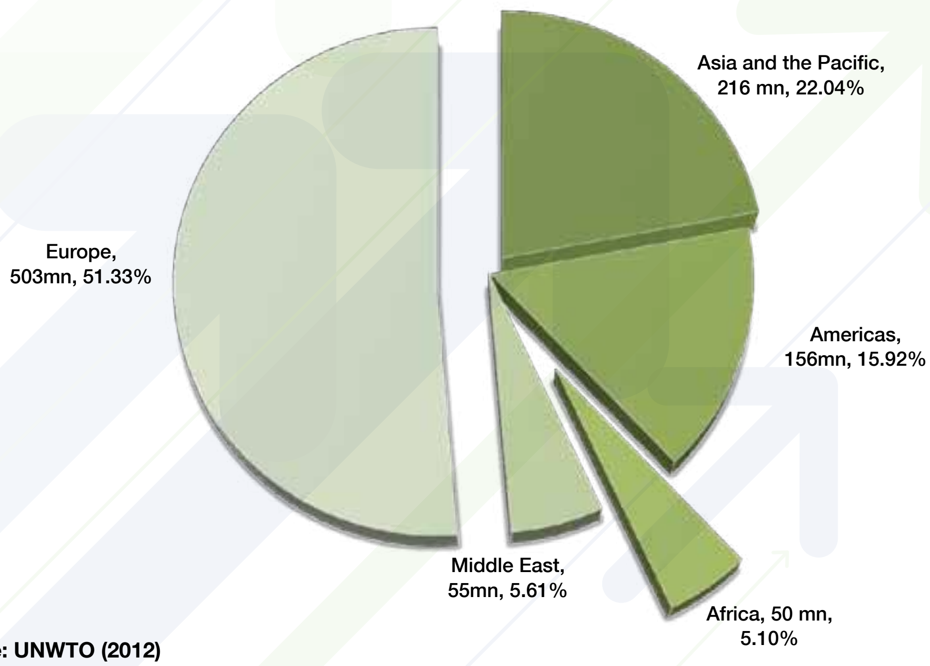
Source: UN-DESA (2011)

Tourism Performance in 2011

In a year characterized by a stalled global economic recovery, major political changes in the Middle East and North Africa and natural disasters in Japan, international tourist arrivals grew by 4.4% in 2011 to a total 980 million, up from 939 million in 2010. Contrary to previous years, growth was higher in advanced economies (+5.0%) than in emerging ones (+3.8%), due largely to the strong results in Europe, and the setbacks in the Middle East and North Africa. Africa maintained international arrivals at 50 million, as the gain of two million or 7% by Sub-saharan destinations was offset by the losses of 12% in North Africa.

International tourism receipts exceeded US$1.0 trillion for the first time in 2011, up from US$928 billion in 2010. In real terms, receipts grew by 3.8%, as a result of a 4.6% increase in international tourist arrivals. According to UNWTO, international tourism receipts continued to recover from the losses of crisis year 2009 and hit new records in most destinations, reaching an estimated US$ 1,030 billion worldwide, up from US$ 928 billion in 2010.

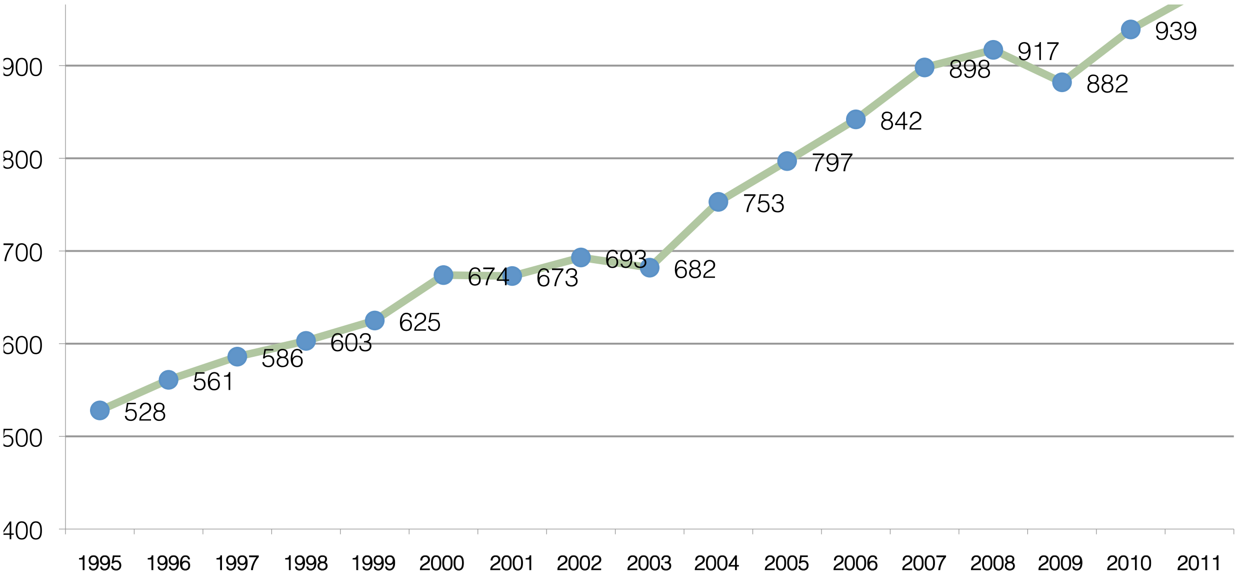
Fig 1.5: World inbound tourism: international tourist arrivals 2011 (million)



Source: UNWTO (2012)

By region, the Americas recorded the largest increase of 5.7% in receipts in 2011, followed by Europe 5.2%; Asia and the Pacific; 4.3% and Africa; 2.2%. The Middle East was the only region posting negative growth of -14%.
Aside from international tourism receipts, tourism also generates export earnings through international passenger transport, which in 2011 amounted to about US$196 billion and bringing total receipts generated by international tourism to US$1.2 trillion.

Fig 1.6: International tourist arrivals (millions)



Source: UNWTO (2012)

Table 1.2: International tourist arrivals by sub-region

	Full year arrivals			2011 % share	% change		
	2009	2010	2011		09/08	10/09	11/10
World	882	939	980	100	-3.8	6.5	4.4
Advanced economies	474	498	523	53.4	-4.3	5.0	5.0
Emerging economies	407	440	457	46.6	-3.2	8.1	3.8
Europe	461.0	474.4	502.8	51.3	-4.9	2.9	6.0
Asia and the pacific	181.1	204.6	216.0	22.0	-1.6	12.9	5.6
Americas	140.7	149.8	156.2	15.9	-4.9	6.5	4.2
Africa	46.7	49.8	49.8	5.1	3.2	6.7	0.0
North Africa	17.6	18.7	16.4	1.7	2.5	6.2	-12.0
Sub-Saharan Africa	29.1	31.1	33.3	3.4	3.6	6.9	7.1
Middle East	52.2	60.2	55.4	5.7	-4.6	15.1	-7.9

Source: UNWTO (2012)

Tourism generated export earning is estimated by UNWTO at US$196 billion in 2011, bringing total receipts generated by international tourism to US$ 1.2 trillion. This means that international tourism (travel and passenger transport) in 2011 accounted for 30% of the world's exports of services and 6% of overall exports of goods and services. As a worldwide export category, tourism ranks fourth after fuels, chemicals and food, while ranking first in many developing countries, according to UNWTO.
The last two years have been difficult ones for the tourism industry and by extension the airline industry as a result of repeated shocks. These shocks ranged from the global economic crisis and volatile oil prices to specific climatic disturbances (the Icelandic volcanic ash cloud, Japanese tsunami, and extreme weather conditions on multiple continents), political instability, and health issues such as the H1N1 influenza pandemic. Tourism is often rightly referred to as one of the most dynamic sectors and as witnessed during the global economic turmoil, Africa's travel and tourism industry was less affected compared to other regions with respect to international tourism receipts. Globally, emerging markets are now

leading the way in the gradual recovery from the effects of the global economic crisis, while the traditional markets of Europe and North America are lagging behind.

Global Airline Industry Performance

According to IATA, worldwide international and domestic revenue passenger kilometers flown grew 5.9% to a new high of 5.2 trillion kilometers in 2011. Contributing to the surge in air travel was a rebound from the recession of 2008 and 2009 as air travel demand remains robust despite slow economic growth in many regions. But despite the increased passenger demand, airlines margins were low. Revenues rose 9.4% to $598 billion driven largely by a rise in volumes and an improvement in yield, while profits fell by almost half compared with 2010, to $7.9 billion largely due to a combination of slower revenue growth and sharp increase in the cost of fuel. The average price of a barrel of oil rose from $79 in 2010 to $111 in 2011. Both passenger and cargo revenues rose above prerecession levels in the year under review.

Airline earnings before interest and tax (EBIT) declined from the highs of 2010 to $16.2 billion or 2.7% of revenues. After debt interest, tax, and financial transactions, industry profits were more than halved from 2010 to a total of $7.9 billion, or 1.3% of revenues.

Regionally, Asia-Pacific airlines delivered the largest absolute net profits and the highest EBIT margins for the second consecutive year. Within the region however, there were variation, with significant losses in Indian domestic markets and substantial profit in Chinese domestic markets. Africa was the weakest-performing region flowed by Europe, where EBIT margins barely exceeded 1% on average. Africa performed dismally with barely positive growth, partly due to the impact of the Arab Spring on the north of the continent.

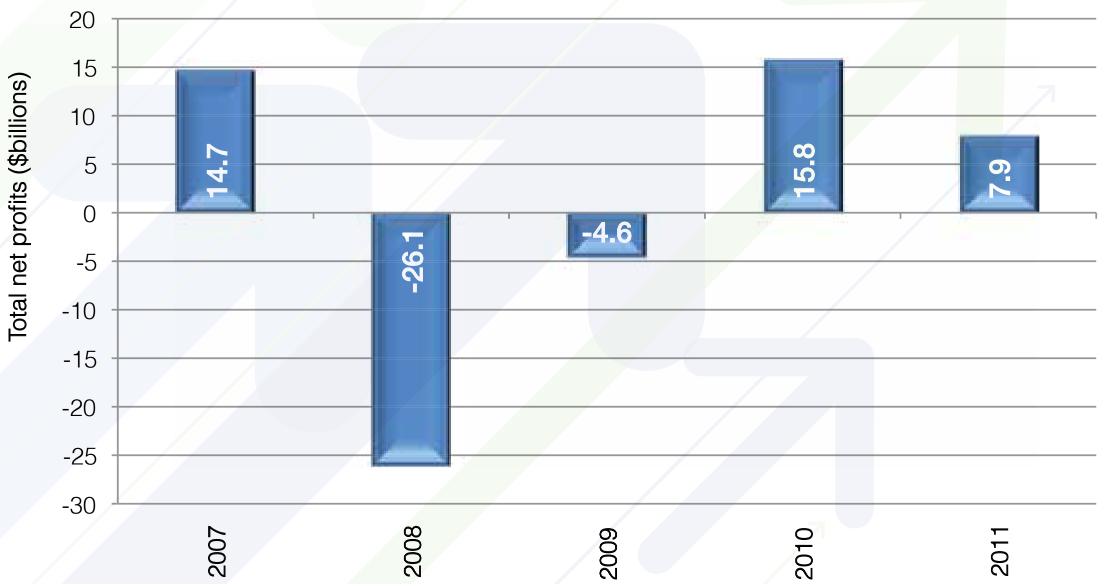
US airlines saw their profits decline in 2011, but they continue to generate EBIT margins close to 3% despite little market growth as a result of limited additional capacity. Profitability in the US domestic market has been particularly robust. Latin American airlines continued to show reasonable profit, albeit at margins that were lower than in 2010. The Middle Eastern airlines saw only a minor reduction in profitability in 2011, as structural improvements at some airlines partly offset the rise in fuel costs.

In 2011, air passenger traffic grew 5.9% to a new high of 5.2 trillion kilometres. The growth for the past two years compares favourably with the 4-5% trend of the past 20-30 years.

After an exceptionally strong 2010 rebound, air freight metric ton kilometres flown fell 0.4% worldwide in 2011.

Worldwide passenger capacity, measured by available passenger kilometres grew by 6.6% in 2011 compared to 4% in 2010. Load factors exceeded 78% in 2011.

Fig 1.7: Total net profits in $ billion



Source: UNWTO (2012)

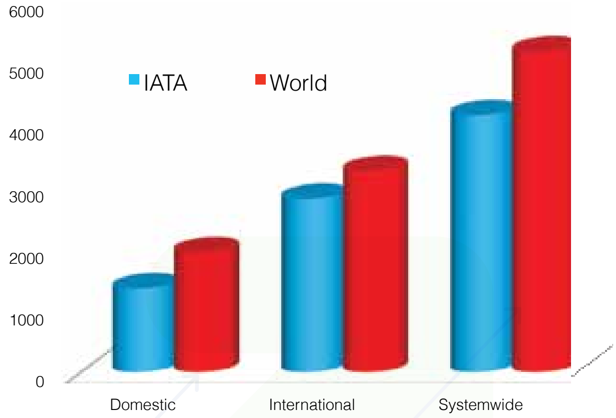
Section Two> Airline Performance

Global Performance

According to IATA, global passenger air traffic improved by 4.4% in 2011 but less than the 7.5% increase in 2010 and the decline in 2009. IATA global estimate of world scheduled passenger traffic, measured in RPK, increased by 5.9% compared to 2010. Scheduled Passenger-Kilometres (RPK) rose 5.7% compared to 7.5% in 2010 while Scheduled Available Seat-Kilometres (ASK) expanded by 6.0% to 5,339 billion. Average passenger load factor (PLF) declined marginally by 0.2% to 78.0%.

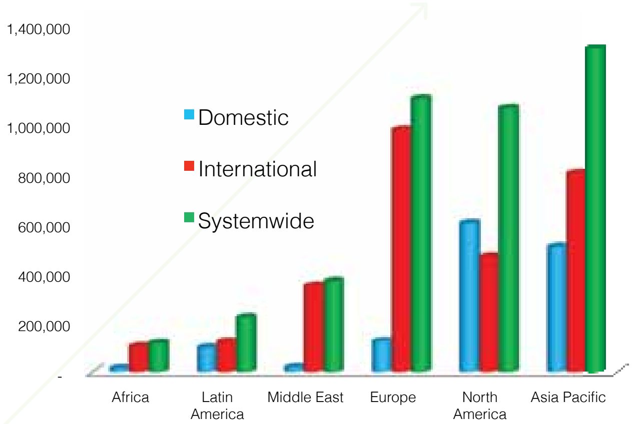
Freight tonnes carried by all scheduled services decreased by 0.7% in 2011, after a significant 13.4% improvement in 2010 and a drop of 8.5% in 2009. Schedule Freight Tonne-Kilometres (FTK) also dropped by 0.4%. Revenue Tonne-Kilometres (RTK) on all scheduled services grew by 3.6%, while Available Tonne-Kilometres (ATK) went up 5.0% in the year under review, resulting in a weight load factor of 66.7%.

Fig 2.1: IATA Share of World's Scheduled Passenger Kilometres (RPKs) 2011 (in Billions)



Source: IATA

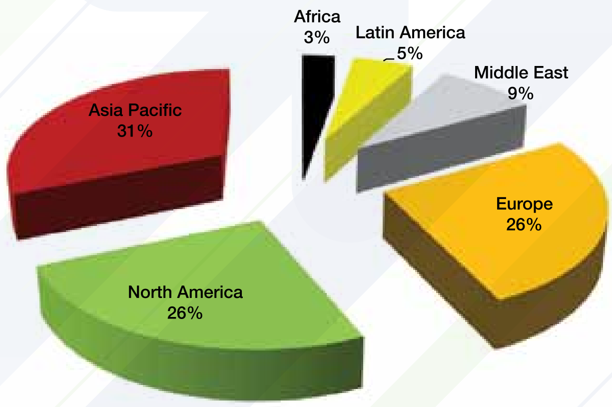
Fig 2.2: Revenue Tonne-Kilometres per Region - IATA Schedule Services 2011



Source: IATA

System-wide, the Asia Pacific region was the world's biggest air transport market by RPKs performed (31.3%) in 2011, followed by Europe and North America at 26.4% and 25.5% respectively. Africa remains the smallest market, accounting for about 2.79% of global RPKs.

Fig 2.3: Revenue Tonne-Kilometres Performed per Region – IATA Schedule Services 2011



Source: IATA

African Airlines Performance
Passengers Carried

Between 2004 and 2010, passenger numbers has consistently increased year on year. In 2004, less than 40 million passengers were carried by African airlines and this increased to over 61 million in 2010; a cumulative growth of 52.5%. The average annual growth during the period is 8.75%.

In 2011 however, the challenges posed by the economic and financial crisis in Europe and the political instability in North Africa resulting from the Arab Spring negatively impacted traffic performance generally across the continent. Total number of passengers carried in 2011 dropped by 8.2% to 56 million from the 2010 figure of 61 million.

Though passenger numbers in all the sub-regions of Africa except North Africa saw an increase in 2011, the total growth could not offset the 18.3% drop in intercontinental passenger numbers experienced in North Africa alone.

The major airlines on the continent in 2011 continued their aggressive network expansion, new markets development and further penetration of their domestic and intra-Africa markets. As a result, passenger numbers (excluding operators from North Africa) increased by 13.9%. The resilience of African economies to the global economic downturn coupled with the high demand for air travel driven by a swelling middle class supported the traffic growth. The AFRAA airlines that reported their passenger numbers for 2011 together carried over 36.4 million passengers, a drop of 17.8% from the 2010 figure of 44.3 Million.

Overall, domestic passenger numbers in 2011 decreased by 12.3%.

Domestic/Intra-Africa Passengers

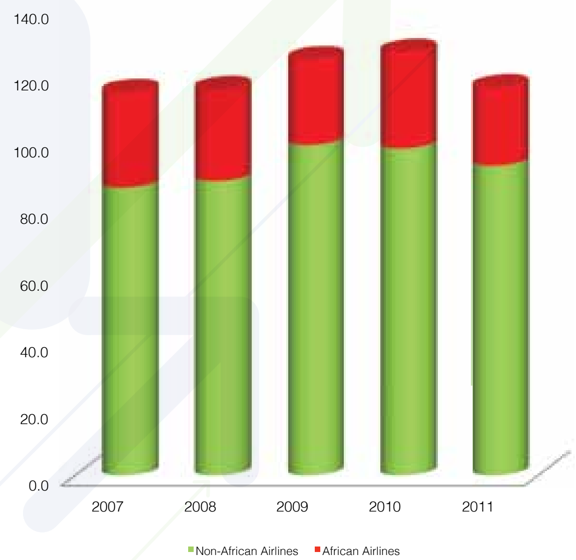
Domestic passenger numbers decreased by 12.3% to 17.9 million due largely to the disruption of local operations in North Africa, particularly Egypt, Libya and Tunisia and also Cote D'Ivoire in West Africa. The growing competition in many domestic markets and the resultant improvement in service quality and lowering of fares is stimulating growth in some markets. The domestic market in Ghana in 2011 for instance, more than doubled the number of passengers carried due to the entry into the market of Starbow Airlines with its superior product and marketing strategy. Intra-Africa passenger numbers went up 10.4% to 14.9 million while intercontinental passenger numbers declined by 12.6% to 23.6 million in 2011.

With a population of over 1.0 billion, spread across the vast continent of 54 countries, there is huge potential for growth of intra-Africa air travel. The major constraint to the growth of intra-Africa traffic is the continued over-reliance on the restrictive Bilateral Air Services Agreements (BASAs) and failure to implement the Yamoussoukro Decision by many States.

