



AFRAA 10TH AVIATION STAKEHOLDERS CONVENTION

“Beyond the Crisis”

DAY 1 PROCEEDINGS, 09 MAY 2022

8 - 10 May 2022 | Nairobi, Kenya

OPENING CEREMONY



10TH AVIATION
STAKEHOLDERS
CONVENTION

8 – 10 May 2022 | Nairobi, Kenya



Welcome and opening remarks by Mr. Abdérahmane Berthé, AFRAA Secretary General



Keynote speech by Mr. Allan Kilavuka CEO – Kenya Airways



**Keynote speech by
Mr. Glyn Hughes
Director General
The International Air Cargo
Association (TIACA)**



**Keynote speech by
the President East Region
AFCAC on behalf of the
African Civil Aviation
Commission (AFCAC)**



**Mr. Nicholas Bodo
Ag. Director General – Kenya Civil
Aviation Authority**

**Keynote speech on behalf of
Mr. Barry Kashambo – ICAO
Regional Director Eastern and
Southern Africa Office (ESAF)
Office**



**Mr. Prosper Zo'o Minto'o - Regional
Director Western & Central African
Regional Office - ICAO**

Speech and Official Opening by Guest of Honour representing the Government of Kenya



**Principal Secretary, State Department
for Transport Dr. Eng. Joseph K.
Njoroge, CBS**



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Networking Coffee

10.00-10.30hrs

(Press conference 10.00-10.45hrs)

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Presentation 1

State of the Airline Industry & Industry priorities for Africa for 2022 and Beyond



Patrick Baudis

Vice President

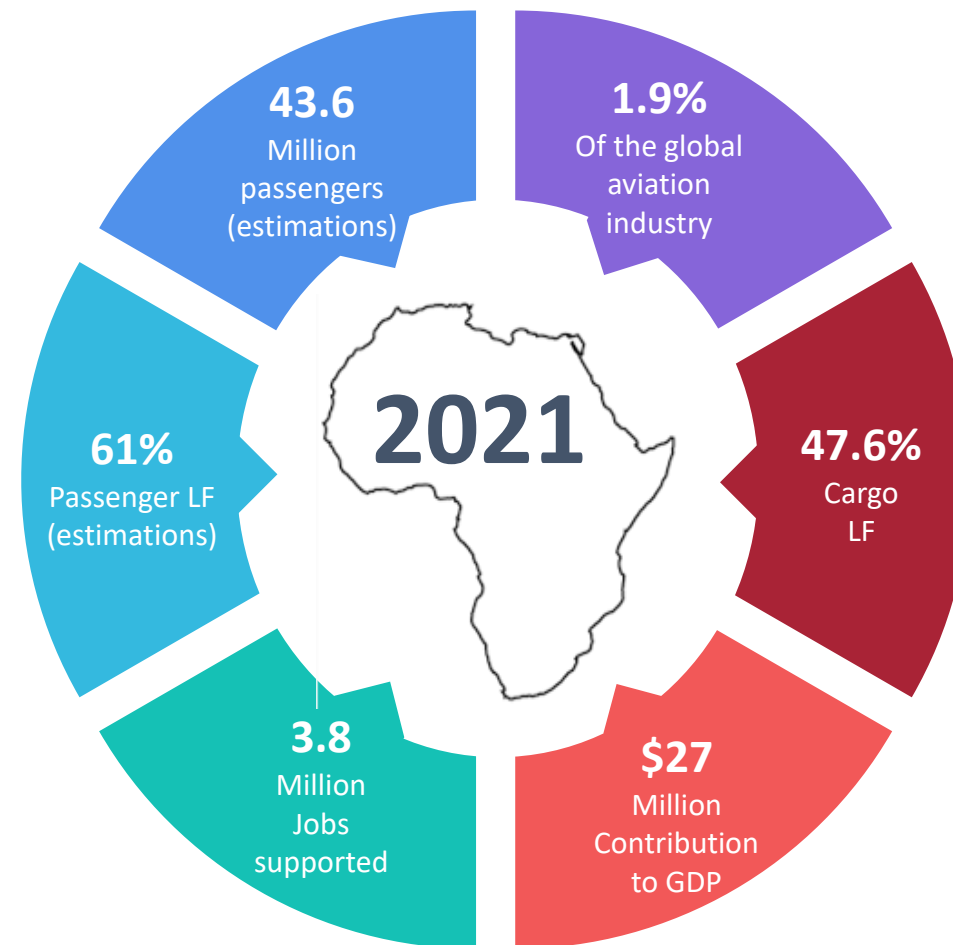
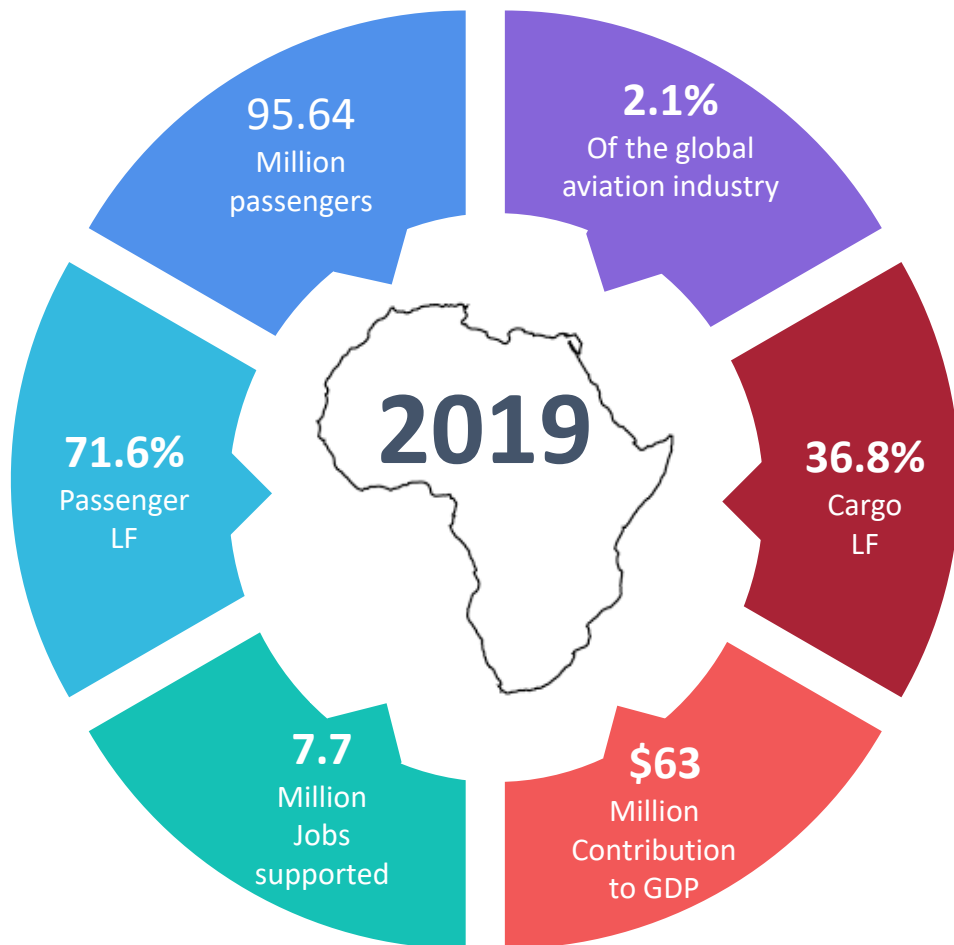
MITSUBISHI AERO ADVISORY



