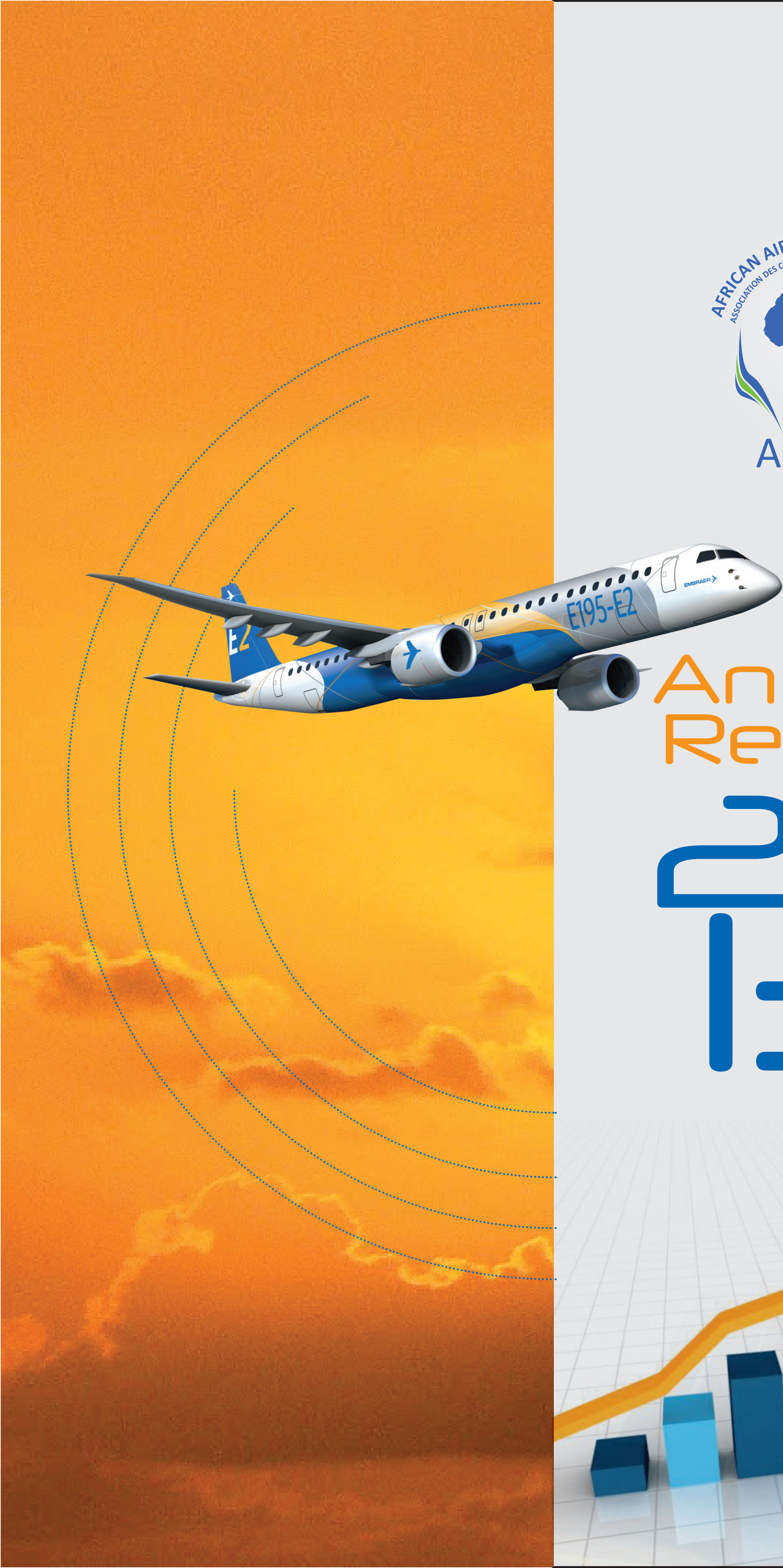

AFRICAN AIRLINES ASSOCIATION
ASSOCIATION DES COMPAGNIES AERIENNES AFRICAINES
AFRAA

Annual Report 2013

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Foreword

African air transport is one of the fastest growing in the world and this growth is projected to continue over the next 20 years at over 6.6% per annum compared to the global average of 4.9% over the same period. With over one billion population, most of whom have never travelled by air, coupled with an expected increase in the middle class to almost 700 million, spending about US$2.2 trillion per year by 2030 (AfDB), African air transport is set for exciting times. Better connected cities and countries through a viable air transport network would be a catalyst to boost intra-Africa business, trade and tourism, and bring in the profits that have long eluded airlines. 2012 witnessed further successful expansion in passenger markets, with 44 more new routes started by African airlines as you will see in this report. Passenger numbers have since 2004 increased year-on-year (except 2011) from less than 40 million in 2004 to 62.9 million in 2012; a cumulative growth of 61.5% or average annual growth of 7.8%. In this report, you will discover that, the resilient African air passenger market in 2012 defied the challenges posed by the long economic slowdown in the Eurozone and continuing political instability in parts of North Africa to grow by 12.5%. In the area of tourism, Africa recorded the second highest growth among the world regions in 2012 of 3 million more international tourist arrivals – a 6% increase. Freight carried by African airlines in 2012 was only 1.8% of total global air freight, but this is forecast to grow by an average of 5% over the next 20 years. The Middle East-Africa route recorded the highest year-on-year air freight growth of 12.8%.

In Sub-Saharan Africa, Ethiopian Airlines, Kenya Airways and South African Airways through their hubs are lead carriers of regional and domestic traffic. They are also competing fervently with non-African carriers to grow their intercontinental market share. In North Africa however, the prolonged instability following the Arab Spring in some markets has adversely affected traffic growth in the last 2 years or so. As a result, Air Algerie, EgyptAir, Royal Air Maroc and Tunis Air, are directly or indirectly adversely impacted because of stagnating growth or traffic decline. However, forward projections look good. Though traffic is growing in West and Central Africa, the dominant carriers are airlines from other regions as only a few carriers in the region conduct limited intercontinental operations.

Safety perception continues to be a problem, though significant improvements have been achieved in recent years as highlighted in the section under safety. To build on the improving safety standards, there will be need to increase and retain experienced and skilled personnel, ensure more stringent safety oversight administration as well as improved infrastructure.

This report contains the breakdown of the composition of fleet operated by African airlines in 2012 as well as planned fleet expansion. African airlines in 2012 operated a total of over 690 aircraft and Boeing forecast that Africa would require 1,070 new airplanes over the next 20 years to meet growing demand and replace current ageing equipment. Of this, about 70% will be single aisle aircraft, 19% small wide body and 9% regional jets. Medium wide body aircraft will constitute about 3%. The total number of commercial aircraft to be in operations in Africa by 2032 will almost double to 1,500.

As traffic grows the industry is expected to invest in new modern, fuel efficient aircraft, build capacity and sharpen competitive skills to stand-up to external competition. A number of airlines already have plans in this regard. Measures are also needed to improve the consistently low passenger load factor which in 2012 was below 69% while global average was 79.2%. This can be achieved by a better match of capacity to demand and yield management.

While African airlines play their part, States' complementary support in developing infrastructure, crafting legislation, regulating the industry and generally creating a conducive environment for air transport development is critical. The issues of safety, security and infrastructure development need commitment from governments to address. Further, States should set-up, resource and empower the necessary institutional and regulatory structures to facilitate market access and liberalization in order to unleash the potential of African aviation and engender airlines to play their role in the socio-economic development and integration of the continent. Under the auspices of the African Union, African States should adopt unified measures in response to evolving legislations from other regions that have extra-territorial implications for Africa. Issues of high taxes on fuel and passengers as well as monopoly service providers at airports should be addressed by governments. Already Angola, Ghana, Cote D'Ivoire and Uganda have positively responded to the pleas by AFRAA and IATA and reduced taxes on fuel and/or improved fuel supply reliability. Lower taxes coupled with cost-effective service delivery will reduce fares and make air travel more affordable to the majority of the people.

Overall, this report provides a comprehensive review of the state of the African air transport industry in 2012 and takes a look at the prospects for the future. It gives a snapshot of what every executive, investor and supplier needs to know about the African airline industry. Also contained in the report are list and contacts of aviation training institutions, maintenance, repair and overhaul (MRO) centres as well as summaries of AFRAA partners. The airlines biography section will help readers get important facts about all member airlines of AFRAA.

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 Embraer for sponsoring the publication of this report. EMBRAER

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.

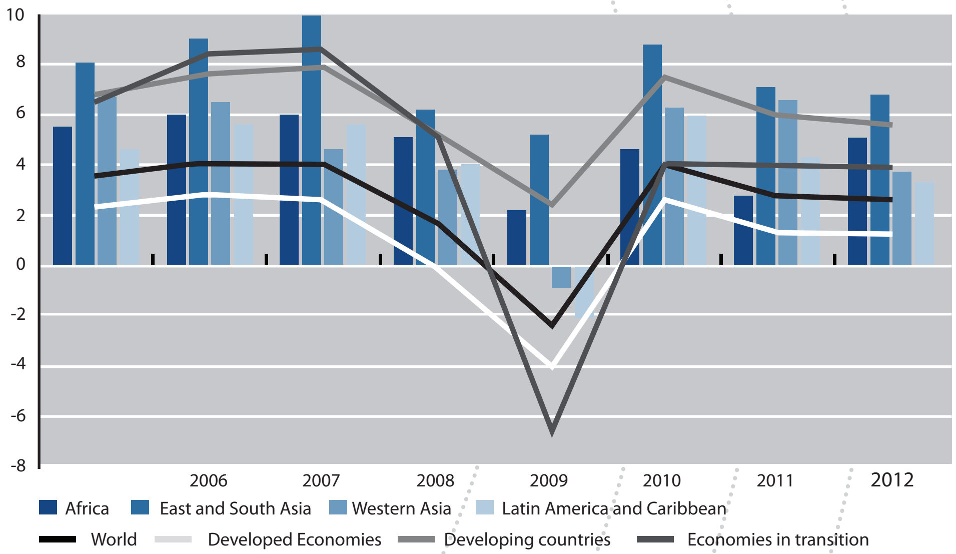
List of Figures

Section One: Economic Performance

World Overview

The recovery of the world economy in 2010 from the deep recession of 2009 was followed by more moderate growth in both 2011 and 2012, according to the African Economic Outlook Report, 2013. The main reasons for the on-going weakness of the world economy include the deepening crisis in the euro zone, sluggish growth in the United States and Japan, and more subdued growth in emerging countries such as China, India and Brazil. Thankfully, experts predict that the risk of the global economy falling into another recession is low. However, there is growing concern that excessive liquidity created by stimulus measures in advanced countries could lead to new bubbles in asset markets and a fall of exchange rates below their market-based levels. The UN DESA reported that world trade volume growth is projected to recover gradually from around 3% in 2012 to 4%-5% in 2013 and 6%-7% in 2014.

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



Source: UN-DESA (2011, 2012)

The Euro area fell into recession in 2012 with GDP declining by 0.4%. The preceding two-year recovery period was short-lived (with GDP rising by 1.9% in 2010 and 1.5% in 2011 after the decline by 4.3% in 2009). The aggregate GDP of Europe is projected to grow at an average annual rate of 1.9% both over the period 2012-2017 and 2.3% during the period 2017-2032, while GDP per capita is forecast to grow at the average rate of 1.7%, over the 2012-2017 period and 2.3% over the period 2017-2032.

However, in Germany, GDP increased in 2012 by close to 1% while in France and in the United Kingdom GDP stagnated or declined marginally. The period of low growth is projected to continue in these countries in the first half of 2013 with some acceleration in the second half of 2013 and in 2014 according to the African Economic Outlook report, 2012.

The US economy has gradually recovered in 2012 driven mainly by private consumption and the turnaround in the housing market. The poor export performance and in 2012, the risk of a large fiscal cliff dampened business confidence.

The African Economic Outlook reported that aggregate North American GDP is projected to grow at an average annual growth rate of 2.5% over the period 2012-2032, while GDP/capita is forecast to grow at the average rate of 1.7%, over the same period. For the period 2012-2017 the average annual growth rates are expected to be 2.7% and 1.9% for the GDP and GDP/capita, respectively. These rates are anticipated to decrease to 2.4% and 1.6%, respectively during the period 2017-2032.

In China, the Economic Outlook reported that growth has slowed down in 2012 to below 8%, from 9.3% in 2011 and 10.4% in 2010. The deceleration was mainly due to a weakening of exports and of domestic demand as the government took measures to cool inflationary pressures. Nonetheless, at current growth rates, China's economy remains robust. While international forecasters are expecting for 2013 growth of 8% – 8.5%, China's government in March 2013 set a lower growth target at 7.5%, unchanged from 2012.

India's growth declined in 2012 to around 5% from 6.9% in 2011 and 9.6% in 2010 according to the African Economic Outlook report. The decline was attributed to a combination of weakening of world trade and domestic uncertainties. However, it is expected that higher agricultural production together with positive effects of recent structural policies and improved external conditions could lead to higher growth of about 6.5% to 7% in 2013/14.

Latin America's growth slowed in 2012 to around 3%, after 4.3% in 2011 and 6% in 2010. The slowdown was caused by weaker export markets, including in China, and by country specific factors. The average rate of growth in Latin America is expected to gradually recover to 3.5% in 2013 and 4% in 2014 as world trade recovers and domestic weaknesses subside. In Brazil, the region's largest economy, growth contracted further in 2012 to around 1%, down from 2.7% in 2011 and 7.5% in 2010.

Africa Economic Outlook

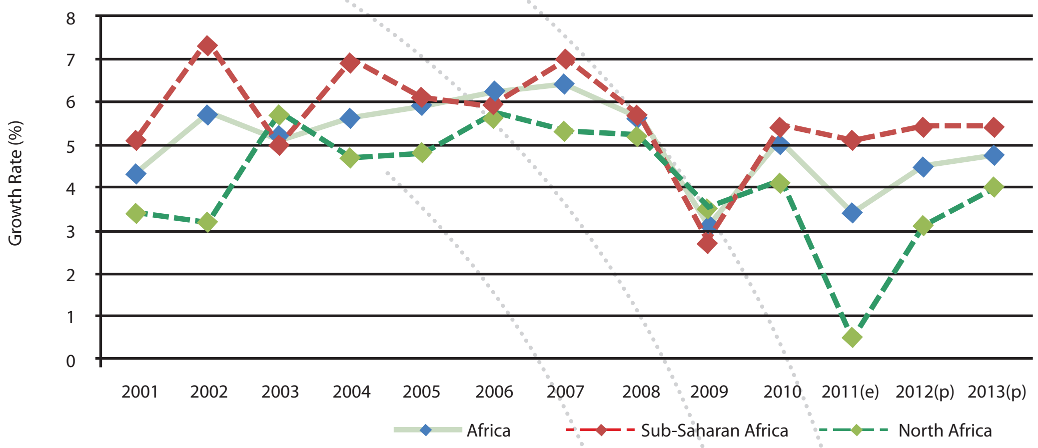
With a population of approximately 1.07 billion, comprising 54 countries, which are richly endowed in mineral resources, Africa's economic tempo has quickened, vibrating with a new commercial enthusiasm. The rate of return on foreign investment is higher in Africa than in many other developing regions, corroborating the fact that it is the fastest growing continent in the world. According to the African Development Bank (AfDB) this is evident as 7 of the world's 10 fastest-growing economies are in Africa.

A recent report by the AfDB projected that, by 2030, most African countries will attain lower-middle to middle-class majorities, and that consumer spending will explode to about US$2.2 trillion. The African economy attracted over US$160 billion from China alone in 2012 according to the AfDB. This created a renewed interest within the international agencies in the region's emerging markets. Recent advancements in African economies have been due to the growth in sales of commodities, services and manufacturing. The growth rate of 4.2% experienced in Africa is higher than the global growth rate of 3.7% in 2011. According to a study by the United Nation in 2011, economic diversification holds great potential to increase Africa's resilience and would contribute to achieving and sustaining long term economic growth and development in the continent (UN DESA).

In 2012, Africa's growth was higher at 6.6% partly due to the rebound of oil production in Libya. Excluding Libya, Africa's growth was 4.2% in 2012 and is projected to accelerate to 4.5% and 5.2% in 2013 and 2014 respectively according to the AfDB. Africa's trade with emerging countries has gained in importance with increased share in total Africa's exports advanced countries continue to be the most important export markets. In 2011, one-third of Africa's merchandise exports went to the European Union (down from 37% in 2006) and more than 11% to the United States against 16% in 2006, while exports to China increased to around 10% of total exports from around 6% in 2006 and exports to India rose to 6% in 2011 from around 4.5% in 2006.

Over the period 2012-2032, the GDP of the African Region is forecast to grow at an average annual rate of 4.6%, reflecting, to a certain extent, economic reforms and liberalization to strengthen the private sector, increase domestic savings, expand non-oil exports and consolidate domestic and international economic policies. During the period 2012-2017, GDP is expected to increase at 5% per annum and at 4.4% during the remainder of the period. Intra-African trade averaged more than USD 40 billion annually between 2005 and 2010, and boasts a higher share of manufactured products than trade with other regions of the world according to the African Economic Outlook report, 2012.

Figure 1.2 Africa's economic growth



Source: African Economic Outlook 2012 – OECD (2012)

Sub-Regional GDP Performance and Projections

In 2012, growth performance varied widely across the continent. Oil-exporting countries achieved significantly higher GDP growth than non-oil producers, mainly as a result of a rebound of oil production in Libya (Economic Report on Africa, 2013). The better growth performance of oil exporters is likely to continue in 2013 and 2014 but the growth differential with non-oil producing countries is becoming smaller.

West Africa is expected to continue its rapid growth with rates of 6.7% in 2013 and 7.4% in 2014. It has become the fastest growing region of the continent. Growth in the region according to the Economic Report on Africa, 2013 is not only driven by oil and mineral sectors but also by agriculture and services and on the demand side often by consumption and investment. Nigeria is expected to continue growing by between 6.7% and 7.3% in 2013 and 2014 respectively. The report observed that in Ghana and Côte d'Ivoire, average growth in 2013/14 is likely to exceed 8% and 9% respectively. In most countries of the region growth is expected to pick up in 2013/14, exceeding 5%.

The Economic Report on Africa, 2013 by AfDB, OECP, UNECA and UNDP notes that due to the resumption of oil production and exports, Libya's GDP bounced back by 96% in 2012, boosting growth in North Africa to 9.5%, after the region's GDP stagnated in 2011. Given political uncertainties and difficult international economic conditions in Egypt, growth is expected to remain subdued at 2% and accelerate to 3.5%, thus remaining below pre-revolution levels. After negative growth of around 2% in 2011, the Tunisian economy recovered in 2012, growing by above 3%. It is expected that the economy continues to grow by around 3.5% in 2013 but achieves higher growth of around 4.5% in 2014. The Kingdom of Morocco and Mauritania continue to achieve solid growth in 2013/14 at average rates of 6% and almost 5% respectively. In Algeria growth is expected to accelerate from 2.5% in 2012 to above 3% in 2013 and to 4% in 2014. In Sudan, the economy has been heavily affected by the secession of South Sudan. In 2012, GDP contracted and for 2013 only moderate growth is projected and some acceleration in 2014 (OECD, 2012).

In East Africa, Rwanda, Tanzania, Ethiopia and Uganda, are on a solid growth path of between around 5% and 7% during the projection period. Since there was no post-election turmoil in Kenya, growth is expected to amount to 4.5% in 2013 and to accelerate to above 5% in 2014.

In Central Africa, GDP is likely to continue to grow by 5.7% in 2013 and 5.4% in 2014 with above average growth in Chad and in DRC. In Chad, oil production and agriculture are the main drivers of growth. In DRC, mining, agriculture and construction are boosting growth. But sustainable growth also requires further progress in political stability and the security problem in the eastern part of the country has significantly affected economic activity in that region.

Table 1.1 Africa Real GDP Growth and Projections by Regions

	2011	2012 (e)	2013 (p)	2014 (p)
Africa	3.5	6.6	4.8	5.3
Central Africa	5.2	5.7	5.7	5.4
Eastern Africa	6.3	4.5	5.2	5.6
Northern Africa	-0.1	9.5	3.9	4.3
Southern Africa	4	3.7	4.1	4.6
Western Africa	6.8	6.6	6.7	7.4

Source: Economic Report on Africa, 2013

In Southern Africa, the Economic Report on Africa projected that GDP is expected to grow by around 4% in 2013 and to accelerate to 4.6% in 2014. In Angola, Mozambique, Zambia and Botswana growth is likely to remain buoyant. Malawi is expected to emerge from its 2012 economic crisis and return to solid growth. According to the Report in 2012, economic growth in South Africa was adversely affected by heavy strikes in the mining sector and the recession in the euro area. With improved global demand and supportive macroeconomic policies a gradual recovery is expected for 2013 and 2014. Zimbabwe continues to record positive growth rates of above 5%. But due to the economic crisis with declining production levels until 2009, by the end of 2014 real GDP will still be more than a quarter lower than in 2001. Swaziland's economic growth continues to be the lowest in the region and in Africa as a whole noted the Economic Report on Africa.

Implications for Air Transport

Air transportation plays a vital role in the continent's growth process by facilitating the movement of goods and persons. Growth in air transportation directly mirrors economic growth due to effects of direct and indirect jobs creation in the industry and other auxiliary sectors such as tourism and others. Expansion in air transportation creates market opportunities for local entrepreneurs by creating regional and global economic centers. In 2010, the aviation industry in Africa supported about 6.9 million jobs (including 257,000 direct jobs) through the impact on travel and tourism which translated into USD67.8 billion of the continent's GDP according to Oxford Economics. The aviation industry's impact on African economies is set to grow. Over the next 20 years, implied job creation by the industry is projected at 879,000 (AfDB).

Overall, international air traffic to and from the continent has been growing at about 6% over the last decade, while domestic traffic has been growing at 12%, driven largely by an explosion of activity in some of the fastest growing countries. In Southern and Eastern Africa, air traffic is growing strongly around hubs in Johannesburg, Addis Ababa, and Nairobi. No clear hub has emerged in West Africa yet. Abidjan, Accra, Dakar and Lagos would probably be obvious choices for a sub-regional hub, but none has yet positioned itself to play the role.

The performance of the African aviation industry is still lagging behind those of the rest of the world at less than 3% of global RPKs. Nonetheless, demand for air transport has increased steadily over the past years with passenger numbers and freight traffic growing significantly. Over the period 2010-2015, Africa will be one of the fastest growing regions in the world in terms of international traffic with an average growth rate of 6.1% compared to the global average of 5.8% (ICAO AFI TFG). Middle East and Asia Pacific will however surpass Africa's growth at 7.9% and 6.9% respectively. Europe, Latin America and North America are projected to record lower international passenger growth of 5.0%, 5.8% and 4.9%, respectively. This positive growth trend is expected to continue in the coming years due to robust economic growth, demographic boom, increasing urbanization, and emergence of the middle class.

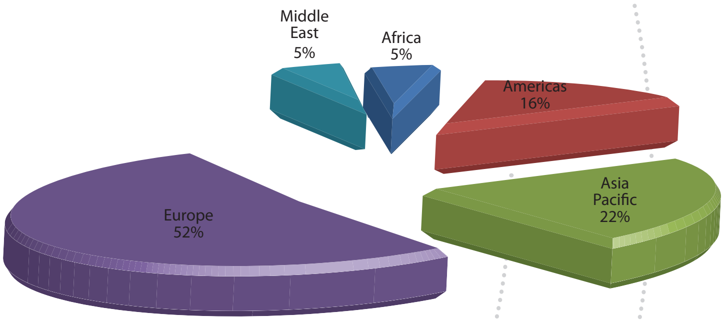
Africa can maintain the growth of its aviation industry if more and more people can afford to pay for the cost of air travel. Currently, around 12% of Africans travel by air but given the current rate of economic growth and emergence of the middle class, there will be high demand for services linked to air transportation. However, dominance of the African market by better resource endowed foreign carriers is adversely constraining the growth and profitability of many African airlines.

Tourism

International tourist arrivals reached 1.035 billion in 2012; 39 million more than in 2011. Global tourism contributed 9.1% to world GDP, 5.9% of worldwide exports and 4.5% of global investment in 2012 (IATA WATS).

Europe accounted for 535 million (more than half) international tourist arrivals in 2012 – an increase of about 3%. The region remains the most visited. Asia Pacific was again the fastest growing region, with 15 million more tourist arrivals than in the previous year an increase of 7%. Total international tourist arrival was 233 million, almost a quarter of global total.