Fig 2.4: Passengers Carried by African Airlines by Region: 2007-2011

Source: AFRAA

Fig 2.5: Total Passengers Carried by African Airlines: 2007-2011

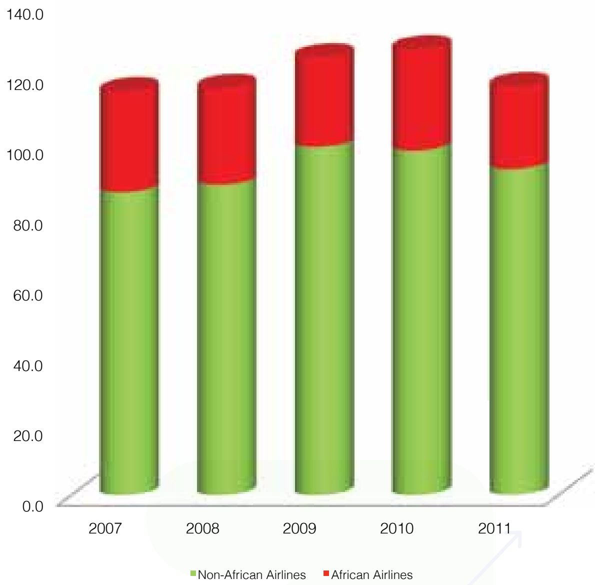


Source: AFRAA

Intercontinental Passengers

Intercontinental passenger numbers dipped due to the economic and financial crisis in Europe and the political instability in North Africa during and after the Arab Spring. The continent's heavy dependence on international tourists took a hit as many passengers cancelled planned visits to the continent. The result was an 18.3% decline in passenger numbers in 2011.
The serious disruption of operations in Egypt and Tunisia and to a lesser extent in Morocco and Algeria and the total shutdown of operations by Afriqiyah Airways and Libyan Airlines in Libya largely accounted for the shortfall. African airlines in 2011 carried about 25% of all intercontinental traffic to/from the continent.
Overall, intercontinental passengers carried by both African and non-African airlines dropped by 9.1% in 2011 compared to prior year.

Fig 2.6: Passengers Carried by African and Non-African Airlines on Intercontinental Routes

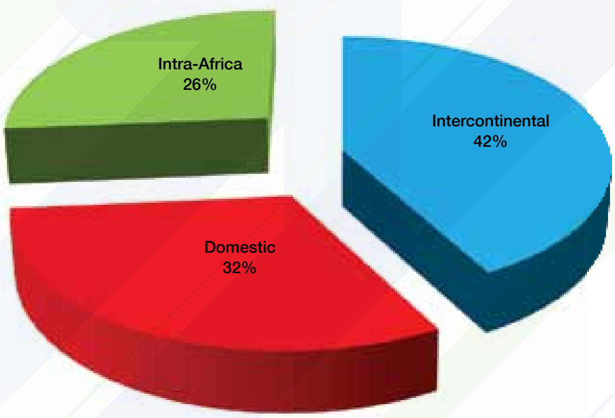


Source: AFRAA

Passenger Distribution

Intercontinental passenger market segment remains the biggest with 42% of all passengers travelling between Africa and other regions of the world. Compared to 2010, this represents a 2% decline. The domestic market segment also loss 2% share to 32%. As explained earlier, the loss of intercontinental and domestic traffic is the result of the Arab Spring and financial crisis within the EU. Intra-Africa segment gained 4% market share; from 22% in 2010 to 26% in 2011.

Fig 2.7: African Airlines Passenger Distribution 2011

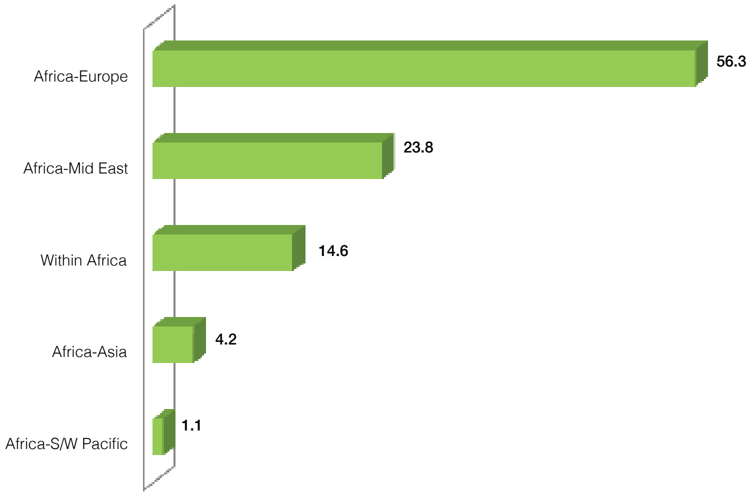


Source: AFRAA

Europe Remains Africa's Biggest Passenger Market

Europe accounts for 56.3% of total traffic originating or terminating in Africa. The high volume of traffic to/from Europe has attracted many carriers from Europe and increased the competition. Next to Europe is the Middle East at 23.8%, up from 14% in 2010. These traffic flows exclude data from North and South America, which is not available separately.

Fig 2.8: Passenger Traffic Flow between Regions (%)



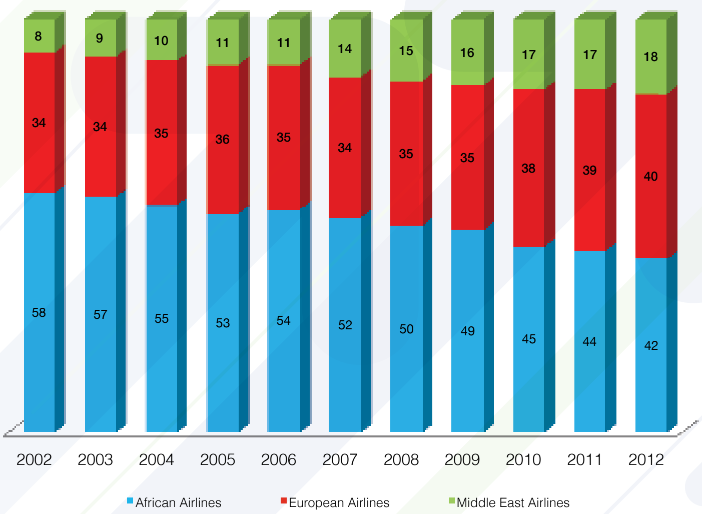
Africa's air transport demand has on average grown by around 5.6% annually in the last five years. In 2010, Africa presented the second-highest traffic growth region in the world at 12.9%. Domestic and international traffic (RPKs) expanded by 7.6% and 12.2% respectively. Africa's strong economic ties with Asia and increasing investments from developed regions are contributing to the positive trend in air travel demand.

Unfortunately, the political unrest in North Africa has negatively affected the 2011 performance of that sub-region and the continent as a whole.

Market Share

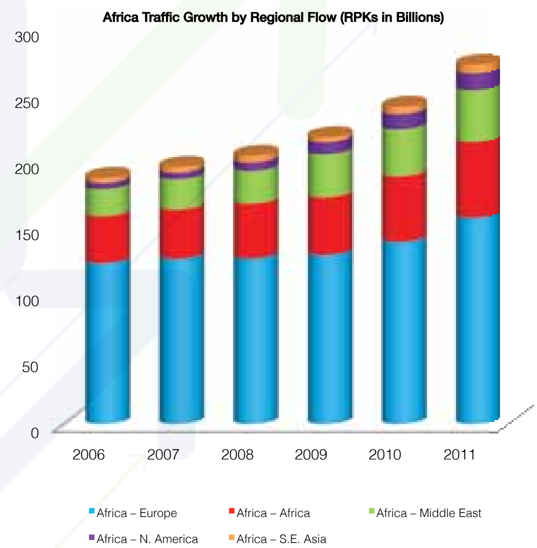
In the last 10 years African Airlines have lost 16% capacity on intercontinental routes to non-African Airlines. Over the same period non-African airlines market share grew from 42% to 58%. Middle East airlines since 2002 have more than doubled their capacity, growing by 125% in the last 10 years. European carriers' capacity inched up 18% in the period 2002-2012.

Fig 2.9: Share of Intercontinental Capacity to/from Africa, 2002-2012 (%)



Source: OAG Schedules iNet

Fig 2.10: Africa Traffic Growth by Regional Flow (RPKs in Billions)

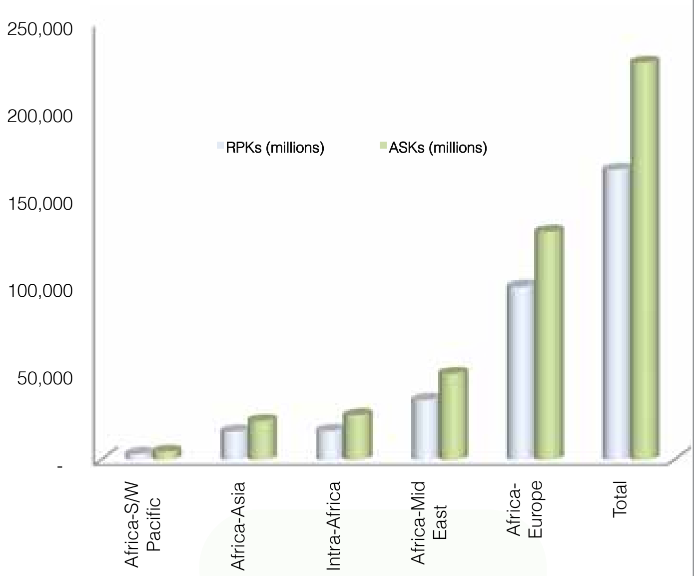


Source: AFRAA

Scheduled Revenue Tonne-Kilometres Performed and Available Capacity

Scheduled Revenue Passenger Tonne-Kilometres (RPKs) performed by African airlines increased by 13.3% to 272.85 billion from last year's 240.78 billion. On the other hand, capacity measured by Available Passenger Tonne-Kilometres was up 27.1% from 252.6 billion in 2010 to 346.52 billion. Average passenger load factor (PLF) dipped 0.3% to 68.8%. Global average PLF was 78.0%.

Fig 2.11: African Airlines Traffic Performance by Region: 2011



Source: AFRAA/OAG Schedules iNet

Fig 2.12: African Airlines RPKs & ASKs – 2007-2011

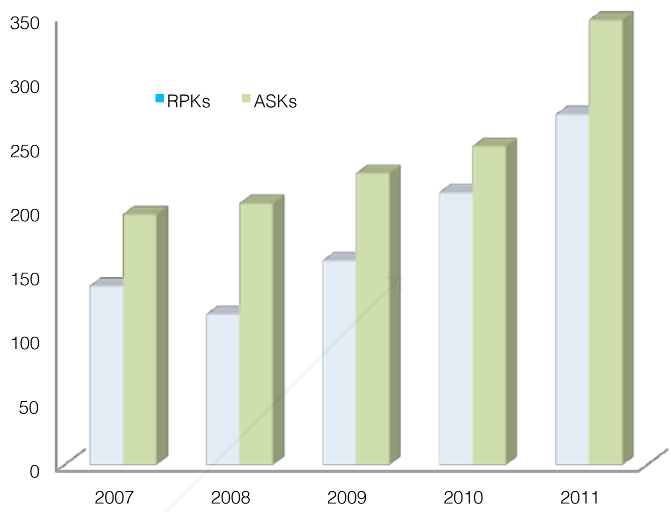
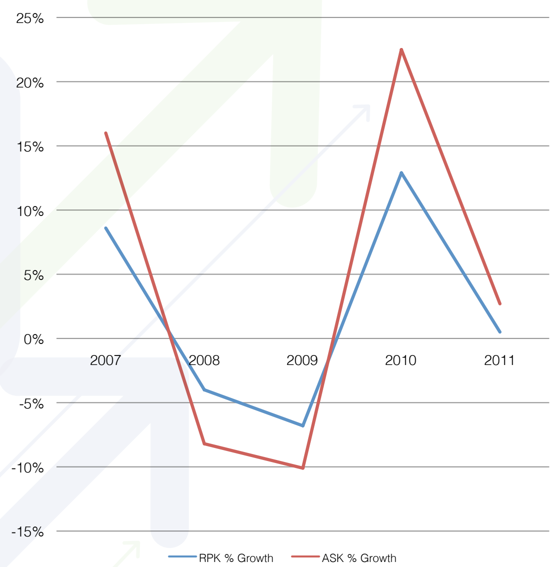


Fig 2.13: Africa Passenger Traffic and Capacity Annual Percentage Growth: 2007-2011

Fig 2.14: Africa Passenger Traffic and Capacity Annual % Growth Trend: 2007-2011

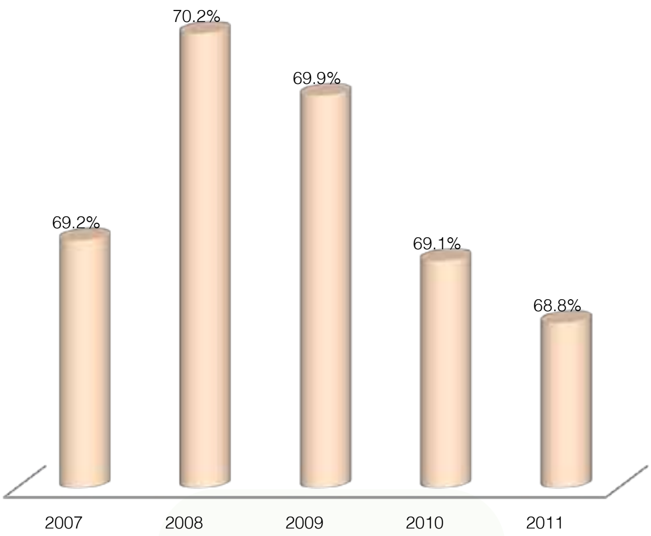


Passenger Load Factor

The imbalance of capacity and demand continues to create inefficiencies in many African airlines. The result is that average passenger load factor for 2011 was 68.2%, down 0.3% from what was achieved in 2010. All regions of the world except Africa had passenger load factors exceeding 75%. Global industry average load factor was 78%; a 9.2 percentage points above the load factor achieved by Africa.

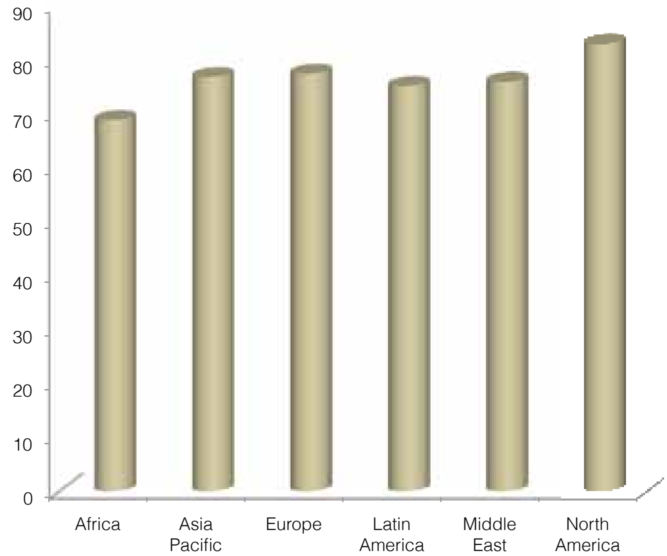
Passenger load factor achieved by AFRAA airlines improved marginally to 67.6%, while weighted load factor was 54.8%. The deployment of high-capacity aircraft on low and mid-density markets drives down load factor and also acts as a disincentive to more frequency where it may be needed.

Fig 2.15: Year-on-Year African Airlines Passenger Load Factor



Source: AFRAA/IATA

Fig 2.16: Passenger Load Factor by Region - 2011



Source: AFRAA/IATA

Africa saw a passenger LF decline of -0.3 and a weight LF drop of -0.7 in 2011. North America remains the region with the highest load factor of 83%. Weight load factor for the continent was however better at 68.1%. The only region that increased LF in 2011 was Latin America (1.2%).

Table 2.1: Passenger and Weight Load Factor for all Regions – 2011

	Passenger LF	% Change	Weight LF	% change
Africa	68.8%	-0.3	61.0%	-0.7
Asia Pacific	76.8%	-0.6	70.6%	-0.7
Europe	77.4%	-0.1	69.4%	-1.2
Latin America	75.1%	1.2	67.3%	0.3
Middle East	75.9%	-0.2	62.0%	-1.0
North America	83.0%	-0.1	61.8%	-1.1
Industry Average	78.0%	-0.3	66.7%	-0.9

Source: AFRAA/IATA

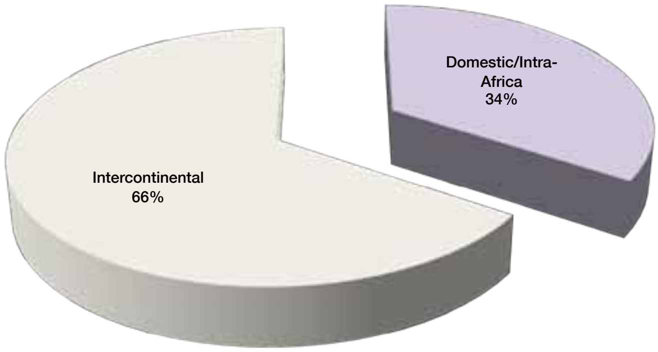
New Routes

The political crisis in North Africa did not significantly affect the development of new routes by African airlines. In 2011, 35 new routes were launched by 17 AFRAA member airlines to domestic, intra-Africa and intercontinental destinations. Of these 12 destinations were intercontinental with the other 23 points within the continent.

Table 2.2: New Destinations by 17 AFRAA Airlines in 2011

New Domestic, Intra-Africa & Intercontinental Routes	
Dakhla	Lagos
Saint Pierre	Libreville
Monrovia	Brazzaville
Sao Tome	Ndola
Enugu	Manchester
Abuja	Kinshasa
Madinah	Cape Town
Abha	Shanghai
Baghdad	Paris
Juba	Guangzhou
Port Said	Muscat
Malakal	Hangzhou
N'djamena	Milan
Ouagadougou	Jeddah
Johannesburg	Moscow
Hahaya	New York
Luanda	Porto

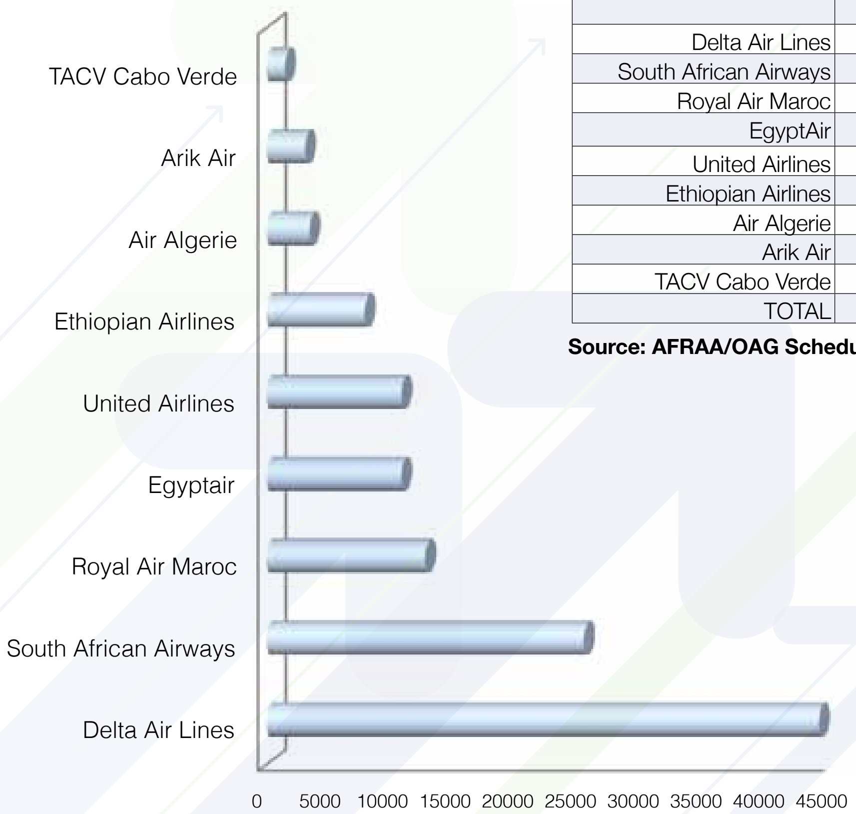
Fig 2.17: New Destinations by AFRAA Airlines in 2011



North America Operations

Delta Airlines, which began direct US-Africa flights in 2006 has continued its dominance on the Africa-North American route with almost 37% of the passenger capacity. Its average monthly frequency is about 180 flights. Another US carrier, United Airlines operates 44 flights a month out of Africa. The 2 North American carriers together operate 45.9% of all scheduled flights across the Atlantic. Seven African airlines together operate 237 flights per month across the Atlantic. This represents 54.1% of the capacity.