AERO ADVISORY
SERVICES

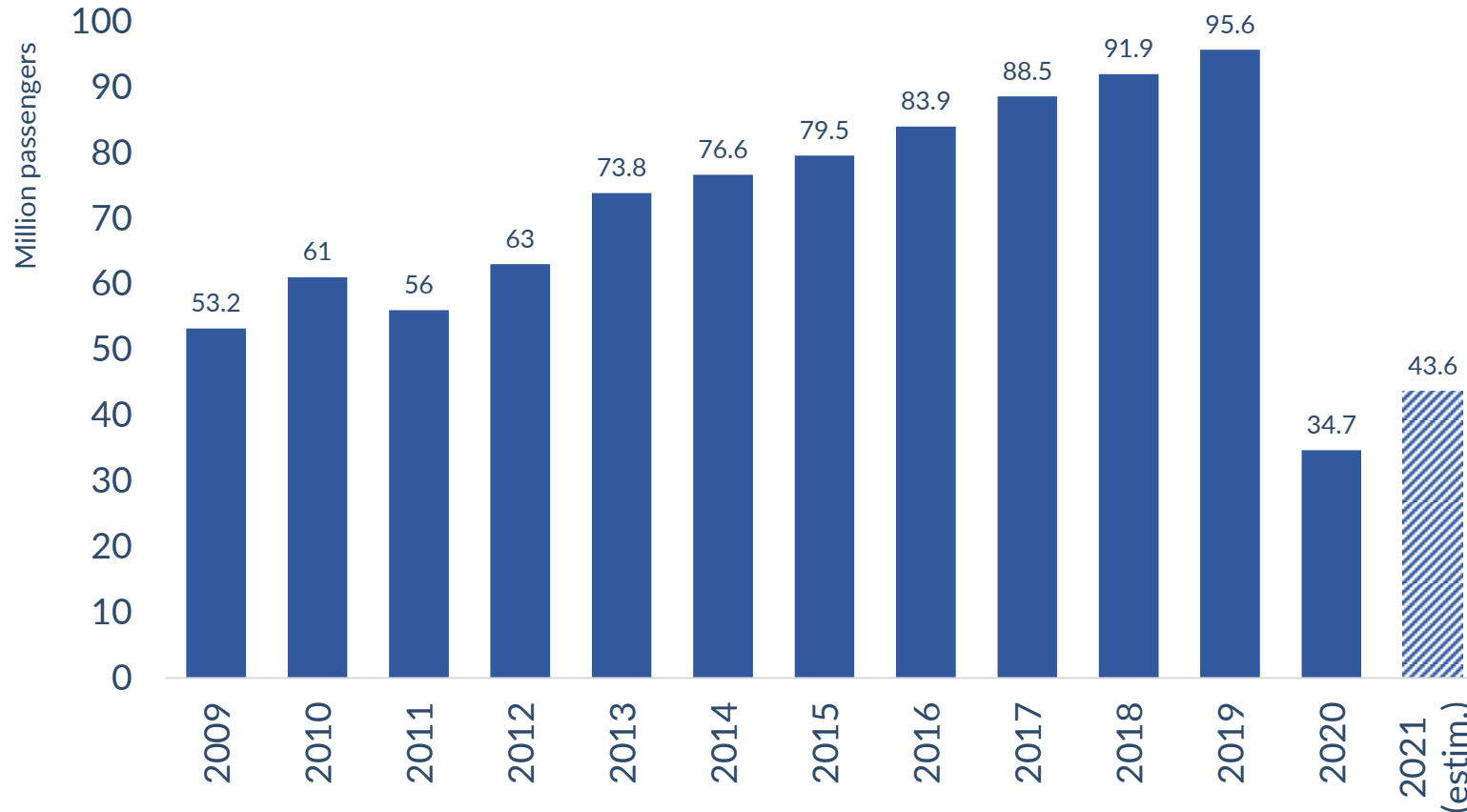
STATE OF THE AFRICAN AIRLINE INDUSTRY 2021