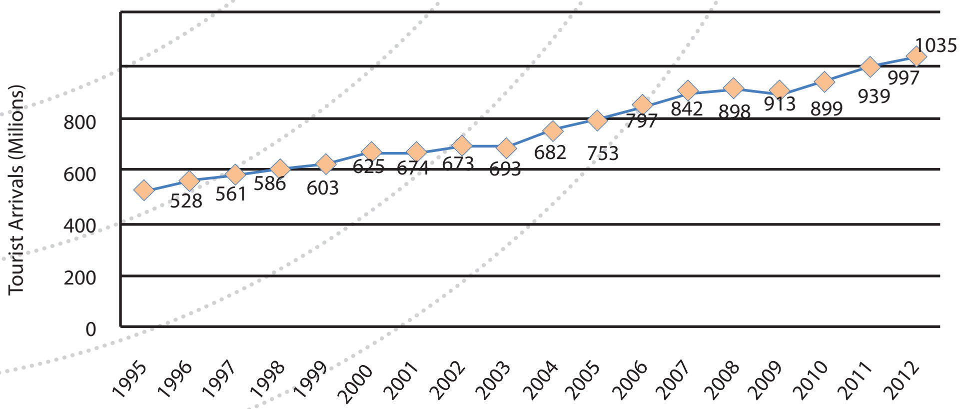
Figure 1.3 International Tourist Arrivals (in Millions) 2012



Source: IATA WATS

The Americas maintained its share of global tourist arrivals, 6%. The region received 6 million more tourists in 2012, reaching a total of 162 million. The Middle East region experienced a 5% drop in tourist arrivals due to the political tension in several popular destinations.

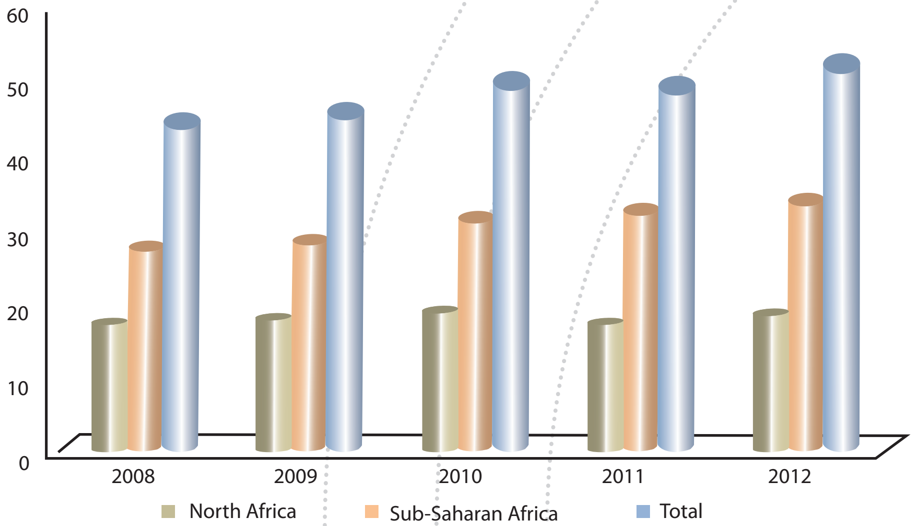
Figure 1.4 International Tourist Arrivals – 1995-2012



Source: AFRAA/IATA WATS

Africa saw the second highest growth across the world regions with 3 million more tourist arrivals in 2012. This is equivalent to a 6% increase. In 2012, Africa attracted 52 million visitors, up from a low 6.7 million visitors in 1990 and receipts from tourism for 2012 amounted to over US$36 billion. Sub-Sahara Africa is outpacing other regions in tourism growth. Africa's tourism revenues are rising fast and are set to contribute more and more to world activity. For example, the number of tourists arriving in Sub-Sahara Africa has grown over 300% since 1990.

Figure 1.5 Africa International Tourist Arrivals: 2008-2012



Source: AFRAA/UNECA

Global Airline Industry Performance

2012 witnessed further successful expansion in passenger markets, with more connectivity driven by strong emerging markets. Asset utilisation reached record levels, boosted by consolidation and other improvements to industry structure. Cargo suffered another difficult year of shrinking markets, falling utilisation and lower yields. However, the good performance of the passenger business led to better profitability. Economic growth and air travel has been weak in the developed economies in the aftermath of the financial crisis. However, emerging markets in Asia, Latin America and Africa expanded strongly, supporting growth of air travel.

In 2012, 65% of the growth in passenger numbers on international markets took place on markets linked to emerging economies. African markets to the Middle East and to the Far East were strong, reflecting the development of new South-South trade lanes.

According to IATA, worldwide international and domestic revenue passenger kilometres flown grew by 6.0% and 4.1% respectively in 2012. In line with the traffic upward trend, seat capacity (ASKs) increased by 4.3% and 4.0% on international and domestic routes respectively. With this, the average load factor increased to 79.2%.

Passenger traffic of IATA airlines on all scheduled services grew by 5.1% - a slight reduction from the 5.7% growth in 2011. International RPKs grew by 5.8%, while domestic RPKs increased by 3.6%. ASKs by IATA member airlines was up 3.8%.

Estimates of scheduled world cargo traffic (FTK) decreased by 1.1% in 2012 compared to 2011 (IATA). International freight traffic, which accounts for more than 87% of total FTKs, decreased by 1.3%, while domestic freight traffic increased by 0.3%. IATA member airlines freight traffic (FTKs) on all scheduled services suffered a decline of 0.5% compared to 2011's decline of 0.4%.

Financial Performance

IATA reported that, global airline profitability declined in 2012 by about 14% on 2011; and way below the strong performance of the industry in 2010 when net profits were above US$19 billion. Total revenue from operations reached US$570.6 billion. The airline industry was still profitable however, with net profit of US$7.6 billion in 2012. This represented an operating margin of 2.3 % and a margin of 1.2% on the net results. Results were mixed across regions, but Asia Pacific airlines achieved the strongest results with a net profit of US$3.9 billion. African airlines however made a loss of US$0.1 billion in 2012.

Table 1.2 Systemwide Global Commercial Airlines Net Profit by Region (US$ billions)

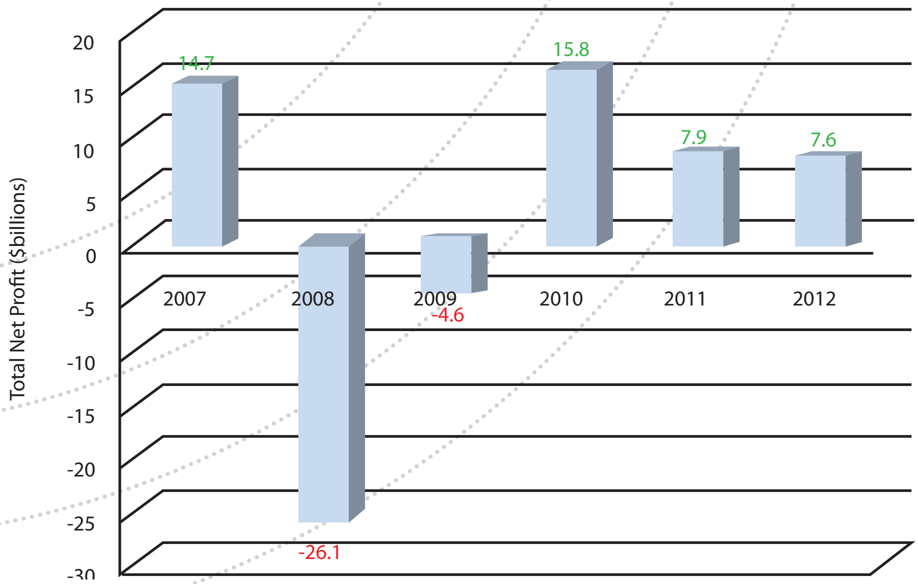
	2010	2011	2012E
North America	4.1	1.7	2.3
Europe	1.9	0.4	0.3
Asia Pacific	11.4	5.5	3.9
Middle East	0.9	1.0	0.9
Latin America	0.9	0.3	0.3
Africa	0.1	-	(0.1)
Total	19.3	8.9	7.6

Source: IATA WATS

IATA reports that Asia Pacific airlines achieved the strongest results in 2012 – a net profit of US$3.9 billion. But this was down from the 2011 profit of US$5.5 billion. North America was the second most profitable region in 2012 with a net profit of US$2.3 billion, up from US$1.7 billion in 2011. Profitability among European airlines continues to be hampered by economic weakness throughout the Eurozone. Airlines in the region achieved US$0.3 billion profit in 2012, a further decline from the 2011 profit of US$0.4 billion. There was no change in profitability between 2011 and 2012 for Latin American carriers. Profits in both years stood at US$0.3 billion.

Airlines in Africa experienced a small decline in 2012 compared to 2011, resulting in a loss of US$0.1 billion while the Middle East carriers also recorded a US$1.0 billion decline in profits in 2012 compared to a decline of US$0.9 billion in 2011.

Figure 1.6 Total Airlines Net Profit – US$ billion



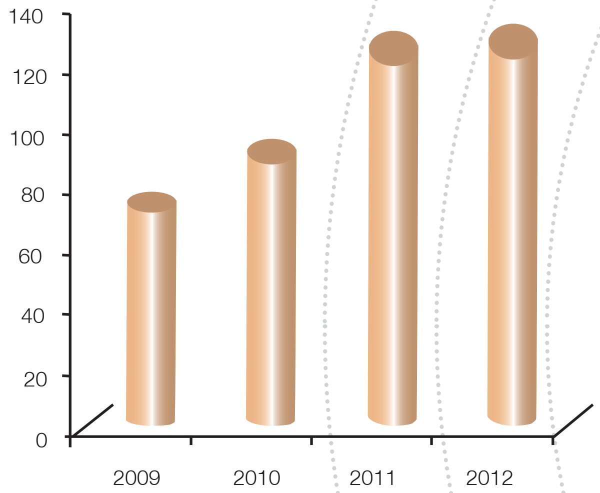
Source: AFRAA/IATA WATS

Jet Fuel Cost

In 2012 global commercial aviation consumed 72 billion USG of fuel, representing about 2% of all fossil fuels burned worldwide, according to IATA. The total annual fuel bill for the worlds' airlines in 2012 is estimated to be US$209 billion, compared to US$176 billion in 2011. In 2012 on average, fuel accounted for 33% of total airline operating costs, although higher in some regions. In Africa for instance, fuel accounted for between 45-55% of operating costs of airlines.

The price of jet fuel in 2012 increased by 1.7% to average US$129.5 per barrel compared with US$127.5 in 2011. This meant that fuel price stayed at the high level reached in 2011 for the most part of 2012, placing sustained pressure on the airline industry profit margin. The average price of fuel in 2012 was more than 80% above the price in 2009.

Figure 1.7 Global Average Fuel Price: 2009-2012



Source: AFRAA/IATA WATS

All regions experienced a similar rise in fuel price in 2012 compared to 2011. North America saw the highest increase at 2.2% while the Middle East and Africa saw prices increase at least 1%. Central and South America had the highest annual average in 2012, at US$134.8 per barrel.

Table 1.3 IATA Jet Fuel Price Index by Region

Year	2009	2010	2011	2012	Last Year	Last 2 Years	Last 3 Years
Asia Pacific	70.5	90.7	126.2	127.6	1.1	40.7	80.9
Europe	71.1	91.6	128.5	130.5	1.6	42.4	83.5
Middle East & Africa	68.8	88.7	124.8	126.1	1	42.1	83.2
North America	74	91.6	127.4	130.2	2.2	42.1	75.9
Central & South America	71	94.8	132	134.8	2.1	42.1	89.8
Global Average	70.9	91.4	127.5	129.6	1.7	41.8	82.8

Source: IATA WATS

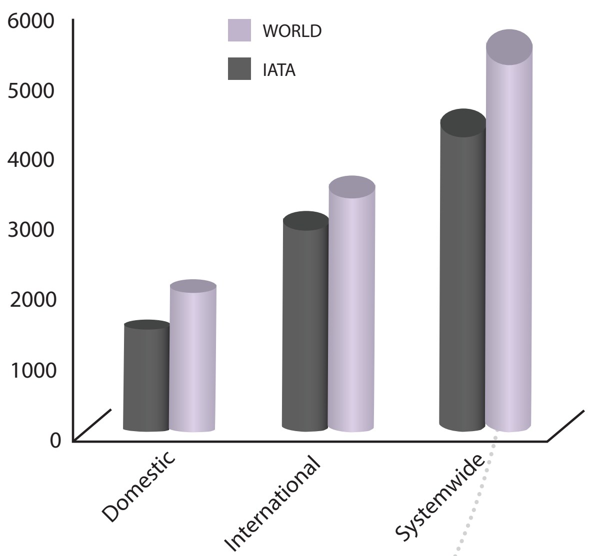
Section Two: Airline Performance

Global Performance

Global passenger air traffic (RPKs) improved by 5.3% in 2012 compare to 2011. International markets had an increment of 6.0% while domestic markets grew by 4.1%. In line with the traffic upward trend, seat capacity (ASKs) increased by 4.3% and 4.0% on international and domestic routes respectively. With this, the average load factor increased to 79.2%.

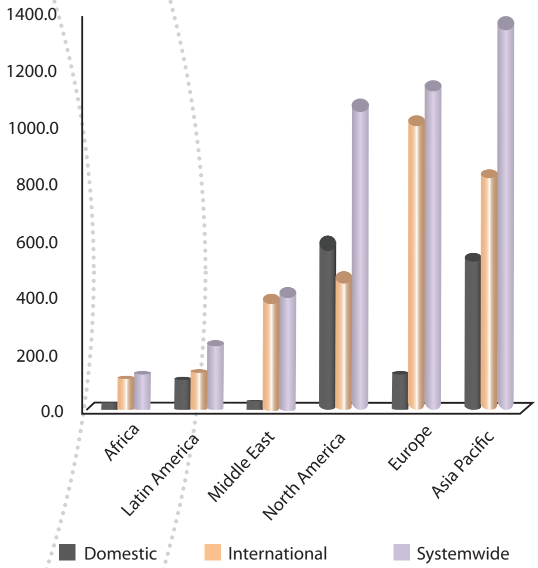
Estimates of scheduled world cargo traffic (FTK) decreased by 1.1% in 2012 compared to 2011. International freight traffic, which accounts for more than 87% of total FTKs, decreased by 1.3%, while domestic freight traffic increased by 0.3%. IATA member airlines freight traffic (FTKs) on all scheduled services suffered a decline of 0.5% compared to 2011's decline of 0.4%.

Figure 2.1 IATA Share of World's Scheduled Passenger Kilometres (RPKs) 2012 (billions)



Source: IATA WATS/AFRAA

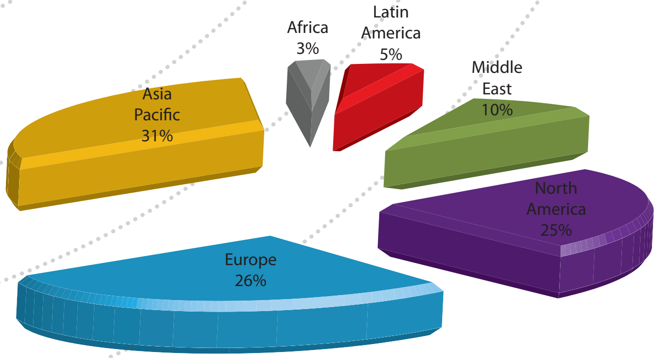
Figure 2.2 Revenue Tonne-Kilometres per Region – IATA Schedule Services 2012



Source: IATA WATS/AFRAA

System-wide, the Asia Pacific region was the world's biggest air transport market by RPKs performed (31.4%) in 2012, followed by Europe and North America at 26.3% and 24.6% respectively. Africa remains the smallest market, accounting for about 2.8% of global RPKs.

Figure 2.3 Revenue Tonne-Kilometres Performed per Region – IATA



Source: IATA WATS/AFRAA

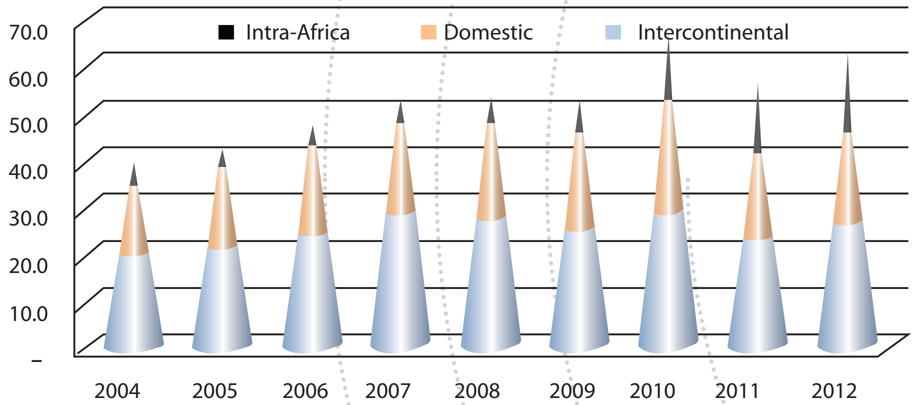
African Airlines Performance
Passengers Carried

Passenger numbers has grown consistently year on year since 2004 except in 2011 where the numbers dipped as a result of the Arab Spring and political instability in parts of North Africa. From less than 40 million passengers carried in 2004 by African airlines, Passenger numbers have increased to almost 63 million in 2012; a cumulative growth of 61.5% (average annual growth 7.8%).

Passenger traffic defied the challenges posed by the persistent economic difficulties in the Eurozone and continuing political instability in parts of North Africa to grow by 12.5% in 2012. Total number of passengers carried stood at 62.9 million, up from the 2011 figure of 56.4 million.

The 19 AFRAA airlines that reported their passenger numbers in 2012 carried 48.4 million passengers or 76.9% of total passengers carried by all African airlines. This represents an increase of 32.9% over the 36.4 million reported by 17 AFRAA airlines in 2011.

Figure 2.4 Total Passengers Carried by Market: 2004-2012



Source: AFRAA

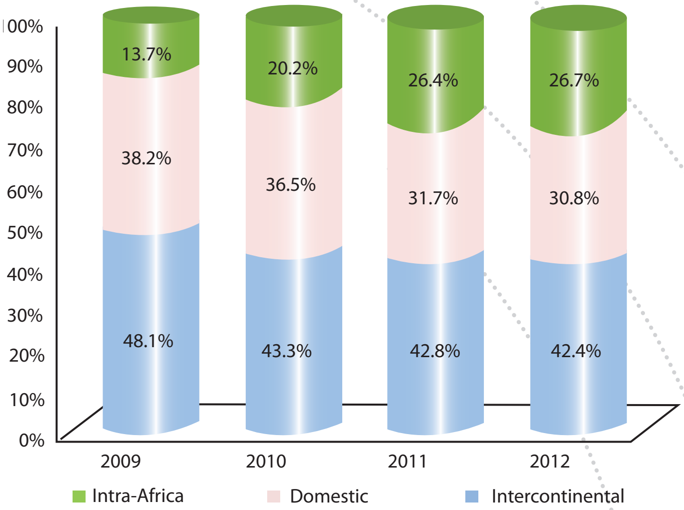
The high GDP growth experienced in 2012 coupled with the attractiveness of Africa as a source for mineral resources and an attractive investment destination continue to attract foreign investments. African airlines therefore continued their aggressive network expansion, new markets development and further penetration of their domestic and intra-Africa markets. As a result, passenger numbers increased on domestic, intra-Africa and intercontinental routes. The total number of intercontinental passengers carried increased to 26.7 million from 23.6 million in 2011.

Domestic and Intra-Africa Passengers

Domestic passenger numbers increased by over 8% to 19.4 million due an increase in access to air travel, lower fares and new routes launched in 2012. The growing competition in many domestic markets and the resultant improvement in service quality and lower fares continue to stimulate demand. Low Costs Airlines, particularly in South Africa, Kenya, Egypt, Morocco and lately Tanzania continue to aggressively promote and attract more passengers, some of whom have never flown by air.

Intra-Africa passenger numbers went up 12.75% to 16.8 million, from 14.9 million in 2011. This growth was driven largely by the rapidly growing business and trade among African countries and the growing middle class, some of whom now prefer air travel.

Figure 2.5 Percentage Share of Passengers Carried by Market: 2009-2012



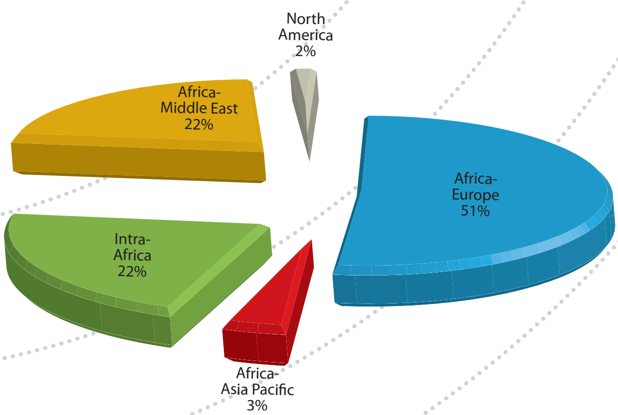
Source: AFRAA

On the intercontinental routes, passenger numbers also went up by 12.5% to 26.7 million in 2012. Significant growth was especially experienced on the Africa-Asia Pacific and Africa-Middle East routes. Africa-Europe still remains the most important intercontinental passenger air transport market, accounting for 51% of total intercontinental passengers.

Significantly, number of passengers carried intra-Africa increased to almost the same number carried between Africa and the Middle East in 2012. Intra-Africa passenger numbers stood at 22% of total carried; same as that to/from the Middle East.

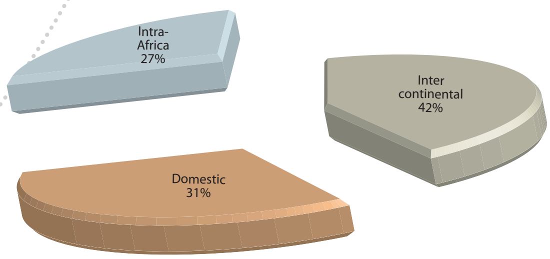
With a population of over 1.07 billion, spread across the vast the continent of 54 countries, there is huge potential for growth in intra-Africa air travel. The major constraint to this growth is the slow pace of liberalisation and the over-dependence on Bilateral Air Services Agreements (BASAs) by many States.

Figure 2.6 Percentages of Passengers Carried by African Airlines to/from Regions, 2012



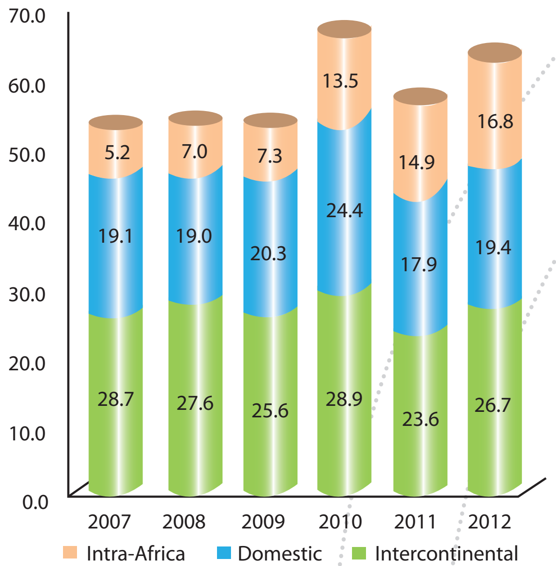
Source: AFRAA/ICAO

Figure 2.7 African Airlines Passenger Distribution 2012



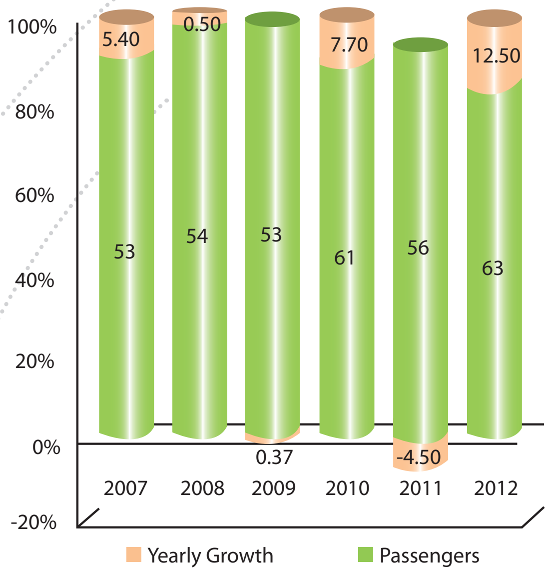
Source: AFRAA

Figure 2.8 Passengers Carried by African Airlines by Region: 2007-2012



Source: AFRAA

Figure 2.9 Total Passengers Carried by African Airlines and Percentage Growth, 2007-2012

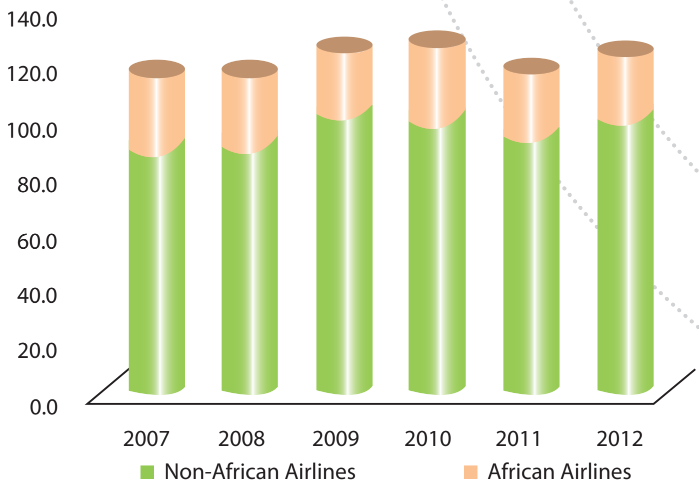


Source: AFRAA

Intercontinental Passengers

Intercontinental passenger numbers in 2012 increased by 12.9% over 2011. African airlines share of this was 5.1% in the year under review, bringing total passengers carried on intercontinental routes to 26.7 million. Non-African airlines carried 7.8% more passengers. The continued economic slowdown in the Eurozone reduced the traffic flow from that market, especially leisure traffic. The political crisis in some countries in North Africa also turned away tourists to the region in the year under review. This was however compensated for by an increase in the number of passengers from Asia, the Middle East and the Americas to sub-Sahara Africa. Non-African airlines still carry the bulk of traffic to/from Africa, accounting for 78.4% of all passengers carried on intercontinental routes in 2012.