Fig 2.18: Operators Market Share on the Africa-USA Route



Source: AFRAA/OAG Schedules iNet

Table 2.3: Africa-North America Capacity Share

Airline	Flights per Month	Seats per Month	% Market Share
Delta Air Lines	180	43963	36.9
South African Airways	92	25260	21.2
Royal Air Maroc	54	12636	10.6
EgyptAir	31	10726	9.0
United Airlines	44	10736	9.0
Ethiopian Airlines	26	7826	6.6
Air Algerie	13	3419	2.9
Arik Air	13	3081	2.6
TACV Cabo Verde	8	1480	1.2
TOTAL	461	119127	100.0

Source: AFRAA/OAG Schedules iNet

Passenger Traffic Forecast

The forecast traffic growth on the African continent is projected at over 6% per annum over the next 18 years to 2030. Intra-Africa will witness average growth of 5.1% to 2030. This is above the global industry average of around 4.9% over the next 20 years.

Table 2.4: Passenger Traffic Forecast

Regions	RPKs in 2011 (billions)	Av. Forecast Growth (2012-2030)
Africa-Africa	57.48	5.10%
Africa-Europe	156.54	4.60%
Africa-Middle East	39.43	6.40%
Africa-North America	12.58	6.40%
Africa-Asia Pacific	6.82	7.50%

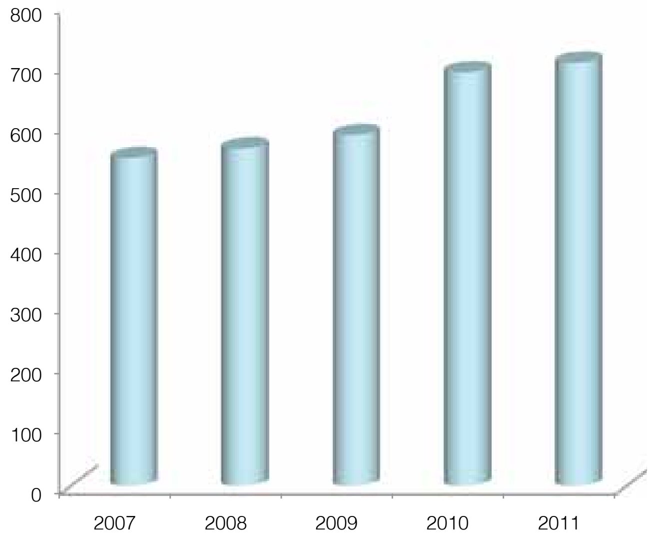
Source: Boeing Forecast

Passenger traffic growth forecast between Africa and other regions show variations, with some regions set to grow faster than others. Over the next 18 years, the fastest growth region will be Asia Pacific, with a revised growth rate of 7.5% per year followed by North America and the Middle East at 6.4% each. Europe will grow the least at 4.6% per year.

Freight Traffic

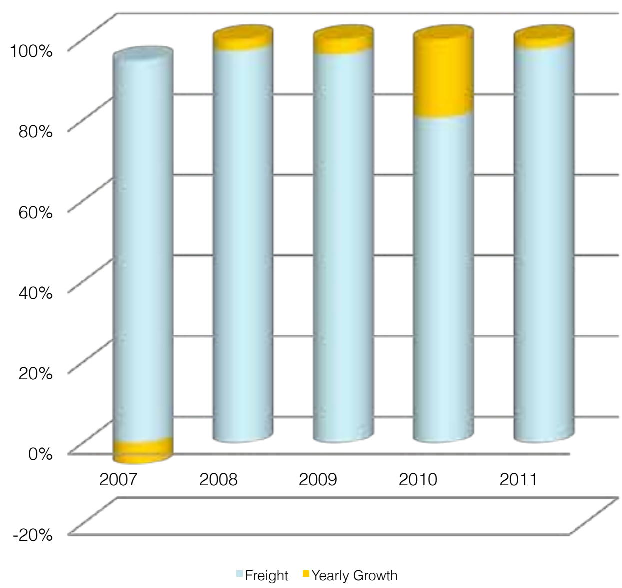
Air freight shipment in Africa is still very low. In 2011 the continent accounted for about 705,000 tonnes of total global freight carried. In FTKs, this represents a growth of 2.7% compared to 23.8% in 2010.

Fig 2.19: African Airlines Year-on-Year Freight Carried (000)



Source: AFRAA/IATA

Fig 2.20: Freight Carried by African Airlines: 2007-2011 (000)



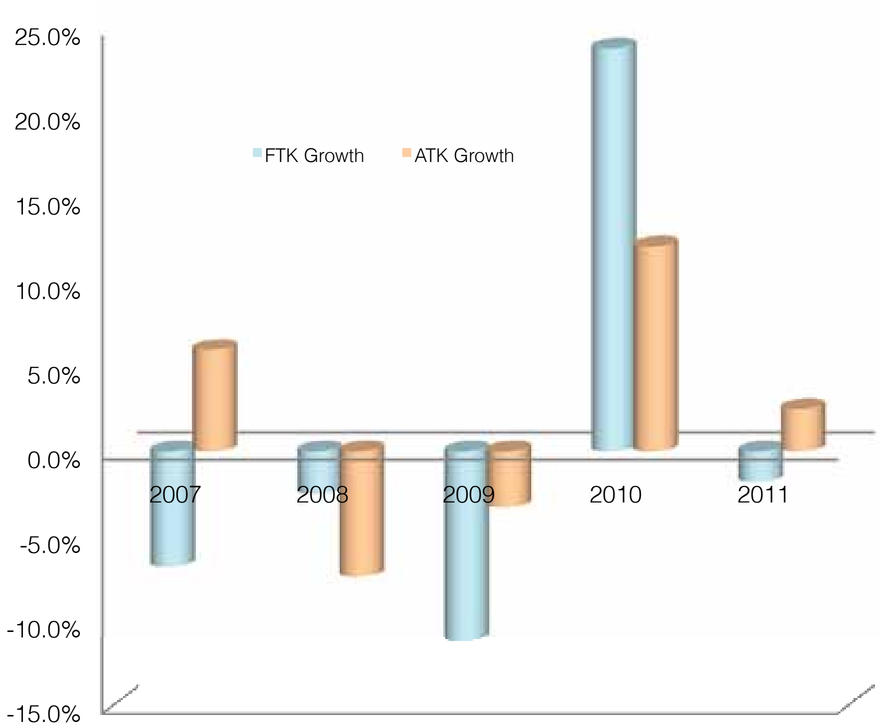
Source: AFRAA/IATA

About 70% of all freight carried is between Africa and other regions. The outbound freight is composed mainly of perishables such fresh fruits, vegetables, flowers and other agricultural produce while the inbound is manufactured goods, electronics and components.

AFRAA airlines in 2011 carried a total of over 615,275 tonnes. In the last 4 years freight carried has seen a gradual growth year-on-year. Growth in 2009 was a modest 2.9% but this substantially increased to 23.8% in 2010. In 2011 a decline of 1.85% was attained. The political situation in parts of the continent as well as the European financial crisis may be contributing factors to the low growth in 2011.

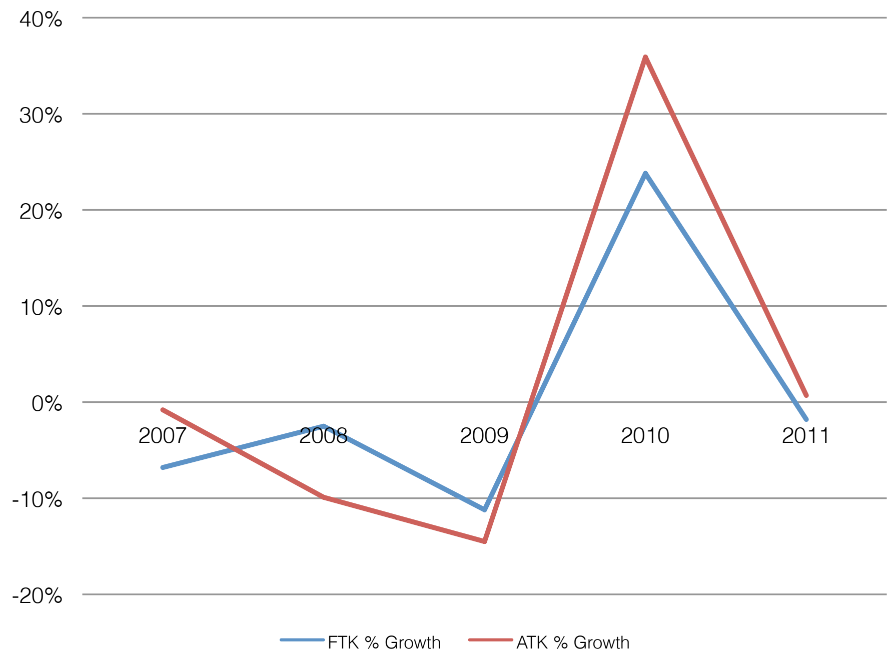
The failure by many airlines to develop the cargo component of their operations has led to dominance of this sector by non-African airlines. On the domestic and regional level, airlines have lost freight business to rail and road transporters due to lack of capacity and bureaucratic customs clearance processes at airports.

Fig 2.21: Africa Freight Traffic and Capacity Growth in 2011



Source: AFRAA/IATA

Fig 2.22: Africa Freight Traffic and Capacity Trend: 2007-2011



Source: AFRAA/IATA

Section Three>

Fleet Composition and Development

Global commercial airline fleet in 2011 was composed of 19,410 passenger aircraft and 1,760 freighters according to Boeing. Of this, Africa's passenger aircraft make up 680 (3.6%) and freighters are less than 10 aircraft. AFRAA airlines in 2011 operated a total of 556 aircraft up from 501 in 2010 (see details in appendix). Global passenger fleet will increase to 32,530 by 2030.

Table 3.1: World Aircraft Fleet – 2011

Region	No. of Aircraft	% of Total Fleet
Asia Pacific	4,410	22.7%
North America	6,610	34.0%
Europe	4,380	22.5%
Middle East	1,040	5.3%
Latin America	1,150	6.0%
C.I.S.	1,140	5.9%
Africa	680	3.6%
World	**19,410**	**100%**
Freighters (All Regions)	1,760	

Source: Boeing

Africa Fleet and Order Book

Africa fleet of 680 aircraft will almost double to 1,210 by 2030. The continent expects to purchase 800 new aircraft to augment the current fleet in the next 20 years. The fleet is composed of 420 single aisle jets, 140 twin aisle jets, 110 regional jets and about 10 large aircraft.

60% of the new fleet will be addition to the existing aircraft in operation while the other 40% will replace current old generation aircraft. Various forecasts indicate that single aisle and middle range aircraft would constitute the bulk of all new aircraft deliveries in Africa in the next 20 year to support intra-Africa traffic development.

Fig 3.1: Africa Fleet Composition 2011

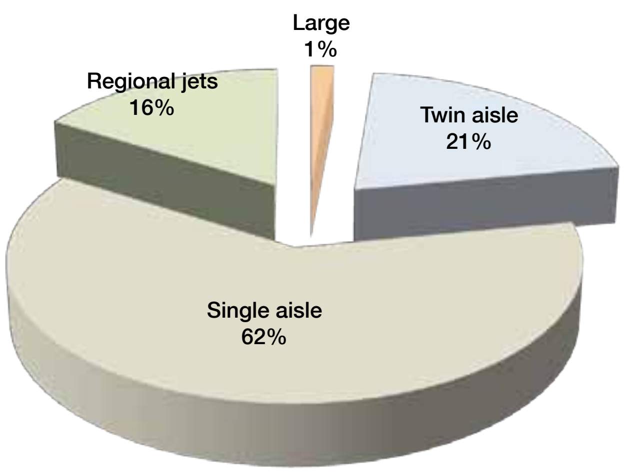
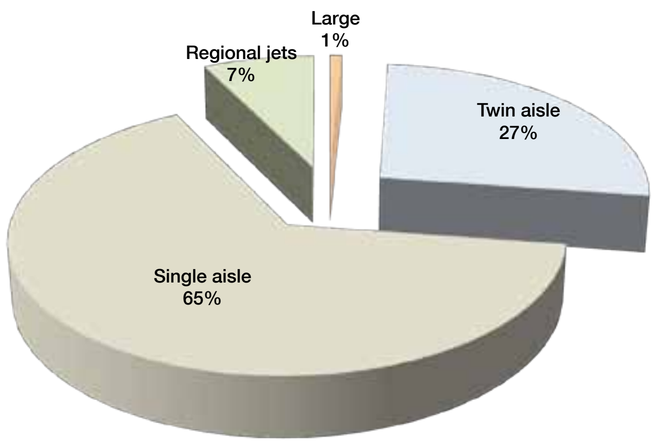


Fig 3.2 Expected Fleet Composition 2030



Section Four> Financial Performance

Performance of Airlines in 2011

IATA estimates the global commercial airline industry generated a net profit of US$7.9 billion in 2011, about half the profit of US$15.8 billion recorded in 2010. This profit is on revenue of US$534.3 billion.

On international schedule routes, IATA members are estimated to have made an operating profit of US$10.2 billion in 2011 and a net profit of US$4.3 billion on revenues of US$303.8 billion. African airlines are estimated to have broken even in 2011.

Operating Revenue and Expenses

12 of AFRAA airlines reported their financial results for 2011. The analysis is therefore limited to these airlines.

The 12 reporting AFRAA carriers total operating revenue was US$7.8 billion in 2011 compared to $9.4 billion in 2010. Operating expenses for the period was US$8.1 billion, resulting in an operating loss of US$270 million. The net result of the reported airlines is US$180 million. Of the 12 reporting airlines, 5 made profit while 7 reported losses.

Fig 4.1: 2011 Financial Results of some AFRAA Airlines (in Billions US$)

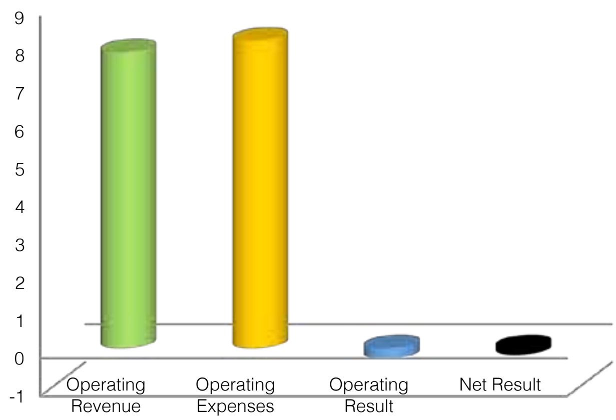


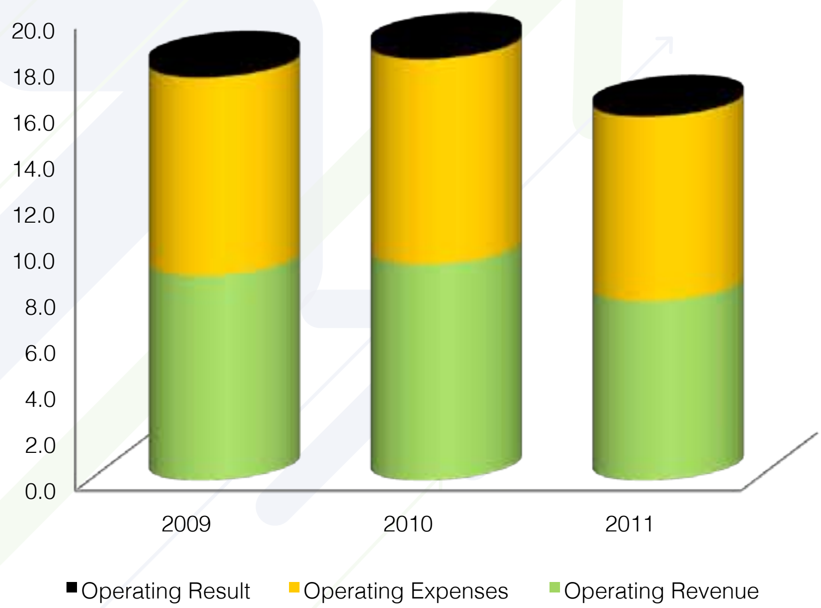
Table 4.1 Global Commercial Airlines Net Profit (in Billions US$)

Region	2009	2010	2011E
North America	-2.7	4.1	1.1
Europe	-4.3	1.9	0.7
Asia-Pacific	2.6	8	4.8
Middle East	-0.6	0.9	1.0
Latin America	0.5	0.9	0.3
Africa	-0.1	0.1	0.0
Global	-4.6	15.8	7.9

Fuel price

Jet A-1 fuel prices were higher in 2011 as a result of higher crude oil costs. In the year under review, the average price of a barrel of Jet A-1 fuel rose 40% to $127.50. This took average fuel price above the previous annual record of $126.70 per barrel set in 2008. The upward pressure on oil prices came from a combination of continuing strong demand from emerging economies and a supply squeeze by producers. Supply disruptions were also caused by the Arab Spring and its resultant impact on oil production in some Gulf States and North Africa in 2011.

Fig 4.2: Some AFRAA Airlines Financial Results



Section Five > Employee Productivity

This analysis is based on the reported data by some AFRAA member airlines.

The total number of people employed directly by AFRAA member airlines in 2011 declined by 7.1% to 74,236 from 79,947 in 2010. Airlines in an effort to improve efficiency and reduce staff cost are restructuring.

Fig 5.1: 2011 AFRAA Airlines Employees by Job Type

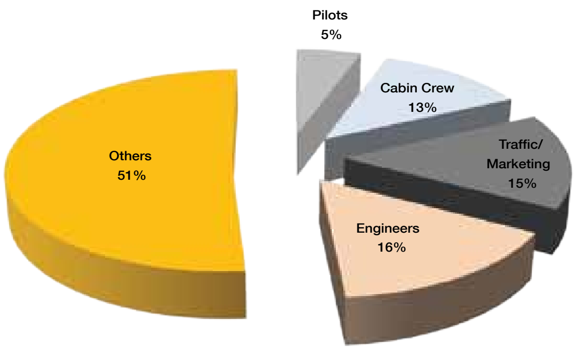


Fig 5.2: AFRAA Airlines Employment by Job Type

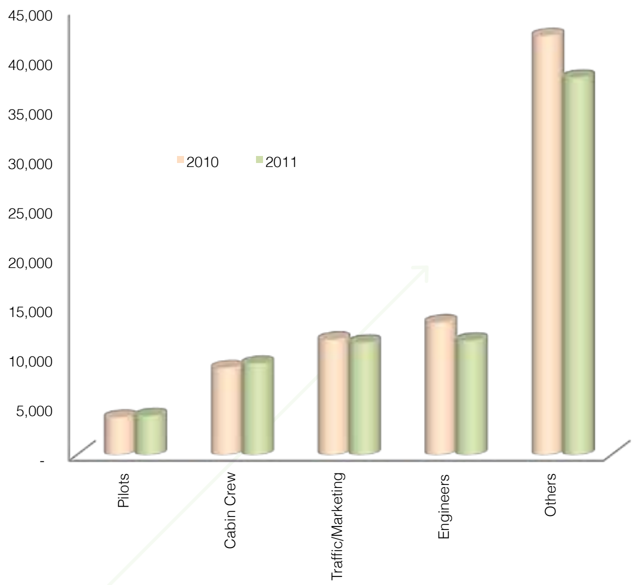


Table 5.1: Employee Performance Indicators

	2010	2011
RPK / Employee	144,300	207,500
Passengers / Employee	555	754
Employee / Aircraft	179	133
Revenue / Employee	US$117,300	US$105,070

Despite the 7.1% reduction in number of employees, the passengers/employee ratio improved by 35.9% compared to 2010. The employee/aircraft ratio went down by 25.7% from 179 in 2010 to 133 in 2011. Revenue per employee however dropped to US$105,070 from US$117,300 in 2011.