BENEFITS OF AVIATION IN AFRICA 2019 VS 2021



Source : AFRAA – IATA - ATAG

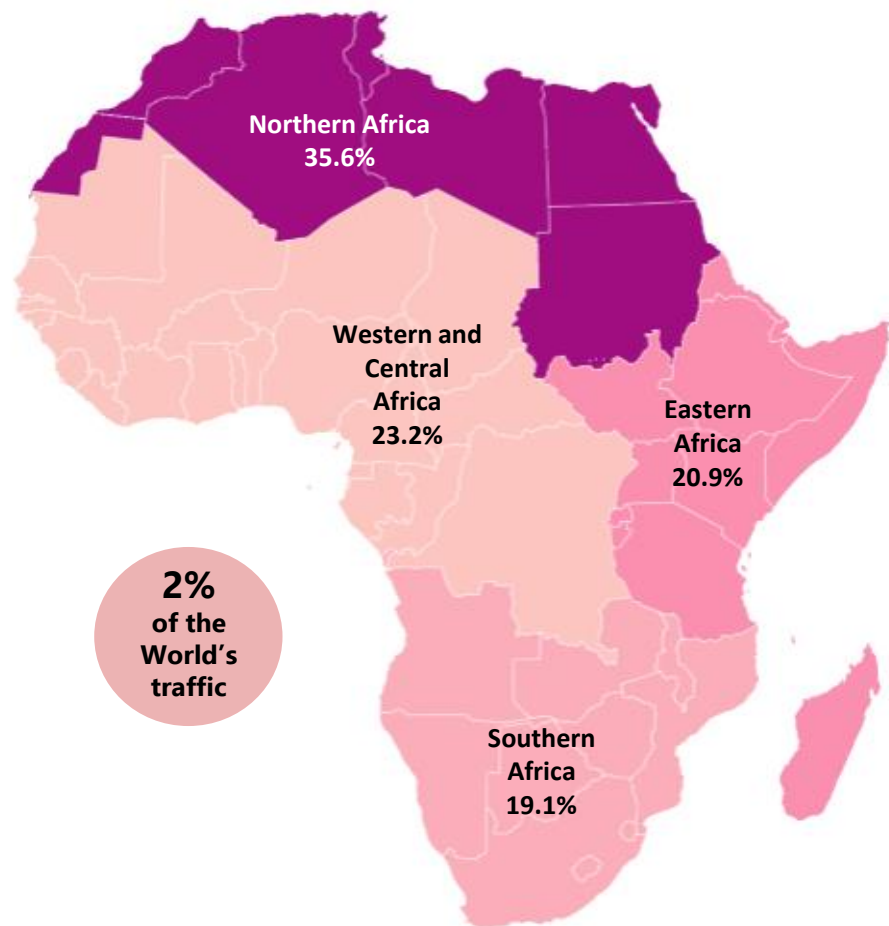
PASSENGER TRAFFIC



Source : AFRAA / IATA

- ✓ African Airlines' scheduled passengers 2021 : 43.6 million (AFRAA estimations)
- ✓ Estimated 54.4% drop compared to 2019

AIR TRAFFIC IN AFRICA



+25.6%

Traffic increase compared to 2020

42%

Share of **Domestic** traffic

31%

Share of Intra-African traffic

27%

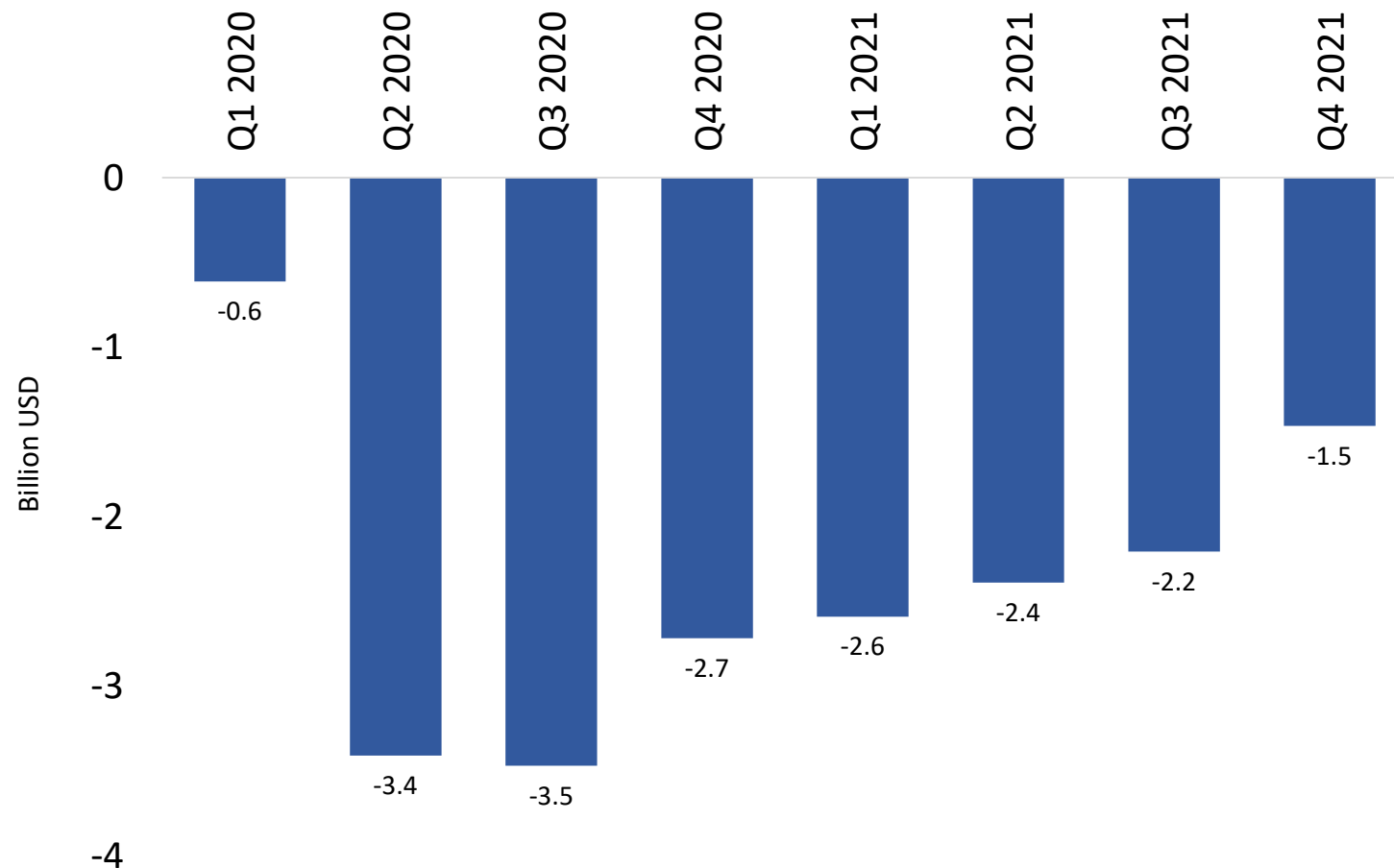
Share of Intercontinental traffic

Europe is the first destination outside Africa from all the sub regions, representing **27%** of the total non-domestic traffic.