Figure 2.10 Passengers Carried by African and Non-African Airlines on Intercontinental Routes

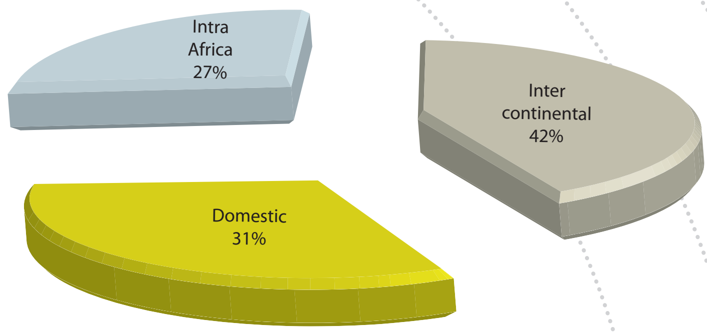


Source: AFRAA

Passenger Distribution

Intercontinental passenger market segment remains the biggest with 42% of all passengers travelling between Africa and other regions of the world. The domestic market segment represents 31% while the intra-Africa market is 27%.

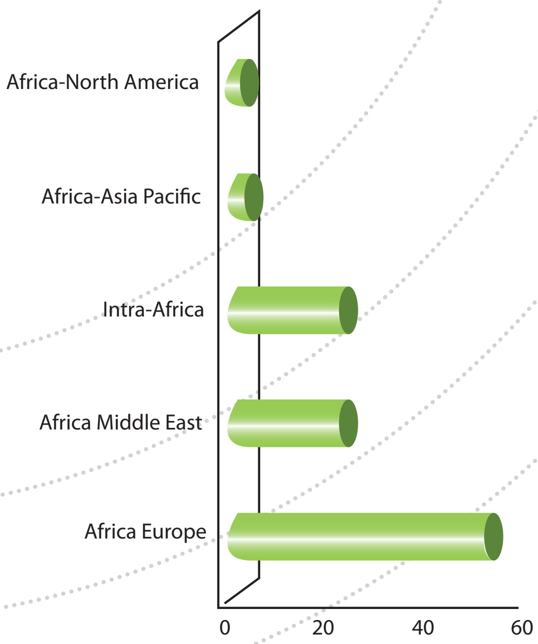
Figure 2.11 African Airlines Passenger Distribution 2012



Source: AFRAA

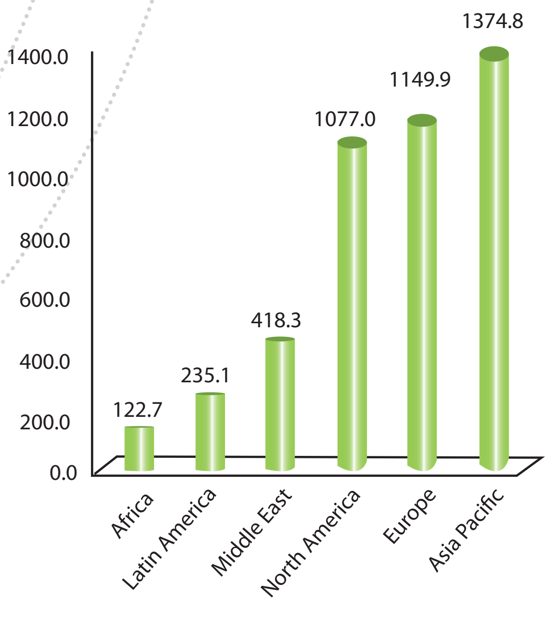
Africa-Europe is still the most important market segments for Africa carriers and travellers, accounting for 51% of all passengers carried by African airlines in 2012. Africa-Middle East followed in a distant second with 22% of all passengers carried. Asia Pacific and North America share remains relatively small though growing very fast. With significant Chinese investments and business interest in Africa, traffic from this region is set to increase substantially in the coming years. Africa's strong economic ties with Asia and growing investments from developed regions are contributing to the positive trend in air travel demand.

Figure 2.12 Passenger Traffic Flow between Africa and Other Regions (%) 2012



Source: AFRAA/ICAO

Figure 2.13 IATA Airlines Revenue Tonne-Kilometres per Region – 2012



Source: AFRAA/ICAO

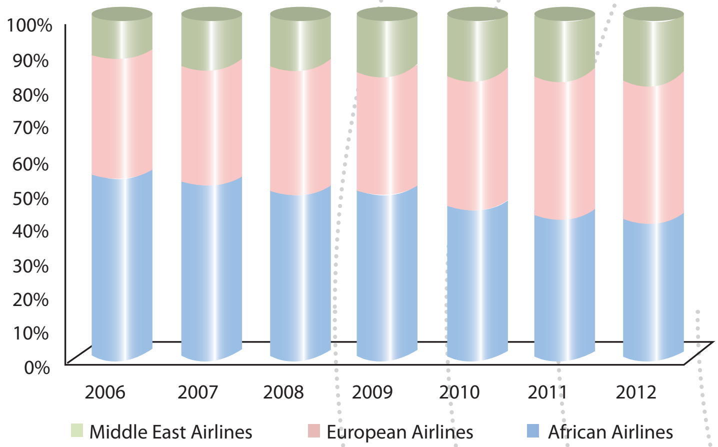
Intra-Africa traffic grew significantly in 2012 to match traffic between Africa and the Middle East at 22%.

Globally, Asia Pacific is the biggest air travel region, accounting for 31.4% of total IATA schedule traffic (RPK) in 2012. Europe comes in second at 26.3% and North America at 24.6%. Africa is still the smallest market in terms of RPKs at less than 3%.

Market Capacity Share

In the last 7 years African Airlines lost 12% capacity on European and Middle East routes to non-African Airlines. Over the same period non-African airlines market share grew from 46% to 58%. Middle East and European carriers have largely benefited from the growing African market. It has been difficult for the African carriers to compete on intercontinental routes because of the absence of intercontinental carriers and airport hubs in West/Central Africa, market access policies (in some countries) that favour non-Africa airlines and limited network reach.

Figure 2.14 Percentage Share of Intercontinental Capacity (ASKs) to/from Africa, 2006-2012

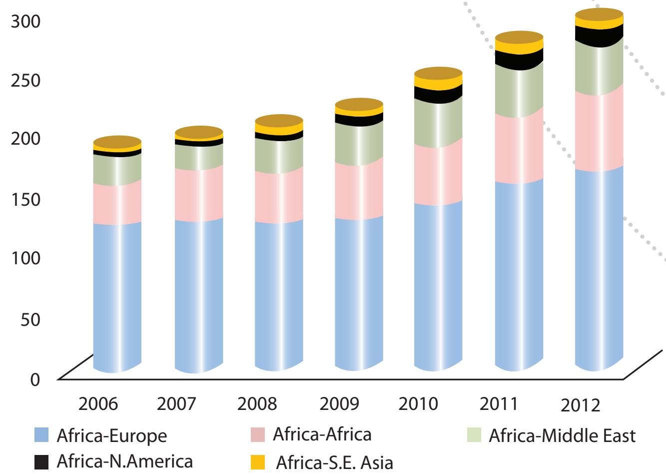


Source: AFRAA/OAG

Traffic Performance

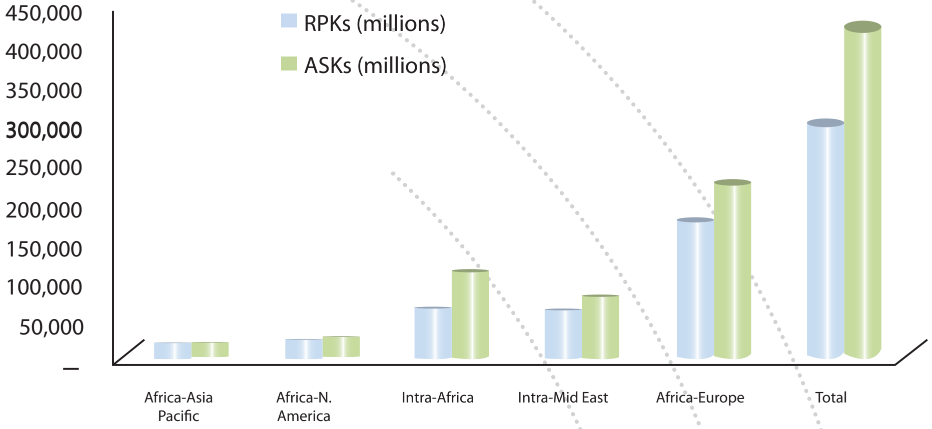
Scheduled Revenue Passenger Tonne-Kilometres (RPKs) performed by African airlines increased by 5.9% to 292.97 billion from last year's 272.85 billion. On the other hand, capacity measured by Available Passenger Tonne-Kilometres (ASKs) was up 4.6% from 252.6 billion in 2010 to 414.2 billion. Domestic RPKs went up by 8% in 2012 while ASK also grew by 5.3%.

Figure 2.15 Africa Traffic Growth (RPKs) by Regional Flow (in billions)



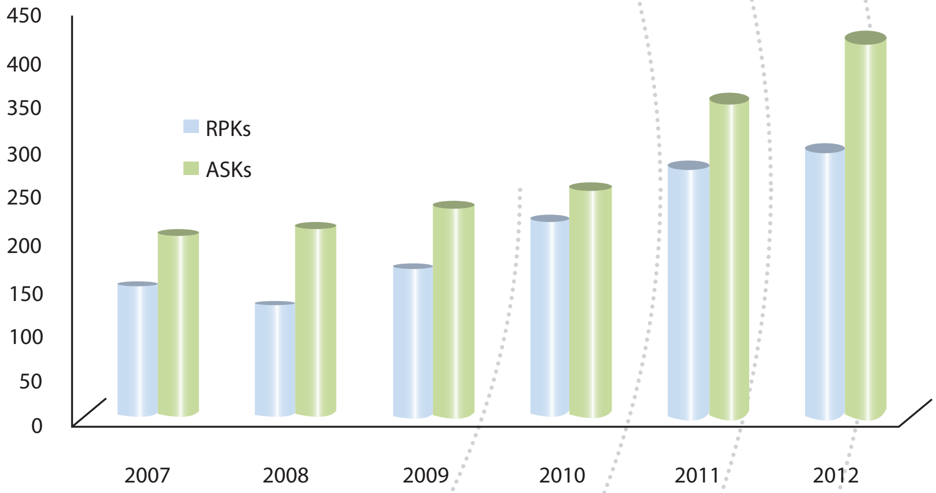
Source: AFRAA/IATA

Figure 2.16 African Airlines Traffic Performance by Region: 2012



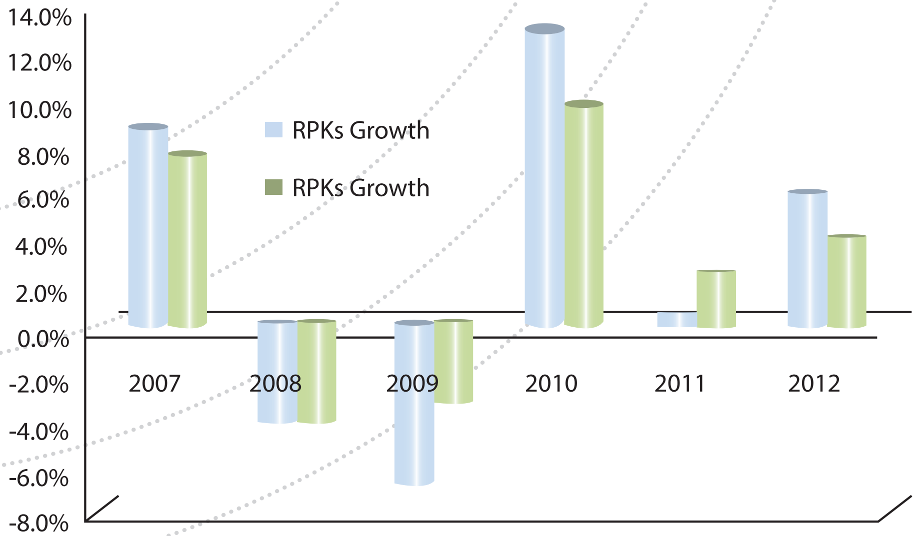
Source: AFRAA/IATA WATS

Figure 2.17 African Airlines RPKs & ASKs – 2007-2012



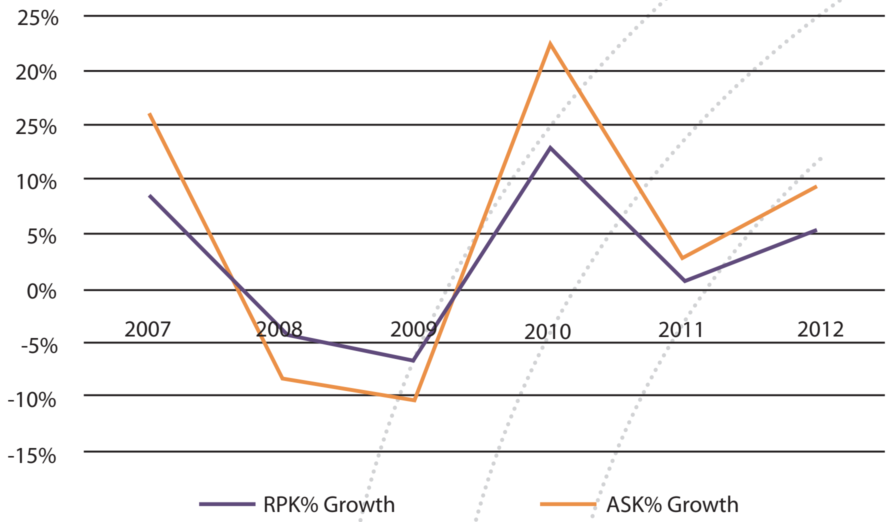
Source: AFRAA

Figure 2.18 Africa Passenger Traffic and Capacity Annual Percentage Growth: 2007-2012



Source: AFRAA/IATA

Figure 2.19 Africa Passenger Traffic and Capacity % Growth Trend: 2007-2012



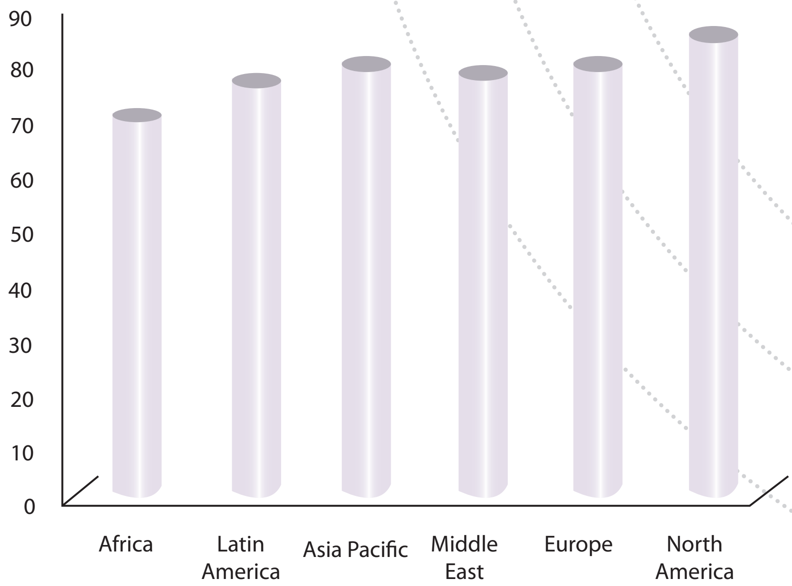
Source: AFRAA/IATA

Passenger Load Factor

The imbalance of capacity and demand continues to create inefficiencies in many African airlines. Over 30% of all capacity put in the market by African airlines went to waste in 2012. Average passenger load factor (PLF) improved marginally by 0.8% to 69.7%. This compared unfavourably to global average load factor of 79.2% for 2012.

The highest load factor was achieved on the Africa-Europe route, 77.5%, followed by the Africa-Middle East Route at 73.9%. Though intra-Africa traffic grew significantly in 2012, average load factor was the lowest compared to all regions other regions at 51.9%.

Figure 2.20 Passenger Load Factor by Region – 2012

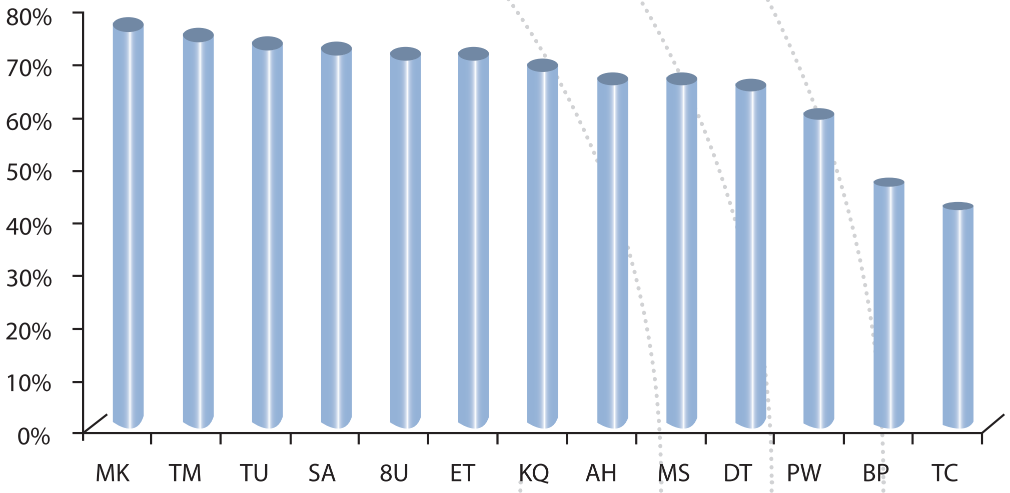


Source: AFRAA/IATA WATS

Mismatch of capacity to demand, limited commercial cooperation and uncoordinated networks among African operators are some of the reasons for the poor load factor on intra-Africa routes. In addition, 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.

The AFRAA member airline with the highest average load factor in 2012 was Air Mauritius at 77%. Air Tanzania reported the lowest annual average load factor of 42%.

Figure 2.21 Passenger Load Factor of some AFRAA Airlines in 2012



Source: AFRAA

Like in 2011, North America remains the world region with the highest load factor of 83.9% followed by Europe at 78.9% and Middle East at 77.8%. All regions saw a marginal increase in load factor in 2012. The least increase was by Latin America at 0.4 percentage points. Africa gained 0.8 percentage points, though overall it attained the lowest load factor of 69.7% in 2012.

Table 2.1: Passenger and Weight Load Factor for all Regions – 2012

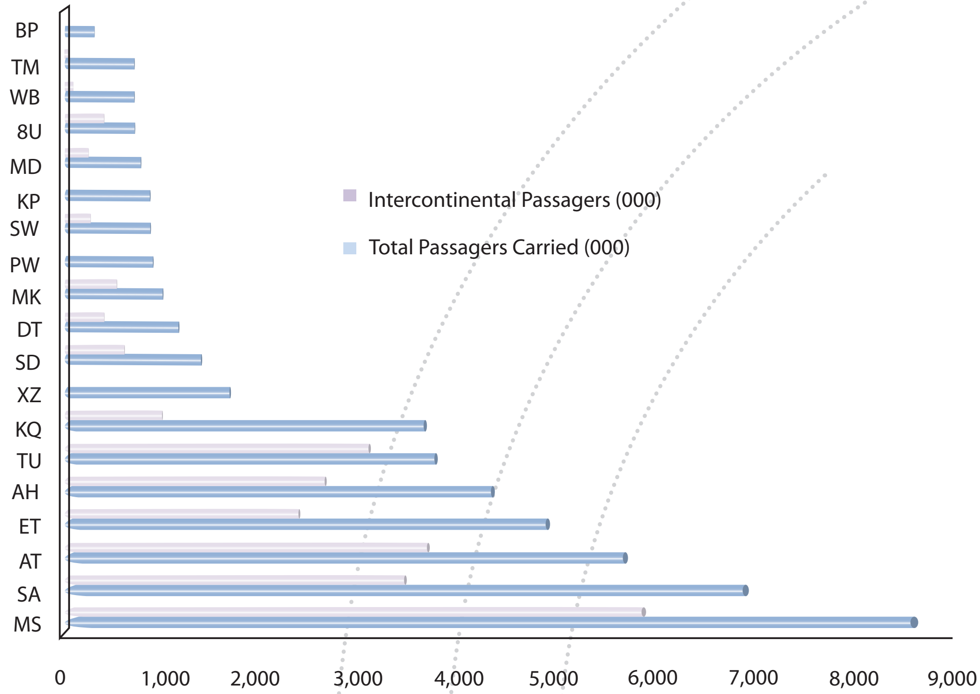
	Passenger LF	% Change	Weight LF	% change
Africa	69.7%	0.8	58.7%	0.6
Asia Pacific	77.5%	0.8	70.2%	0.1
Europe	78.9%	1.4	69.3%	0.6
Latin America	75.6%	0.4	65.0%	-0.3
Middle East	77.8%	1.9	63.5%	1.5
North America	83.9%	0.9	61.7%	0.6
Industry Average	79.2%	1.0	64.7%	0.5

Source: AFRAA/IATA WATS

AFRAA Airlines Passenger Traffic

AFRAA airlines that reported performance in 2012 carried a total of 48, 517,000 of which intercontinental passengers made up 50%. The biggest airline by number of passengers carried in 2012 was EgyptAir, with over 8.6 million passengers transported.

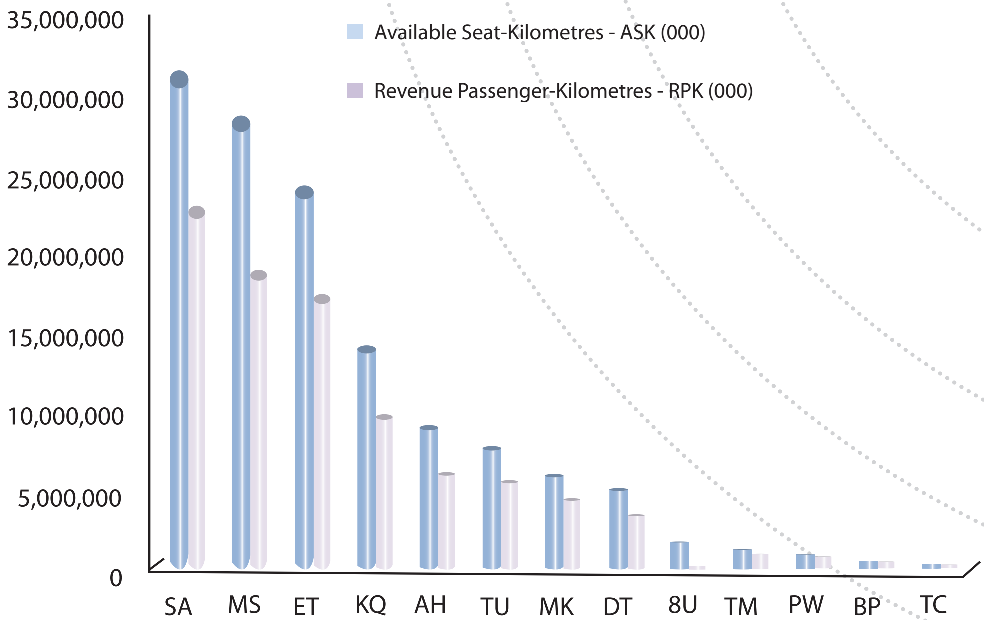
Figure 2.22 Total Passengers Carried by Some AFRAA Airlines in 2012 (000)



Source: AFRAA

The AFRAA airlines that reported their performance in 2012 put on the market total ASKs of 126,475 million. Total reported RPKs was 87,410 million while the overall average load factor was 69.1%. South African Airways is Africa's biggest carrier in terms of ASKs and RPKs, followed by EgyptAir, Ethiopian and Kenya Airways respectively.

Figure 2.23 ASKs and RPKs of Some AFRAA Airlines in 2012 (000)

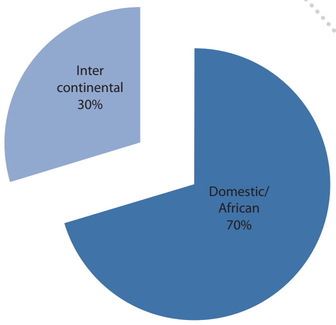


Source: AFRAA

New Routes

African airlines in 2012 continued with their aggressive route expansion, not just within the continent, but also on intercontinental routes. In 2012, 44 new routes were launched by 19 AFRAA member airlines to domestic, intra-Africa and intercontinental destinations. Of these, 13 destinations were intercontinental with the remaining 31 new routes within the continent.