Section Six> Safety

Accident Statistics for 2011

The aircraft accident statistics for 2011 published by the flight Safety Foundation show that there were 39 fatal airline accidents worldwide with 551 fatalities. 5 of the accidents or 13% of the total took place in Africa with 142 fatalities (with 14 of them on the ground).

Fig 6.1: Africa Share of Total Accidents

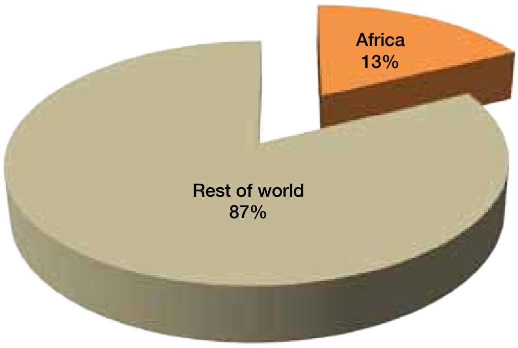
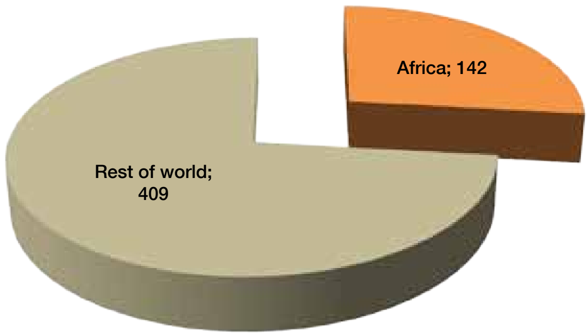


Fig 6.2: Accident Fatalities



The year 2011 was the safest year for Civil Aviation in Africa during the past 20 years, a remarkable improvement. The worst accident on the continent took place on 8 July when a Hewa Bora Airways Boeing 727-030 crashed in the DRC with 77 fatalities. The average age of the aircraft involved in fatal accidents in Africa was about 31 years. The Hewa Bora aircraft was 46 years old.

Three of the five accidents in Africa took place in the DRC. The DRC has consistently recorded high accident rates over the years while the rest of the continent has shown marked improvement.

The improvement in safety on the continent is due to the concerted efforts by various stakeholders including ICAO, IATA, AFRAA, AFCAC as well as States that are working within their capacities to enhance safety. Currently 38 African airlines are IOSA certified and the number of airlines seeking IOSA certification continues to increase. The various stakeholders need to keep up the momentum until accident rates on the continent reach world average rates. Particular efforts should be focused on the DRC which is the major contributor of accidents in Africa which negatively affects the image of the whole continent.

Progress on IOSA Registration

It is critical that safety on the African continent be improved for the industry to take advantage of the opportunities available. Currently, a total of 38 airlines on the continent have IOSA certification.

Airlines on IOSA Register

Table 6.1: AFRAA Member Airlines on IOSA Registry (22)

	Airline	Country of Registration
1	Afriqiyah Airways	Libya
2	Air Algerie	Algeria
3	Air Botswana	Botswana
4	Air Burkina	Burkina Faso
5	Air Madagascar	Madagascar
6	Air Malawi	Malawi
7	Air Mauritius	Mauritius
8	Air Namibia	Namibia
9	Air Seychelles	Seychelles
10	EgyptAir	Egypt
11	Ethiopian Airlines	Ethiopia
12	Interair South Africa	South Africa
13	Kenya Airways	Kenya
14	LAM Mozambique Airlines	Mozambique
15	Libyan Airlines	Libya
16	Precision Air Services	Tanzania
17	Royal Air Maroc	Morocco
18	Tunisair	Tunisia
19	South African Airways	South Africa
20	South African Express Airways	South Africa
21	Sudan Airways	Sudan
22	TAAG Angola Airlines	Angola

Source: IATA

Table 6.2: Non AFRAA member airlines on IOSA registry (16)

	Airline	Country of Registration
1	Air Austral	Reunion Islands
2	Air Cairo	Egypt
3	Air Memphis	Egypt
4	Almasria Universal Airlines	Egypt
5	ALS Limited	Kenya
6	AMC Airlines	Egypt
7	Arik Air	Nigeria
8	Comair	South Africa
9	Equaflight Societé SARL	Congo
10	Lotus Air	Egypt
11	Nouvel Air	Tunisia
12	SAFAIR (Proprietary) Ltd	South Africa
13	South African Airlink	South Africa
14	TACV Cabo Verde Airlines	Cape Verde
15	Tassili Airlines	Algeria
16	Trans Air Congo	Congo

Source: IATA

In partnership with the IATA Airline Training Fund (IATF), AFRAA has over the years delivered many safety courses to hundreds of airline personnel. In 2011, AFRAA delivered the following courses in 2011:

Table 6.3: Courses held in 2011

	Course	Venue and host	Dates
I. AFRAA courses			
1	Professional Skills for Instructors	Gaborone, Botswana, hosted by Air Botswana	10 – 14 January 2011
2	Aircraft handling and Ramp Supervision	Gaborone, Botswana, hosted by Air Botswana	25 – 30 April 2011
3	Reliability Analysis	Gaborone, Botswana, hosted by Air Botswana	2 – 4 May 2011
4	General Human Factors in Aviation	Windhoek, Namibia, hosted by Air Namibia	18 – 22 July 2011
5	Finance for Non- Finance Managers	Gaborone, Botswana, hosted by Air Botswana	29 – 31 August, 2011
6	Budgeting	Gaborone, Botswana, hosted by Air Botswana	7 – 11 November, 2011
7	CRM Threat and Error Management	Blantyre, Malawi, hosted by Air Malawi	30 Nov – 3 December 2011
8	CRM Threat and Error Management	Blantyre, Malawi, hosted by Air Malawi	30 Nov – 3 December 2011
II. JOINT AFRAA/ IATA courses			
1	Airline Internal Audit	Gaborone, Botswana, hosted by Air Botswana	14 – 18 March 2011
2	Management of Aviation Security	Nairobi, Kenya, hosted by Kenya Airways	26 – 30 April 2011
3	Emergency Planning and Response Management	Dar es Salaam, Tanzania, hosted by Precision Air	16 – 20 May 2011
4	Safety Management Systems for Airlines	Windhoek, Namibia, hosted by Air Namibia	23 – 27 May 2011
5	General Human Factors in Aviation	Windhoek, Namibia, hosted by Air Namibia	25 – 29 July 2011
III. Seminars and Workshops			
1	SIS Forum	Nairobi, Kenya, hosted by AFRAA/ IATA	10 - 12 May 2011
2	ICT Forum	Johanesburg, SA, hosted by SITA	31 May - 2 June 2011
3	IATA/ AFRAA Regulatory Forum	Nairobi, Kenya, hosted by AFRAA/ IATA/AFCAC	21 - 22 June 2011

The various initiatives by several stakeholders such as ICAO, IATA, AFCAC, AFRAA, and States to improve safety on the continent augur well for air transport development. To meet the growing demand there have been significant infrastructure developments, including the building of new airports and expansion and modernization of existing ones in countries such as Botswana, Egypt, Ethiopia, Ghana, Kenya, Mali, Nigeria, Senegal and South Africa.

AFRICAN AIRLINES ASSOCIATION
ASSOCIATION DES COMPAGNIES AERIENNES AFRICAINES
AFRAA

Vision

To be the leader and catalyst for the growth of a globally competitive and integrated African airline industry.

Mission

To serve African airlines, promote and protect their common interests.

Objectives

- To facilitate the establishment of industry best practices in safety and security.
- To be the repository of data and its analysis focusing on key issues in the aviation sector.
- To provide a platform for consensus building among member carriers.
- To facilitate joint projects between member airlines aimed at reducing their costs and increasing their revenues.
- To actively contribute in human capital development.
- To interact with the regulatory bodies to support and protect the common interests of all African airlines.
- To provide forums for members and industry partners to enhance their knowledge base and enhance mutual cooperation.
- To facilitate the development of environmental policies in keeping with industry best practices.
- To reflect the positive image of African airlines worldwide.

Section Seven > AFRAA Secretariat Value Added Activities

The activities of the Secretariat are guided by the AFRAA Business Plan 2011-2013 approved by the Executive Committee in February 2012. The Business Plan was predicated on the need to transform AFRAA and realign its activities with the diverse needs of members and delivering value added services to airlines. A key feature of the business plan is Key Performance Indicators for the Secretariat approved by the Executive Committee premised on the dictum that what gets measured gets done.

The report covers safety, training, industry costs, enhancing image of African airlines, environment, liberalization of air transport services, strengthening AFRAA's continental representation and leadership role. Below are highlights of the activities by the Secretariat to meet specified targets.

Safety and Security

Safety and Security are the top priorities of AFRAA. To enhance safety, AFRAA is committed to work with several stakeholders including ICAO, AFCAC, IATA, AASA and regional economic communities.
Aircraft accident statistics for 2011 published by the flight Safety Foundation show that there were 39 fatal airline accidents worldwide with 551 fatalities. 5 of the accidents or 13% of the total took place in Africa with 142 fatalities (14 on the ground). The worst accident on the continent involved a 46 year old Hewa Bora Airways B727-030 in the DRC with 77 fatalities. The DRC has consistently recorded high accident rates over the years and in 2011 accounted for 3 of the 5 accidents in Africa. In the past 20 years, 2011 turned out as the safest year for civil aviation in Africa. The improvement in safety on the continent is due to the collaborative efforts by various stakeholders including AFRAA, ICAO, IATA, AFCAC as well as States that are working within their capacities to enhance safety. Currently 38 African airlines (of which 22 are AFRAA airlines) are IOSA Certified and the number of airlines preparing for IOSA certification continues to increase.
The Secretariat undertook a number of actions to enhance safety as follows:

i. AFI Safety Summit

The AFI 2012 Safety Summit was convened by IATA and ICAO in Johannesburg, South Africa on 15 – 16 May 2012. The AFRAA Secretary General joined several other organizations including ICAO, IATA, AFCAC, ASECNA, ACI Africa, CANSO, IFALPA, AASA, Boeing and Airbus to endorse the AFI Strategic Safety Improvement Action Plan 2012- 2015. The Action Plan had specific actions by various stakeholders to ensure that safety levels in Africa reach world standards by 2015 including ensuring that all airlines on the EU blacklist are out of it by then. The Plan was endorsed by Ministers responsible for Aviation at a conference in Abuja in July 2012.

ii. Ministerial Conference in Abuja, Nigeria

The Secretary General attended the conference of Ministers responsible for Aviation held in Abuja on 16-20 July 2012 where he made two presentations. One presentation was on the EU blacklist, highlighting its unfairness while giving commercial advantage to EU carriers and another on economic benefits of safe air transport in Africa. The conference endorsed AFRAA's recommendations to condemn the EU Blacklist and instead, for the EU to seek dialogue with the AU on enhancing safety on the continent. The conference also endorsed our recommendations which we made together with IATA to make IOSA mandatory for all carriers to ensure that African aviation adopts industry best practice in safety and security.

iii. Safety Workshop in DRC

The AFRAA Secretary General made presentations at the Safety workshop held in Kinshasa, DRC on 7-10 August 2012. The workshop was sponsored by the US Department of Transportation under the Safe Skies for Africa program. Since the DRC consistently have fatal airlines accidents every year and has the highest accident rates in the world, AFRAA's presentations focused on the need for the authorities to take its safety oversight responsibilities seriously as the accident rates in the country were tarnishing the whole continent. AFRAA pledged its willingness to help in training and human capital development. Other stakeholders present including ICAO, IATA, AFCAC, IFALPA, the US Government and some Civil Aviation Authorities also pledged to assist in improving safety in this country.

iv. ISAGO

AFRAA attended the ACI Africa Annual General Assembly held in Livingstone, Zambia on 27 – 29 August. Among those that attended the Assembly were CEO's and senior executives of airports, ground handling companies and civil aviation authorities. The AFRAA Secretary General urged airports to only license Ground Handlers that have ISAGO certification. The same message was conveyed by the Secretary General at the Aviation & Allied Business Leadership Conference which was held in Windhoek on 2 – 4 September attended by several Ministers responsible for Aviation and senior executives from airports and airlines among others.

IATA regional office and AFRAA have agreed to work together to target at least five more ground handling companies to obtain ISAGO certification by 2013, focusing on BidAir, Sierra Leone Airports Authority, Air Madagascar, Lilongwe Handling, AHS Senegal/ SHS Senegal.

v. Safety Training

AFRAA is on target to complete 18 safety courses by December 2012. AFRAA was targeting to help at least three more airlines to be IOSA certified by 2013 and worked very closely with IATA, who sponsored six courses. One of the target airlines, Air Botswana, successfully completed the IOSA Certification in mid-2012 and is now a proud holder of IOSA certification and is now back as IATA member.

Training And Human Capital Development

The spectacular changes taking place in the aviation industry, including the need to adhere to industry best practices in safety, security and operational standards, globalization, advanced information technology, new aircraft models, fierce competition, unstable world financial markets, fluctuating and rising fuel prices and the need to meet the dynamic needs of customer, it is essential for airlines to have adequately trained personnel and visionary leadership to lead the organizations forward. Therefore training and developing people in various disciplines will allow carriers to adapt speedily and appropriately to the never-ending changes in the industry.

Developing people is among the top priorities of AFRAA to ensure that African aviation continues to grow using highly trained and capable personnel. Our mission, therefore, is to develop knowledge of the aviation business through training, seminars, workshops and conferences. We will continue to develop good links with reputable training organizations particularly IATA to create new synergies in delivering relevant training for the industry.

In 2011 the AFRAA Secretariat conducted 13 training courses attended by a total of 440 trainees from majority of member airlines. Our collaboration with the IATA Airline Training Fund (IATF) for the development of capacity continues to grow.

In 2011, IATF granted to AFRAA 5 free courses which were allocated to airlines to assist them in preparing for IOSA registration. In 2012, IATF availed to AFRAA 6 courses. Under the arrangement with IATF in 2012, AFRAA used Africa-based qualified, experienced and certified IATA trainers to provide the training which is very much appreciated.

To reduce airlines training costs, courses are mostly conducted at airlines home-bases instead of at the AFRAA Headquarters in Nairobi. This approach has enabled the beneficiary airlines to train more staff for each course.

The courses conducted in 2011 were two managerial courses and 11 safety/security courses. In addition three workshops were held namely SIS Forum in partnership with IATA, ICT Forum in collaboration with SITA and an AFRAA/IATA/AFCAC Regulatory Forum.

AFRAA Fuel Project

After several unsuccessful attempts at setting up a joint fuel project, AFRAA in 2011 launched the project with 8 participating airlines pooling their volumes and jointly tendering for their fuel requirements. The participating airlines signed individual contracts with the successful suppliers. Estimated savings from this project is around US$4.0 million. Participating airlines did not all start their contracts at the same time due to existing contracts that were expiring at different times.

Following the initial success, the second tender was issued in 2012 for jet fuel procurement in 2013. The number of airlines has increased from 8 to 14 and the pooled fuel volumes more than double to over 1.0 billion litres. Unlike the first tender, the 2013 procurement will be for the entire year (January to December). Negotiations are on-going and expected to conclude by the end of November.

In addition to pooling of fuel volumes, the Fuel Project is also concerned about and is addressing issues of product quality, supply reliability, insurance cover, fuel taxes/charges and monopoly suppliers at some stations.

In May 2012, a workshop jointly organised by AFRAA and IATA and hosted by Ethiopian Airlines in Addis Ababa discussed the high taxes, charges and fees on fuel at some stations. The workshop agreed on a strategy to lobby governments and other stakeholders for a reduction in taxes at specific locations. Through IATA, letters were written to the relevant ministries in Ghana, Uganda, Nigeria and Angola on the crippling impact of the high fuel taxes and charges and urging them to reduce them to encourage increased travel and affordable fares. The letters are receiving attention. The joint AFRAA/IATA lobbying efforts paid off with the 23 US cents reduction in taxes in fuel in Angola around the middle of this year. This resulted in a saving of about US120 million for all operators to Angola and about US$60 million for African airlines. Unfortunately, the tax reduction did not apply to airlines that were buying their fuel in Angola from a broker.

To develop capacity in fuel, AFRAA in partnership with IATA organised a two-day course on fuel basics at the AFRAA Headquarters in Nairobi in October. The course was attended by 25 trainees from 12 airlines. The very experienced and knowledgeable facilitators were from IATA namely Luis Felipe de Oliveira, Assistant Director Commercial Fuel Services and Mesias Gerardo, Manager, Commercial Fuel Services Industry Charges, Fuel & Taxation.

Taxes, Fees And Charges

Taxes, fees and charges on Africa airlines, and passengers are still among the highest in the industry. During the year, AFRAA did analysis of the various taxes and charges applied to airlines and identified the high taxes, charges and fees by States and service providers. This information enabled us to do some lobbying work for reduction. The AFRAA Fuel Steering Committee also held a meeting in Addis Ababa to discuss the impact of taxes, fees and charges on airlines and map out a strategy for campaigning for reduction. The meeting was jointly organised with IATA. Following the meeting, IATA wrote to governments and other stakeholders urging for a reduction of taxes to facilitate increased air travel. Meetings were also held with government officials and other stakeholders in Nigeria, Uganda and Angola. This lobbying effort by AFRAA and IATA resulted in the reduction of 23 US cents in jet fuel tax in Angola. A saving of about US$60 million in fuel cost was realised by African airlines.

At the request of AFCAC, AFRAA presented a paper to a meeting of African civil aviation authorities in Dakar in October. The paper highlighted the importance of air transport to the development of the continent and the crippling impact of high taxes, levies and charges. AFRAA called for adherence to ICAO guidelines on taxes and charges, the transparent fixing of taxes and charges, the application of taxes levied on projects in aviation and the reduction of high taxes in some states.

Route Network Coordination

AFRAA launched a Route Network Cooperation Task Force aimed at optimising the schedules of participating airlines, develop virtual alliances and deliver incremental revenues. 9 airlines have shown interest in the project. These are: ASKY Airlines, Ethiopian Airlines, Kenya Airways, Air Malawi, LAM-Mozambique Airlines, Royal Air Maroc, RwandAir, TAAG Angola. Specifically, the Task Force is working at attaining the following objectives:

- i. Growing flights connectivity between African cities and between Africa and other regions through coordinating each carrier frequencies, days of operation, and departure times
- ii. Developing the airline schedule on markets where the carriers have small or limited exposure
- iii. Adding new destinations under the airline own code without operating the route
- iv. Improving aircraft utilization and use aircraft resources in new markets
- v. Enhancing elapse time on beyond markets to increase carriers' market share
- vi. Analysing new market opportunities by specific carrier and potential partners
- vii. Reviewing opportunities to seasonally reduce schedules between two or more carriers in common markets

The project consultant is Sabre Airlines Solutions, which has vast experience is supporting similar initiatives in the Middle East and Latin America. A MoU was signed in March between AFRAA and Sabre. Following the first meeting of the Task Force, participation agreements and a works order were circulated to the airlines for signing and return to Sabre. Once this stage is completed, the Task Force will move to the next phase of reviewing the schedules and making decisions on alignment and adjustment. Sabre will provide regular reports on the project showing the incremental benefits to each airline. Preliminary analysis of some of the schedules of the airlines indicates realignments could improve connectivity and increase passenger numbers and load factors. The project potentially could increase passenger revenue significantly.