Northern Africa represents 35.6% of the total continental traffic, mainly directed to Europe (56%) and Middle- East (30%) of the non-domestic traffic.

Source : AFRAA/OAG

AFRICAN AIRLINES QUARTERLY PASSENGER REVENUE LOSSES

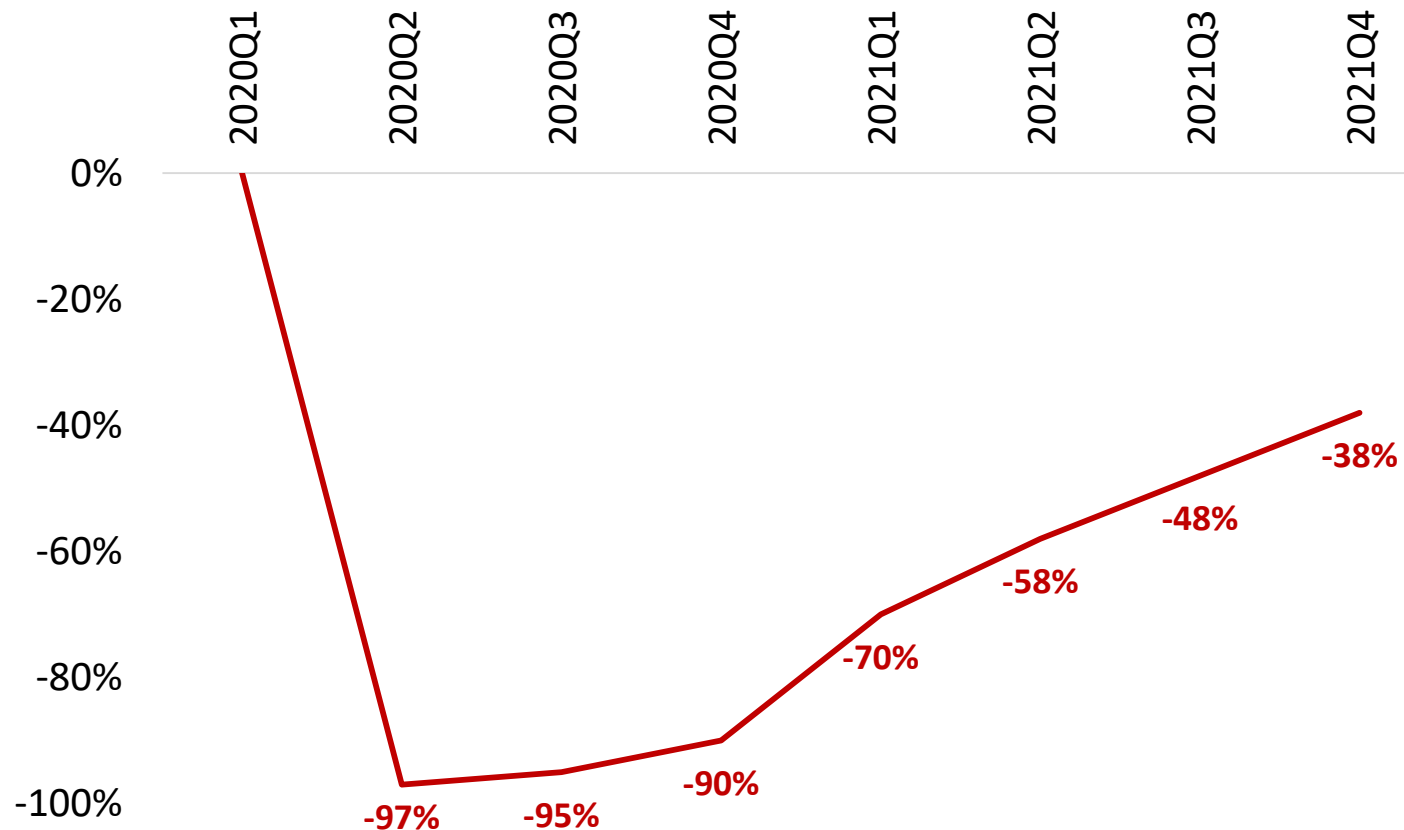


- ✓ In 2020, Passenger revenue losses were estimated at USD 10.21 billion.
- ✓ In 2021 the situation slightly improved and losses are estimated at **USD 8.6 billion**, representing 49.8% of 2019 revenues.

Source : AFRAA/OAG

INTRA-AFRICAN CONNECTIVITY

Number of Connections



- ✓ Sharp drop of 97% during the second quarter, due to the Covid19 crisis.
- ✓ The situation gradually improved, and intra-African connectivity grew by almost 60% over the year 2021.