Figure 2.24: New Destinations by AFRAA Airlines in 2012



Source: AFRAA

Table 2.2: New Destinations by AFRAA Airlines in 2012

	Origin	Destination		Origin	Destination
1	Benghazi	Amman	23	Addis Ababa	Dammam
2	Benghazi	Khartoum	24	Addis Ababa	Bangkok-Kuala Lumpur
3	Benghazi	Tunis	25	Nairobi	New Delhi
4	Tripoli	Amman	26	Nairobi	Kilimanjaro
5	Adrar	Tamanrasset	27	Nairobi	Eldoret
6	Algiers	Alicante	28	Maputo	Beira-Harare
7	Oran	Tunis	29	Dar es Salaam	Lilongwe-Harare
8	Gaborone	Lilongwe	30	Dar es Salaam	Lubumbashi-Lusaka
9	Gaborone	Lanseria	31	Dar es Salaam	Mombasa
10	Gaborone	Harare-Nairobi	32	Dar es Salaam	Shinyanga
11	Gaborone	Harare-Blantyre	33	Tangiers	Madrid Barajas
12	Gaborone	Cape Town	34	Kigali	Mwanza
13	Maun	Victoria Falls	35	Cape Town	George
14	Antananarivo	Guangzhou	36	Durban	Lusaka
15	Windhoek	Gaborone	37	Durban	Harare
16	Mahé	Abu Dhabi	38	OR Tambo	Kigali-Bujumbura
17	Lome	Cotonou-Malabo	39	OR Tambo	Beijing
18	Douala	Kinshasa	40	OR Tambo	Accra-Abidjan
19	Douala	Lagos	41	Johannesburg	Brazzaville
20	Malabo	Madrid	42	OR Tambo	Pointe Noire-Cotonou
21	Brazzaville	Paris Charles De Gaulle	43	Monastir	Moscow Domodedovo
22	Addis Ababa	Seychelles	44	Tozeur	Paris CDG

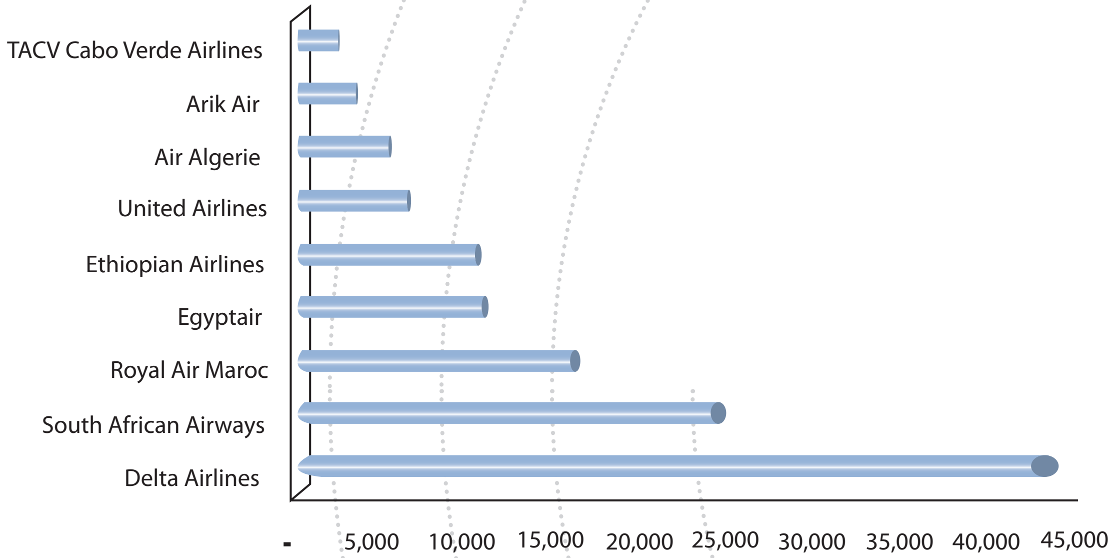
Source: CAPA and airline websites

North America Operations

Delta Airlines, which began direct US-Africa flights in 2006 has continued its dominance on the Africa-North American route with over 36% of the passenger capacity. Its average monthly frequency is around 180 flights. Another US carrier, United Airlines reduced its capacity by half to 22 flights a month out of Africa. The 2 North American carriers together operate 41.35% of all scheduled flights across the Atlantic.

7 African airlines together operate 250 flights per month across the Atlantic. This represents 58.65%, an increase of over 4% from 2011 capacity.

Figure 2.25: Operators Market Share on the Africa-USA seats per month



Source: AFRAA/OAG

Table 2.3: Africa to North America Capacity Share 2012

Operating Carrier	Flights per month	Seats per month	% share (seats)
Delta Air Lines	180	42,668	36.31%
South African Airways	86	23,806	20.26%
Royal Air Maroc	61	15,552	13.23%
EgyptAir	30	10,380	8.83%
Ethiopian Airlines	33	9,862	8.39%
United Airlines	22	5,918	5.04%
Air Algerie	19	4,781	4.07%
Arik Air	12	2,844	2.42%
TACV Cabo Verde Airlines	9	1,715	1.46%
TOTAL	**452**	**117,526**	

Source: AFRAA/OAG

Passenger Traffic Forecast

IATA annual survey of airline forecasts for traffic growth showed that travel is expected to grow by over 5.3% on average over the next 4 years to 2016. IATA's long term forecast however expects demand (RPKs) growth to average 4.8% over the next 20 years. Similar forecast of passenger demand (RPKs) growth by Airbus, Boeing and Embraer average between 4.9 – 5% over the next 20 years.

The forecast passenger 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 2012 (billions)	Av. Forecast Growth (2012-2030)
Africa-Africa	54.89	5.10%
Africa-Europe	165.78	4.60%
Africa-Middle East	51.76	6.40%
Africa-North America	13.16	6.40%
Africa-Asia Pacific	7.22	7.50%

Source: Boeing Market Outlook

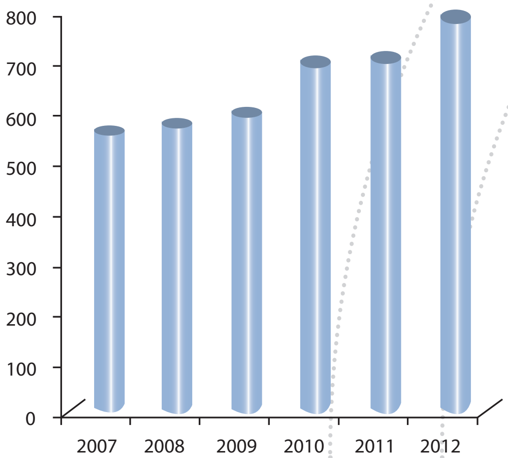
Passenger traffic growth forecast between Africa and other regions show variations, with some regions set to grow faster than others. Over the next 18 years, the fastest growth region will be Asia Pacific, with a revised growth rate of 7.5% per year followed by North America and the Middle East at 6.4%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

Section Three

Freight Traffic

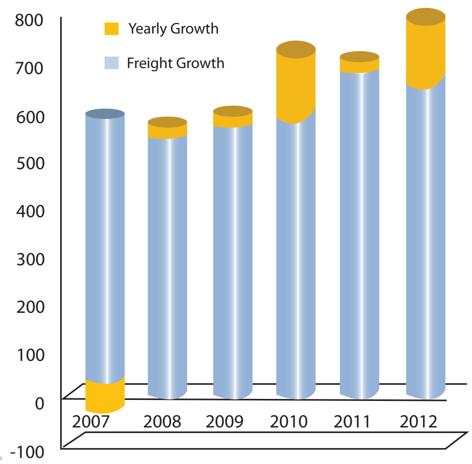
Air freight shipment in Africa is still very low. In 2012 the continent airlines carried about 788,500 tonnes of total global freight carried, representing 1.8% of total air freight shipment. AFRAA member airlines in 2012 carried a total of over 710,800 tonnes. In FTKs, this represents a growth of 11.7% compared to 2.7% in 2011. The Middle East and Africa recorded the highest year-on-year air freight growth of 12.8% and 11.0% respectively.

Figure 3.1 African Airlines Year-on-Year Freight Carried (tonnes)



Source: AFRAA/IATA WATS

Figure 3.2 Freight Carried by African Airlines: 2007-2012 (tonnes)

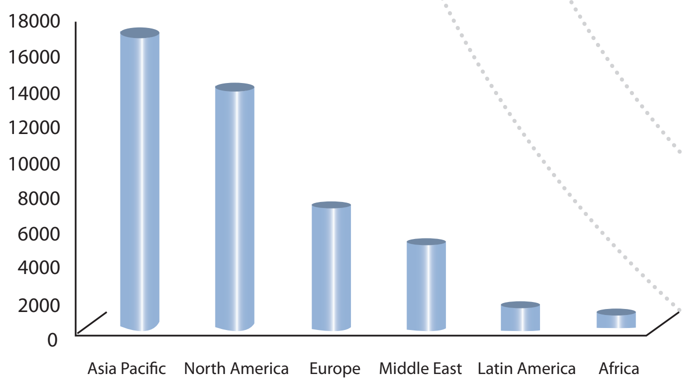


Source: AFRAA/IATA WATS

Over 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, mining equipment and components. Though small, intra-Africa air freight is growing very fast because of recent increase in regional trade and cross investments among African countries. With harmonisation of customs regulations and procedures and availability of regular scheduled freighter services, intra-Africa air freight could gain more importance.

Already, major African carriers such as EgyptAir, Ethiopian, Kenya Airways, and South African Airways are investing substantial resources to grow their air freight business. This will reduce the hitherto over reliance on passenger aircraft belly-space for cargo shipment, which is limited and subject to baggage load.

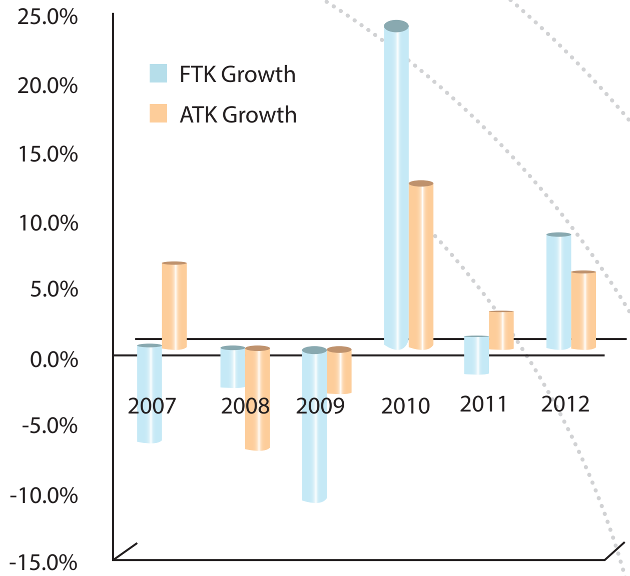
Figure 3.3 Freight Carried by Region (tonnes) – 2012



Source: AFRAA/IATA WATS

The failure by many African airlines to develop the cargo component of their operations has led to dominance of the intercontinental sector by non-African airlines. On the domestic and intra-Africa segments, the bulk of freight is transported by rail or road due to lack of capacity and bureaucratic customs clearance processes at airports.

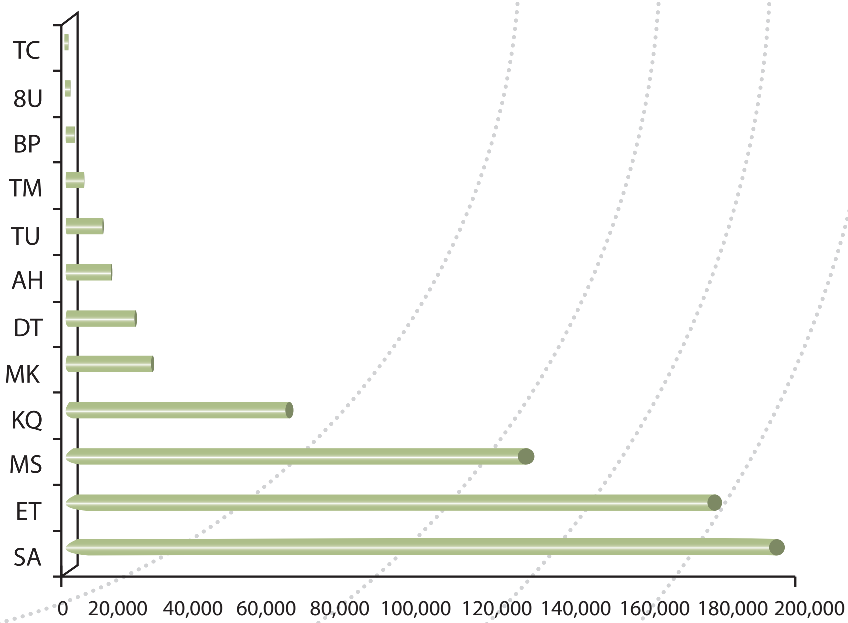
Figure 3.4 Africa Freight Traffic and Capacity Growth in 2007-2012



Source: AFRAA/IATA

Reporting AFRAA airlines together moved 710,800 tonnes. 63% of the freight was carried on intercontinental routes, with 27% and 10% carried on domestic and regional routes respectively. SAA carried the largest portion of freight at 195,336 tonnes followed by Ethiopian Airlines at 178,100 tonnes.

Figure 3.5 Total Freight Carried by Some AFRAA Airlines in 2012 (000)



Source: AFRAA

Freight Traffic Forecast

The past two years of decline in global air freight markets has influenced expectations for the medium and long term. IATA survey showed that airlines on average now expect air freight tonnes to grow by 3% annually over the next 4 years to 2016 on international markets. The manufacturers are also conservative in their long term forecast and expect air freight demand (FTKs) growth to average 4.9 – 5.2% over the next 20 years. IATA however, maintains its long term forecast of 5% average growth.

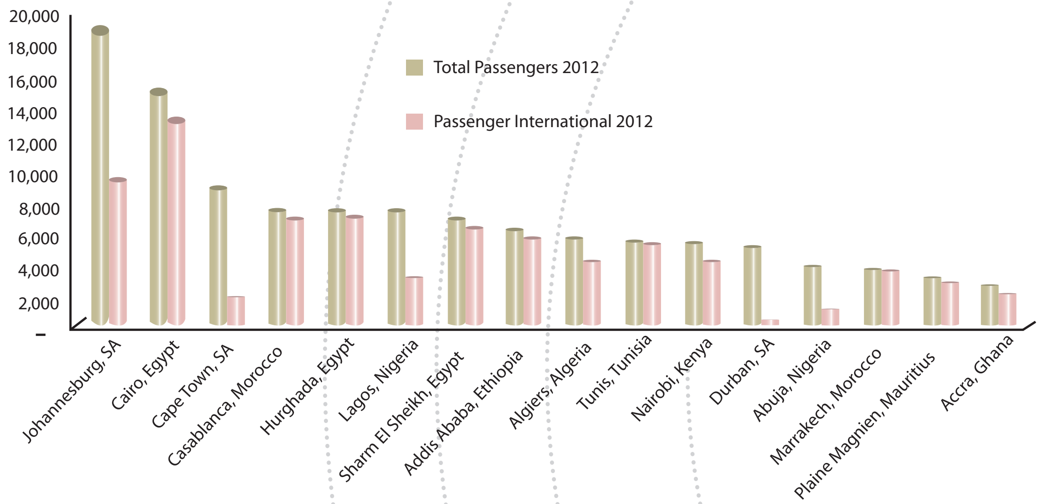
Section Four

African Airports Statistics

In 2012, African airports carried 164 million passengers. This represented a 7% growth over the number of passengers carried in 2011. International passengers constituted 65% of the 107 million passengers carried by the top 20 airports.

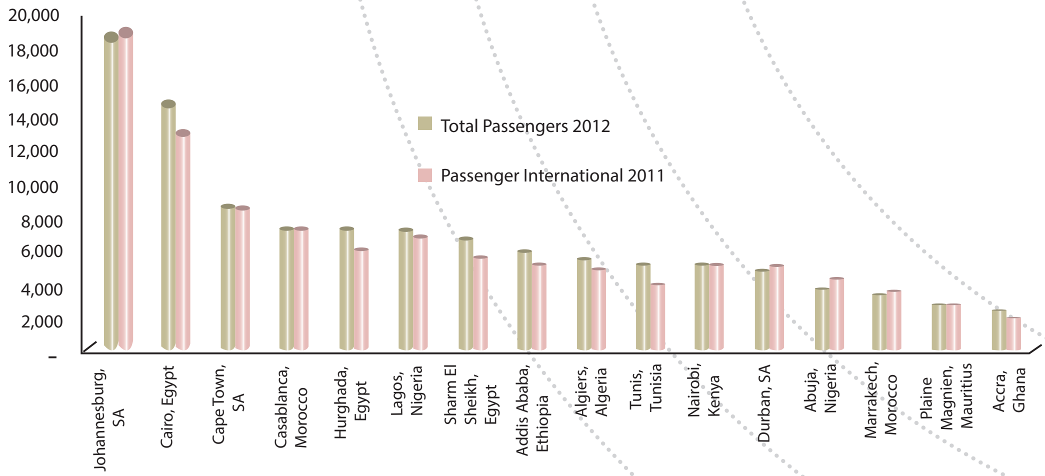
Of the top 20 airports, 3 are located in South Africa and 3 in Egypt, making the two countries the biggest air transport markets in Africa. O.R. Tambo International Airport is the busiest airport in Africa in terms of passenger numbers, cargo handled and aircraft movement.

Figure 4.1 Top African Airports by Passengers Carried (000)



Source: AFRAA/ACI-AFRICA

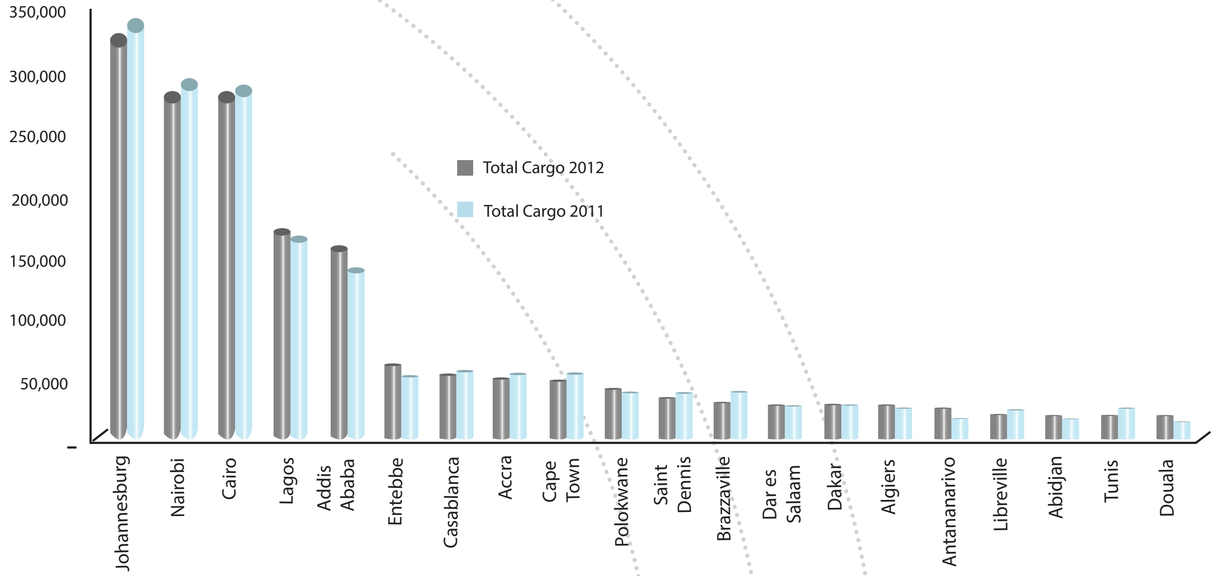
Figure 4.2 Top African Airports by Passengers Carried in 2011 and 2012 (000)



Source: AFRAA/ACI-AFRICA

Cargo traffic at African airports in 2012 was at the same level as in 2011; 1,844,000 tonnes. Compared to 2010 however, this represents a growth of 12.8%. The major cargo airport is O. R. Tambo International in Johannesburg. It accounted for 324,000 tonnes. Since 2010, Nairobi Jomo Kenyatta International Airport has marginally overtaken Cairo Airport as the second most important cargo hub in Africa. The five most significant cargo airports include; Johannesburg O.R. Tambo, Nairobi Jomo Kenyatta, Cairo Airport, Lagos hub Murtala Mohammed Airport and Addis Ababa Bole International Airport.

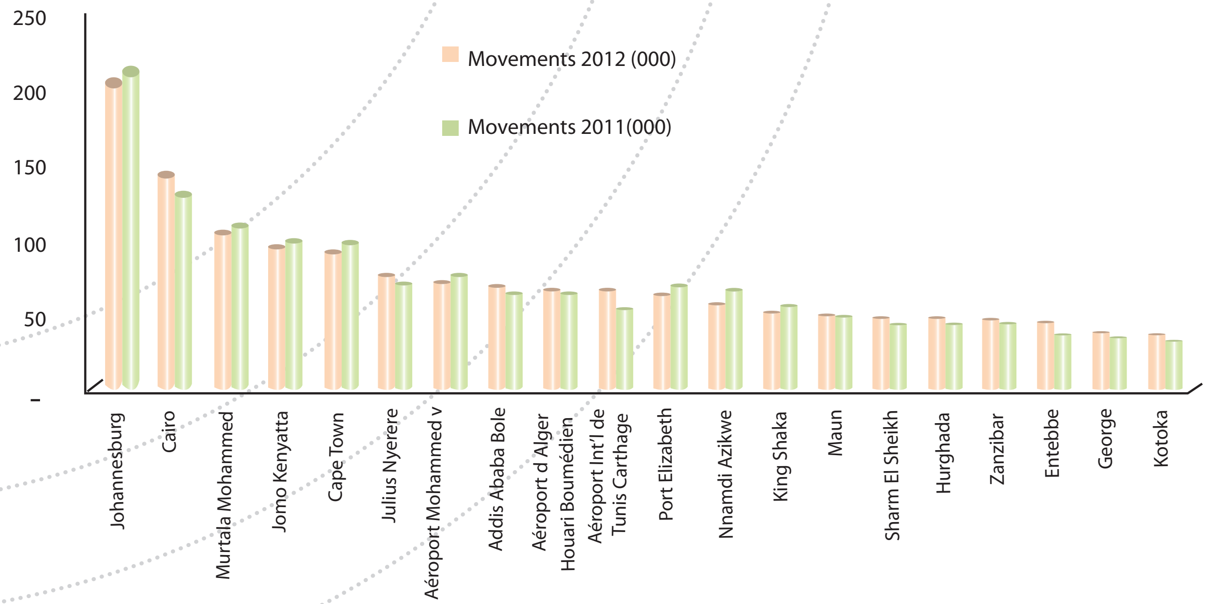
Figure 4.3 Top 20 African Airports by Total Cargo Handled



Source: AFRAA/ACI-AFRICA

Aircraft movement has not seen significant change since 2011. There were 2.68 million aircraft movement in 2012 compared to 2.65 the year before, with O.R. Tambo being the busiest airport. O.R. Tambo recorded about 30% more aircraft movements than its closest rival, Cairo International., in 2012. However, Cairo airport recorded the highest annual growth in aircraft movement of 10% in 2012.

Figure 4.4 Top 20 African Airports by Aircraft Movement



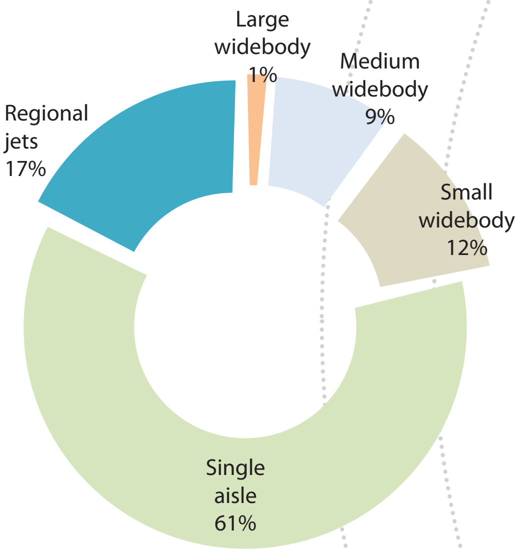
Source: AFRAA/ACI-AFRICA

Section Five

Fleet Composition and Development

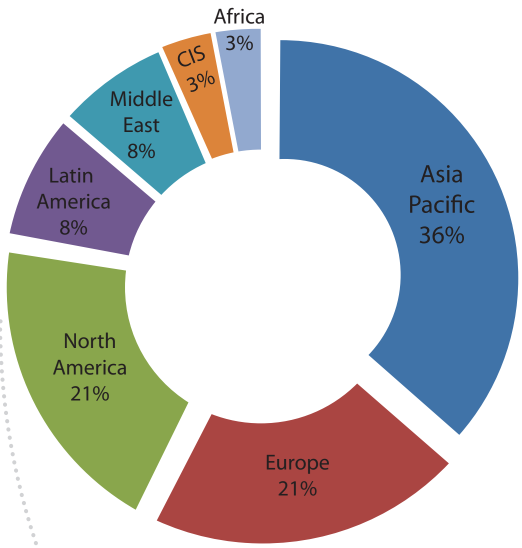
Global commercial airline fleet in 2012 was composed of 20,320 passenger aircraft and 1,730 freighters according to Boeing. By 2032, this is expected to double to 41,240. Between 2013 and 2032, 35,280 new aircraft are expected to be added to or replace some existing fleet in operation globally. The total cost of the additional fleet is estimated at over US$4,860 billion.