Ground Handling Cooperation

AFRAA is promoting a Joint Ground Handling Project to address some of the common challenges faced by airlines at some airports. Among others, the Ground Handling project aims to deliver value in the following areas:

i. Safety and safety governance at airports
ii. Sharing of airport audit findings to reduce cost
iii. Pilferage and baggage theft at airports
iv. Lobbying airports to only licence ground handlers with ISAGO certification
v. Reciprocal handling support and assistance in events of unscheduled diversion
vi. Joint/cross utilisation of airport ground staff
vii. Lobbying to reduce airport charges/fees and involvement of operators in fixing of such fees/charges
viii. Ensuring service delivery is in line with contracted service level agreements

ICT AND E-Commerce

Technology continues to evolve and this offers airlines opportunities for business development. The use of mobile applications to improve passenger experience and grow sales is expanding. Mobile money is also becoming a reality and some airlines are adopting this to generate additional revenue through e-commerce.

In line with the determination by IATA to eliminate paper from the rest of the passenger processing process, AFRAA and IATA held a joint Electronic Miscellaneous Document (EMD) implementation workshop in Nairobi in March 2012. The workshop was aimed at providing guidelines to airlines on how to best implement EMD within the IATA project deadline of December 2013. It was attended by 54 delegates from 17 African airlines. Four (4) system providers attended the event and took the opportunity to share with airlines their implementation experiences.

AFRAA also held two other events jointly with Sabre and IATA. The Sabre Airline Solutions summit was held in Nairobi in April and the AFRAA-SITA ICT Forum was held in Dubai in October. Both events were well attended by AFRAA airlines and the presentations and discussions were focused in updating airlines on industry ICT development trends and the solutions/support these partners can provide airlines. There were also exhibitions of some of the latest technology in use in the industry.

Aeropolitical Issues

Aero-political and regulatory priorities throughout the year were focused on pushing for the full implementation of the Yamoussoukro Decision (YD), the operationalization of the Executing Agency, development of non-binding Airlines Passenger Service Commitment Guidelines and updating airline legal and regulatory affairs officers of global and regional developments in the sector. The EU list of banned airlines once again contained many African States and airlines and AFRAA had to condemn the basis of the banning of airlines, lack of transparency and the failure by the EU to provide guidelines of how a State or airline can exit the list.

AFRAA continues to lobby governments and regulators to liberalise the market in Africa. AFRAA is also actively participating in the review of the work being done by a consultant with regards to the operationalization of the Yamoussoukro Decision. The Secretariat participated in the meeting hosted by AFCAC to review the initial draft report and a validation workshop. We are happy to note that the African Union is keenly working on operationalizing the implementation of the YD and this gives a lot of hope that soon our airlines will be free to fly to anywhere they want on the continent without restrictions.

To avoid the fractional development of consumer protection regulations by individual States and some Regional Economic

Communities (RECs), AFRAA undertook to formulate a non-binding airlines passenger service commitment guideline. The draft was send to AFCAC for their input and is now available on the AFRAA website. It will also be uploaded on the AFCAC website. This service commitment guideline will serve as the basis for the development of any future air passenger service level commitment by any African State or REC.

To ensure that African airlines are kept abreast with the global and continental regulatory and aero-political developments, a forum was jointly organised by AFRAA, IATA and AFCAC and hosted by LAM Mozambique Airlines in Maputo. The forum was attended mostly by airlines from the Eastern and southern Africa regions.

AFRAA continues to condemn the EU list of banned airlines which on the surface is intended to improve safety but behind the scenes is actually intended for competition purposes. We call upon the EU to stop its airlines from operating into African airspaces it considers unsafe instead of banning African operators. The failure of the EU to provide a clear exit path for banned States and airlines is very unfair.

Land Development

AFRAA has a vast piece of valuable unused land at its headquarters in Nairobi. The Association wants to develop this land to generate additional revenue. This will enable AFRAA to fund more activities for the benefit of members. The Executive Committee was presented proposed projects to be built on the land. After reviewing the proposals, the Committee directed the Secretariat to undertake a market and feasibility study to determine the optimal use of the land. Following competitive bidding the contract for the market/feasibility study was awarded to Afriland Valuers Limited of Nairobi. The report of the study will be discussed by the Executive Committee (EXC) meeting scheduled for 18 November 2012.

After the approval of the recommendations of the market study, a business plan for the project will be developed for approval by the EXC. The Secretariat believes that generating non-subscription revenue will not only assist in expanding the support AFRAA can give to members, but would also result in further reduction in membership subscription fees.

Communication and Information Dissemination

One of the key areas of focus by AFRAA is to enhance the knowledge base of its members and partners about developments within the African aviation industry. In this regard, AFRAA has developed a number of communication channels through which it disseminate accurate, relevant and timely information to member airlines, partners and other stakeholders in the industry. The quality of both electronic and printed publications has been improved to match the new image of AFRAA. AFRAA members, partners and other stakeholders now receive regular communication through a variety of general and specialised publications.

i. Annual Report

AFRAA Annual Report is the statistical presentation of the air transport performance yearly. This publication is printed in English and distributed at the Annual General Assembly with copies also mailed directly to all member airlines. A soft copy is posted on the AFRAA website.

ii. Africa Wings Magazine

This is a comprehensive quarterly full colour air transport magazine, dedicated to reporting on developments in the industry. It carries research articles on various sectors of the industry and also reports successes, challenges and changes taking place in African airlines and partner companies.

This publication is in English and French and distributed to all AFRAA member airlines and partners as well as other stakeholders. Electronic versions are uploaded on the AFRAA website.

The magazine design, layout, translation, printing and distribution are outsourced but AFRAA maintains control of editorial content, editing and proof reading. The cost of Africa Wings is met by resources generated through paid advertisements placed in the magazine.

iii. AFRAA News Bulletin

To keep members and partners abreast with current developments in African aviation, an electronic monthly newsletter is published and distributed to over 600 readers. The publications carry stories on management changes, aircraft deliveries, safety and security developments, new products and destination launch, technology adoption, airport improvements, etc. Capacity data is also analysed comparing Africa to other regions of the world.

iv. CEOs Briefing Paper

With the support of some AFRAA partners, a bi-monthly CEOs briefing paper is published and exclusively circulated to airline CEOs and other top Executives. The briefing paper is usually based on a topical subject of interest to top management and is presented in a concise, easy-to-read manner with illustrations in graphs, tables and charts.

v. AFRAA Website

The main source of both current and historical information about developments within AFRAA is the website. Redesigned last year, with improved aesthetics and now easy to navigate, the website attracts many visitors on a daily basis. AFRAA has developed internal capacity for regularly updating the website and uploading new information.
To assist in marketing member airlines with EASA/FAA certified training centres, aircraft simulators and MROs, the website has listed the contact details and types of training, simulators or maintenance service provided with a direct link to each of the training centres and MROs. AFRAA Partners have a dedicated page where details of their services can be seen in addition to a pointing link to each partner's website.
In partnership with PANAPRESS, visitors can download daily aviation development news from across Africa.

vi. New AFRAA Logo

In keeping with the rebranding of AFRAA, a new logo approved by the Executive Committee has been in use since 01 June 2012. The new logo features the map of Africa with the full name of the Association written in English and French over the map in an arc format and AFRAA written at the bottom. On the left and right sides of Africa are three wavy-curves of varying sizes signifying the dynamism and diversity of the industry in Africa. The logo comes in a blue colour with a touch of green to symbolise African Airlines resolve to conduct their business in an environmentally responsible manner.

vii. Data Partners

AFRAA has partnered with Innovata and OAG for the provision of statistics and data which we use in our reports to help our stakeholders make informed decisions.

New Members And Partners

AFRAA activities are supported by its members and partners in diverse ways. The Association continues to recruit new members and partners with the objective of providing support to as many airlines in Africa as possible. We continue to invite some non-member airlines to participate in activities organised by the Secretariat and also engage them through our various communication media.
This year, 4 airlines and 9 service providers joined AFRAA. The new airlines are: Camair-Co, Cameroon; ECAIR, Congo Brazzaville; Starbow Airlines, Ghana and Air Burundi, Burundi. The 9 new AFRAA Partners include: Aero Industrial Sales Co, FLYHT, Mercator, Airbus SAS, Rockwell Collins, OneSutra, Ilyushin Finance Co., Aviation News Ltd and OAG.
These additions bring the AFRAA membership to 33 airlines while the partnership programme has 29 service providers registered. The partners of AFRAA continue to provide invaluable support to the development of African air transport through financial and non-financial contributions to the Secretariat and member airlines. We greatly value their support.

Working With Other Organisations

AFRAA cooperates with the African Union Commission; other major industry organisations including IATA, AASA, AACO, ICAO, AFCAC, ACI-Africa; governmental and non-governmental bodies, Regional Economic Communities (RECs) – ECOWAS, EAC, COMESA, SADC, UEMOA; manufacturers and service providers. This collaboration accords AFRAA goodwill and a broad framework resources and assistance that benefits members, protecting their interest and provides support for better economic environment for their operations.
The cooperation with international and regional organisations has strengthened and consolidated AFRAA's continental role and enabled it to play the representation and leadership role expected. AFRAA will continue to seek ways of growing these beneficial partnerships for the betterment of African air transport.

Section Eight> AFRAA Airlines Individual Summary Facts

AFRIQIYAH AIRWAYS

Eng. Emhemed M. Elwani
Chairman and
Ag. Chief Executive Officer

ADDRESS
P.O. Box 83428,
Ali Khalifa Zaidi
St, Tripoli, Libya
Tel: +218 21
4440853/4446016/4444971
Fax: +218 21 4449128
SITA: TIPABXH
www.afriqiyah.aero

AFRAA MEMBERSHIP
Became member in 2002
Established in 2001

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	1
Regional	17
International	11

EMPLOYEES
1062

FLEET

Airbus 319	3
Airbus 320-200	5
Airbus 330-200	2

FLEET ON ORDER

Airbus 320-200	4

AIR ALGERIE

Mr. Mohamed Salah Boultif
Chief Executive Officer

ADDRESS
1 Place Maurice Audin,
Alger, Algerie
Tel: +213 21 637070
Fax: +213 21 744425
www.airalgerie.dz

AFRAA MEMBERSHIP
Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP

Aeroflot	Aigle Azur
Air Canada	Air China
Alitalia	Iberia
Korean Air	Lufthansa
Middle East Airlines	Qatar Airways
Tunisair	Turkish Airlines

DESTINATIONS SERVED

Domestic	30
Intra-Africa	09
International	29

EMPLOYEES
9,750

FLEET

Airbus 330-200	5
ATR72-500	12
Boeing737-800	17
Boeing 737-600	5
Boeing 767-300	3

Cargo

Lockheed L100-130	1

AIR BOTSWANA

Mrs. Sakhile Reiling
General Manager

ADDRESS
P.O. Box 92,
Gaborone, Botswana
Tel: +267 368 8406
Fax: +267 397 2983
www.airbotswana.co.bw

AFRAA MEMBERSHIP
Became member in 1991
Established in 1947

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Kenya Airways

DESTINATIONS SERVED

Regional	4
Intra-Africa	3

EMPLOYEES
355

FLEET

ATR42-500	3
ATR72-500	2
British Aerospace BAe 146-100	2

air burkina

Mr. Sergio Rosa
Chief Executive Officer

ADDRESS
29, Avenue de la Nation,
BP 1459 Ouagadougou,
Burkina Faso
Tel: +226 5049 2323
Fax: +226 50317174
www.air-burkina.com

AFRAA MEMBERSHIP
Became member in 2002
Established in 1967

OWNERSHIP STRUCTURE
AKFED/IPS consortium (part of the Aga Khan Development Network): 88%
Government: 5%
Other: 7%

COMMERCIAL PARTNERSHIP
Air Mali
Air France

DESTINATIONS SERVED

Domestic	2
Regional	5
International	1

EMPLOYEES
262

FLEET

Bombardier CRJ200	1
McDonnell Douglas 87	2

Air Madagascar

Mr. Hughes Ratsiferana
Chief Executive Officer

ADDRESS
31 Avenue de l'Indépendence,
BP 437, Antananarivo 101
Madagascar
Tel: +261 20 22 22222
Fax: +261 20 22 33760
www.airmadagascar.com

AFRAA MEMBERSHIP
Became member in 1975
Established in 1962

OWNERSHIP STRUCTURE

Malagasy state:	89.56%
ARO:	5.53%
SONAPAR:	2.53%
Air France:	1.65%
NY HAVANA:	0.32%
Staff:	0.39%

COMMERCIAL PARTNERSHIP
Air France
Kenya Airways
South African Airways
Thai Airways
Air Austral

DESTINATIONS SERVED

Domestic	13
Intra-Africa	8
International	4

EMPLOYEES
1,296

FLEET

Airbus 340-300	1
ATR42-320	1
ATR42-500	1
ATR72-500	2
Boeing 737-300	3
Boeing 767-300ER	3
Boeing 777-200	1
DHC-6 Twin Otter Series 300	3

air malawi
Africa's friendly airline

Mr. Patrick Chilambe
Chief Executive Officer

ADDRESS
P.O. Box 84, Blantyre, Malawi
Tel: +265 1820811
Fax: +265 1821396
www.airmalawi.com

AFRAA MEMBERSHIP
Became member in 1968
Established in 1964

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED

Regional	2
Intra-Africa	6
Intercontinental	1

EMPLOYEES
240

FLEET

ATR42-320	1
Boeing 737-200	2

Mr. Abderahmane Berthé
Chief Executive Officer

ADDRESS
Immeuble TOMOTA –
Avenue Cheick Zayed BPE
2286 Hamdallaye, Bamako
Mali
Tel: +223 20 700110
Fax: +223 20 295600

AFRAA MEMBERSHIP
Became member in 2008
Established in April 2005 (as CAM) and May 2009 (as Air Mali)

OWNERSHIP STRUCTURE
Aga Khan for Economic Development/ AKFED: 51%
Malian State: 20%
Agora Mali company: 21.66%
Malian shareholders: 7.34%

COMMERCIAL PARTNERSHIP
Air Burkina
Air Uganda
Air France

DESTINATIONS SERVED

Domestic	3
Regional	7
International	1

EMPLOYEES
213

FLEET

McDonnell Douglas 87	3
Bombardier CRJ 200	1
Beechcraft C1900	1

Mr. André Viljoen
Chief Executive Officer

ADDRESS
5, President John Kennedy Avenue,
Port Louis, Mauritius
Tel: +230 207 7903/23
Fax: +230 208 8530
www.airmauritius.com

AFRAA MEMBERSHIP
Became member in 1985
Established in 1967

OWNERSHIP STRUCTURE
Government: 44.42%
State Investment Corporation Ltd: 13.73%
Rogers & Co. Ltd: 13.52%
Air France: 8.50%
Air India: 7.06%
Pershing LLC: 5.85%

COMMERCIAL PARTNERSHIP
Air France
Malaysia Airlines
Air India
Emirates
South African Airways
Kenya Airways

DESTINATIONS SERVED

Regional	1
Intra-Africa	7
Intercontinental	17

EMPLOYEES
2,355

FLEET

Airbus 340-300E	2
Airbus 340-300	4
Airbus 319-100	2
Airbus 330-200	2
ATR 72-500	2

Mrs. Theo Namases
Ag. Chief Executive Officer

ADDRESS
Air Namibia (Pty) Ltd,
P.O. Box 731,
Windhoek, Namibia
Tel: +264 61 2996002
Fax: +264 61 2996003
www.airnamimbia.com.na

AFRAA MEMBERSHIP
Became member in 2000
Established in 1946

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
TAAG Angola

DESTINATIONS SERVED

Domestic	6
Regional	6
Intercontinental	2

EMPLOYEES
463

FLEET

Airbus 319-100	3
Airbus 340-300	2
Boeing 737-500	2
Embraer ERJ 135	4

FLEET ON ORDER

Airbus 319-100	2
Airbus 330-200	2

Mr. Kinfe Kahssaye
Chief Executive Officer

ADDRESS
Etiebets Place, 9th Floor, #21,
Mobolaji Bank Anthony Way,
Ikeja Lagos, Nigeria
Tel: +234 1 2711153
Fax: +234 1 2704335
www.flynigeria.com

AFRAA MEMBERSHIP
Became member in 2007
Established in 2004

OWNERSHIP STRUCTURE
Nicon Group: 48%
Virgin Atlantic Airways: 49%
IGI: 2%
Magami Holdings: 1%

COMMERCIAL PARTNERSHIP

Lufthansa	RwandAir
PrecisionAir	TAAG Angola
United Airlines	Yemen Airways
Royal Jordanian	Meridiana
Senegal Airlines	Turkish Airlines

DESTINATIONS SERVED

Domestic	10
Intra-Africa	16
Intercontinental	1

EMPLOYEES
635

FLEET

Airbus 330-200	2
Boeing 737 – 300	8
Boeing 737-400	1
Embraer E-190	2

Mr. Cramer Ball
Chief Executive Officer

ADDRESS
Air Seychelles,
Seychelles International Airport
P.O. Box 386
Victoria, Mahé, Seychelles
Tel: +248 391002
Fax: +248 391005
www.airseychelles.com

AFRAA MEMBERSHIP
Became member in 1993
Established in 1978

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Air France

DESTINATIONS SERVED

Domestic	8
Intra-Africa	3
Intercontinental	7

EMPLOYEES
878

FLEET

Shorts360	1
DHC-6 Twin Otter	4
Airbus 330-200	1
Airbus 3320-200	1

FLEET ON ORDER

Airbus 330-200	1

Capt. Milton Lusajo Lazaro
Ag. Managing Director and C.E.O

ADDRESS
Air Tanzania
P.O. Box 543
Dar es Salaam, Tanzania
Tel: +255 22 2197200
Fax: +255 22 2134069
www.airtanzania.com

AFRAA MEMBERSHIP
Became member in 1977
Established in 2002,
formerly Air Tanzania Corporation
established in 1977

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	3

EMPLOYEES
171

FLEET

Bombadier Dash 8- Q300	1

Mr. Innocent Mavhunga
Ag. Chief Executive Officer

ADDRESS
Air Zimbabwe Corporation,
P.O. Box AP 1 Harare, Zimbabwe
Tel: +263 4 575111
Fax: +263 4 575468
www.airzimbabwe.aero

AFRAA MEMBERSHIP
Became member in 1981
Established in 1946

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	2
Intra-Africa	3
Intercontinental	3

FLEET

Boeing 737-200	3
Boeing767-200	2
Xian MA60	2

Mr. Busera Awel
Chief Executive Officer

ADDRESS
BIDC-ECOWAS Building
128, Boulevard du 13 Janvier
P.O. Box 2988 Lomé-TOGO
Tel: +228 220 88 18
Fax: +228 220 89 00
www.flyasky.com

AFRAA MEMBERSHIP
Became member in 2010
Established in 2009

OWNERSHIP STRUCTURE
Private: Ethiopian Airlines, Ecobank, BIDC, BOAD, SAKHUMNOTHO Group Holding and other West and Central African private investors

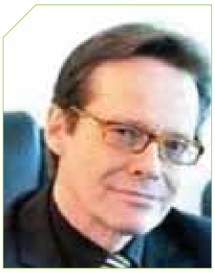
COMMERCIAL PARTNERSHIP
Ethiopian Airlines

DESTINATIONS SERVED

Domestic	1
Intra-Africa	19

FLEET

Boeing 737 (NG)-700	3
Bombardier Dash 8-400 NG	1



Mr. Alex Van Elk
Director General

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Boulevard de la liberté
BP 4852 Douala-Cameroun
Tel: (+237) 33 42 20 10 / 33 42 20 13
Fax: 33 42 20 30 / 33 42 30 15
33 42 29 80 / 33 42 29 85
http://www.camair-co.cm/

AFRAA MEMBERSHIP
Became member in 2012
Established in 2008
Commenced operations in 2011

OWNERSHIP STRUCTURE
100% by The Government of Cameroon

COMMERCIAL PARTNERSHIP
Air France

DESTINATIONS SERVED

Domestic	3
Itra-Africa	1
Intercontinental	1

FLEET

Boeing 737-700	2
Boeing 767-300ER	1

Ceiba

Mr. Santiago Nsobeya Efuman Nchama
Chief Executive Officer

ADDRESS
Calle Presidente Nasser
916, Malabo, Equatorial Guinea
Tel: +240 333098149 / 222013663
www.fly-ceiba.com

AFRAA MEMBERSHIP
Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE
100% by The State of Equatorial Guinea

COMMERCIAL PARTNERSHIP
Air France

DESTINATIONS SERVED

Domestic	2
Itra-Africa	14
Intercontinental	1

FLEET

ATR 42-320	1
ATR 42-500	1
ATR 72-500	2
Boeing 777-200LR	1

ECAir

Mrs. Fatima Beyina-Moussa
Director General

ADDRESS
1604, Avenue des Trois Martyrs
Quartier Batignolles
Brazzaville
République du Congo
Email: info@flyecair.com
www.flyecair.com

AFRAA MEMBERSHIP
Established in 2011
Became member in 2012

OWNERSHIP STRUCTURE

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Intra-Africa	2
Intercontinental	1

EMPLOYEES
29285

FLEET

Boeing 737-300	2
Boeing 757-200	1

EGYPTAIR

Captain Tawfik Assy
Chairman & CEO EgyptAir Holding Co.