Source : AFRAA/OAG

INDUSTRY PRIORITIES FOR AFRICA 2022 AND BEYOND

OUR UNIQUE 30-YEAR FORECAST



A **passenger demand model** following a **behavioral approach**, considering the distribution of incomes with the propensity and likelihood to travel



A unique horizon: **up to 30-year forecast**



A **traffic flow analysis** that goes beyond intra-regional levels, down to the **country-pair and city-pair levels**, and which considers departure and arrival times for each route



A unique **new route opportunity model**, allowing to include route developments that do not exist today



An **aircraft-type specific retirement model** for current and future fleet retirements

MAJOR CHALLENGES TO OVERCOME

- **Recovering from the Pandemic**



MAJOR CHALLENGES TO OVERCOME

- Recovering from the Pandemic
- **Improving Profitability**



MAJOR CHALLENGES TO OVERCOME

- Recovering from the Pandemic
- Improving Profitability
- **Developing Infrastructure**



MAJOR CHALLENGES TO OVERCOME

- Recovering from the Pandemic
- Improving Profitability
- Developing Infrastructure
- **Facilitating Trade and People Movements**



MAJOR CHALLENGES TO OVERCOME

- Recovering from the Pandemic
- Improving Profitability
- Developing Infrastructure
- Facilitating Trade and People Movements
- **Achieving Sustainability Goals**



5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

POPULATION AND GDP

Population
(2019 → 2050)

x1.9

2.2%
per annum

GDP
(2019 → 2050)

x2.5

3.2%
per annum



SEAT CAPACITY

2019

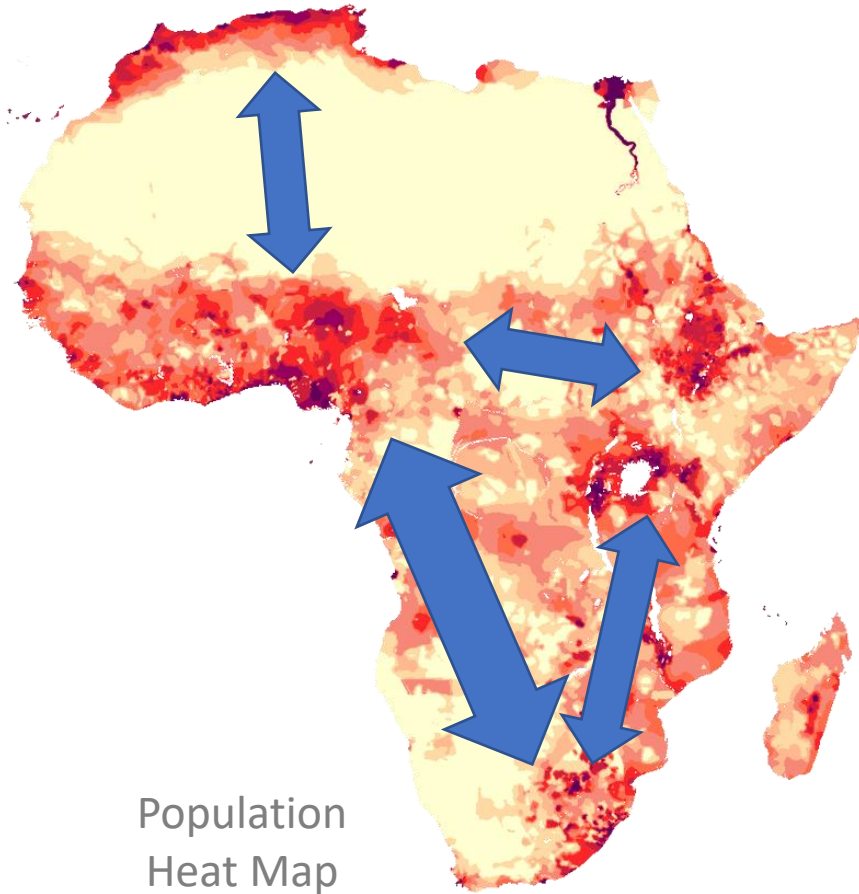
2050

Rank		Seat Capacity (millions)			Seat Capacity (millions)
1	South Africa	41.0			Ethiopia 84.7
2	Morocco	30.8			Morocco 79.9
3	Ethiopia	19.1			South Africa 77.5
4	Nigeria	15.1			Nigeria 64.8
5	Algeria	14.8			Kenya 43.6
6	Kenya	13.5			Tunisia 37.6
7	Tunisia	12.4			Algeria 36.6
8	Tanzania	6.2			Tanzania 21.2
9	Ghana	4.8			Sudan 20.7
10	Sudan	4.4			Ghana 19.2

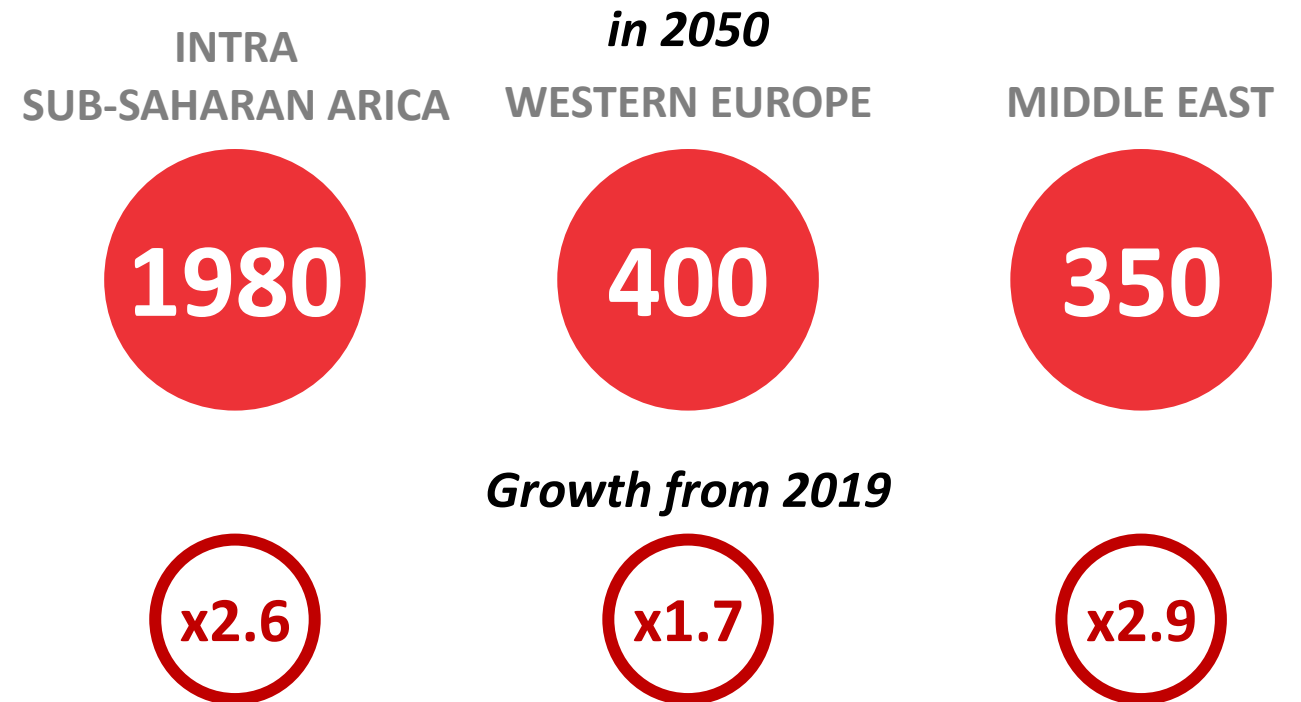
“Beyond the Crisis”