Figure 5.1 Africa Fleet Composition – 2012



Source: Boeing Market Outlook

Figure 5.2 Aircraft Demand Forecast 2013-2032



Source: Boeing Market Outlook

Africa passenger aircraft make up of 690 (3.4%) of the total global fleet. There are also about 10 freighters in operation. AFRAA airlines in 2012 operated a total of 573 aircraft or 83% of total African commercial fleet (see details in appendix).

Table 5.1 Aircraft in Service globally in 2012 and Additional Demand by 2032

	2012	2032	New Planes	Value ($B)
Large wide body	790	910	760	290
Medium wide body	1,520	3610	3300	1090
Small wide body	2,310	5410	4530	1100
Single aisle	13,040	29130	24670	2290
Regional jets	2,660	2180	2020	90
Total	**20,320**	**41,240**	**35,280**	**4,860**

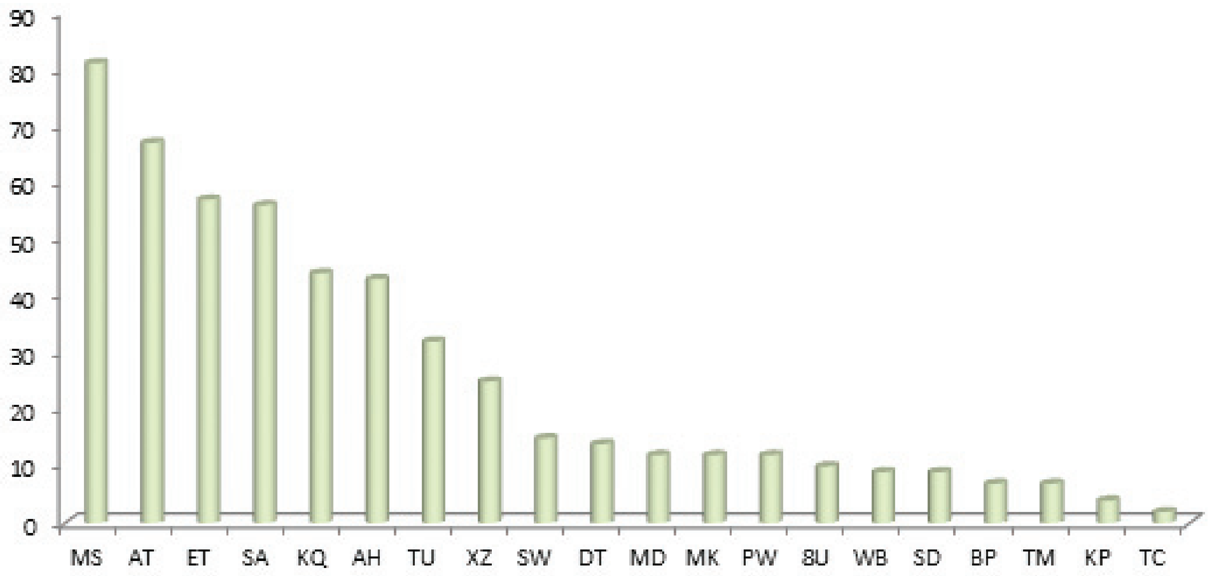
Source: Boeing Market Outlook

Africa Fleet and Forecast

Currently 61% of the total of 690 aircraft in operation in Africa is made up of single aisle type. Wide body (large, medium and small) constitute up 24% and regional jets 17%.

AFRAA airlines in 2012 operated a total of over 570 aircraft. The top 5 airlines in terms of number of aircraft in operation are Egypt Air, Royal Air Maroc, Ethiopian Airlines, South African Airways and Kenya Airways.

Figure 5.3 Fleet of Some AFRAA Airlines in 2012



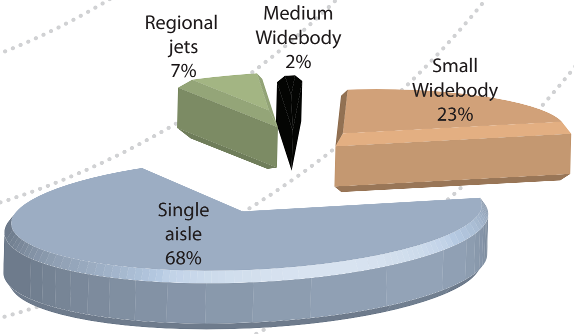
Source: AFRAA

Fleet Forecast

Boeing forecast Africa to require 1,070 new airplanes over the next 20 years to 2032. Of this, about 68% will be single aisle aircraft, 23% small wide body and 7% regional jets. Medium wide body aircraft will constitute about 2%. The total number of commercial aircraft to be in operations in Africa by 2032 will almost double to 1,500.

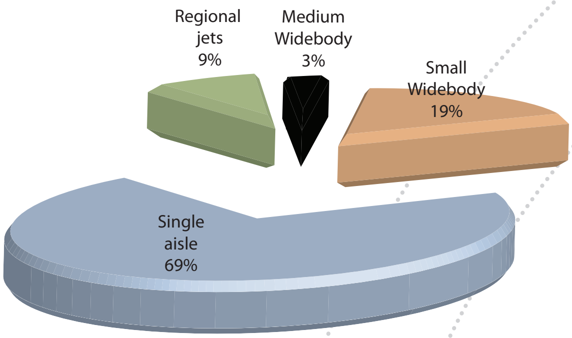
The average age of the current African fleet is about 14 years. Fleet is composed of 150 large to small wide body, 420 single aisle planes and 120 regional jets.

Figure 5.4 Forecast Africa New Fleet Composition



Source: Boeing Market Outlook

Figure 5.5 Africa Fleet Composition by 2032



Source: Boeing Market Outlook

According to Boeing Market Outlook, global commercial fleet is expected to reach 41,240 aircraft in 2032. Africa share of this will be about 1,070. Part of this new order will replace existing ageing fleet while the rest will be additional capacity to meet the growing traffic demand. The Yamoussoukro Decision on the Liberalization of Air Transport Markets in Africa, which set out to create a single African market is receiving renewed attention, with some countries gradually opening up their markets to other African airlines. The full implementation will significantly boost intra-Africa air transport development and investments in regional aircraft.

Over 80% of the expected new aircraft will be single aisle and small wide body jets, a clear indication of the anticipated growth in intra-Africa and domestic travel. By 2032, Africa fleet composition would remain similar to what it is today – dominated by single aisle and regional jets. About 22% of the fleet will consist of medium and small wide body aircraft.

Section Six

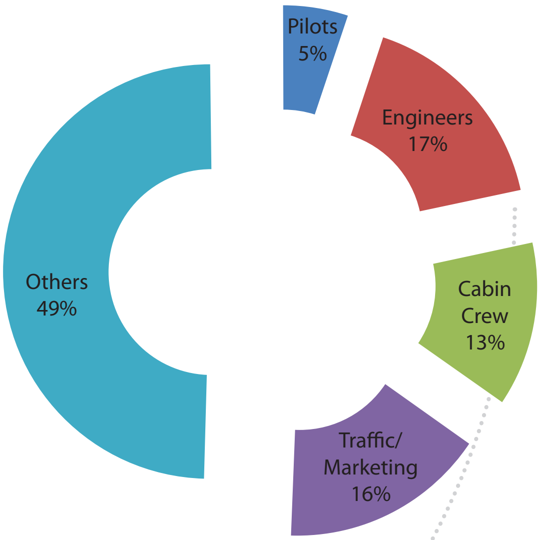
Employee Productivity

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

In 2012, total number of employees of IATA member airlines increased 1.9% over 2011. IATA member airlines productivity averaged 381,000 RTKs per employee and 574,000 ATKs per employee. The increased employee productivity reflects the traffic growth, at 1.7% and 2.0% respectively.

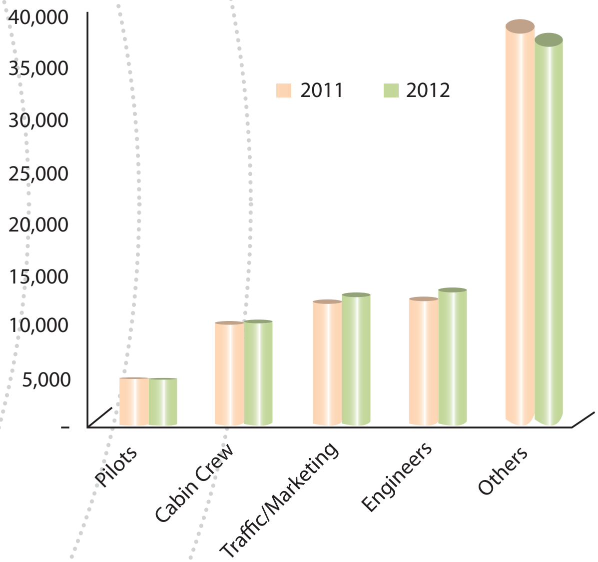
The total number of people employed directly by AFRAA member airlines in 2012 declined marginally to 74,556 from 74,236 in 2011. A number of airlines in an effort to improve efficiency restructured to increase productivity and shed off excess staff. The reduced head count could partly also be due to the brain-drain which has seen highly qualified and experienced employees attracted by competitors in other parts of the world.

Figure 6.1 2012 AFRAA Airlines Employees by Job Type



Source: AFRAA – Reported AFRAA airlines only

Figure 6.2 AFRAA Airlines Employment by Job Type



Source: AFRAA – Reported AFRAA airlines only

Table 6.1: Employee Performance Indicators

	2011	2012
RTK/employee	207,500	197,000
Number of passengers/employee	555	844
Employee/aircraft	179	130

Source: AFRAA – Reported AFRAA airlines only

AFRAA airlines in 2012 employed a total 3,836 pilots – 114 less than were employed in 2011. A total of 836 more engineers/technicians were engaged in the same years, bringing the total to 12,409.

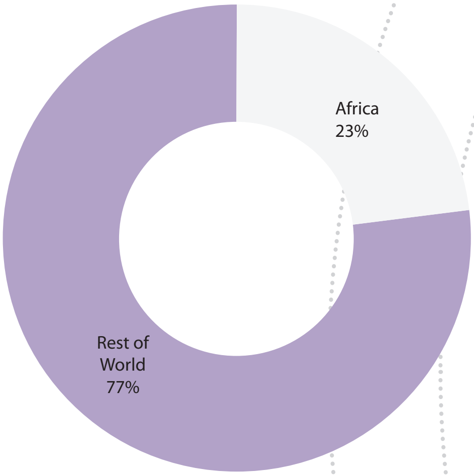
ICAO forecasts that pilots needed in Africa by 2030 will increase to about 56,000. The annual training need is estimated at about 3,800 but the current capacity can train only about 1,000 pilots leaving a shortfall of about 2,800 pilots.

Section Seven

Safety

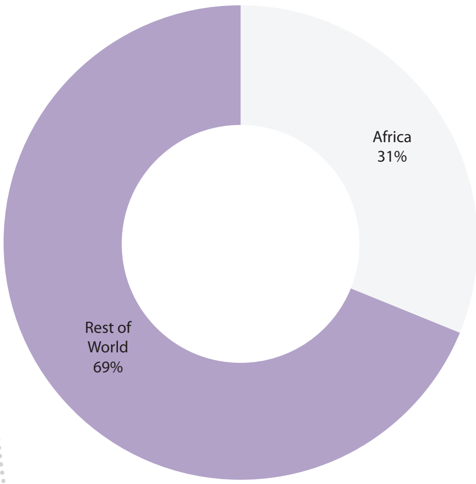
In 2012, there were 31 fatal airline accidents worldwide with 555 fatalities. 7 of the accidents or 23% occured in Africa with 252 fatalities (49 of them on the ground). Three of the accidents were in DRC, a country which consistently registers high accident rates on the continent. The detailed accident statistics are available at Annex 1.

Figure 7.1 Africa-vs-Rest of World Accidents – 2012



Source: Aviation Safety Network

Figure 7.2 Africa and World Share of Fatalities – 2012



Source: Aviation Safety Network

2011 was the best year for Africa in terms of accident rates. There were a total of 5 fatal airline accidents on the continent out of 39 worldwide, according to statistics from the Flight Safety Foundation. Of these, the DRC topped the list with 3 of the 5 fatal accidents.

It is clear that if efforts are made to reduce accidents in the DRC, the rate of accidents on the continent will be significantly reduced. All stakeholders need to work together to ensure that accident rates are brought down to world average levels.

To help find effective ways to further improve safety on the continent, an Aviation Safety Summit was held in Johannesburg on 14-16 May 2012 convened by IATA and ICAO together with AFCAC, AFRAA, ASECNA, ATNS, AASA, ACI, EASA, FAA, CANSO, IFALPA, IFATCA, BOEING & AIRBUS for key decision makers and came up with an agreed AFI Strategic Improvement Action plan. The plan was approved by Ministers responsible for Air Transport in Abuja in July 2012 and endorsed by the African Union (AU) Head of States Summit in January 2013. The implementation of the AFI Strategic Improvement Action Plan with the following agreed strategic tasks is critical to ensure that aviation safety levels on the continent are up to world standards by 2015:

- Adoption and implementation of an effective and transparent regulatory oversight system;
- Implementation of runway safety measures;
- Training on preventing Loss of Control;
- Implementation of Flight Data Analysis (FDA)
- Implementation of Safety Management Systems (SMS).

The AU Head of States agreed to make IOSA mandatory for all carriers by 2015. Africa has 39 airlines on the IOSA registry. AFRAA commends States for making IOSA registration mandatory before issuing an air operator's certificate from 2016 as this will demonstrate to the world that African airlines adopt world class best practices in safety, security and operations.

Progress on IOSA Registration

Africa has 39 airlines on the IOSA registry. It is critical that all African airlines be IOSA certified so as to demonstrate that safety in the number one priority for carriers. It is mandated that by 2015 all African airlines will obtain IOSA certification. AFRAA is committed to play its part to facilitate all African airlines obtain IOSA certification and is working closely with IATA and other stakeholders to achieve this. We appreciate Aviation Compliance Solutions (Pvt) Ltd, an IATA approved IOSA auditing firm, joining the AFRAA partnership programme and being ready to train African professionals to be IOSA auditors which will help inculcating a safety culture on the continent. IATA held two workshops for non IOSA registered airlines in February 2013, one of which was hosted by AFRAA in Nairobi attended by 33 participants from 15 airlines.

AFRAA Member Airlines on IOSA Registry (22):

- Afriqiyah Airways
- Air Algérie
- Air Botswana
- Air Burkina
- Air Madagascar
- Air Mauritius
- Air Namibia
- Air Seychelles
- Air Zimbabwe
- EgyptAir
- Ethiopian Airlines
- Interair South Africa
- Kenya Airways
- LAM Mozambique Airlines
- Libyan Airlines
- Precision Air Services
- Royal Air Maroc
- Tunisair
- South African Airways
- South African Express Airways
- Sudan Airways
- TAAG Angola Airlines

Non AFRAA Member Airlines on IOSA registry (17):

- Air Austral (Reunion Islands)
- Air Cairo (Egypt)
- Air Memphis (Egypt)
- Air Uganda
- Almasria Universal Airlines (Egypt)
- ALS Limited (Kenya)
- AMC Airlines (Egypt)
- Arik Air (Nigeria)
- Comair (South Africa)
- Equaflight Societé SARL (Congo Republic)
- Nouvelair (Tunisia)
- SAFAIR (Proprietary) Ltd
- South African Airlink
- TACV Cabo Verde Airlines (Cape Verde)
- Tassili Airlines (Algeria)
- Trans Air Congo (Congo Republic)
- Tristar Air (Egypt)

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 a irline 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 the African airlines worldwide.

Section Eight: Secretariat Activities

The activities of the Secretariat are guided by the AFRAA Business Plan approved by the Executive Committee.

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 some of the activities by the Secretariat to meet specified targets.

1. Safety

Safety is the top priority of AFRAA but still remains a major challenge. To enhance safety, AFRAA is committed to work with several stakeholders including ICAO, AFCAC, IATA and regional economic communities. This work culminated in the adoption of the AFI Strategic Improvement Action Plan by the African Ministers and Heads of States of the AU. AFRAA, in conjunction with IATF also provided 6 technical courses to airlines to build capacity and help them prepare for IOSA. In addition, AFRAA provided courses in Aviation Audit, Load Control and Dangerous Goods to some airlines at their request.

AU Heads of State Endorsement of IOSA

Following recommendations of Ministers responsible for Aviation after their conference in Abuja on 16-20 July 2012, the Heads of State of the African Union endorsed the requirement for all African airlines to be IOSA registered by end of 2015. This is a major milestone which should see safety standards in Africa reach world levels and ensure that all African States and airlines are out of the EU banned list.

AFRAA is working closely with IATA, AFCAC and ICAO to facilitate the achievement of the safety targets for Africa by 2015 mainly through capacity building and providing advisory services for airlines preparing for IOSA audits.

Making IOSA mandatory for all carriers will encourage the development of a safety culture by all African carriers. Africa has 39 airlines on the IOSA registry and the number of airlines preparing for IOSA certification continues to increase. IATA and AFRAA require that all their member airlines be IOSA certified so as to reaffirm their commitment to safety as the number one priority for member airlines.

IATA Safety Audit for Ground Operations (ISAGO)

AFRAA, IATA agreed and other stakeholders of the view that ground handling companies should adopt the IATA Safety Audit for Ground Operations (ISAGO) as a vehicle to ensure quality, safety and security. The basis for this is that AFRAA/IATA member airlines are required to be IOSA registered and they expect ground handlers to also adopt similar quality and safety standards.

The implementation of the IATA Safety Audit for Ground Operations (ISAGO) aims to improve safety and cut airline costs by drastically reducing ground accidents and injuries.

2. Training and Human Capital Development

Developing people is among the top priorities of AFRAA to ensure that African aviation continues to grow using highly trained and capable personnel.

World class (EASA/FAA Certified) African training centres in Egypt, Ethiopia, Kenya, Libya, Kingdom of Morocco, Seychelles and Tunisia are on the AFRAA website and Annual Report to facilitate bilateral co-operation among airlines.

AFRAA continues to work closely with major stakeholders in the aviation industry to enhance its training programmes. In early February, AFRAA teamed up with Lufthansa Consulting to host the first African CEO's Workshop to deliberate on various fields of cooperation. AFRAA also hosted a workshop organized by IATA to create awareness on IOSA so as to assist those airlines seeking IOSA registration.

In light with the directives to have all the airlines IOSA certified, AFRAA Training Department set targets at the start of the year 2013 to address some of the airlines' training needs. In 2013, AFRA Secretariat conducted 12 training courses and 5 workshops/forums. Our collaboration with the IATA Airline Training Fund (IATF) for the development of capacity continues to grow. IATF sponsored 4 free courses to African non-IOSA registered airlines in the AFI region to facilitate the IOSA registration. The courses conducted in the training calendar are as follows:

AFRAA Courses

	Name of the Course	Host Airline	Dates
1.	Gap analysis	Camair-Co	21 - 26 January
2.	Passenger Handling	Air Botswana	11 - 15 March
3.	Passenger Handling	Air Botswana	18 - 22 March
4.	Passenger Handling	Air Botswana	25 - 29 March
5.	SMS for Airlines	Air Tanzania	15 - 19 July
6.	Audit Technics	Air Tanzania	22 - 26 July
7.	Aircraft Handling & Ramp Supervision	Camair-Co	9 -14 September
8.	Quality Management Systems	Air Tanzania	9 - 13 September

AFRAA continues to work with major stakeholders to ensure best practice in the African airlines industry.

Courses sponsored by IATF

The courses listed were conducted for African non-IOSA registered airlines in the AFI region to facilitate the IOSA registration. AFRAA hosted the courses in Nairobi.

	Name of the Course	Airlines Attending	Dates
1.	Management of Airside Safety	7 airlines	24 - 28 June
2.	Airline Document Control	12 airlines	23 - 26 July
3.	ERP	14 airlines	26 - 30 August
4.	SMS for Airlines	9 airlines	23 - 27 September

Workshops and Forums

Workshops held in conjunction with various patrons in the airline industry include:

	Name of the Course	Dates	In Conjunction with
1.	African Airlines CEOs Cooperation Summit	8 - 9 February	Lufthansa Consulting
2.	IOSA Awareness Workshop	18 - 22 February	IATA
3.	Executive Seminar for Airline CEOs	17 April	IATA
4.	Joint Fuel Training course	24 - 25 September	IATA
5.	Regulatory Forum	27 November	IATA & AFCAC

3. AFRAA Fuel Project

The AFRAA Fuel Committee completed its second negotiations on the 28th October 2013 for a total of 102 airport locations. 11 AFRAA members pooled their fuel volumes of over 1 billion litres in the tender. The negotiations are expected to be completed by December 2013.

The second Fuel Training of AFRAA/IATA held in Nairobi

The Second AFRAA/IATA fuel training was held at the BOMA Inn hotel in Nairobi on the 24th-25th September 2013. Capacity building is key to the success of any Airline especially for those resource personnel working on fuel and procurement. This is because Fuel remains a key cost element in the cost structure in the Airlines operating expenses making up to 50% of the costs. AFRAA has embarked on various projects, which are intended to address the issues of mitigating this cost which has an impact on the bottom-line.

The training was sponsored by Engen and had representation from 13 airlines, ICAO and Aviation training institutions. A total of 32 participants benefited from the training. The training preceded the 3rd AFRAA fuel tender negotiations.

Taxes, Fees and Charges

Taxes, fees and charges on areas such as fuel and passengers are still among the highest in the industry. During the year, AFRAA did analysis and identified the various high taxes and charges applied to airlines by some States and service providers. This information enabled us to do lobbying work for reduction.

Fees, charges and taxes on aviation fuel in Africa are way above world average. Globally, fuel accounts for about 30-36% of an airline's operational cost whilst in Africa this ranges from 45% -55%. Fuel prices at some stations in Africa are over twice the world average. This has a very adverse impact on the competitiveness of African airlines. AFRAA and IATA had a successful year in their lobbying efforts to reduce taxes, fees and charges.

i) Cote d'Ivoire

To address the high fuel cost in Cote d'Ivoire, a meeting was held by IATA and AFRAA with the local refinery company Société Ivoirienne de Raffinage (SIR) on 25th July 2013. Also in attendance at the meeting were representatives from Air France, Air Cote d'Ivoire and Brussels Airlines.

Following the meeting, SIR agreed to evaluate and implement the proposal of a 16% reduction in jet fuel prices that would discourage airlines from tankering into Abidjan. The 16% reduction would be for a period of 3 months to assess its effectiveness in getting airlines to uplift fuel in Abidjan. Following this, AFRAA and IATA wrote to all the members flying to Abidjan announcing the price reduction and encouraging them to lift fuel from there. A review meeting would be held in January 2014 to ascertain the volume increase in the Oct-Dec period and confirm the 16% price reduction for a longer period.

ii) Angola

Angola had one of the highest fuel prices in the world with studies showing that the average fuel prices were more than double global averages. In 2010, Average price Cag was 202,71, whilst average SONANGOL price being CAG 425,17.

A joint team of AFRAA and IATA engaged the authorities in Angola urging them to lower the fuel price and introduce transparency in the price formula used. SONANGOL (the monopoly supplier in Angola) subsequently announced in May 2012 a 3-step plan to reduce the Jet fuel prices in Angola.

- The first step consisted of reducing the costs of storage & facilities, into plane and inventory costs.
- Second step was more transparency in pricing for the airlines.
- Third step consisted of reduction of the transport costs from the refinery to the airports.

The Jet fuel price was reduced by an average of US$1.3 per American Gallon or around 20% of the price in the country. With the volume uplifts in Angola of around 84 Million American Gallons a year, the total savings only for the first phase was around US$110 million a year. The airline industry appreciates this laudable effort by the Angolan Government and SONAGOL which have gone a long way to alleviate the fuel cost burden for airlines flying to and from the country.

iii) Ghana

Aviation Turbine Kerosene (ATK) Prices in Ghana were about 25% higher than the global average and 17% higher than the regional average. After lobbying by airlines led by AFRAA and IATA, the Ghana civil Aviation Authouríty (GCAA) took up the issue with the Ghanaian Government which agreed to reduce the Stabilization Margin (cross subsidy) by 75%, translating to a reduction of around 22 US cents per litre. The fuel prices in the country dropped by around 75 CAG resulting in a savings of around US$37.5 million USD a year for the airline industry.

iv) Uganda

Persistent fuel shortage at Entebbe Airport was the major challenge in Uganda due to some structural limitations and lack of State intervention. AFRAA and IATA after identifying the root causes of the fuel shortage, engaged with both the suppliers and the Government of Uganda with the aim of fixing the regular shortage. The joint lobbying efforts yielded results with the installation of additional storage tanks by Air Total at the airport. This has mitigated the hitherto fuel shortage.

AFRAA and IATA plan to pursue similar supply improvements and fuel cost reduction measures in Kenya, Ethiopia and Rwanda.