ADDRESS
EGYPTAIR Admin. Complex
Middle Bldg. 3rd Floor
P.O Box 11776 Airport Road,
Cairo, Egypt
Tel: +202 2267 6542/2267 4650
Fax: +202 269 63334
www.egyptair.com

AFRAA MEMBERSHIP
Became member in 1968
Established in 1932

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP

Austrain Airlines	Air China
Asiana Airlines	British Midland
Brussels Airlines	Ethiopian Airlines
Gulf Air	Lufthansa
Malaysian Airlines	Singapore Airlines
South African Airways	Swiss Air
Spanair	SyrianAir
TAP Portugal	Turkish Airlines
United Airlines	Tunis Air
Scandinavian Airlines	Thai
LOT Polish Airlines	All Nippon Airways

DESTINATIONS SERVED

Domestic	8
Intra-Africa	15
Intercontinental	43

EMPLOYEES
31,725

FLEET

Airbus 300-600RF	2
Airbus 300B4-200F	2
Airbus 330-200	7
Airbus 330-300	4
Airbus 320-200	13
Airbus 321-200	4
Airbus 340-200	3
Boeing 737-800	18
Boeing 737-500	4
Boeing 777-200ER	4
Boeing 777ER-300	6
Embraer ERJ-170	12

FLEET ON ORDER

Boeing 737-800	2

Ato Tewolde GebreMariam
Chief Executive Officer

ADDRESS
P.O. Box 1755,
Addis Ababa, Ethiopia
Tel: +251 11 663 12 19
Fax: +251 11 661 14 74
www.ethiopianairlines.com

AFRAA MEMBERSHIP
Became member in 1968
Founded December 21, 1945
Started operation in 1946

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
ASKY Airlines
Star Alliance

DESTINATIONS SERVED

Domestic	17
Intra-Africa	43
Intercontinental	29

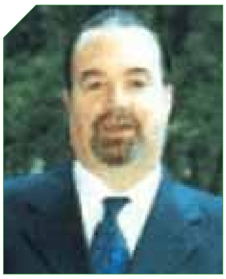
EMPLOYEES
6,201

FLEET

Boeing 737-800W [3 with Sky Interior]	7
Boeing 737-700NG	5
Boeing 747-200F	2
Boeing 757-200 ER	4
Boeing 757-260F	2
Boeing 767-300ER	12
Boeing 777-200LR	5
Boeing 777F	1
Boeing 787-8	2
McDonnell Douglas 11F	2
Q400 DHC-8	9

FLEET ON ORDER

Airbus 350-900	12
Boeing 777-200F	5
Boeing 777-300F	2
Boeing 787-8	8
Boeing 737-800	7
Q400	4



Mr. David Tokoph
Chairman & Chief Executive Officer

ADDRESS
Private Bag 8,
Johannesburg International
Airport 1627, South Africa
Tel: +27 11 622 7281
Fax: +27 11 622 6239
www.interair.co.za

AFRAA MEMBERSHIP
Became member in 2001
Established in 1993

OWNERSHIP STRUCTURE
Private Shareholding

COMMERCIAL PARTNERSHIP
Air Austral

DESTINATIONS SERVED

Intra-Africa	16

FLEET

Boeing 737–200	2
Boeing 727-200	3
Boeing 767-200ER	1

Dr. Titus Naikuni
Group Managing Director & CEO

ADDRESS
P.O. Box 19002, Nairobi, Kenya
Tel: +254 20 6422010
Fax: +254 20 823757
www.kenya-airways.com

AFRAA MEMBERSHIP
Became member in 1977
Established in 1997

OWNERSHIP STRUCTURE
Individual Kenyan shareholders: 30.94%
KLM: 26%
Government: 23%
Kenyan institutional investors: 14.2%
Foreign institutional investors: 4.47%
Individual foreign investors: 1.39%

COMMERCIAL PARTNERSHIP
Air Madagascar
Air Mauritius
Air Nigeria
LAM Mozambique
Air Botswana
Jet Airways
TAAG-Angola Airlines
Precision Air
Qantas
SkyTeam

DESTINATIONS SERVED

Domestic	4
Intra-Africa	42
Intercontinental	11

EMPLOYEES
4834

FLEET

Boeing 767 - 300ER	6
Boeing 777 - 200ER	4
Boeing 737 - 300	6
Boeing 737 - 700	4
Boeing 737 – 800	5
Embraer 170LR	5
Embraer 190	7

FLEET ON ORDER

Boeing 787-8	9
Embraer 190	8

Mrs. Marlene Mendes Manave
Chief Executive Officer

ADDRESS
P.O. Box 2060, Maputo,
Mozambique
Tel: +258 21 4687 10
Fax: +258 21 46 51 34
www.lam.co.mz/en

AFRAA MEMBERSHIP
Became member in 1976
Established in 1936

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Ethiopian Airlines
Kenya Airways
South African Airways
TAP Portugal
TAAG Angola Airlines

DESTINATIONS SERVED

Domestic	10
Intra-Africa	4
Intercontinental	1

EMPLOYEES
710

FLEET

Boeing 737-200	2
Embraer 190	2
Bombardier Q400	3

Mr. Emhemed M. Abrebish
Chief Executive Officer
& Member of Board of Directors

ADDRESS
P.O. Box 2555, Omar
Mukhtar Street/Tripoli. G.S.P.
Libyan Arab Jamahiriya,
Tripoli, Libya
Tel: +218 21 3614102
Fax: +218 21 3614815
www.libyanairlines.aero or
www.ln.aero

AFRAA MEMBERSHIP
Became member in 1968
Established in 1965

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Lufthansa

DESTINATIONS SERVED

Domestic	10
Regional	4
International	9

FLEET

Airbus 300-600	2
Airbus 320-200	4
Bombardier CRJ900	8
Airbus TR42-500	2

FLEET ON ORDER

Airbus 320-200	5
Airbus 330-200	4
Airbus350-800	4

Mr. Alphonse Kioko
Chief Executive Officer

ADDRESS
P.O. Box 70770,
Dar es Salaam, Tanzania
Tel: +255 22 286 0701
Fax: +255 22 286 0725
www.precisionairtz.com

AFRAA MEMBERSHIP
Became member in 2006
Established in 1991

OWNERSHIP STRUCTURE
Kenya Airways: 49%
Michael Ngaleku Shirima: 51%

COMMERCIAL PARTNERSHIP
Air Nigeria
Kenya Airways
RwandAir

DESTINATIONS SERVED

Domestic	11
Regional	5

EMPLOYEES
684

FLEET

ATR72-202/212/500	5
ATR42-300	4
BOEING 737-300	3

FLEET ON ORDER

ATR42-600	4
ATR72-600	1

Mr. Driss Benhima
Chief Executive Officer

ADDRESS
Aeroport CASA-ANFA,
Casablanca, Maroc
Tel: +212 522 912000
Fax: +212 522 912021
www.royalairmaroc.com

AFRAA MEMBERSHIP
Became member in 1977
Established in 1957

OWNERSHIP STRUCTURE
Moroccan Government: 96.80%
Private Investors: 3.20%

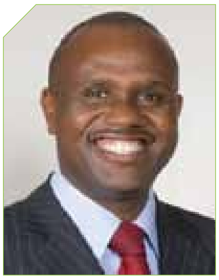
COMMERCIAL PARTNERSHIP
Brussels Airlines
Etihad Airways
Iberia
Turkish Airlines

FLEET

Airbus 321	4
Beechcraft AT7	4
ATR 42-600	2
ATR76-600	2
Boeing 737-700	6
Boeing 737-800	21
Boeing 737-400	5
Boeing 737-500	6
Boeing 747-400	1
Boeing 767-300	5
Douglas 73F (cargo)	1

FLEET ON ORDER

Boeing 787 Dreamliner	6



Mr. John Mirenge
Chief Executive Officer

ADDRESS
P.O. Box 7275 Kigali, Rwanda
Tel: +250 25250 3687
Fax: +250 25250 3686
www.rwandair.com

AFRAA MEMBERSHIP
Became member in 2009
Established in 2002

OWNERSHIP STRUCTURE
Government: 99%
Bayigamba Robert: 1%

COMMERCIAL PARTNERSHIP
Brussels Airlines
Precision Air Services

DESTINATIONS SERVED
N/A

EMPLOYEES
449

FLEET

Boeing 737-500	2
Boeing 737-800	2
Bombardier CRJ900 Next Gen	1
Bombardier Dash 8-200	1

FLEET ON ORDER

Bombardier CRJ900 Next Gen	1

Mr. Inati Ntshanga
Chief Executive Officer

ADDRESS
4th Floor, West Wing
Pier Development,
O R Tambo International Airport,
Johannesburg,
P.O. Box 101 O R
Tambo International
Airport, 1627, South Africa
Tel: +27 11 978 9900
Fax: +27 11 978 9456
www.flyexpress.aero

AFRAA MEMBERSHIP
Became member in 2003
Established in 1994

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
South African Airways
Mozambican Airlines – LAM
SA Airlink
Congo Express

DESTINATIONS SERVED

Domestic	5
Intra-Africa	11

EMPLOYEES
1015

FLEET

Bombardier CRJ 200ER	12
Bombardier CRJ 700	2
Bombardier Dash 8-Q300	7
Bombardier Dash 8-Q400	2

FLEET ON ORDER

Bombardier Dash 8-Q400	4

Mr. Vuyisile Kona
Chairman Board of Directors & Ag. CEO of SAA

ADDRESS
Floor 5, Block G, Airways Park,
OR Tambo International-Johannesburg,
South Africa
Tel: +27 11 978 1908
Fax: +27 11 978 6055
www.flysaa.com

AFRAA MEMBERSHIP
Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP

Air Mauritius	Air China
Air India	Air Mauritius
Air New Zealand	All Nippon Airways
Asiana Airlines	EgyptAir
Emirates	Ethiopian Airlines
JetBlue Airways	SWISS
Lufthansa	Mango
Qantas Airways	SAS
Saudia	Singapore Airlines
TAP Portugal	Thai Airways
United Airlines	Virgin Atlantic Airways
South African Express	
LAM – Mozambique Airlines	

DESTINATIONS SERVED

Domestic	5
Intra-Africa	26
International	32

EMPLOYEES
9,209

FLEET

Airbus 319-130	11
Airbus 330-200	5
Airbus 340-200	5
Airbus 340-300	8
Airbus 340-600	9
Boeing 737-300F	2
Boeing 737-200F	1
Boeing 737-800	15

FLEET ON ORDER

Airbus 320-200	10
Airbus 321-200	10
Airbus 330-200	1

Capt. Kwaku Nimoh Mensah
Co-Chief Executive Officer

Dr. Brock Friesen
Co-Chief Executive Officer

ADDRESS
832 First Street
P O Box K026 Kanda,
Accra – Ghana
Tel: +233 245000000 or
18181 on MTN
www.flystarbow.com

AFRAA MEMBERSHIP
Fully owned subsidiary of
ASF Limited, a Ghanaian
private company

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	3
Regional	4

EMPLOYEES
213

FLEET

British-Aerospace BAe 146-300	3

FLEET ON ORDER

British-Aerospace BAe 146-300	1
British-Aerospace BAe 146-200	1

Eng. Adil Mohamed Ahmed Yousif
Managing Director

ADDRESS
P.O. Box 253, 161, Block 10,
Obeid-Khatim Street, Riaydh,
Khartoum, Sudan
Tel: +249 9123 05604
Fax: +249 183 243717
www.sudanair.com

AFRAA MEMBERSHIP
Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE
Government: 51%
Private: 49%

COMMERCIAL PARTNERSHIP
Nasair

EMPLOYEES
1840

FLEET

Airbus A300B4-600R	3
Airbus A320-200	1
Fokker 50	3
Yakovlev Yak-42D	1

Mr. António Luis Pimentel Araujo
President and CEO

ADDRESS
123, Rua da Missao,
Luanda, Angola
Tel: +244 222 327596
Fax: +244 222 390739
www.taag.com

AFRAA MEMBERSHIP
Became member in 1978
Established in 1938

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Air France
Air Namibia
Air Nigeria
British Airways
Brussels Airlines
Iberia
Lufthansa
LAM Mozambique
Kenya Airways

DESTINATIONS SERVED

Domestic	12
Intra-Africa	10
Intercontinental	7

EMPLOYEES
3,281

FLEET

Boeing 737-200	2
Boeing 737-200C	1
Boeing 737-700	4
Boeing 737-700C	1
Boeing 777-200ER	3
Boeing 777-300ER	2

Mr. Rabah Jerad
Chairman & President

ADDRESS
Boulevard 7 Novembre 1987,
2035 Tunis Carthage, Tunisia
Tel: +216 7083 7000
Fax: +216 7083 6100
www.tunisair.com

AFRAA MEMBERSHIP
Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE
Government: 74%
Others: 26%

COMMERCIAL PARTNERSHIP
Air France
Air Namibia
Air Nigeria
British Airways
Brussels Airlines
Iberia
Lufthansa
LAM Mozambique
Kenya Airways

DESTINATIONS SERVED

Domestic	12
Intra-Africa	10
Intercontinental	7

EMPLOYEES
3,281

FLEET

Airbus 300-600	3
Airbus 319-100	4
Boeing 737/600	7

FLEET ON ORDER

Airbus 320-200	8
Airbus 350-800	3

Mrs. Maureen Dlamini
Chief Executive Officer

ADDRESS
Petroda House, 2nd Floor,
Great East road, Rhodes Park,
Lusaka, Zambia
Fax: +260 211 257 631
www.flyzambezi.com

AFRAA MEMBERSHIP
Became member in 2009
Established in 2008

OWNERSHIP STRUCTURE
Private

COMMERCIAL PARTNERSHIP
Kulula
Proflight

DESTINATIONS SERVED

Intra-Africa	7

EMPLOYEES
170

FLEET

CRJ-200ER	2

Section Nine> Airline MROS

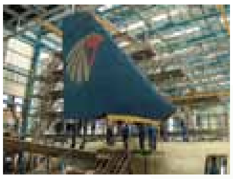
FAA or EASA Certified African MROs

Air Algerie Technics
Contact: Houari Boumediene Airport
Dar el Beida-Algiers-Algeria
Maintenance Base
Direction Technique
S/D Commerciale
Tel/Fax: + 213 21 50 93 38
E-mail: dah-technics@airalgerie.dz

Royal Air Maroc
Contact: Aeronautical Maintenance Centre
Tel: +212-22-499000
E-mail: ciae@royalairmaroc.com

Atlantic Air Industries Maroc
Contact: Mr. Bécaye BA
Directeur Général
Tel: +212 (0) 523 297 724
Fax: +212 (0) 523 297 730
Mobile: +212 (0) 661 251 702
E-mail: becaye.ba@aai-eu.fr

Snecma Engine Services
Contact: Mr. Alexandre BRUN
General Manager
Tel: +(212) 522 536 900
E-mail: snecma.morocco@snecma.ma



EgyptAir Maintenance and Engineering
Contact: Eng. Khaled Omar
Advertising & Communication
Directorate
Cellular: + 2 0122 2152757
Office: +2 02 22656855/202-22657445
Fax: +2 02 22656873 / 202-22685749
E-mail: advertising_me@egyptair.com /
contactus_me@egyptair.com

South African Airways Technical
Contact: Mr. Mike Kenny
Executive Manager Business
Development & Sales
Tel: +27119789993
E-mail: mikekenny@flysaa.com /
SATMarketing@flysaa.com

Ethiopian Airlines
Contact: Mr. Amare Gebreyes,
A/Director, MRO Sales and Marketing
Tel: +251 116 651191 / 251 116 651192
Fax: +251 116 651200
E-mail: Amareg@ethiopianairlines.com

Tunisair Technics

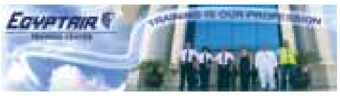
TunisAir Technics
Contact: Mr. Naceur Bouraoui
Director, TunisAir Technics
Tel: +216 70 837000 EXT. 3111.
E-mail: ali.saidane@tunisair.com.tn

Libyan Aircraft Engineering and Maintenance
Contact: Mr Abdulla A. Mohamed
Maintenance & Engineering Director
Tel: +218 215635668
E-mail: a.abonaama@laem.ly / anaama09@
yahoo.com

Section Ten> Airline Training Centres

FAA or EASA Certified Training Centers

Aldawlya for Training and Science
Contact: Mr. Abdulati Elmeshkhi
CEO
Tripoli, Libya
Tel/fax: +218 213622811/+218 7242395
E-mail: a.elmeshkhi@aldawlya-trn.com



EgyptAir Training Centre
Contact: Eng Tarek Darwish
General Manager, Technical Train
Tel: +20-10-661-5367
E-mail: technical.traininggm@egyptair.com

Ethiopian Aviation Academy
Contact: Mr. Amare Gebreyes,
A/Director, MRO Sales and Marketing
Tel: +251 116 651191 / +251 116 651192
Fax: +251 116 651200
E-mail: Amareg@ethiopianairlines.com

Kenya Airways Pride Centre
Contact: Dr Mbithe Anzaya
Head of Learning and Development
Tel: +254 20 264 22846/64
E-mail: learning.development@kenya-airways.com

Royal Air Maroc Academy
Contact: Mr. Mohamed Mrabet
Director General, RAM Academy
Tel: +212 5 22912543
Fax: +212 (0)22912581
E-mail: ramacademy@royalairmaroc.com

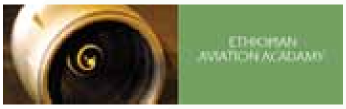
Tunisair Training Centre
Contact: Mr. Khaled Essafi
Director, Training Centre
Tel: +216 70 837 000 Ext. 2914
E-mail: khaled.essafi@tunisair.com.tn

Section Eleven> Providers of Aircraft Simulators

Airlines With Aircraft Simulators

Aviation Training Centre of Tunisia (ATCT)
2 A320 aircraft simulators
Contact: Thouraya Ayadi
General Director
Tel: +216 71911811
Fax: +216 71911606
E-mail: atct@atct.com.tn

EgyptAir Training Centre
A320, A330, A340, B737NG and B777
full flight simulators
Tel: +202 2265 6262
Fax: +202 2265 6240
E-mail: trainingcenter@egyptair.com



Ethiopian Aviation Academy
B737NG and B757/B767
full flight simulator trainings
Contact: Mr. Amare Gebreyes,
A/Director, MRO Sales and Marketing
Tel: +251-116-651191 / 251-116-651192
Fax: +251-116-651200
E-mail: Amareg@ethiopianairlines.com

Kenya Airways Pride Centre
B737 NG full flight simulator
Contact: Dr. Mbithe Anzaya
Head of Learning and Development – Pride Centre
Tel: +254 20 264 22846/64
E-mail: learning.development@kenya-airways.com

Section Twelve> AFRAA Partners

Profiles and Contacts

Aero Industrial Sales Company, (AIS), located at the global aviation hub: The New York JFK International Airport, is an FAA AC 0056A / ASA-100 accredited distributor, for over twenty five years, of commercial aviation spare parts, avionics, components, chemicals as well as Ground Support Equipment, (GSE).