5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

REGIONAL CONNECTIVITY

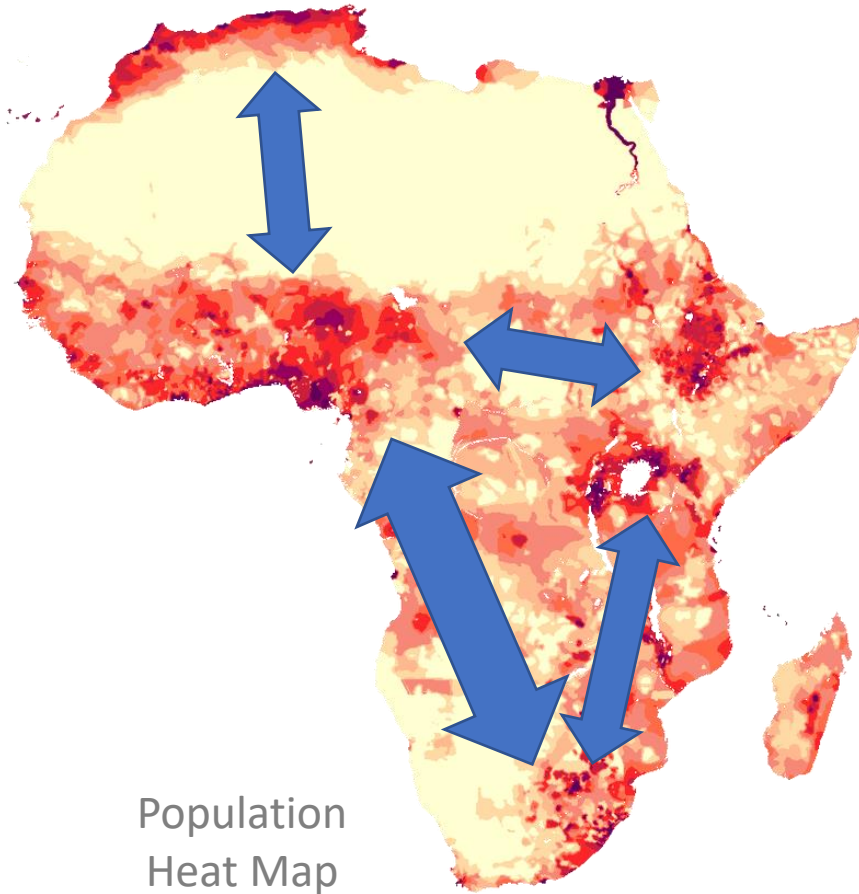


NUMBER OF SUB-SAHARAN AFRICAN ROUTES



5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

REGIONAL CONNECTIVITY



Population Heat Map

NUMBER OF NORTH AFRICAN ROUTES

in 2050

INTRA NORTH AFRICA

WESTERN EUROPE