Additional progress on the lobbying efforts by AFRAA and IATA is noted as follows:

- In Seychelles, the government replaced a 15% goods and services tax (GST) on a ticket with a VAT zero-rated for international travel, saving airlines US$ 22 million annually.
- In West & Central Africa, the air navigation service provider, ASECNA, agreed to continue to freeze charges from the region for eight consecutive years.

4. 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. A number of airlines have shown interest in the project. The project potentially could increase passenger revenue and load factors significantly at no additional cost.

The project consultant is Sabre Airlines Solutions, which has vast experience in supporting similar initiatives in the Middle East and Latin America. A MoU was signed between AFRAA and Sabre to record a process for the offering of consulting services by Sabre Airline Solutions to AFRAA members participating in the project. The Secretariat conducted a master class at the Aviation Suppliers Convention in June 2013 to sensitize more airlines about the Network Cooperation Project.

The project will take effect following the signing of the works order and Master Agreement between the airlines and Sabre Airline Solutions who have accepted to share in the project risk and guarantee the outcome.

5. Ground Handling Cooperation

AFRAA is promoting a Joint Ground Handling Project to address some of the common challenges faced by airlines at some airports and joint procurement of ground handling services. Five airlines have expressed interest in the project and participated in the meetings – TAAG Angola, Kenya Airways, EgyptAir, South African Airways and Camair-Co. The project identified its priority areas of focus, developed an action plan and has established the framework of operation for members. Some of the intended activities of the project will cover:

i) Safety, security and quality
ii) Pooling of resources and investment
iii) Training and capacity building
iv) Joint procurement of ground handling services at targeted airports for participating member airlines.

The Task Force has also developed and adopted joint ground handling membership rules and procedures to guide the operations of the team. Through the project, members stand to make significant benefits especially through joint procurement of ground handling services. The Secretariat is inviting interested airlines to join the project.

6. Regulatory 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 of the YD, development of non-binding Airlines Passenger Service Commitment Guidelines, lobbying against the EU banned list and EU ETS scheme as well as updating airline legal and regulatory affairs officers of global and regional developments in the sector. The Secretariat engaged the services of a consultant based in the UK, Gates and Partners, to develop the Association's guidelines for Anti-Trust and Competition Law compliance.

AFRAA is pleased that the 38th ICAO Assembly came up with a global deal on aviation emissions in early October this year. The agreement puts in place a fair and equitable solution that respects the special circumstances and respective capabilities in which a number of countries, especially third world countries, find themselves.

In conjunction with the International Air Association (IATA) and the African Civil Aviation Commission (AFCAC), AFRAA held the 2013 Aeropolitical Forum at the Leisure Lodge Hotel in Mombasa, Kenya on 27 November. The Forum reviewed the latest public policy developments and discussed the Aeropolitical challenges anticipated in 2014. The Forum also discussed the conclusions made at the 38th ICAO Assembly in Montréal and covered topics on safety, which is the industry's highest priority, liberalization, consumer protection and taxation.

7. Land Development

AFRAA has a 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. We are currently reviewing proposals to develop the land on a Build-Operate-and Transfer basis, as directed by the Executive Committee.

8. 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.

9. New Members and Partners

The Association continues to recruit new members and partners with the objective of providing support to airlines.

We warmly welcome the one airline and 8 partners that joined AFRAA this year. The new member airline is Marsland Aviation Company. The 10 new Partners are: Atlantic FuelEx, IC Publications, HADID International Services FZE, Linkham Consulting, Marsh Ltd, MTU Maintenance, WireCard Technologies, ACS Aviation Solutions, UAS International Trip Support (PTY) Ltd and ARINC EMEA.

AFRAA partners continue to provide valuable support to the development of African aviation through financial and non-financial contributions to the Secretariat and member airlines. We greatly value their support.

10. Working with other Organisations

AFRAA cooperates with the African Union Commission, NEPAD, AfDB; 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 of resources and assistance that benefits members, protects their interest and provides support for better economic environment for their operations.

11. African Aviation Vision 2063

The African Union celebrated its 50th anniversary this year. This was an opportune moment for the organisation to reflect on its performance in the past 50 years and to chart a vision for the next 50 years.

As their contribution to the aviation vision for Africa in the next 50 years, AFRAA and AFCAC jointly presented a document titled: "Vision 2063 for African Aviation" which was presented to the AU Commission for inclusion in the broad AU Vision 2063.

12. How African airlines can increase market share

AFRAA undertook a study to understand the underlying causes of the dwindling market share of African markets on intercontinental routes in spite of the growing traffic. Following the study, AFRAA produced a 41-page document on how African airlines can increase market share. This document was reviewed and approved by the Executive Committee of AFRAA and circulated to all member airlines. The document made recommendation on improving African aviation and getting African airlines to regain market leadership.

E-JETS
E2
THE SECOND GENERATION

Section Nine: FAA or EASA certified Airline MROs in Africa

Air Algerie Technics

Contact: Mr. Ali Guemmache
Commercial & Marketing Manager,
Technical Division
Tel: +213 21 50 93 93
Email: guemmache-a@airalgerie.dz /
guemmache.a@gmail.com

Atlantic Air Industries Maroc

Contact: Mr. Bécaye BA
Directeur Général
Tél: +212 (0) 523 297 724
Fax: +212 (0) 523 297 730
Mobile: +212 (0) 661 251 702
Email: becaye.ba@aai-eu.fr

EgyptAir Maintenance and Engineering

Contact: Eng. Soua Farg
Advertising & Communication Directorate
Cellular: +2 0122 2152757
Office: +2 02 22656855 / 202-22657445
Fax: +2 02 22656873 / 202-22685749
Email: advertising_me@egyptair.com /
contactus_me@egyptair.com

Ethiopian Airlines

Contact: Tewodros Balcha (Mr.)
Managers Sales & Business Development
Tel: +251 115 174013
Fax: +251 116 651200
Email: TewodrosB@ethiopianairlines.com

Libyan Aircraft Engineering & Maintenance

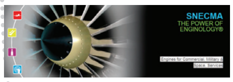
Contact: Mr. Abdulla A. Mohamed
Maintenance & Engineering Director
Tel: +218 215635668
Email: a.abonaama@laem.ly /
anaama09@yahoo.com

Royal Air Maroc

Contact:
Aeronautical Maintenance Centre
Tel: +212-22-499000
Email: ciae@royalairmaroc.com

South African Airways Technical

Contact: Mr. Mike Kenny
Executive Manager Business
Development & Sales
Tel: +27119789993
Email: mikekenny@flysaa.com /
SATMarketing@flysaa.com



Snecma Engine Services

Contact: Mr. Alexandre BRUN
General Manager
Tel: +212 522 536 900
Email: snecma.morocco@snecma.ma

Tunisair Technics

TunisAir Technics

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

Section Ten: FAA or EASA certified Airline Training Centres in Africa

Aldawlya for Training and Science

Contact: Mr. Abdulati Elmeshkhi
Chief Executive Officer
Tripoli, Libya
Tel/fax: +218 213622811/+218 7242395
Email: a.elmeshkhi@aldawlya-trn.com

EgyptAir Training Centre

Contact: Eng Souad Farg
General Manager, Technical Training
Tel: +20 10 661 5367
Email: technical.traininggm@egyptair.com

Ethiopian Aviation Academy

Contact: Tewodros Balcha (Mr.)
Manager Sales & Business Development
Tel: +251-115-174013
Fax: 251-116-651200
Email: TewodrosB@ethiopianairlines.com

Kenya Airways Pride Centre

Contact: Dr. Mbithe Anzaya
Head of Learning and Development
Tel: +254 20 264 22846/64.
Email: learning.development@kenya-airways.com

Royal Air Maroc Academy

Contact:
Tel: +212 5 22912543
Fax: +212 (0) 22 91 25 81
Email: ramacademy@royalairmaroc.com

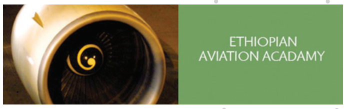
Tunisair Training Centre

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

Section Eleven: Providers of Aircraft Simulators

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

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



Ethiopian Aviation Academy
B737NG and B757/B767 full flight simulator trainings
Contact: Tewodros Balcha (Mr.)
Managers Sales & Business Development
Tel: +251 116 651191 / +251 116 651192
Fax: +251 116 651200
Email: TewodrosB@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
Email: learning.development@kenya-airways.com

Section Twelve: AFRAA Member Airlines Profiles

الخطوط الجوية الأفريقية
AFRIQIYAH AIRWAYS

Eng. Emhemed M. Elwani
Chairman & Chief Executive Officer

ADDRESS
PO 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%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED

Domestic	4
Intra-Africa	5
International	5

EMPLOYEES
1,086

FLEET

Airbus 319-111	3
Airbus 320-214	8
Airbus 330-200	2

FLEET ON ORDER

Airbus 320-214	1
Airbus 330-200	3
Airbus 330-300	3
Airbus 350-900	10

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
Finnair
Luxair
Syrian Air
Kuwait Airways

DESTINATIONS SERVED

Domestic	29
Intra-Africa	09
International	29

EMPLOYEES
9,563

FLEET

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

CARGO

Lockheed L100-130	1

FLEET ON ORDER

Airbus 330-200	3
Boeing 737-800	5
Boeing 787-800	8

AIR BOTSWANA
Going Your Way

Mr. Joseph Simon Motse
Ag. General Manager

ADDRESS
PO 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%

DESTINATIONS SERVED

Domestic	5
Intra-Africa	7

EMPLOYEES
473

FLEET

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

air burkina

Mr. Abderahmane Berthé
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 France

DESTINATIONS SERVED

Domestic	2
Intra-Africa	7

FLEET

Bombardier CRJ-200ER	1
McDonnell Douglas MD-83	1
McDonnell Douglas MD-87	2
Saab 340B	1

Air Madagascar

Mr. Hugues Ratsiferana
President & 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	7
International	4

FLEET

Airbus 340-300	2
ATR42-320	1
ATR42-500	1
ATR72-500	2
Boeing 737-300	3

AIR MAURITIUS

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 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	2
Intra-Africa	7
Intercontinental	12

EMPLOYEES
2,186

FLEET

Airbus A340-300E	2
Airbus A340-300	4
Airbus A319-100	2
Airbus A330-200	2
ATR 72-500	2

Mrs. Theo Namases
Chief Executive Officer

ADDRESS
Air Namibia (Pty) Ltd
PO 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
Kenya Airways
TAAG Angola Airlines

DESTINATIONS SERVED

Domestic	6
Regional	6
Intercontinental	2

EMPLOYEES
463

FLEET

Airbus 319-100	4
Airbus A330-200	1
Airbus 340-300	2
Boeing 737-500	2
Embraer ERJ 135	4
Beech Aircraft Corporation BEECH1900D	3

FLEET ON ORDER

Airbus 330-200	1

Mr. Cramer Ball
Chief Executive Officer

ADDRESS
Air Seychelles, Seychelles
International Airport
PO Box 386, Victoria,
Mahe, 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
Etihad

DESTINATIONS SERVED

Domestic	2
Intra-Africa	2
Intercontinental	2

EMPLOYEES
878

FLEET

Shorts 360	1
DHC-6 Twin Otter	4
Airbus 330-200	2

Capt. Milton Lusajo Lazaro
Ag. Managing Director &
Chief Executive Officer

ADDRESS
Air Tanzania
PO 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	4
Regional	1

EMPLOYEES
196

FLEET

Boeing 737-200	1
Bombardier Dash 8- Q300	1

Mr. Edmund Makona
Ag. Chief Executive Officer

ADDRESS
Air Zimbabwe Corporation
PO 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	2
Intercontinental	3

EMPLOYEES

FLEET

Boeing 737-200	3
Boeing767-200	2
Xian MA60	2
Airbus A320-200	2
Embraer ERJ 145LR	1

Mr. Yissehak Zewoldi
Chief Executive Officer

ADDRESS
BIDC-ECOWAS Building
128, Boulevard du 13 Janvier
PO Box 2988 Lomé-TOGO
Tel: +228 220 88 18
Fax: +228 220 89 00
Website: 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

EMPLOYEES

FLEET

Boeing 737 (NG)-700	3
Bombardier Dash 8-400 NG	4

Mr. Mbotto Edimo Frederic
Director General

ADDRESS
Immeuble La Rotonde-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
Intra-Africa	1
Intercontinental	1

EMPLOYEES

FLEET

Boeing 737-700	2
Boeing 767-300ER	1

FLEET ON ORDER

Boeing 787-800	2

Mr. Bienvenido Esono
Chief Executive Officer

ADDRESS
Calle Presidente Nasser
916, Malabo, Equatorial Guinea
Tel: +240 333098149 /+240222013663
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
Intra-Africa	14
Intercontinental	1

FLEET

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

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

DESTINATIONS SERVED

Domestic	3
Intra-Africa	2
Intercontinental	1

FLEET

Boeing 737-300	2
Boeing 757-200	1

Capt. Hossam Kamal
Chairman & Chief Executive Officer
EgyptAir Holding Co.

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

AFRAA MEMBERSHIP
Became member in 1968
Established in 1932

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Star Alliance

DESTINATIONS SERVED

Domestic	10
Intra-Africa	17
Intercontinental	48

EMPLOYEES
32,805

FLEET

Airbus 300-600RF	2
Airbus 300B4-200F	1
Airbus 330-200	7
Airbus 330-300	4
Airbus 320-200	13
Airbus 321-200	4
Airbus 340-200	1
Boeing 737-800	20
Boeing 737-500	4
Boeing 777-200ER	3
Boeing 777ER-300	6
Embraer ERJ-170	12

FLEET ON ORDER

Airbus 330-300	1
Boeing 787-800	10

Ethiopian
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THE NEW SPIRIT OF AFRICA

Ato. Tewolde GebreMariam
Chief Executive Officer

ADDRESS
PO 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 [6 with Sky Interior]	9
Boeing 737-700NG	5
Boeing 757-200 ER	4
Boeing 757-260F	2
Boeing 767-300ER	12
Boeing 777-200LR	6
Boeing 777F	2
Boeing 787-8	5
Q400NG DHC-8	13
McDonnell Douglas 11F-	2

FLEET ON ORDER

Airbus 350-900	14
Boeing 777-200LRF	4
Boeing 787-8	8
Boeing 777-300ER	4
Boeing 737-800	5

Interair
South Africa

Mr. David Tokoph
Chairman and
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	3
Boeing 767-200ER	1

Kenya Airways
The Pride of Africa

Dr. Titus Naikuni
Group Managing Director &
Chief Executive Officer

ADDRESS
PO 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 Botswana
LAM Mozambique
Jet Airways
TAAG-Angola
Precision Air
Qantas
SkyTeam

DESTINATIONS SERVED

Domestic	4
Intra-Africa	43
Intercontinental	12

EMPLOYEES
3,994

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	12

FLEET ON ORDER

Boeing 787-8	9
Embraer 190	9

LAM
Linhas Aéreas de Moçambique

Mrs. Marlene Mendes Manave
Chief Executive Officer

ADDRESS
PO Box 2060, Maputo, Mozambique
Tel: +258 21 46 87 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
PrecisionAir
South African Airways
South African Express
TAP Portugal
TAAG Angola Airlines

DESTINATIONS SERVED

Domestic	10
Intra-Africa	5

EMPLOYEES
709

FLEET

Boeing 737-500	1
Embraer 190	3
Bombardier Q400	3
Embraer 145	2
Brasilia 120	3

الخطوط الجوية الليبية
LIBYAN AIRLINES

Eng. Khaled Ben Alewa
Chief Executive Officer and
Member of Board of Directors

ADDRESS
PO Box 2555, Omar Mukhtar
Street/Tripoli. G.S.P. Libyan Arab
Jamahiriya, Tripoli, Libya
Tel: +218 21 3614102
Fax: +218 21 361 4815
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

EMPLOYEES

FLEET

Airbus 320-200	7
Airbus 330-200	3
Bombardier CRJ900	6
ATR 42-500	2

FLEET ON ORDER

Airbus 320-200	2
Airbus 330-200	1
Airbus350-800	4

PrecisionAir
YOU ARE WHY WE FLY

Ms. Sauda Said Rajab
Chief Executive Officer

ADDRESS
PO 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: 41.23%
Michael Ngaleku Shirima: 42.91%
PW employees: 1.10%
Others: 14.76%

COMMERCIAL PARTNERSHIP
Air Nigeria
Kenya Airways
RwandAir

DESTINATIONS SERVED

Domestic	11
Intra-Africa	5

EMPLOYEES
724

FLEET

ATR 72-500	5
ATR 42-300/500/600	6

FLEET ON ORDER

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

DESTINATIONS SERVED

EMPLOYEES

FLEET

Boeing 737-700	6
Boeing 737-800	31
Boeing 747-400	1
Boeing 767-300ER	5
Boeing 737-300F	1
Embraer ERJ190LR	2

FLEET ON ORDER

Boeing 787-8	5

Mr. John Mirenge
Chief Executive Officer

ADDRESS
PO 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

Domestic	1
Intra-Africa	7
International	1

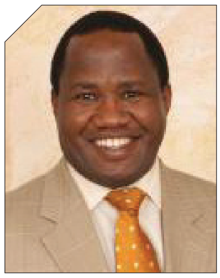
EMPLOYEES
449

FLEET

Boeing 737-700	2
Boeing 737-800	2
Bombardier CRJ900 Next Gen	2
de Havilland Canada DHC-8-102	1

FLEET ON ORDER

Bombardier Dash 8-Q400	1



Mr. Monwabisi Kalawe
Chief Executive Officer

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
Star Alliance

DESTINATIONS SERVED

Domestic	5
Intra-Africa	26
International	32

EMPLOYEES
9,011

FLEET

Airbus 319-100	11
Airbus 330-200	6
Airbus 320-200	4
Airbus 340-600	9
Airbus 340-300	8
Boeing 737-300F	2
Boeing 737-200F	1
Boeing 737-800	11
Boeing 737-400(F)	1

FLEET ON ORDER

Airbus 320-200	8
Airbus 321-200	10
Boeing737-300F	1

Mr. Inati Ntshanga
Chief Executive Officer

ADDRESS
4th Floor, West Wing Pier
Development
OR Tambo International Airport,
Johannesburg,
PO Box 101 or 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
LAM Mozambque Airlines
SA Airlink
Congo Express

DESTINATIONS SERVED

Domestic	5
Intra-Africa	11

EMPLOYEES
1,015

FLEET

Bombardier CRJ 200ER	10
Bombardier CRJ 700	3
Bombardier Dash 8-Q400	9

Mr. James Eric Antwi
Chief Executive Officer

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

AFRAA MEMBERSHIP
Became member in 2012
Established in 2011

OWNERSHIP STRUCTURE
Fully owned subsidiary of ASF Limited
a Ghanaian private company

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	3
Regional	4

EMPLOYEES
213

FLEET

British-Aerospace BAe 146-300	4
British-Aerospace BAe 146-200	1

Mr. Abd Elmahmoud Suleiman Mohammed
Managing Director

ADDRESS
PO 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

DESTINATIONS SERVED

EMPLOYEES

FLEET

Airbus A300B4-600R	2
Airbus A320-200	1
Fokker 50	4
Boeing 737-300	1
Boeing 737-500	1

TAAG LINHAS AEREAS DE ANGOLA
ANGOLA AIRLINES

Mr. Joaquim Teixeira da Cuhna
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	5
Boeing 737-700C	1
Boeing 777-200ER	3
Boeing 777-300ER	2

FLEET ON ORDER

Boeing777-300ER	3

الخطوط التونسية
TUNISAIR

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
EgyptAir
Syrian Arab Airlines
Middle East Airlines

DESTINATIONS SERVED

Domestic-Intra-Africa	24
Intercontinental	93

EMPLOYEES
3,769

FLEET

Airbus 300-600	3
Airbus 320-200	17
Airbus 319-100	4
Boeing 737-500	4
Boeing 737-600	7

FLEET ON ORDER

Airbus 320-200	7
Airbus 330-200	3

Section Thirteen: AFRAA Partners Profiles and contacts

SAFETY, COMPLIANCE & OPERATIONAL EXCELLENCE

ACSCG (Aviation Compliance Solutions Consolidated Group) is a leading, global, professional services firm delivering aviation solutions with a focus on safety, compliance and operational excellence. ACS is the Auditing and Compliance arm of ACSCG and is one of only eight (8) IATA accredited Audit Organisations (AO) globally that can conduct the IATA Operational Safety Audit (IOSA) and ISAGO audits. ACS is one of the three (3) original organisations involved since the inception of the IOSA Programme in 2003. ACS is also an IATA Strategic Partner which through our participation in various IATA work groups and task forces' helps us gain a unique insight into airlines priorities and we are recognized for working together with IATA in serving the air transport industry.

ACS is also approved by the Flight Safety Foundation to conduct BARS (Basic Aviation Risk Standard) Audits. Our services range from safety audits and operational reviews through to specialist aviation training, Fatigue & Risk Management specialists and recruitment services. ACS clients range from aircraft operators, maintenance providers, airports, training schools, government departments and industry associations.

For over a decade, we have successfully completed hundreds of projects, working with both large international carriers and smaller GA and charter operators.

Our success is underpinned by the professionalism and experience of our people. Featuring a broad range of skills and backgrounds including pilots, engineering, flight operations/technical crew, cabin crew, project managers, auditors, former regulators and airline senior managers; our aviation specialists have an average of over 35 years' industry experience.

Contact: Mr. Matthew Miller
Business Development Manager
ACS Global HQ
Suite 120, 87 Turner Street
Port Melbourne Victoria 3207Australia
Tel: +61 3 9644 8400
Email: mmiller@acsgroup.aero

AUSTRALIA
Suite 120, 87 Turner Street
Port Melbourne, Victoria
Australia 3207
Tel: +61 3 9644 8400
Fax: +61 3 9644 8499
Email:

EUROPE
Estuary House
New Street, Malahide
Co. Dublin, Ireland
Tel: +353 1 551 0250
Fax: +353 1 551 0255
Email: europe@acsgroup.aero

JAPAN
2-16-5 Hashigadai
Narita City, Chiba
Japan 286-0037
Tel: +81 80 3029 5020
Email: japan@acsgroup.aero

Aero Industrial Sales Company, (AIS), located, since 1986, at the global aviation hub: The New York JFK International Airport, is an FAA AC 0056A / ASA-100 accredited distributor for commercial aviation spare parts, avionics, components, chemicals as well as GSE (Ground Support Equipment). Subjected to regular FAA/ASA-100 surveillance and audit, AIS maintains up-to-date Inspection and Quality Control System.

Led by a veteran of the provisioning team for the First African Commercial JET fleet in 1962, AIS is run by dynamic young bloods who have taken the steam off the word AOG. As easy as a LUFTHANSA AOG at JFK for a major component, which we supplied them within the hour, or a 747 stranded at JOB'RG for an aileron because of a food truck damage, our location gives as global reach unmatched by many.

Over the last few years, AIS has successfully undertaken major Initial Provisioning for Boeing 777 & 737 NG fleet as well as complete renovation of ground support and delivery of over one hundred latest technology GSE. Talk about GSE: AIS was honored and certified as the "Best Distributor in Africa for 2012" by the global leader in GSE – The TLD Group of France.

AIS has a proud exposure in AFRICA, and we show our appreciation of the AFRICAN Airlines development by regularly assisting and participating in the AFRAA CONFERENCES. Throughout our African colorful booth, you might have noticed our theme which emphasizes that the "African Economic Independence is through Interdependence". It's not the unit price of the bolt you were quoted; as it's what it costs you on arrival at your door. We make that difference.

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

Mr. Dahir Mohammed
Vice President Sales and Marketing
Aero Industrial Sales Company, (AIS)
Tel: (718) 949-3300
Fax: (718) 949-9898
Email: dahir@aeroindustrialsales.com

AIRBUS
AN EADS COMPANY

Airbus is the world's leading aircraft manufacturer whose customer focus, commercial know-how, echnological 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.

Contact Person: 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

amadeus
Your technology partner

Technology, Brighter, Bolder, Better innovation
The leading provider of IT solutions to your tourism

Amadeus is a leading provider of advanced technology solutions for the global travel industry. Customer groups include travel providers (e.g. airlines, hotels, rail and ferry operators, etc.), travel sellers (travel agencies and websites) and travel buyers (corporations and travel management companies).

The Amadeus group employs more than 11,000 people worldwide, across central sites in Madrid (corporate headquarters), Nice (development) and Erding (operations), as well as 71 local Amadeus Commercial Organisations globally. In Africa, Amadeus is present in more than 50 countries and recently opened a Regional Solution Centre in South Africa. The group operates a transaction-based business model. For the year ended December 31, 2012 the company reported revenues of €2,910.3 million and EBITDA of €1,107.7 million.

Amadeus is listed on the Spanish Stock Exchange under the symbol "AMS.MC" and is a component of the IBEX 35 index as well as the Dow Jones Sustainability Index International (DJSI-World). Amadeus regularly produces white papers and industry reports that set the tone for industry discussions. Passengers first: re-thinking irregular operations is the latest example; it offers practical strategies to airlines for managing customer expectations better. All these reports are available online in the Airline IT Resource Centre (www.amadeus.com/airlineit/resources/resources_4white.html).

To find out more about Amadeus, please visit www.amadeus.com and to learn more about the Amadeus solutions for airlines, visit the Airline Solutions section (www.amadeus.com/airlines/airlines.html).