Subjected to regular FAA/ASA-100 surveillance and audit, AIS maintains up- to-date Inspection and Quality Control System.

And also, led by a veteran who participated in the initial provisioning for the first commercial jet aircraft that ever landed in the African Continent – the Boeing B720B - delivered to Ethiopian Airlines in 1962, and supporting the latest airplanes to date, AIS has taken the steam out of the word AOG.

Whether your need is for basic standards or major components of any flying Boeing airplane – from classic 727 to the current 777 – a GSE of a small baggage tractor or a giant wide-body Towbarless push-back, whether you are a national carrier or a one cargo airplane operator, AIS, with its ideal location – JFK – is your solution when AOG strikes. For more information, Please visit the website: www.aeroindustrialsales.com

Contact Person:
Mr. Mohammed Mahmoud
President
Aero Industrial Sales Company, (AIS),
Tel: (718) 949-3300
Fax: (718) 949-9898
Email: mohammed@aeroindustrialsales.com
URL: www.aeroindustrialsales.com

Contact Person:
Mr. Dahir Mohammed
V.P. Sales & Marketing
Aero Industrial Sales Company, (AIS),
Tel: (718) 949-3300
Fax: (718) 949-9898
Email: dahir@aeroindustrialsales.com

Airbus is the world's leading aircraft manufacturer whose customer focus, commercial know-how, technological leadership and manufacturing efficiency have propelled to the forefront of the industry.

Airbus' modern and comprehensive product line comprises highly successful families of aircraft ranging from 100 to more than 500 seats: the single-aisle A320 Family, the wide-body long-range A330/A340 and the all-new next generation A350 XWB Family, and the double-deck A380. Airbus also offers freighter versions of its A330, while the military division designs, develops and produces a comprehensive range of highly versatile products for military and "civic"/humanitarian missions.

Across all its fly-by-wire aircraft families Airbus' unique approach ensures that aircraft share the highest possible degree of commonality in airframes, on-board systems, cockpits and handling characteristics, which reduces significantly operating costs for airlines.

Airbus itself is a truly global enterprise of some 55,000 employees, with fully-owned subsidiaries in the United States, China, Japan and in the Middle East, spare parts centres in Hamburg, Frankfurt, Washington, Beijing and Singapore, training centres in Toulouse, Miami, Hamburg and Beijing and more than 150 field service offices around the world. Airbus also relies on industrial co-operation and partnerships with major companies all over the world, and a network of some 1,600 suppliers in 30 countries. Airbus today consistently captures about half of all commercial airliner orders.

Contacts
Mr. Hadi Akoum
Vice President Sales
Africa and Indian Sub-Ocean Customer Affairs
AIRBUS

1 Rond-Point Maurice Bellonte
31707 Blagnac Cedex, France
Tel: +33 5 61 93 31 39
Fax: +33 5 67 19 15 31
Email: hadi.akoum@airbus.com

Technology, Brighter, Bolder, Better innovation

The leading provider of IT solutions to your tourism and travel industry

Amadeus is a leading transaction processor for the global travel and tourism industry, providing transaction processing power and technology solutions to both travel providers (including full service carriers and low-cost airlines, hotels, rail operators, cruise and ferry operators, car rental companies and tour operators) and travel agencies (both online and offline).

The company acts both as a worldwide network connecting travel providers and travel agencies through a highly effective processing platform for the distribution of travel products and services (through our Distribution business), and as a provider of a comprehensive portfolio of IT solutions which automate certain mission-critical business processes, such as reservations, inventory management and operations for travel providers (through our IT solutions business).

Headquarters Address:
AMADEUS IT GROUP SA
Salvador de Madariaga, 1
E-28027 Madrid, Spain
T+34 91 582 7740
URL: www.amadeus.com

Contact Person:
Ms. Barbara Moreno
Senior Marketing Executive
Airline Distribution Marketing
Amadeus IT Group SA
T: +34 91 582 0209
M: +34 648 038 767
F: +34 91 582 1353
E: bmoreno@amadeus.com

And
Mr. Paschal Wafula
Account Manager
East Africa & Indian Ocean Islands
Airline IT & Distribution
Amadeus IT Group SA
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American General Supplies, Inc. (AGS) is an after-market parts business established in July 1982 as a commercial aircraft spare parts supplier in Chicago. In the past 25 years AGS has diversified and constantly grown to become a reliable full service supplier. The diverse activities of AGS include, but are not limited to the following:

- Commercial aircraft spare parts supply including all related materials and equipment such as shop and ground support equipment
- Aircraft, engines, and other component maintenance through marketing alliance and maintenance agreements with organizations that have the capability, such as Sabena, Avborne, Ethiopian Airlines, etc.
- Technical assistance to customer airlines through personnel secondment on site and /or providing training in the USA
- Facility audits and capability development for customer airlines;
- Technical writing assistance such as maintenance program, technical policies and procedures, etc.
- Surplus material consignment handling for customer airlines
- Supporting customer airlines as Purchasing Agents
- Providing financing services to customer airlines with flexible payment terms

AGS is committed to render better service through its well-known quality and safety standards and always strives to meet its customers' needs.

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Atlantic Air Industries Maroc (AAI Maroc) is a subsidiary of Atlantic Air Industries that was started in October 2008, in a country in which the local market is in full swing and showing a great international attractiveness.

Atlantic Air Industries Maroc is located in Benslimane, near Casablanca. Under EASA Part 145 approval, It is a secondary base of Atlantic Air Industries France, with facilities approved by the manufacturers ATR and Embraer. In addition to the EASA approval, AAI Maroc also has Moroccan, and other West/Central Africa CAA approvals. AAI Maroc was opened to provide very high quality and cost competitive maintenance services to operators based in North/West/Central Africa and Southern Europe.

AAI Maroc is renowned for its integrated solutions and high technical expertise across Africa and Southern Europe. Beyond its know-how ensuring higher technical reliability, it offers operators & aircraft owners competitive prices which warranty them lower maintenance and ownership costs. Under its EASA approvals and partnerships, AAI Maroc provides its customers with the best services to satisfy them with the quality and reliability of its work.

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ATPCO is the world leader in the collection and distribution of fare and fare-related data for the airline and travel industry. Its products and services organize fares into established formats that seamlessly integrate with global distribution systems, pricing systems, computer reservation systems, governments and related travel organizations. By providing these solutions for the travel industry, ATPCO creates efficiencies in the overall fare management process.

ATPCO currently works with more than 460 airlines worldwide, and it supplies more than 99 per cent of the industry's intermediated fare data to all the major airfare pricing engines. Headquarters are located in Washington, DC, and regional offices are located in London, Miami and Singapore.

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AWAS is a global leader in commercial aircraft leasing, with the scale, expertise, and dedication to deliver innovation solutions for our customers around the world.

AWAS serves markets in The Americas, Europe, Middle East, and Asia-Pacific, from its Dublin headquarters and offices in New York, Miami, and Singapore.

For over 25 years AWAS has been providing flexible, customized and competitive aviation finance solutions to airlines worldwide. The company's staff is known throughout the industry for providing an unmatched level of knowledge and consultative expertise to its customers, helping them to meet their business goals.

AWAS' current portfolio is over 200 modern aircraft strong, and it has another 100+ of the latest, most desirable commercial aircraft on order from Airbus and Boeing. AWAS' aircraft portfolio is on lease to over 90 airline customers in 44 countries. Their fleet features a full range of the most popular aircraft types including both narrow-bodied and wide-body aircraft to serve customers ranging from international flag carriers, low cost airlines, regionals, air freight, charter, and domestic operators.

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Boeing is the world's largest aerospace company and leading manufacturer of commercial jetliners and defense, space and security systems. A top U.S. exporter, the company supports airlines and U.S. and allied government customers in more than 90 countries. Boeing products and tailored services include commercial and military aircraft, satellites, weapons, electronic and defense systems, launch systems, advanced information and communication systems, and performance-based logistics and training.

Boeing has a long tradition of aerospace leadership and innovation. The company continues to expand its product line and services to meet emerging customer needs. Its broad range of capabilities includes creating new, more efficient members of its commercial airplane family; integrating military platforms, defense systems and the warfighter through network-enabled solutions; creating advanced technology solutions; and arranging innovative customer-financing options.

With corporate offices in Chicago, Boeing employs more than 159,000 people across the United States and in 70 countries. This represents one of the most diverse, talented and innovative workforces anywhere. More than 123,000 employees hold college degrees – including nearly 32,000 advanced degrees – in virtually every business and technical field from approximately 2,700 colleges and universities worldwide. Boeing also leverages the talents of hundreds of thousands more skilled people working for Boeing suppliers worldwide.

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CFM International is a leading manufacturer of aircraft engines in the medium thrust range of applications, powering 25 models of aircraft for both commercial as well as military customers around the world. CFM combines the resources, engineering expertise and product support of two major aircraft engine manufacturers: Snecma (SAFRAN Group) of France, and GE of the U.S.

Truly a product of international cooperation, the CFM56 line of six engine models offers unparalleled reliability and cost of ownership. With a thrust range of 18,500 to 34,000 pounds, they're well-suited for many commercial and military aircraft.

Underlying CFM's rapid and hard-earned success is the ingenuity of its designers, engineers and product support personnel throughout the world. At CFM, our goal is to maintain the trust of airlines and airframers and contribute to the operational success of our customers. We do this by building remarkable engines and offering dedicated services.

CFM keeps the CFM56 family of engines the best in their class by infusing newly matured technology into the existing fleet. We're also anticipating tomorrow's industry needs with the advanced LEAP-X technology development program.

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For 41 years, Embraer (Empresa Brasileira de Aeronáutica S.A.) has been designing, building and selling aircraft for the commercial, executive and defense markets. In addition to its corporate headquarters and main manufacturing facilities in São José dos Campos, near São Paulo, Brazil, Embraer has branch offices, industrial operations and customer service facilities in the USA, France, Portugal, China and Singapore.

Embraer is the leader in providing commercial jet fleet solutions of up to 120 seats. More than 1,000 aircraft from its 37 to 50-seat ERJ 145 family of regional jets have been delivered to airlines around the world. The company developed a new category of airliners – E-Jets – to satisfy the growing need for airlines to right-size their fleets and open new markets with 70 to 120-seat aircraft. 670 E-Jets are in service with 58 airlines in 39 countries.

In Africa, Embraer has over 40 jets in operation with 11 operators, flying under colors of some of the region's most prominent airlines including Kenya Airways, Egyptair, LAM Mozambique, South African Airlink or Air Nigeria. Operators have discovered the tremendous mission versatility and compatibility that E-Jets offer with their larger mainline fleets and are flying the Embraer aircraft on long sectors (up to 5 hours) and increasing frequency on trunk routes. As of September 30th, 2010, there were 2,553 aircraft (1806 firm orders and 747 options) on the E-Jets and ERJ order book. Embraer had 17,009 employees and a firm order company backlog of US$15.3 billion.

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GE Transportation Aircraft Engines is the world's leading manufacturer of large jet aircraft engines. GE offers products and services for commercial, corporate, military and marine applications that offer the performance and reliability that customers expect.

Since its inception, GE Transportation Aircraft Engines has been at the forefront of many of aviation's most storied accomplishments. From the first U.S. jet engine to an engine for use on the next space shuttle, GE continues to build upon its rich heritage.

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Hahn Air – the ticketing expert, specialised in passenger airline ticketing

Hahn Air is the ticketing expert for optimised revenues. It takes out the complexity of global sales and gives access to higher, optimised and secure revenues. Hahn Air is a reliable contracting partner for 85,000 IATA and IATAN travel agents and more than 240 airlines.

Hahn Air

- takes over costs and risks in all markets
- cooperates with all major travel management companies and online travel agencies
- offers the most economic solution to sell in more than 190 BSP/ARC and non-BSP markets

Outsourcing of passenger airline ticketing to Hahn Air has become an industry standard. Every 7 seconds – 24 hours a day and 365 days a year – a passenger checks in with a Hahn Air e-ticket at one of almost 4,000 boarding points worldwide.

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IBS is a leading provider of next-generation IT solutions to the Travel, Transportation and Logistics (TTL) industry. A specialist in the domain, IBS offers a wide range of next-generation solutions that manage mission-critical operations of major airlines, airports, oil and gas companies, seaports, cruise lines and tour operators world-wide.

As a product-led services company, the IBS solutions help you to,

- Increase revenue & market share
- Reduce cost of business
- Manage growth

IBS Software also offers services that include software development, technology consulting, application development, re-engineering & maintenance, on site software development, business intelligence, data warehousing and support services.

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Ilyushin Finance Co. (IFC) is a member of the United Aircraft Corporation" (UAC) – the Russian aviation industry integrator. The company carries a decade of experience in the sales and leasing of the civil aircraft, it has the longstanding ties with the leading aircraft manufacturers and the strong business relations with the first-class credit institutions. IFC provides its clients with the long-term financing and the export crediting solutions creating a friendly environment for the lease and purchase of the Russian-made aircraft.

IFC is the largest Russia's air leasing company which supplies Russian Il-96, Tu-204 and An-148 aircrafts to the domestic and foreign markets. The principal customers who order the air facilities, apart from Russian air companies, are Cuban, Venezuelan, Ecuadorian, Brazilian, Peruvian, Irani, Syrian and other air carriers. A wide model line of competitive, economic and reliable in operation passenger and cargo aircraft, as well as business aviation, will meet the demands of the most fastidious user. Numerous positive responses from IFC's old and new clients prove excellent flight performance and high economic efficiency of the air facilities under conditions of long-term operation. The number of IFC's clients is steadily increasing, which also speaks for staying interest to the supplied Russian air facilities.

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innovata

Providing innovative data and timetable solutions to the aviation community.

Innovata, a global leader in travel and hospitality content management and distribution solutions is now established and recognized as a major industry source for worldwide airline schedule and related data. As a partner of IATA in marketing the Schedule Reference Service (SRS) to the industry, Innovata maintains one of the world's largest flight databases (passenger and cargo) representing more than 99% of the air segment miles flown worldwide, containing over 900 airlines, 95% of which are updated and refreshed every week.

Innovata delivers accurate, reliable and up to date information to meet a wide range of data service needs for aviation related industries and has, for several years, been the market leader in the provision of timetables and route mapping services, via all distribution channels, to airlines and airports worldwide.

Take a look on the Innovata website www.innovata-llc.com/mapping/mapping.html and view samples of the dynamic and interactive route network maps, showing direct routes, online and interline connections, dynamically plotted and displayed for users searching and querying, along with a comprehensive timetable display, all of which can be configured for any airline or airport. Headquartered in Atlanta, USA, with regional offices in UK and Singapore, Innovata serves over 200 customers, in 52 countries. www.innovata-llc.com

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KENYON
INTERNATIONAL EMERGENCY SERVICES

Kenyon is an international leader in worldwide disaster management, providing pre-incident crisis planning and post emergency response services on behalf of the world's foremost companies. Privately owned, Kenyon remains the only firm in its business with over a hundred year history, comprehensive resources, and experience in every type of mass fatality accident including aviation disasters, natural disasters, war, and terrorist attacks.

Kenyon Operations Services provide experienced, specialized personnel and equipment to respond to incidents. Kenyon teams establish and staff family support areas, telephone inquiry centers, crisis communications centers, practical facilities (morgues) and processes for the recovery, identification and return of the deceased and their property.

Kenyon Consulting Services provide incident-experienced planning and training specialists who work with your organization to develop and implement crisis management plans and systems. For those organizations with developed plans and systems, Kenyon conducts exercises to test those systems for real-world response. Headquartered in Houston, Texas, it has offices and facilities in Sydney, Australia, London, UK, and Beirut, Lebanon.

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Lufthansa Consulting

Lufthansa Consulting is an aviation and management consulting company dedicated to globally assist aviation industry clients to successfully meet the challenges that lie ahead. With more than 20 years of experience in providing consultancy services to airlines, airports, cargo operators and civil aviation authorities, Lufthansa Consulting has effectively built on its own expertise and can still tap into the extensive Lufthansa network offering their clients solutions that have an immediate impact and are designed to last.

From its offices in key markets and with its network of representatives, Lufthansa Consulting serves operators in every region around the world. The company's regional market representatives serving Africa, Middle East, Asia/Pacific, Russia CIS, Europe and the Americas address clients' specific issues locally. Lufthansa Consulting business policy relies on a deep insight into the aviation business blended with understanding of local conditions that combined lead to delivery of required solutions with best results.

Lufthansa Consulting is well-known as both strategic and a pragmatic business partner, especially in the African market. Airline restructuring, privatization support or cost management, on time-performance measures, safety issues and network management projects - Lufthansa Consulting's service portfolio addresses a wide range of business activities and boosts the success of African airlines and airports. As an independent subsidiary of Lufthansa German Airlines, Lufthansa Consulting is in the unique position to develop and offer customized management consulting services and comprehensive business solutions to all sectors of the African aviation industry.

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Lufthansa Systems
IT that makes your life easier

Lufthansa Systems is one of the leading IT service providers for the airline and aviation industry worldwide. The company has 3,000 employees at several sites in Germany and offices in 14 other countries. As a global player, Lufthansa Systems focuses on the continual development of its innovative solutions as well as expanding its activities around the world.

Lufthansa Systems provides the full range of IT services – from IT consultancy, development and implementation of industry solutions to the operation in its own data centers. The IT solutions cover all airline business processes, including planning, passenger and cargo management, finance, flight operations, and aircraft maintenance. Lufthansa Systems not only develops individual applications but also provides airlines with integrated platform solutions which optimize their core processes. These platforms combine applications into a seamless solution, thereby placing information within the context of a particular business process.

The portfolio is focused on meeting the diverse demands of different airline business models. Network airlines, regional airlines and low-cost carriers can all benefit from packages of solutions which are customized to their individual needs.

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Get passengers and cargo to their destinations—safely and on time. That's the promise of every airline. Rising complexity puts the burden on technology to keep it. Which is where Mercator comes in.

Every airline CEO knows that profits only follow when planes and processes really flow. Our aviation heritage gives us unequalled insight into what this requires. In 1995, Mercator was created to support Emirates Airline—and dnata soon after, the fourth largest airport services company in the world. By delivering IT solutions for these major organizations, we became intimate with both the big picture and micro needs of the industry.

Our team developed an extensive portfolio of solutions, testing them at the highest level in the real world. Today, we offer these systems and the process knowledge of Emirates and dnata on the commercial market. Our solutions combine across five key areas of service excellence: Safety, Passenger, Cargo, CRM and Finance.

Our clients span the globe and include award-winning carriers, hybrid, low-cost and regional airlines. While aviation has always driven our technology, the variety of operations we serve has taken our industry expertise to another level. Our IT infrastructure helps any airline reduce costs, streamline processes and increase productivity—enabling you to deliver your essential promise.

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OAG processes and distributes flight schedules data, live and historical flight status information, travel planners, flight timetables, flight network mapping software, business travel planning products, aviation market reports and flight schedules analysis tools for the air passenger and air cargo markets. You can receive the OAG aviation data via an API to use in your own IT systems, or online, mobile, print or CD formats compatible for display on your desktop, laptop, smartphone or tablet.

To register with OAG and to discuss your aviation data requirements with one of our specialist advisors, please visit the website: http://www.oagaviation.com/.

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OneSutra is a Travel Technology Company offering consultancy services to airlines and travel agents. It specializes in development, marketing and support of travel technology software and other travel industry solutions.

OneSutra's travel domain knowledge and experience is par excellence having worked with leading travel agents and airline community members. Its key differentiator remains in customer satisfaction and delivering best and most affordable solutions to Airlines and Travel Companies that help build their revenues.

OneSutra's clients look forward to a broad, expanding and scalable portfolio of solutions covering automated solutions for back-office operations of airlines and travel agents. OneSutra recently tied up with a leading Global Distribution System to develop Travel Booking Engines for their travel agents. This exclusivity to these clients will help OneSutra deliver added benefits to its growing customer.

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Pratt & Whitney, a United Technologies company, provides dependable power to hundreds of airlines and operators every day. Our fleet of commercial engines has logged more than 1 billion hours of flight powering the single-aisle and wide-body aircraft that fly both passengers and cargo around the world.