MIDDLE EAST

470

1690

180

Growth from 2019

x2.8

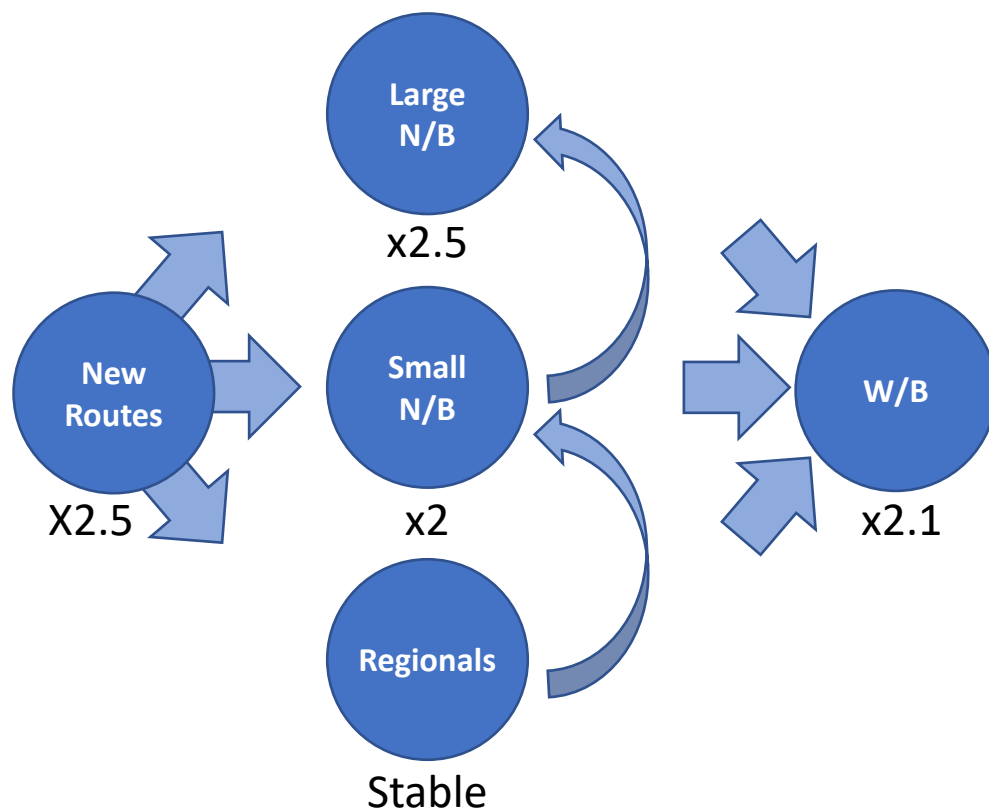
x3.0

x2.2

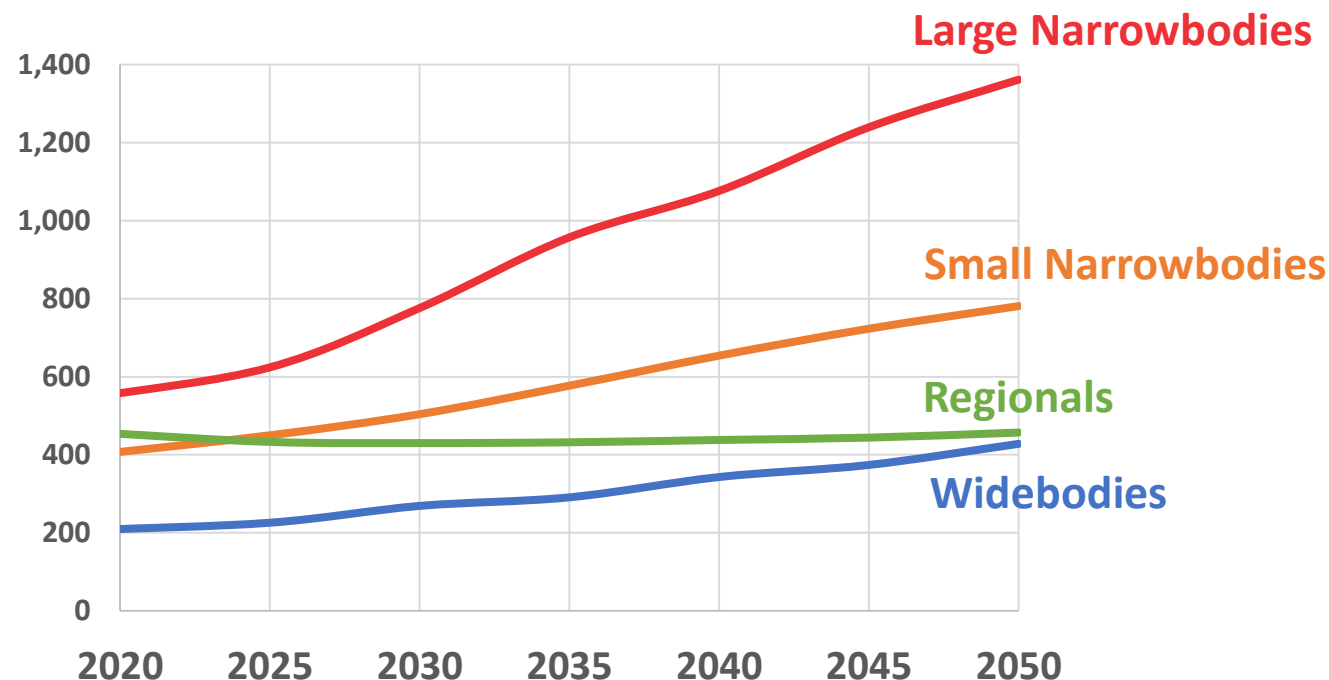
5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

FLEET EVOLUTION AND RIGHT SIZING

- A cascading shift up in aircraft size
- A more balanced distribution between aircraft segments