Contact Person: Mr. Christoph Althoff
Regional Director Western Europe and Sub-Saharan Africa
Airline Account Management, Europe and Africa
Amadeus IT Group S.A.
Tel: +34 91 582 1461
Email: calthoff@amadeus.com

Mr. Paschal Wafula
Account Manager East Africa and
Indian Ocean Islands
Airline IT & Distribution
Amadeus IT Group SA
Tel: +254 733 705 722
Email: paschal.wafula@amadeus.com

American General Supplies, Inc. (AGS) is an after-market commercial aviation spare parts and services supplier, founded in Chicago in 1982. Now based in Gaithersburg, Maryland, AGS has over the past 30+ years, diversified and constantly grown to become a well-known, respected and reliable full service commercial aviation supplier. We are a proud partner of AFRAA. We represent Honeywell Aerospace, Trepel Airport Equipment Company GmBH, TUG Technologies, Malabar International, SWITLIK, the Stinar Corporation and Clyde Machines in sub-Saharan Africa.

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 tires, etc.
- Aircraft, engines, and other component maintenance through marketing alliances and maintenance agreements with organizations that have the capability, such as Sabena, Sargent Aerospace, 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 programs, technical policies and procedures, etc.
- Surplus material consignment handling for customer airlines
- Supporting customer airlines as Purchasing Agents
- Providing long-term financing services to customer airlines with flexible payment terms

AGS is committed to rendering better service through its well-known quality and safety standards and always strives to meet its customers' needs. Call us… we can help. Our business is to keep you flying!

Contact Person: Mr. Teddy Kassa
SVP Sales and Purchasing
American General Supplies, Inc.
7840 Airpark Road Gaithersburg, MD 20879
Tel: 301-590-9200
Fax: 301-590-3069

Trusted globally for all kinds of fuel needs, Atlantic FuelEx provides high quality fuel services to commercial carriers, corporate organizations and governmental entities at most competitive prices. Thanks to its extremely vibrant and reliable global network. Be it Africa, Middle East, Europe, North and South America, Caribbean or Asia, Atlantic FuelEx has major fuel suppliers and regional fuel distributors everywhere. With their collective support, Atlantic FuelEx extends dedicated localized services to clients all over the globe.

Atlantic FuelEx works closely with the clients by alerting them round-the-clock on the internationally fluctuating fuel prices; besides providing a comprehensive list of related services such as Fuel Management, unique VAT-Exempt and VAT-Compliant aviation fuel policies, Tax Consultation Services (Federal Excise Tax, State, Local and etc.) and Zero Cost Consultation. Furthermore, it provides customized advises and suggestions which will surely help clients to choose ideal locations to refuel their aircrafts and enjoy maximum saving on each and every purchase.

Atlantic FuelEx operates tank farms with fuel reservoirs that are equipped with the most modern technical equipment's. A qualified technical workforce posted at each of these destinations undertakes the refueling needs. Best of all, these terminals are managed and maintained as per the international aviation regulations, standards and requirements. Atlantic FuelEx extends credit terms, single point of contact facilities, complete price transparency, highly pro-active credit risk management service, detailed & speedy invoicing, tax consultation & verification and periodically cross-checking with customer's accounting department to maintain reliable information. What's more, all its allies and partners enjoy all the comforts generated by its years of experience in the market.

Contact Person: Mr. Rani Awad
President & Chief Executive Officer
Atlantic FuelEx | Atlantic Group AIS LLC
Al Sapphire Tower office No. 702, Dubai , UAE
Tel: +97142556626
Fax: +97142556405
Email: rani.awad@atlanticfuelex.com

ATPCO is the world leader in the collection and distribution of fare and fare-related data for the airline and travel industry. Today, we work with more than 450 airlines worldwide, supplying more than 99 percent of the industry's intermediated fare data to all the major airfare pricing engines.

Customers get more than just a fare collection and distribution system with ATPCO. They gain the knowledge of an industry leader with unmatched experience developing solutions for the entire life cycle of the fare, from pricing to settlement. Our fully customizable industry standards and solutions help customers promote their ancillary services, recoup fees and surcharges, and efficiently settle with their interline partners.

Most importantly, our customers help shape the collective future of the industry. ATPCO brings together competing airlines and systems while acting as a neutral mediator to set global standards and broker industry agreements. We're then first to market with fare-related products and services, proving our continued promise to providing solutions for the travel industry.

ATPCO headquarters are located in Washington, DC, and regional offices are located in London, Miami, and Singapore.

Contact Person: Mr. Frank Socha
Regional Director
Central House, Lampton Road
ATPCO
Hounslow, Middx TW3 1HY
United Kingdom
Tel: +44 208 538 0811
Email: fsocha@atpco.net
Web: www.atpco.net

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.

Contact Person: Mr. Mark Elgar
Vice President Sales
Direct: +353 1 635 5064
Mobile: +353 86 607 1535
Fax: +353 1 635 5001
Email: mark.elgar@awas.com

BOEING

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 globally 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.

Contact Person: Mr. Robert Faye
Sales Director, Africa
Boeing Commercial Airplanes
Tel: +206 766-1553
Mobile: +206 412-6325
Email: robert.e.faye@boeing.com

BOMBARDIER

Bombardier Commercial Aircraft, a business unit of Bombardier Inc., is a world leader in the design and production of aircraft that seat up to 145 passengers. Its mission is to provide a complete range of commercial aircraft optimized for best-in-class efficiency with the highest level of customer service. The product portfolio is comprised of the Q400 NextGen turboprop airliner, the CRJ NextGen family of regional jets, and the CSeries jetliners, which are the world's newest and most advanced single-aisle, mainline aircraft for the 100- to 149-seat market segment.

Bombardier commercial aircraft are already significantly present in Africa with more than 160 Dash 8/Q-Series and CRJ aircraft in service with, or ordered by, 40 operators and leasing companies in over 20 countries on the continent. Africa is poised for growth and Bombardier is excited by the potential opportunities for expanding commercial aviation in the region and its role in that development. The company's market forecast for the 2012-2031 timeframe predicts that African airlines will take delivery of 550 aircraft in the 20- to 149-seat segment industry wide. The majority of that demand is expected to be in the 100- to 149-seat market segment for which our all-new CSeries family of airliners is being developed, while the remainder is expected to be mainly in the 60- to 99-seat market segment for which our Q400 NextGen and CRJ NextGen aircraft are optimized.

For news and more information, please follow us on Twitter @Bombardier_Aero or visit our websites: www.bombardier.com | www.cseries.com | www.crjnextgen.com | www.q400nextgen.com

Contact Person: Mr. Philippe Poutissou
Vice President Marketing
Bombardier Commercial Aircraft
123 Garratt Boulevard
Downsview, Ontario M3K 1Y5
Email: Philippe.poutissou@aero.bombardier.com

The Power of Flight

CFM INTERNATIONAL, A GLOBAL LEADER

Since its creation in 1974, CFM International has become one of the world's leading suppliers of jet engines for commercial airplanes. CFM engines set the industry standard for technical innovation, reliability and cost of ownership.

Pioneers and visionaries

CFM is a 50/50 company of Snecma (Safran) and GE. It develops, produces and sells the CFM56 product line, the best-selling jet engine in the history of civil aviation and a leader in the single-aisle aircraft segment. This long-standing joint venture, unprecedented in the aviation industry, is nurtured by the complementary capabilities and cultures of the two parent companies. Building on this success, GE and Snecma have extended their partnership to the year 2040 and also kicked off an exciting new challenge: to develop the LEAP engine, which will power the next generation of single-aisle commercial aircraft.

The CFM spirit

By capitalizing on the powerful expertise and the world-class industrial organization of its parent companies, CFM consistently develops innovative solutions and delivers products offering outstanding reliability. Customer satisfaction is an integral part of the company's strategy and CFM delivers world-class services and optimized cost of ownership to keep its customers satisfied. Along with the new LEAP engine, CFM has developed even more cost-effective packages to support operators and keep CFM56 engines running efficiently.

The work split

Each partner handles the production of all modules for which they are responsible, then sends half of its production to the other partner. GE is in charge of the CFM56 core, comprising the high-pressure compressor, combustor and high-pressure turbine. Snecma is responsible for the fan module, low-pressure compressor and turbine, gearbox and accessories.
The complete engines are assembled on a 50/50 basis by GE at its facilities in Evendale, Ohio (near Cincinnati), and Durham, North Carolina, and by Snecma at Villaroche (near Paris, France).

Contact Person: Mr. François-Xavier HUSSENET
Marketing Director
Tel: +33 1 60 59 50 92
Email: francois-xavier.hussenet@snecma.fr
www.hahnair.aero

Mr. Bruno CASTOLA
Regional Vice President Sales-Africa
Tel: +33 1 60 59 95 14
Email: bruno.castola@snecma.fr

Embraer S.A. (NYSE: ERJ; BM&FBOVESPA: EMBR3) is the world's largest manufacturer of commercial jets up to 120 seats, and one of Brazil's leading exporters.

Embraer's Commercial Aviation is present in Africa with 1 E-Jets dedicated maintenance center in Egypt and, 1 ERJ aircraft maintenance center in South Africa to support a total fleet of 42 E-Jets for 6 operators and 41 ERJs for 16 operators.

Embraer's headquarters are located in São José dos Campos, São Paulo, and it has offices, industrial operations and customer service facilities in Brazil, China, France, Portugal, Singapore, and the U.S. In the Middle East, where Embraer Founded in 1969, the Company designs, develops, manufactures and sells aircraft and systems for the commercial aviation, executive aviation, and defense and security segments. It also provides after sales support and services to customers worldwide. For more information, please visit www.embraer.com.br

Headquarters Address: EMBRAER Aviation Europe
Le Rameau-Paris Nord 2
22, Avenue des Nations, BP 50356 Villepinte
95942 Roissy CDG Cedex – France
Tel: +33 (0) 1 4938 4400
Fax: +33 (0) 1 4938 4401

Contact Person: Mr. Christophe Michaud
Head of Sales Middle East and Africa
Tel: +33 1 49 38 44 24,
Email: cmichaud@embraer.fr

Through FLYHT's demonstrated track record in Africa, the company sees a perfect fit between its AFIRS™, UpTime™ products and the desire for African airline operators to improve flight safety, increase operational efficiencies and save on fuels costs.

FLYHT signed its first customer in Africa in 2008 and then has continued to work in Africa to help increase safety and operational efficiencies within the industry. FLYHT has worked extensively with the Nigerian Civil Aviation Authority (NCAA) to establish an Operations Command Centre in Lagos to track all commercial aircraft independent of ATC radar and more recently develop a new Safety Management System Dashboard that will allow for real-time tracking of all Nigerian registered assets' flight profiles. FLYHT works with six of the ten domestic carries in Nigeria and seen interest in its AFIRS offering from operators in Angola, Kenya, Ethiopia, Uganda, Rwanda and South Africa.

Since 1998 FLYHT has been providing proprietary technological products and services designed to reduce costs and improve efficiencies in the airline industry. The company has patented and commercialized three products and associated services currently marketed to airlines, manufacturers and maintenance organizations around the world. It's premier technology, AFIRS, UpTime, enables airlines to monitor and manage aircraft operations anywhere, anytime, in real-time. FLYHT's triggered data streaming mode, FLYHTStream, automatically streams vital data, normally secured in the black box, to designated sights on the ground in real time in the event that an aircraft encounters an emergency.

Contact Person: Mr. Derek Taylor
Sales Director | FLYHT Aerospace Solutions Ltd. | TSX.V: FLY
200W, 1144 – 29 Avenue NE, Calgary, AB, T2E 7P1, Canada
Tel: 403.291.7429
Office: 1.866.250.9956

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.

Contacts Dr. Abhimanyu (Rajiv) Bissessur
Regional Sales Director for Africa Region
Mobile: +230 5250 7801
Email: abhimanyu.bissessur@ge.com

HADID INTERNATIONAL SERVICES

When HADID International Services was born more than 30 years ago, the aviation industry was very different from today. Aviation industry has been characterized by continuous and dramatic development and change since the first sustained engine-powered flight in the early 1900s.

HADID saw a gap in the market, a real need for a dynamic, constantly evolving aviation services partner that could keep up with the rapid changes in the industry. HADID was formed to fill that gap. Over the past 30 years, HADID has been committed to staying ahead of the curve. To learning and anticipating its clients' changing requirements. This commitment has paid off. HADID is proud to have very long standing relationships with its clients, suppliers, partners and Civil Aviation Authorities around the world.

HADID International Services is one of the world's leading providers of on-demand aviation services. With more than three decades of experience and dedication to the industry, HADID International Services offers its clients unrivalled expertise in complete flight planning. An impressive and continually growing client list is testament to the company's high quality standards and the trust it has built over years of getting to know its customers' every need.

As a global market leader in the provision of bespoke aviation services, HADID's clients benefit from over 30 years of experience in providing overflying and landing permits at short notice, superior ground handling services and all related services such as catering, transportation, hotel accommodation, security and fuel at most competitive rates, state of the art flight planning and tailor made charter brokerage across the world. With over 200 employees, the company is headquartered in Dubai, UAE, with branches in Algeria, Niger, India and Pakistan, in addition to a worldwide network of representative offices. This network gives HADID a truly global reach across seven continents. HADID's currently serving commercial airlines both passenger and cargo, Private & business operators, medevac (Ambulance) flights, VIP flights, Amiri/ Royal flights.

Contact Person: Mr. Mohammed Abu Libdeh
Chief Executive Officer
Tel: +971 4 299 7777
Fax: +971 4 299 7700
Email: ceo@hadid.aero
Web: www.hadid.aero

Mr. Issa Zuriqi
Regional Director Africa
and Australasia
Issa@hadid.aero

Mr. Chakib Boudjemaa
Business Development Manager Africa
chakib@hadid.aero

Hahn Air

Hahn Air is the leader in the airline distribution industry.

More than any other airline, we have specialised in global distribution for our partner airlines. We have more than 260 implemented interlining agreements in place and we have access to 91,000 travel agencies and 2,500 Hahn Air Ticketing Centres in over 190 markets.

By connecting to our worldwide sales network system, we exploit significant high yield incremental revenue streams for you. Services in a nutshell:

- We take the complexity out of your global sales while increasing your revenue
- We manage your global distribution niches
- We connect your airline to the global travel agent network.

A connection with Hahn Air's e-ticketing platform became an industry's standard for every airline.
By now every 7 seconds a passenger checks in with a Hahn Air E-Ticket at one of almost 4,000 boarding points worldwide.

Contact: Hahn Air Lines GmbH
An der Trift 65
D-63303 Dreieich
Germany
Tel: +49 6103 7331 171
Fax: +49 6103 7331 139
Email: abg@hahnair.com
Website: www.hahnair.aero

Ms. Kirsten Riedemann
Director Airline Business Group
HAHN AIR LINES GMBH
An der Trift 65
63303 DREIEICH - GERMANY
Email: k.riedemann@hahnair.com

And
Ms. Anna Schoepfer
Manager Airline Business Group
Hahn Air Lines GmbH
Tel: +49-6103-5013-171
Email: a.schoepfer@hahnair.com

ILYUSHIN FINANCE CO.

Given the growing African air traveling market and increasing demand for new cost-effective aircraft we would be glad to assist African airlines to expand the capacity and profitable business, arrange fleet planning, route analysis, deliveries, financing of aircraft and more. We offer to lease the following new generation jets: CS-300 Bombardier narrow-body 140-160 passenger aircraft, Antonov-148/-158 & Sukhoi SSJ-100 regional jets, MC-21 Irkut narrow-body 180-200 passenger airliner.

The main activities of "IFC" include:

- Finance and operating leasing of the commercial aircraft;
- Arrangement of export financing facility for foreign airlines to take the delivery of Russian aircraft;
- Comprehensive after-sale support of our customers, including pilot, cabin crew and technical staff training, engineering, spare parts support.

The main advantages of our services:

- Vast experience in aircraft leasing in Russia and abroad (including structured financing of aircraft purchase, arranging loan financing for clients, sale via export agencies, sales of active lease contracts);
- Flawless credit history, cooperation with the largest Russian and international banks;
- Wide experience of aircraft customization for full satisfaction of the client's needs;
- Comprehensive after-sales service.
- Highly skilled and devoted team of marketing, technical, legal and financial professionals;
- Established connections with Russian aviation authorities;
- The largest order book among Russian lessors;

Contact Person: Mr. Andrey Lebedinets
Deputy General Director,
ILuyshin Finance Co.
Rublevo-Uspenskoe schosse, building 6
143030 Russia, Moscow
Email: lebedinets@ifc-leasing.com

Mr. Sergey Rudenko
Marketing department manager
Email: rudenko@ifc-leasing.com

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.

Headquarters in the United States, it has offices and facilities in the United Kingdom, Australia, Lebanon, and Dominican Republic.

Contact: Kenyon Headquarters U.S.
15180 Grand Point Drive
Houston, Texas USA 77090-6307
Phone: +1 281 872 6074 (24 Hours)
Fax: +1 281 872 6086
Email: Kenyon@kenyoninternational.com
www.kenyoninternational.com

Mr. Mazen Bekdash
Regional Manager Middle East & Africa
Tel: +961 1 964517
Email: bekdashm@KenyonInternational.com;
kenyonmiddleeast@kenyoninternational.com

LINKHAM SERVICES
PREMIUM SOLUTIONS TO THE TRAVEL, CARD & FINANCIAL SERVICE INDUSTRIES

Linkham Services are a market leading provider of broking and niche insurance services. Within Africa, our core specialism within the Airline and Travel space is the end to end delivery of Ancillary revenue solutions - from travel insurance through to airport lounge access.

Having gained significant expertise within the European market, Linkham Services not only have the knowledge and insight to deliver complete Ancillary revenue solutions, but we also provide complete, and seamless, technology solutions which ensure that your passengers are provided with relevant products in a non-intrusive manner, at the right time.

We don't stop there. We believe in providing on-going support to ensure the long term success of the programme – so we provide regular feedback, recommendations and implementable solutions to ensure that you are sending the right messages to your customers!

Linkham Services is part of the Linkham Group, with presence across multiple regions - this means that we can draw on a significant breadth of skills and resources to deliver – and delivery is our core objective!

Contact Person: Mr. Shailendre Woodhoo
Regional Direct – Africa
Linkham Services Mauritius
5th Floor Nexteracom Tower 1
Ebene
Mauritius
Email: shailendre.woodhoo@linkhamservices

Ms. Natacha Lily
Head of Retail Travel Insurance
Linkham Services Mauritius
5th Floor Nexteracom Tower 1
Ebene
Mauritius
Email: natacha.lily@linkhamservices.com

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.

Lufthansa Consulting serves clients in many regions around the world and our business policy relies on a deep insight into the aviation business blended with an understanding of the local conditions in the client's business environment.
This combination ensures that our experts provide the appropriate solutions with optimal results.

Lufthansa Consulting is well-known as both a strategic and 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.

Contact Person: Mrs. Catrin Drawer, Associate Partner
Mr. Bruno Boucher, Associate Partner
Lufthansa Consulting GmbH
MAC/Main Airport Center
Unterschweinstiege 2-14
Building A, 1st floor
60549 Frankfurt/M., Germany
Tel: +49 (0)69-696 0
Fax: +49 (0)69-696 20830
Email: mail@lhconsulting.com

Mr. Bruno Boucher
Associate Partner Africa
Lufthansa Consulting GmbH
MAC / Main Airport Center
Unterschweinstiege 14
Gebädeteil A, 1.OG
D-60549 Frankfurt am Main
Germany
Bruno.Boucher@lhconsulting.com

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.

Contact Person: Mrs. Ulrike Behrens
Head of Strategic Marketing
Tel: +49 69 696 91098
Email: Ulrike.behrens@lhsystems.com

MARSH

Marsh, a global leader in insurance broking and risk management, teams with its clients to define, design, and deliver innovative industry-specific solutions that help them protect their future and thrive. It has approximately 26,000 colleagues who collaborate to provide advice and transactional capabilities to clients in over 100 countries.

Marsh is a wholly owned subsidiary of Marsh and McLennan Companies (NYSE: MMC), a global team of professional services companies offering clients advice and solutions in the areas of risk, strategy and human capital. With 53,000 employees worldwide and annual revenue exceeding US$11 billion, Marsh & McLennan Companies is also the parent company of Guy Carpenter, a global leader in providing risk and reinsurance intermediary services; Mercer, a global leader in human resource consulting and related services; and Oliver Wyman, a global leader in management consulting.

Marsh Aviation and Aerospace is headquartered in London and has over 300 professionals, operating through 18 specialist aviation hubs around the world – including South Africa. With a global airline market share of over 37% and owned/partner offices in 40+ African countries, Marsh is the regional leader for aviation insurance and risk advisory services.

Contact: South Africa
Mr. Michael J Moran
Marsh Aviation & Aerospace Practice
Regional Head
Tel: +27 (0)11 060 7335
Mobile: +27 (0)82 617 4344
Email: michael.j.moran@marsh.com

France
Mr. Ludovic Berlioux
Marsh Aviation & Aerospace Practice
Directeur Aviation
Tel: +33 (0)1 41 34 59 56
Mobile: +33 (0)6 27 42 57 40
Email: ludovic.berlioux@marsh.com

مركاتور
mercator

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, Loyalty 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.

Contact Person: Mr. Mukund Srinivasan
Vice President
Tel: +971 4 203 3135
Email: enquiries@mercator.com

Ms. Bashira A Nashawati
Sales Support: Middle East & Africa
Emirates Group
Tel: +971 042032036
Mobile: +971 0561774248
Email: bashira.nashawati@emirates.com

MTU Aero Engines

MTU Maintenance, a business division of MTU Aero Engines, is the world's largest independent provider of commercial engine maintenance services. The company offers services ranging from the maintenance, repair and overhaul (MRO) of commercial aircraft engines to component repair and accessory maintenance. Its portfolio includes aircraft engines in all thrust classes – from small turboprop engines to the largest engine ever developed, General Electric's GE90-110B/-115B. MTU Maintenance operates globally with facilities in Hannover and Berlin-Brandenburg (Germany), Rzeszów (Poland), Vancouver (Canada), Dallas (U.S.A.), Zhuhai (China) and close to Kuala Lumpur (Malaysia).

Apart from core engine maintenance, MTU Maintenance stands out for its services, always providing flexible solutions that are individually tailored to suit its customers' needs and ensure maximum benefit at affordable costs: A considerable engine lease pool known as e.pool®, on-site support and on-wing repairs, accessories and LRU management, MTUPlus Engine Trend Monitoring, logistics support, 24/7/365 AOG service and fleet management up to Total Engine Care (TEC®) packages for all engine types in its portfolio.

While many MRO providers, when faced with a defective part, may be quick to reach for replacement parts, MTU's maintenance experts rather repair. Owing to its innovative processes and decades of experience, MTU Maintenance succeeds in repairing heavily worn parts, components and accessories at an affordable price. Its high-tech repair approaches are globally unique and known under the trademark MTUPlus repairs. They have been developed in-house by MTU Maintenance and are approved and certified by EASA and FAA agencies. These techniques run the gamut from automated selective stripping of coatings to specialty high-temperature brazing, and high-precision welding and joining using automated laser machines.

MRO portfolio at a glance: Turboprops: PT6A, Helicopters: PW200, Business jets: PW300, PW500, CF34-3, Regional jets: CF34-3/-8/-10E, Narrow-bodies: V2500 series, CFM56-3/-5B/-7, PW2000*, PW6000, CF6-50/-80C2, Wide-bodies: CF6-50*/-80C2, GE90-110B/-115B, GP7200 and Including military applications (KC10, C-17).

Contact: MTU Maintenance Hannover GmbH
Muenchner Str. 31 - 30855 Langenhagen
Germany
Tel: +49 511 7806 0 | Fax: +49 511 7806 2111
AOG: +49 171 431 4333
mtu.maintenance@mtu.de
www.mtu.de

Mrs. Grit Doebeling
MTU Maintenance Hannover GmbH
Marketing & Sales Communications Manager
Muenchner Strasse 31 - 30855 Langenhagen
Germany
Tel: +49 (0)511 7806 4299
Fax: +49 (0)511 7806 4932
Email: Grit.Doebeling@mtu.de

Nigeria, with plans to expand operations to other African countries. It handles about 70% of domestic and foreign airlines operating in Nigeria.

Since 2005, Nahco Aviance has embarked on business diversification programme that cut across industries and geography, as a result of which it has developed strategic global alliances through its membership of Aviance, the global alliance of 10 reputable airport service providers operating from 112 stations in 17 countries, and The International Air Cargo Association (TIACA), which exists to promote the air cargo industry and world trade. In 2010, Nahco Aviance was awarded the ISAGO certification, the IATA Safety Audit for Ground Operations, becoming the first and only ground handling company in West Africa to receive one of the aviation industry's highest honours for safety and service quality. Nahco Aviance is rated Aa- by Augusto and A- by GCR

Pursuant to the company's commitment to exceptional value creation for shareholders, the company is currently consolidating its aviation services operations and expanding across Africa. Also, the company is diversifying into power distribution, following the deregulation of Nigeria's power sector.

In 2010, it incorporated NAHCO Energy & Power Limited – a joint venture of nahco aviance, Rosehill Group and Empower of Finland, which is a technical partner. The company also incorporated NAHCO FTZ Limited to drive the initiative into the power sector and enhance operational efficiency and competitiveness.