We continue to invest in our current engines, developing new technologies to improve fuel efficiency, performance and environmental impact. Our new PurePower® PW1000G engine delivers double-digit improvement in fuel burn versus today's engines, which translates into average savings of up to $1.5 million per aircraft per year.

The company also has one of the largest global networks of repair and overhaul facilities and offers services that are focused on lowering the customers' cost of ownership. Pratt & Whitney, the world's only OEMRO®, offers a broad portfolio of service solutions including line maintenance services, engine monitoring and diagnostics, environmentally friendly on-wing EcoPower® water washes, lease engines, custom engine service programs, and new and repaired parts.

Learn more at www.pw.utc.com/oemro and www.purepowerengines.com.

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Rockwell Collins is a pioneer in the design, production and support of innovative solutions for our customers in aerospace and defense. Our expertise in flight deck avionics, cabin electronics, mission communications, information management, and simulation and training is strengthened by our global service and support network spanning 27 countries. Working together, our global team of 20,000 employees shares a vision to create the most trusted source of communication and aviation electronics solutions, applying insight and foresight to help our customers succeed.

Our aviation electronics systems and products are installed in the flight decks of nearly every air transport aircraft in the world. Our airborne and ground-based communication systems transmit nearly 70 percent of all U.S. and allied military communication. Whether developing new technology to enable network-centric operations for the military, delivering integrated electronic solutions for new commercial aircraft, or providing a level of service and support that increases reliability and lowers costs for aircraft operators throughout the world, we deliver on our commitments.

We believe that the closer we get to our customers, based on promises kept, the greater the benefit for all involved. This is how we create value for our customers. And how we build trust, every day.

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Rolls-Royce, a world-leading provider of power systems and services for use on land, at sea and in the air, has established a strong position in global markets – civil aerospace, defence aerospace, marine and energy and nuclear. The civil aerospace business powers over 30 types of commercial aircraft and has a strong position in all sectors of the market: wide-body, narrow-body and corporate and regional aircraft. Over 13,000 engines are currently in service with 650 airlines, freight operators and lessors and 4,000 corporate operators. A Rolls-Royce powered aircraft takes off or lands every 2.5 seconds.

Rolls-Royce is the world's second largest provider of defence aero-engine products and services, with 18,000 engines in service for 160 customers in 103 countries. Our engines power aircraft in all sectors: transport, combat, reconnaissance, training, helicopters and unmanned aerial vehicles.

Rolls-Royce has a world-leading range of capabilities in the marine market, encompassing the design, supply and support of power and propulsion systems. We are leaders in the integration of technologically complex, mission critical systems for offshore oil and gas, merchant and naval vessels.

Rolls-Royce has more than 2,500 marine customers and has equipment installed on over 30,000 vessels worldwide, including those of 70 navies. The energy business supplies gas turbines, compressors and diesel power units to customers around the world. The business is a world leader in the supply of power for onshore and offshore oil and gas applications. Our developing civil nuclear capability has further strengthened our position in the power generation market.

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Sabre Airline Solutions® provides leading high-performance solutions for the airline industry. Combining our unique expertise and leading technology, we power an airline's business performance by helping you market and sell your product worldwide, serve your customers and operate efficiently.

We also provide the technology that sets you free with "Software as a Service" capabilities for a number of solution areas ranging from: multi-channel distribution and merchandising; reservations and departure control; airline operations; marketing and planning to more than 300 leading airlines. With this flexible technology, you're able to easily adapt as your business grows. Our solutions are backed by industry-leading customer service and an unmatched track record of delivery. Additionally, through our consulting services, we help train your staff and align your business with industry best practices. We are also an environmentally and socially responsible company.

Product and Services

From commercial solutions that help you develop and promote your product, to comprehensive reservations to help you interact with customers at every touch point and operations solutions to help you perform efficiently, we have what you need to drive your success. Sabre Airline Solutions® is a complete solution partner that offers the following portfolio:

- Commercial Planning
- Technology
- Enterprise Operations
- Consulting Services
- Airline Reservations

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Seabury is the leading independent transportation-focused investment banking and advisory firm serving aviation, aerospace, cargo and maritime on a global basis, in three different areas: investment banking, corporate recovery/restructuring and a broad range of management consulting services. The company's professionals have advised over 225 clients worldwide in the airline, aerospace, cargo/logistics and maritime sectors, as well as private equity investors interested in those sectors.

Seabury has led or been a significant participant in seven of the 10 largest airline financial or operational turnarounds around the globe in the last 15 years. Seabury professionals have an in-depth understanding of the aerospace, aviation, cargo/logistics and maritime industries, and consistently challenge convention to deliver more creative solutions that yield tangible financial and operational benefits.

Seabury has deep expertise in a wide array of aviation specific business challenges. They have been involved in virtually every major airline turnaround of the last ten years. In recent projects Seabury have helped clients examine longstanding business models, weighing the wisdom of entering new market segments or exiting old ones. Working with client teams, Seabury helped carriers and their labor relations personnel reframe workforce costs and practices. Seabury has guided its clients in gaining greater strength with key suppliers. And their extensive experience with investors, coupled with their finely-tuned due diligence capabilities, gives Seabury a strong advantage to clients considering the purchase or sale of assets.

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SERVAIR is the leading French airline catering and cleaning company. SERVAIR offers airlines a range of services that are vital to the air transport sector and for the comfort of passengers. Its requirements, in terms of quality and know-how, have led to SERVAIR becoming a true driving force for its 120 customer companies, helping them to improve their commercial offers to passengers, while scrupulously adhering to the constraints of air transport.

Servair an international reference: Ranked 3rd in the world with its partners and subsidiaries, Servair has consolidated its international presence, operating in more than 60 stopovers and aiming at becoming the brand of reference in 4 continents. In order to help its customers on key stopovers, Servair has developed a strong and long-lasting partnership policy with Flying Food Group in the US, Air Chef in Italy, Sats and China Southern in China.

Servair, leader in Africa: Servair already enjoys a long experience in Africa. The first African unit was opened in 1987 in Dakar, Senegal. Today, Servair is affirming its position as Africa's leading caterer with a total of 16 units* and 2500 employees. These units are built in a spirit of co-development with local partners and local providers committed themselves to produce the standards of quality associated with the Servair brand. Recently, Servair made the acquisition of NAS catering in Nairobi and Mombasa and opened new airlines catering units with local partners in Accra, Ghana and shortly in Brazzaville and Pointe Noire, Congo and a duty free outlet and snack bar at Conakry's International G'Bessia airport. New openings will be announced soon.

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SITA is the world's leading specialist in air transport communications and IT solutions. SITA delivers and manages business solutions for airline, airport, GDS, government and other customers over the world's most extensive network, which forms the communications backbone of the global air transport industry.

SITA's portfolio includes managed global communications, infrastructure and outsourcing services, as well as services for airline commercial management and passenger operations, flight operations, aircraft operations and air-to-ground communications, airport management and operations, baggage operations, transportation security and border management, cargo operations and more. With a customer service team of over 2,000 staff around the world, SITA invests significantly in achieving best-in-class customer service, providing integrated local and global support for both its communications and IT application services.

SITA has two main subsidiaries: OnAir, which is the leading provider of in-flight connectivity, and CHAMP Cargosystems, the world's only IT company dedicated solely to air cargo. SITA also operates two joint ventures providing services to the air transport community: Aviareto for aircraft asset management and CertiPath for secure electronic identity management.

SITA is one of the world's most international companies. Its global reach is based on local presence, with services for over 500 air transport industry members and 3,200 customers in over 200 countries and territories. Set up in 1949 with 11 member airlines, SITA today employs people of more than 140 nationalities, speaking over 70 different languages. SITA had consolidated revenues of US$1.46 billion in 2010. For further information go to www.sita.aero

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Travelport is a broad-based business services company and a leading provider of critical transaction processing solutions and date to companies operating in the global travel industry, an industry that generated approximately $2.6 trillion in revenue in 2008 (Travelport is comprised of the global distribution system ("GDS") business that includes transaction processing business operating under the Worldspan and Galileo brands, and Airline IT Solutions, which host missioncritical applications and provides business and data analysis solutions for major airlines and GTA, a leading global wholesaler of accommodation, ground travel, sightseeing and other destination services with three decades of travel expertise.

Travelport operates in approximately 160 countries and has approximately 5,300 employees. Travelport also owns approximately 48% of Orbitz Worldwide, a leading global on-line travel company. Travelport GDS and Airline IT Solutions.

- Travelport GDS, which includes Galileo and Worldspan, is one of three major Global Distribution Systems (GDS).
- Operates in around 160 countries.
- Provides travel distribution services to over 950 travel suppliers, 63,000 off-line and online travel agencies and millions of end customers.
- Aggregates inventory from 430 airlines, over 87,000 hotel properties, 25 car rental companies, 400 cruise and tour operators and 13 major rail networks.
- Airline IT Solutions provides airlines inventory management and related solutions, IT applications on a subscription basis to airlines and business intelligence services.
- Used by 232 airlines directly/indirectly.
- Estimated that IT services used in the handling of up to 520m boarded passengers in 2009.
- Largest airlines served are United airlines and Delta/Northwest.

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AFRAA Member Airlines Two-Letter Codes>

Afriqiyah Airways	8U
Air Algerie	AH
Air Botswana	BP
Air Bukina	2J
Air Madagascar	MD
Air Malawi	QM
Air Mali	I5
Air Mauritius	MK
Air Namibia	SW
Air Nigeria	VK
Air Seychelles	HM
Air Tanzania	TC
Air Zimbabwe	UM
ASKY Airlines	KP
Camair-Co	QC
Ceiba Intercontinental	C2
ECAir	LC
EgyptAir	MS
Ethiopian Airlines	ET
Interair SA	D6
Kenya Airways	KQ
LAM Mozambique Airlines	TM
Libyan Arab Airlines	LN
Precision Air	PW
Royal Air Maroc	AT
RwandAir	WB
South African Airways	SA
South African Express	XZ
Starbow Airlines	S9
Sudan Airways	SD
TAAG Angola Airlines	DT
Tunisair	TU
Zambezi Airlines	ZJ

African Airlines Association Secretariat Team>

AFRAA Secretariat Team

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Some Member Airlines 2011 Performance

	AIR ALGERIE	AIR MADAGAS-CAR	AIR MALAWI	AIR MAURITIUS	AIR NIGERIA	AIR NAMIBIA	AIR SEYCHELLES	AIR TANZANIA	EGYPTAIR	ETHIOPIAN AIRLINES	KENYA AIRWAYS	LAM MOZAMBIQUE	PRECISION AIR	SOUTH AFRICAN AIRWAYS	TAAG ANGOLA	TUNIS AIR	TOTAL
TRAFFIC DATA																	
Domestic Passengers (000)	1,260	313	31	114	792	39	179	9	1,613	505	764	360	427	3,207	551		10,164
Regional Passengers – within Africa (000)	213	154		478	429	261	66		816	1,772	1,914	204	376		148	326	7,157
Intercontinental Passengers (000)	2,251	86	48	732	1,221	126	156		4,979	2,048	993	16		3,273	296	2,848	19,073
Total Passengers Carried (000)	3,724	552	79	1,324	2,442	426	401	9	7,408	4,325	3,671	580	803	6,480	995	3,174	36,393
Domestic Freight Carried (000)	1,445	760	289	65		1		20	1,104	200	843	3,377	943	35,726	1,843		46,616
Regional Freight Carried (000)	339	680		12,068		835	2,634		11,564	37,000	18,877	658	637		2,211	1,086	88,589
Intercontinental Freight Carried (000)	9,959	2,620	315	19,102		5,994	3,222		106,623	134,000	42,649	430		137,252	9,370	8,534	480,070
Total Freight Carried (000)	11,743	4,060	604	31,235		6,829	5,856	20	119,291	171,200	62,369	4,465	1,580	172,978	13,424	9,620	615,274
Revenue Passenger-Kilometres - RPK (000)	4,853,898	1,168,506	63,171	6,615,415	698,846	1,446,581	1,364,970	7,000	15,494,773	15,279,991	9,449,247	762,000	399,000	21,383,715	2,544,099	4,946,596	86,477,808
Available Seat-Kilometres - ASK (000)	7,622,476	1,659,486	120,243	8,640,753	1,126,994	2,307,504	1,853,530	15,000	24,380,303	21,128,970	13,334,671	1,068,000	656,000	30,295,509	4,139,812	7,125,063	125,474,314
Passenger Load Factor - PLF (%)	63.68%	70.41%	52.50%	76.60%	61.00%	63.00%	74.00%	49.00%	63.60%	72.32%	71.00%	71.30%	60.90%	70.60%	61.00%	69.40%	
Passenger Tonne-Kilometres - PTK (000)	436,851	105,166	11,784	599,392		50,939	143,457	1,000	1,498,118	1,901,684	933,056	69,000	72,000	1,896,133	228,969	382,915	8,330,464
Freight & Mail Tonne-Kilometres - FTK (000)	2,149	20,851	550	190,002		81,748	32,036	210	336,603	840,782	278,138	8,000	-	1,062,033	62,840	16,244	2,932,186
Revenue Tonne-Kilometres - RTK (000)	439,000	126,016	12,334	789,395		173,154	175,493	1,000	1,834,721	2,742,466	1,223,102	77,000	-	2,958,166	291,809	485,659	11,329,315
Available Tonne-Kilometres - ATK (000)	686,023	217,898	19,952	1,292,641		276,206	284,907	3,000	3,669,950	4,378,834	1,933,773	127,000	-	5,004,859	731,761		18,626,804
Weight Load Factor - WLF (%)	64.00%	57.83%	61.80%	61.10%		63.00%	62.00%	67.00%	50.00%	62.63%	63.00%	60.50%	-	59.10%	40.00%		
EMPLOYEES DATA																	
Pilots	415	72		166	68	98	61	22	850	400	405	25	81	790	163	334	3,950
Engineers	1,480	131		-	82	9	129	31	4,965	1,319	215	96	89	2,914	52	61	11,573
Cabin Crew	925	159		525	102	135	161	27	2,201	959	866	94	95	1,731	430	811	9,221
Traffic/Marketing	4,428	142		807	9		76	29	2,919	1,040		272	51	581	262	753	11,369
Others	2,502	792		857	374	401	451	62	20,790	2,483	3,348	224	368	2,867	2,374	230	38,123
Total No. of Employees	9,750	1,296		2,355	635	643	878	171	31,725	6,201	4,834	711	684	8,883	3,281	2,189	74,236
DESTINATIONS SERVED																	
Domestic – within the country	30	13		1	10	3	6	3	8	17	3	10	11		12	0	127
Intra-Africa - within Africa	9	7		7	16	6	2	0	15	40	42	4	5		10	24	187
Intercontinental - Africa to other Regions	29	4		17		1	7	0	43	28	11	1	0		7	93	241
New Destinations (all markets)	-	1		1		0			6	4	3	0	2		1	2	20
FLEET IN OPERATION																	
	43	15	3	12	13	9	7	1	79	51	37	7	12	49	13	30	381

AFRAA Member Airlines Fleet

#	Airline	FLEET TYPE																																Totals
		A300	A310	A319/ 320/ 321	A330	A340	B787	B777	B767	B757	B747	B737 -200	B737 -3/4/ 500	B737 -6/7/7/ 800	B727	MD-11	MD -82/83	MD-87	CRJ 200	CRJ 700	CRJ 900	ERJ -170 /175/ 190/ 195	BAe 146 -100/ 200/ 300	F28	F50	Dash -8	ATR 42	ATR 72	DHC -6-8	Beech 1900C/D	Shorts 360	Saab 340B	Xian MA60	
1	Afriqiyah Airways			8	2																													10
2	Air Algérie *				5				3					22														12						42
3	Air Botswana																						2				3	2						7
4	Air Burkina																	2	1															3
5	Air Madagascar					1		1	3				3														2	2	3					15
6	Air Mali																	3	1											1				5
7	Air Malawi											2															1							3
8	Air Mauritius			2	2	6																						2						12
9	Air Namibia			2		2							2									3												9
10	Air Nigeria				2								9									2												13
11	Air Seychelles			1	1																								4		1			7
12	Air Tanzania																									1								1
13	Air Zimbabwe								2			3																					2	7
14	ASKY Airlines													3												1								4
15	Camair-Co								1					2																				3
16	Ceiba Intercontinental							1																			2	2						5
17	ECAir									1			2																					3
18	EgyptAir	4		17	11	3		10					4	18								12												79
19	Ethiopian Airlines						2	6	12	6	2			12		2										9								51
20	Inter Air South Africa								1			4																						5
21	Kenya Airways							4	6				6	9								12												37
22	LAM Mozambique											2										2				3								7
23	Libyan Airlines			6																	6						2							14
24	Precision Air												3														4	5						12
25	RwandAir												2	2							1					1								6
26	Royal Air Maroc			4					6		5		12	34														6						67
27	South African Airways			11		21								17																				49
28	SA Express Airways												1						10	5						9								25
29	Starbow Airlines																						3											3
30	Sudan Airways	2	1	2									3												4									12
31	TAAG Angola Airlines							5				3		5																				13
33	Tunisair	3		18									4	5																				30
34	Zambezi Airlines																		2															2
	Totals	9	1	71	23	33	2	27	34	7	7	14	51	129	0	2	0	5	14	5	7	31	5	0	4	24	14	31	7	1	1	0	2	562

* Air Algerie also has one Lockheed C-130

AFRAA Member Airlines Commercial Partnership – 2011

	8U	AH	BP	2J	MD	QM	I5	MK	SW	VK	TC	HM	UM	KP	QC	C2	MS	ET	D6	KQ	TM	LN	PW	AT	WB	SA	XZ	SU	DT	9D	TU	ZJ	Total
Afriqiyah																																	
Air Algerie																																	1
Air Botswana																																	1
Air Burkina																																	1
Air Madagascar																																	1
Air Malawi																																	
Air Mali																																	1
Air Mauritius																																	2
Air Namibia																																	1
Air Nigeria																																	4
Air Tanzania																																	
Air Seychelles																																	
Air Zimbabwe																																	
ASKY Airlines																																	1
Camair-Co																																	
Ceiba Intercontinental																																	
Egyptair																																	3
Ethiopian Airlines																																	4
Interair SA																																	
Kenya Airways																																	8
LAM Mozambique																																	5
Libyan Airlines																																	
Precision Air																																	3
Royal Air Maroc																																	
RwandAir																																	2
South African Airways																																	5
South African Express																																	2
Sudan Airways																																	
TAAG Angola																																	4
Toumai Air Tchad																																	
Tunisair																																	2
Zambezi Airlines																																	
Total		1	1	1	1	1	1	2	1	4				1			3	4		7	5		3		2	5	2		4		2	0	51

AFRAA Members>

- الخطوط الجوية الأفريقية AFRIQIYAH AIRWAYS
- AIR ALGERIE
- AIR BOTSWANA
- air burkina
- Air Madagascar
- air malawi
- air mali
- AIR MAURITIUS
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- AIR NIGERIA
- air seychelles
- Air Tanzania
- air zimbabwe
- ASKY AIRLINES
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- Ethiopian — The New Spirit of Africa
- Interair South Africa
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- LAM
- Libyan Airlines
- PrecisionAir — You are why we fly
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- South African Airways — A STAR ALLIANCE MEMBER
- starbow
- Sudan Airways
- TAAG — Linhas Aereas de Angola Angola Airlines
- TUNISAIR الخطوط التونسية
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AFRAA Partners>

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- amadeus — Your technology partner
- AGS American General Supplies, Inc.
- Atlantic Air Industries Maroc
- ATPCO
- AWAS
- BOEING
- cfm — The Power of Flight
- EMBRAER
- GE
- Hahn Air
- ibs
- Ilyushin Finance Co
- innovata
- KENYON
- Lufthansa Consulting
- Lufthansa Systems — IT that makes your life easier
- مركاتور mercator
- OAG
- One Sutra
- Pratt & Whitney — A United Technologies Company
- Rockwell Collins
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