Contact Person: Mr. Gordon Gofwan
Executive Director, Business Development
g.gofwan@nahcoaviance.com

Mr. Abiodun Adewuni
Customer Relationship Manager, African
biodun_adewuni@yahoo.com

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

Contact Person: Mr. Phil Callow
Chief Executive Officer
OAG
450 Capability Green
Luton, Beds LU1 3LU
United Kingdom
Email: Phil.Callow@ubmaviation.com
URL: http://www.oagaviation.com

Ms. Sarah Dixon
Head of Marketing
OAG
450 Capability Green
Luton, Beds LU1 3LU
United Kingdom
Email: Sarah.Dixon@ubmaviation.com

Pratt & Whitney
A United Technologies Company

Pratt & Whitney, a United Technologies Corp. company is a world leader in the design, manufacture and service of aircraft engines, industrial gas turbines and space propulsion systems. The company's 36,000 employees support more than 11,000 customers in 195 countries around the world.

Pratt & Whitney was founded in Hartford, Conn., in 1925 by Frederick Rentschler. Pratt & Whitney's first aircraft engine was the 410-horsepower, air¬cooled Wasp, which delivered unprecedented performance and reliability for the time and transformed the aviation industry. Pratt & Whitney has been leading change ever since.

Pratt & Whitney builds engines for front line fighters, like the F-15 Eagle, F-16 Fighting Falcon, F-22 Raptor and F-35 Joint Strike Fighter, as well as the C-17 Globemaster III military transport.

The company continues to develop new engines and work with its partners in International Aero Engines and the Engine Alliance to meet airline customers' future needs.

Pratt & Whitney's broad portfolio of businesses includes industrial gas turbines that light cities and power ships. The company's PureCycle® power system converts heat from geothermal resources, oil and gas wells and other sources into clean electricity.

Contact Person: Mr. Wayne Huot
General Manager (Africa)
Sales & Global Services
Pratt & Whitney
Email: wayne.huot@pw.utc.com
Tel: +1-860-557-2120

Mr. Stephane Auter
Regional Marketing Manager
Regional Airlines-EMEA
Email: stephane.auter-EMEA@pwc.ca

Rockwell Collins

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.

Contact Person: Mr. Thomas Mullarkey
Director, Commercial Systems Marketing – Europe, Middle East & Africa
Rockwell Collins
400 Collins Road
Cedar Rapids 1A 52498, USA
Email: tmullark@rockwellcollins.com

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.

Contact Person: Mr. Kevin Evans
Vice President for Africa
ROLLS-ROYCE PLC
PO Box 31, Derby,
UK, DE24 8BJ
Tel: +44 (0)1332 2 48832 (office)
Email: kevin.evans@rolls-royce.com

As a complete business partner, Sabre Airline Solutions® offers the world's broadest portfolio and the industry's largest Software as a Service platform, giving airlines the freedom to better market their schedules, sell their products, serve their customers and operate efficiently.

With our expertise and consulting services, we help 380+ customers in the airline, airport and aviation organizations around the globe to help increase their revenues, decrease costs and deliver their unique customer experience. Additionally, our world-class delivery and customer care helps to create faster ROI and lower total cost of ownership for their business.

Sabre Airline Solutions is a part of Sabre Holdings®, the world leader in the travel marketplace, with 1,400 professionals dedicated to the airline business.

For more information please visit: www.sabreairlinesolutions.com

Contact Person: Annika Akerman
Solution Partner MEA
Sabre Airline Solutions
6 rue Castérès, 92110 Clichy
France
Mobile: +33 (0)6 83 69 47 54
Fax: +33 (0)1 45 19 77 43
Email: annika.akerman@sabre.com
www.sabreairlinesolutions.com

SEABURY

At Seabury, we live for aviation. We believe expert support makes a difference. That is why our teams blend former industry executives, top-tier consultants and seasoned investment bankers.

We believe designing projects with change in mind will allow our clients to navigate towards improved results faster, and make them more sustainable. That is why we prefer to work onsite with our clients and focus on sharing our expertise to build internal competence.

We believe strong business intelligence capabilities strengthen feedback loops which allow our clients to continually learn and innovate. That is why we always respect and use the data at hand. We have developed a suite of software tools considered the best globally for in-depth analysis and supporting rapid decision making. We employ new generation, cloud-based project management tools to facilitate planning and tracking of targeted improvement programmes. We have dedicated network planning, cargo and maintenance teams with world-leading network planning tools, global cargo databases and maintenance best practice models.

We believe in partnering and sharing risk with our clients, and by combining their unique perspective with our broad experience we can create significant value. That is why since 1995 our professionals have advised on 1000 client engagements spanning Africa, the Middle East, Europe, Asia-Pacific and the Americas. Our assignments have involved negotiating for over US$100 billion of new aircraft and arranging US$30 billion of financing, raising over US$5 billion of equity. We have also been the sole financial and restructuring advisor for 10 of the 15 largest airline turnarounds.

We believe there is still huge untapped potential in this industry. That is why we enjoy working with our clients on strategic issues such as fleet campaigns, mergers, alliances as well as on specific, tactical opportunities such as commercial and revenue enhancement techniques, maintenance cost reduction, and workforce efficiency improvements. If you share our passion and some of our beliefs we would like to partner with you!

Contact: Dr. Jesko-Philipp Neuenburg
Senior Vice President
M +44 788 79 444 05
jneuenburg@seaburygroup.com

New York
1350 Avenue of the Americas, 25th Floor
New York, NY 10019, USA
Tel: +1 212 284 1133

London
Burdett House
15-16 Buckingham Street
London, WC2N 6DU, United Kingdom
Tel: +44 208 166 0300

Hong Kong
Suite 1701, 17/F, Somptueux Central
52-54 Wellington Street, Central, Hong Kong
Tel: +852 5802 5688

SERVAIR

Third largest caterer world-wide, Servair asserts itself as an undisputable reference in the field of air service. Over 50 stops and four continents, Servair meets the needs of its customers, airlines companies, businesses and communities, respecting their local cultural quality and personality. Established in Africa (Libreville, Gabon) in 1989, Servair has gradually placed itself as a major player in airline catering on the continent. With 20 units in 2013, Servair employs 3,250 people in Africa.

In February 2011, Servair announced its membership to AFRAA (African Airlines Association), the Association of African airlines, which is an organization mandated to ensure effective cooperation among companies and to accelerate the economic and social integration of African countries. Servair units in Africa offer a wide range of services in all aspects of catering and meals. In addition, they deploy the expertise of the company, namely: Respect for hygiene and food safety standards, the use of advanced technologies, the culinary expertise, African units master all culinary and logistical skills to meet the increasingly diverse needs and transmission of knowledge.

Each Servair center is created according to the same principles of development of the local economy. In each location, Servair systematically honors equity partnerships with local players who have a good knowledge of their markets and their codes, and is committed to producing quality standards associated with the Servair brand while respecting local conditions. Its subsidiaries also enable the group to propose establishments in the Caribbean and the Indian Ocean. This strategy of alliances and development responds to a desire to advance a multi-stop supply, by ensuring its presence in the world's major airports.

Contact Person: Mr. Eric Rouvillois
General Manager
NAS Airport Services
Tel: +254-20-6972000 | Fax: +254-20-822323
PO Box 19010-00501, Nairobi, Kenya
EricR@Nascat.com

Mr. Moreau Jean-Louis
SERVAIR – Roissypole
Jlouis.moreau@servair.fr

SITA
Create success. Together

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 ATI.

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 and CHAMP Cargosystems. 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 around 450 ATI members and 2,800 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$1.57 billion in 2012.

SITA has been awarded Aviation IT Service Provider of the Year by AFRAA. The award recognizes SITA for its broad portfolio of solutions for the ATI, its collaboration with customers to pilot emerging technologies, and its investment in R&D in innovative solutions for the industry. This is SITA's second major award this year. In March, the Air Transport News (ATN) 2013 Awards recognized SITA as the IT Company of the Year for its influential leadership, achievements, innovation, entrepreneurial spirit and social responsibility.

Contact Person: Mr. Hani El Assaad
President Middle East, India & Africa
Mobile: +961-3-242473
Office: 961-1-637333
Fax: +961-1-637348
CVS: 7-2363333
Email: hani.el.assaad@sita.aero

Mr. Samson MUNDA
Sales Director, Africa
Tel: +2711 517-7000
Fax: +2711807- 8752
Email: sam.munda@sita.aero

Travelport

Travelport is a leading distribution services and e-commerce provider for the global travel industry.

With a presence in over 170 countries, approximately 3,500 employees and 2012 net revenue of more than $2.0 billion, Travelport is comprised of the global distribution system ("GDS") business, which includes the Galileo and Worldspan brands, its Airline IT Solutions business and a joint venture ownership of eNett.

Headquartered in Atlanta, Georgia, Travelport is a privately owned company.

Contact Person: Mr. Darryl Erasmus
Regional Marketing & PR Manager, Africa
Travelport GDS
Tel: +27 (0) 11 620 5000
Email: darryl.erasmus@travelport.com
URL: www.travelport.com

Travelport GDS,
One Axis Park, 10 Hurricane Way,
Langley, Berkshire, SL3 8AG, United Kingdom,
Tel: +44 (0) 1753 28 8000,
Fax: +44 (0) 1753 28 8001.

wirecard

Wirecard AG is one of the world's leading independent providers of outsourcing and white label solutions for electronic payment transactions. The Wirecard Group has been supporting companies in accepting electronic payments from all sales channels. A global multi-channel platform bundles international payment acceptances and methods, supplemented by fraud prevention solutions. When it comes to issuing their own payment instruments in the form of cards or mobile payment solutions, Wirecard provides companies with an end-to-end infrastructure, including the requisite licenses for card and account products.

Wirecard AG is listed on the Frankfurt Securities Exchange (TecDAX, ISIN DE0007472060, WDI).

www.wirecard.com | www.wirecardbank.com | www.mywirecard.com

Contact Person: Ms. Marion Bobzin
Coordinator Africa
Wirecard Technologies GmbH
Einsteinring 35
85609 Aschheim
Germany
Tel: +49 (0) 89 / 4424 1711 / +49 (0) 89 / 4424 1680
Fax: +49 (0) 89 / 4424 2711
Email: marion.bobzin@wirecard.com / airline@wirecard.com

AFRAA Member Airline Two-Letter Codes

Afriqiyah Airways	8U
Air Algerie	AH
Air Botswana	BP
Air Bukina	2J
Air Madagascar	MD
Air Mauritius	MK
Air Namibia	SW
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 Airlines	LN
Precision Air	PW
Royal Air Maroc	AT
RwandAir	WB
South African Airways	SA
South African Express	XZ
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Sudan Airways	SD
TAAG Angola Airlines	DT
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Senior Management

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Mr. Ephrem Kamanzi	:	Translation/Interpretation
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Ms. Dicie Okaya	:	Conference Coordination

Designed and Produced by:

Camerapix Magazines Limited
PO Box 45048, 00100
GPO Nairobi, Kenya
Telephone: +254 (20) 4448923/4/5
Fax: +254 (20) 4448818
Email: creative@camerapix.co.ke / customercare@camerapix.co.ke

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Section Fourteen: Annexes

Annex 1: Table 7.1 Fatal Accident Statistics for 2012

	Date	Aircraft Type	Airline	Location	No. of Fatalities	Age (years)
1.	30 Jan	Antonov 28 (Cargo)	TRACEP-Congo Aviation	10 km from Namoya, DRC	3	22
2.	12 Feb	Grumman Gulfstream IV	Katanga Express	Bukavu-Kavumu Airport, DRC	4+2	22
3.	1 Mar	Cessna 750 Citation X	Asia Today Limited	4 km E of Egelsbach Airport, Germany	5	9
4.	1 Mar	Piper PA-31-325 Navajo	Aerohein	About 10 miles south of Quellón, Chile	8	N/A
5.	4 Mar	Cessna 1725 Sky hawk SP	Avia Tours	Near Baylaw Village, Mambajao, Philippines	2	N/A
6.	15 Mar	Convair CV-340 (Cargo)	Jet One Express	San Juan, Puerto Rico	2	59
7.	2 Apr	ATR-72-201	UTAir	2,5 km SW of Tyumen Airport Russia	33	19.5
8.	20 Apr	Boeing 737-236	Bhoja Airlines	2,5 km SW of ISB Airport, Pakistan	127	27.4
9.	21 Apr	Curtiss C-46F 1 CU (Cargo)	SkyTeam	Viru Viru International Airport (VVI) Bolivia	3	67
10.	9 May	Sukhoi Superjet 100-95	Sukhoi	75 km S of Jarkata, Indonesia	45	2.8
11.	14 May	Dornier 228-212	Agni Air,	5 km SW of Jomsom Airport, Nepal	15	15
12.	2 June	Boeing 727-221F (Cargo)	Allied Air	Accra-Kotoka Airport, Ghana	0+12	30.2
13.	3 June	McDonnell Douglas MD-83	Dana Air	near Lagos-Murtala Muhammed Int. Airport Nigeria	153+10	22
14.	6 June	SA227AC Metro III (Cargo)	Air Class Lineas Aéreas	Isla de Flores, Rio de la Plata, Uruguay	2	30
15.	2 Aug	Cessna 500 Citation I	Airnor	Santiago de la Compostela Airport, Spain	2	28
16	19 Aug	Antonov 26-100	Alfa Airlines	near Talodi, Sudan	32	38
17	22 Aug	Let L-410UVP-E9	Mombasa Air Safari	Ngerende Airstrip, Masai Mara Game Reserve, Kenya	4	21
18.	30 Aug	BN-2b-26 Islander	Dapeng Airlines	Hualien County, Taiwan	3	21
19.	12 Sep	Antonov 28	Patropavlosk-kamchatsky air Ent.	10 km from Palana Airport, Russia	10	23
20.	28 Sep	Dornier 228-202	Sita Air	E of Kathmandu Airport, Nepal	19	25.5
21.	7 Oct	BN-2A-26 Islander	FlyMontseratt	Antigua-V.C. Bird International Airport (ANU)	3	43.3
22.	6 Nov	Cessna 208B Super Cargomaster	Baron Aviation	3,3 km SW of Wichita-Mid-Continent Airport, KS (ICT), USA	1	21
23.	18 Nov	Cessna 208B Grand Caravan	Gogal Air Service	2 km E of Snow Lake Airport, MB, Canada	1	6
24.	19 Nov	Piper PA -32-300 Cherokee Six B	Star Marianas Air (Marianas Air Transfers Inc.)	Near Saipan International Airport Mariana Islands	1	N/A
25.	24 Nov	Mil Mi-8 helicopter	Euro-Asia Air	Almaty Province Kazakhstan	8	N/A
26.	30 Nov	Ilyushin 76T	Air Highnesses, opf. Aéro-Service	1 km SW of Brazzaville-Maya Maya Airport (BZV) Congo	7+25	34
27.	17 Dec	Antonov 26-100 (Cargo)	Amazon Sky	near Tomas, Yauyos province, Peru	4	N/A

Annex 2: Airlines Capabilities

NAME	MAINTENANCE TRAINING	CREW TRAINING	SIMULATOR TRAINING	EASA/ FAA certification	OTHER TRAINING CAPABILITIES	WEBSITE
Aldawlya for Training and Science, Libya	Aircraft/ engine basic and recurrent training on A320 series, A330 and CRJ 900 Aircraft	Pilot, flight attendant and flight dispatcher training	-	-	Safety, Security,Commercial courses and Ground handling	www.aldawlya.ly
Air Algerie	Aircraft/ engine basic and recurrent training on 737NGs, A330 and ATR 72	Basic and recurrent pilot and cabin crew training	Full flight CAE for B737NG and B747- 8	EASA 145 EASA 147	Safety/ Security, Managerial/ leadership, commercial (Marketing, Cargo, Finance etc.) and ground handling	www.airalgerie.dz/
Air Botswana	Aircraft/ engine basic and recurrent training on ATR 42/ 72, BAe 146	-	-	-	-	http://www.airbotswana.co.bw
Air Madagascar	Aircraft/ engine basic and recurrent training on ATR 42/ 72, B737-200 and B767	Flight and Cabin crew training on B737/ B767 and ATR 42/ 72	-	EASA 147	Safety and rescue training, English language proficiency	www.airmadagascar.com
Air Mauritius	Aircraft/ engine basic and recurrent training on A320 series, A330, A340, ATR 42/72 and Bell Jet Ranger	-	-	-	IATA authorised training center	www.airmauritius.com
Air Zimbabwe Training School	B737-200, B767-200, BAe 146 and MA 60	Flight and cabin crew training on B737-200, B767 and MA 60	-	-	Safety, Security, Cargo and Ground handling training	www.airzimbabwe.aero
Comair Training* Center, South Africa	Aircraft/ engine basic and recurrent training on B737 - classics & NG and ATR 500	Pilot and cabin crew, dispatcher basic and recurrent training	B737 NG & classics and ATR 42/72 full flight simulator	EASA 145 EASA 147	Safety, Security and Commercial courses	www.comair.co.za
EgyptAir Training Center	Basic type, overhaul, boroscope and engine module courses on B737NG, B757, B767, B777, A320 series and A330	Pilot, Cabin crew on B737NG, B757, B767, B777, A320 series and A330	A320, A330, B727NG & B777 full flight simulator training	EASA 145 EASA 147	Safety , Security, Cargo, Ground services, commercial and IATA courses (IATA authorised training center)	http://training.egyptair.com/
Ethiopian Airlines Training Academy	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic pilots, basic and recurrent cabin crew training	B737NG & B757/ B767 full flight simulator	FAA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	www.ethiopianairlines.com/en/schools/
Kenya Airways Pride Center	Aircraft/ engine basic system and recurrent/ refresher training on B737NG/ classics, B767, B777 and Embraer 170	Basic and recurrent cabin crew training	B737NG full flight simulator	EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training. (IATA authorised training center)	www.kenya-airways.com
LAM Mozambique	Aircraft/ engine basic and recurrent training on B737-200 and Embraer 190	-	-	-	-	www.lam.co.mz/en
Royal Air Maroc Training Academy	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B747, A320 series, A330, ATR 42/72 and CRJ-190 at Royal Air Maroc Academy	Basic pilots, basic and recurrent cabin crew training	B737NG & B757/ B767 full flight simulator	EASA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	http://www.royalairmaroc.com/
South African Airways Training Center	Aircraft/ engine basic and recurrent training on B737 NG & classics, B747, B757, B767, A320 series, A330 and A340	Basic pilots, basic and recurrent cabin crew training	-	EASA 145 EASA 147 FAA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training. (IATA authorised training center)	www.flysaa.com
TAAG Angola Airlines	-	-	-	-	Safety, Security and Commercial courses	www.taag.com
Tunisair Training Center	Aircraft/ engine basic and recurrent training on A300, A320 series, A330 and B737NG	Basic and recurrent cabin crew training	B737NG & A320 series full flight simulator	EASA 145 EASA 147	(IATA authorised training center)	www.tunisair.com

* Comair Training Center is not a member of AFRAA but it has been included since it provides services to various airlines in Africa

Annex 3: AFRAA Airlines Fleet - 2013

#	Airline	FLEET TYPE																																	Totals
	Airline	A300	A310	A319/ 320/321	A330	A340	B777	B767	B757	B747	B737-200	B737-3/4/500	B737-6/7/800	B787	MD-82/83	MD-87	MD-11	CRJ 200	CRJ 700	CRJ 900	ERJ-120/135/ 145/170 /175/ 190/ 195	EMB 120	BAe 146-100/200/300	F28	F50	Dash -8	ATR 42	ATR 72	DHC-6-8	Beech 1900C/D	Shorts360	Saab 340B	Yak-ovlev Yak	Xian MA60	
1	Afriqiyah Airways			11	2																														13
2	Air Algérie *				5			3					22															12							43
3	Air Botswana																						2				3	2							7
4	Air Burkina														1	2		1														1			5
5	Air Madagascar					2						3															2	2							9
6	Air Mauritius			2	2	6																						2							12
7	Air Namibia			4	1	2						2									4									3					16
8	Air Seychelles				2																								4		1				7
9	Air Tanzania										1															1									2
10	Air Zimbabwe			2				2			3										1													2	10
11	ASKY Airlines												3													4									7
12	Camair-Co							1					2																						3
13	Ceiba Intercontinental						1																				2	2							5
14	ECAir								1			2																							3
15	EgyptAir	3		17	11	1	9					4	20								12														77
16	Ethiopian Airlines						8	12	6				14	5			2												13						60
17	Inter Air South Africa							1			3																								4
18	Kenya Airways						4	6				6	9								17														42
19	LAM Mozambique											1									3					2									6
20	Libyan Airlines			7	3															6							2								18
21	Precision Air																										6	5							11
22	Rwandair												4							2									1						7
23	Royal Air Maroc							5		1		1	37								2														46
24	South African Airways			15	6	17					1	3	11																						53
25	SA Express Airways																	10	3							9									22
26	Starbow																						5												5
27	Sudan Airways	2		1								2													4										9
28	TAAG Angola Airlines						5				3		6																						14
29	Tunisair	3		21								4	7																						35
	Totals	8	0	80	32	28	27	30	7	1	11	28	135	5	1	2		11	3	8	39		7	0	4	16	15	25	18	3		1		2	551

* Air Algerie also has one Lockheed C-130

Annex 4: Airline 2012 Performance

	AFRIQIYAH AIRWAYS	AIR ALGERIE	AIR BOTSWANA	AIR MAURITIUS	AIR TANZANIA	EGYPTAIR	ETHIOPIAN AIRLINES	KENYA AIRWAYS	LAM MOZAMBIQUE	PRECISION AIR	SOUTH AFRICAN AIRWAYS	TAAG ANGOLA	TUNIS AIR
TRAFFIC DATA													
Domestic Passengers (000)	311	1,431	95	92	34	1,595	579	794	397	272	3,452	576	677
Regional Passengers – within Africa (000)	-	272	188	370	1	1,153	1,947	1,869	212	605		178	
Intercontinental Passengers (000)	383	2,619	-	507	0	5,853	2,350	965	2		3,436	381	3,077
Total Passengers Carried (000)	694	4,322	283	969	35	8,601	4,876	3,629	611	877	6,887	1,135	3,754
Domestic Freight Carried (000)	-	1,350	264	60	27	1,137	300	871	3,217		157,490	2,109	
Regional Freight Carried (000)	-	346	714	9,083	6	10,924	39,740		817			3,496	1,203
Intercontinental Freight Carried (000)	-	9,622	-	13,998	0	114,285	138,060	59,723	56		37,846	12,599	7,762
Total Freight Carried (000)	470	11,318	978	23,142	33	126,346	178,100	60,594	4,090		195,336	18,204	8,965
Revenue Passenger-Kilometres - RPK (000)	-	5,831,249	147,911	4,380,628	21	18,479,717	16,991,671	9,473,289	674,000	484,171	22,400,725	3,123,038	5,423,560
Available Seat-Kilometres - ASK (000)	1,358,556	8,771,093	318,352	5,684,138	50	27,938,967	23,737,447	13,698,203	905,000	810,517	30,989,959	4,825,012	7,438,196
Passenger Load Factor - PLF (%)	71.80%	66.48%	46.50%	77.10%	42.00%	66.00%	71.58%	69.20%	74.50%	59.70%	72.30%	65.00%	72.90%
Passenger Tonne-Kilometres - PTK (000)	91,115	524,812		396,289	2	1,781,734	2,073,964	852,596	61,000	50,354	1,988,109	281,073	443,333
Freight & Mail Tonne-Kilometres - FTK (000)		1,726		138,872	0	356,722	829,947	312,891	5,000		1,196,896	83,339	15,220
Revenue Tonne-Kilometres - RTK (000)	91,115	526,538	13,319	535,162	2	2,138,456	2,915,511	1,165,487	66,000	50,354	3,185,005	364,413	458,553
Available Tonne-Kilometres - ATK (000)	135,856	793,575	21,241	832,769	8	4,185,692	4,862,614	1,910,178	99,000		5,242,338	878,211	843,991
Weight Load Factor - WLF (%)	71.8%	66.35%	62.70%	64.30%	50.00%	51.00%	59.98%	61.00%	67.00%		60.80%	41.00%	54.30%
EMPLOYEES DATA													
Pilots	78	414.00	46	162	19	854	454	461	23	76	793	128	328
Engineers	120	1,440	25	350	28	4,995	1,695	562	100	98	2,918	15	63
Cabin Crew	325	951	36	500	21	2,507	1,264	674	93	95	1,877	401	792
Traffic/Marketing	134	4,441	14	126	39	2,983	1,091	455	283	75	554	725	1,073
Others	429	2,317	-	1,048	89	21,466	2,535	1,842	210	380	2,869	2,096	1,501
Total No. of Employees	1,086	9,563	473	2,186	196	32,805	7,039	3,994	709	724	9,011	3,365	3,757
DESTINATIONS SERVED													
Domestic – within the country	-	28	5		4	10	16	4	10			13	0
Intra-Africa - within Africa	-	9	7		1	17	43	43	5			11	11
Intercontinental - Africa to other Regions	-	29	-		0	48	30	12	0			7	73
New Destinations (all markets)	-	3	1		3	5	6	3	1				1

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