Evolution of the African Fleet



5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

AIRLINE PARTNERSHIPS AND RESURGENCE OF NATIONAL CARRIERS

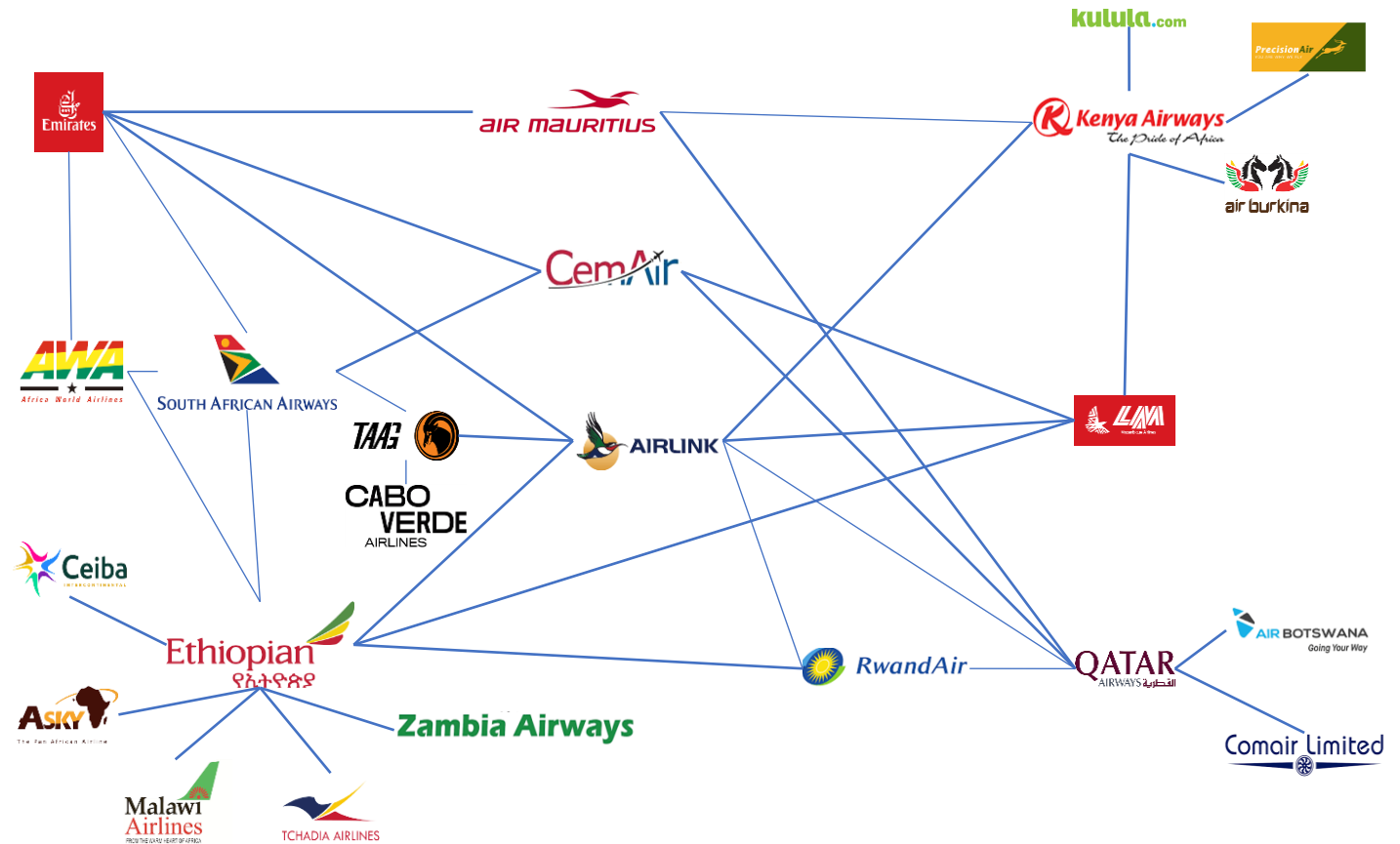
MORE AIRLINE PARTNERSHIPS



- Funding
- Faster Operational Expertise
- Access to Wider Network
- Reinforced Connectivity
- Faster Implementation



- Less Control on Network/Fleet
- Risk of Long-Haul Traffic being diverted to partner



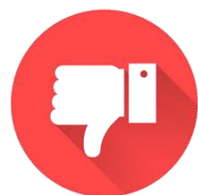
5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

AIRLINE PARTNERSHIPS AND RESURGENCE OF NATIONAL CARRIERS

MORE NATIONAL CARRIERS



- More Control of Destiny
- Direct Alignment with Country's Economic Strategy



- Higher Initial Investment
- Expensive Learning Curve
- Longer Implementation

Government-owned (Africa)	Private (Africa)	Private (Kenya)	Private (Nigeria)	Private (RSA)
AIR BOTSWANA Ibom Air air burkina Kenya Airways <i>The Pride of Africa</i> Air Côte d'Ivoire LAM <i>Compagnie Africaine d'Aviation</i> AIR SENEGAL Malawian Airlines Air Tanzania <i>The Wings of Kilimanjaro</i> RwandAir air zimbabwe SOUTH AFRICAN AIRWAYS ASKY SUDAN AIRWAYS Camair-Co TAAZ Ceiba TCHADIA AIRLINES Congo Airways Uganda Airlines <i>Fly the Crane to the Pearl of Africa</i> Ethiopian Zambia Airways	AFRIJET AWA <i>Africa World Airlines</i> بدر للطيران BADR AIRLINES CAA <i>Compagnie Africaine d'Aviation</i> <i>République Démocratique du Congo</i> fastjet Heli Malongo NATIONAL AIRWAYS PrecisionAir PROFLIGHT ZAMBIA تاركو للطيران TARCO AIR TAC <i>TRANS AIR CONGO</i> WESTAIR AVIATION	748 AFRICAN EXPRESS AIRWAYS <i>THE PEOPLE'S CHOICE</i> AIRKENYA <i>The best way to fly</i> RLS BB DAC fly540.com Jambojet.com Safarilink silverstone SKYWARD EXPRESS	aero AIR PEACE <i>...your peace, our goal</i> Arik AZMAN AIR SERVICES LTD DANA AIR MaxAir GLOBAL lift SOLENTA AVIATION	AIRLINK Fly CemAir Comair Limited kulula.com FlySafair <i>for the love of flying</i>

5 TRENDS THAT WILL DRIVE TRAFFIC GROWTH IN AFRICA

EMERGENCE OF LOW-COST CARRIERS

TODAY

Inelastic traffic (business + high yield VFR)

Difficulty to travel (visas...)

Not enough trade

Increasing population
Increasing trade
Increasing GDP per capita
Easier travel conditions



TOMORROW

More affordable air travel

+

More trade

+

More connectivity

=

**Auspicious environment
for more leisure travel**

=

More LCCs



OUR 30-YEAR FORECAST FOR AFRICAN AVIATION

2020-2050 Delivery Breakdown

	Widebodies	Narrowbodies (>150 seats)	Small Narrowbodies (100-150 seats)	Regional aircraft	TOTAL
2019 fleet in service	207	546	399	458	1610
2020-2050 deliveries	473	1,716	768	472	3429
<i>Growth</i>	221	815	382	0	1418
<i>Replacement</i>	252	901	386	472	2011
2050 fleet in service	428	1,361	781	457	3027

CONCLUSION

- A fast-growing population with **an increasing middle-class**
- A **boom of intra-regional routes**, and to a lesser extent, to Western Europe and Middle East
- **Cascading shift up in aircraft size** leading to the need for **some 2500 narrowbody deliveries**, large and small, in the next 30 years
- **More airline partnerships** and **more national carriers**
- **More LCCs**

A need for 3400 aircraft over the next 30 years



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8 – 10 May 2022 | Nairobi, Kenya



THANK YOU



AERO ADVISORY
SERVICES

CEO Keynote Interview 1

CEO insights on the core issues in the African market, developments in the region and critical aspects of success for the industry



Mr. Allan Kilavuka
CEO – Kenya Airways



Ms. Maureen Kahonge
Senior Manager Business Development & Communications - AFRAA

Moderator



Presentation 2

Intra-Africa Connectivity Status and Building Blocks to the Attainment of the Single African Air Transport Market (SAATM)



Stephen Musa
Acting Director of Air Transport
AFCAC

Importance of Air Connectivity

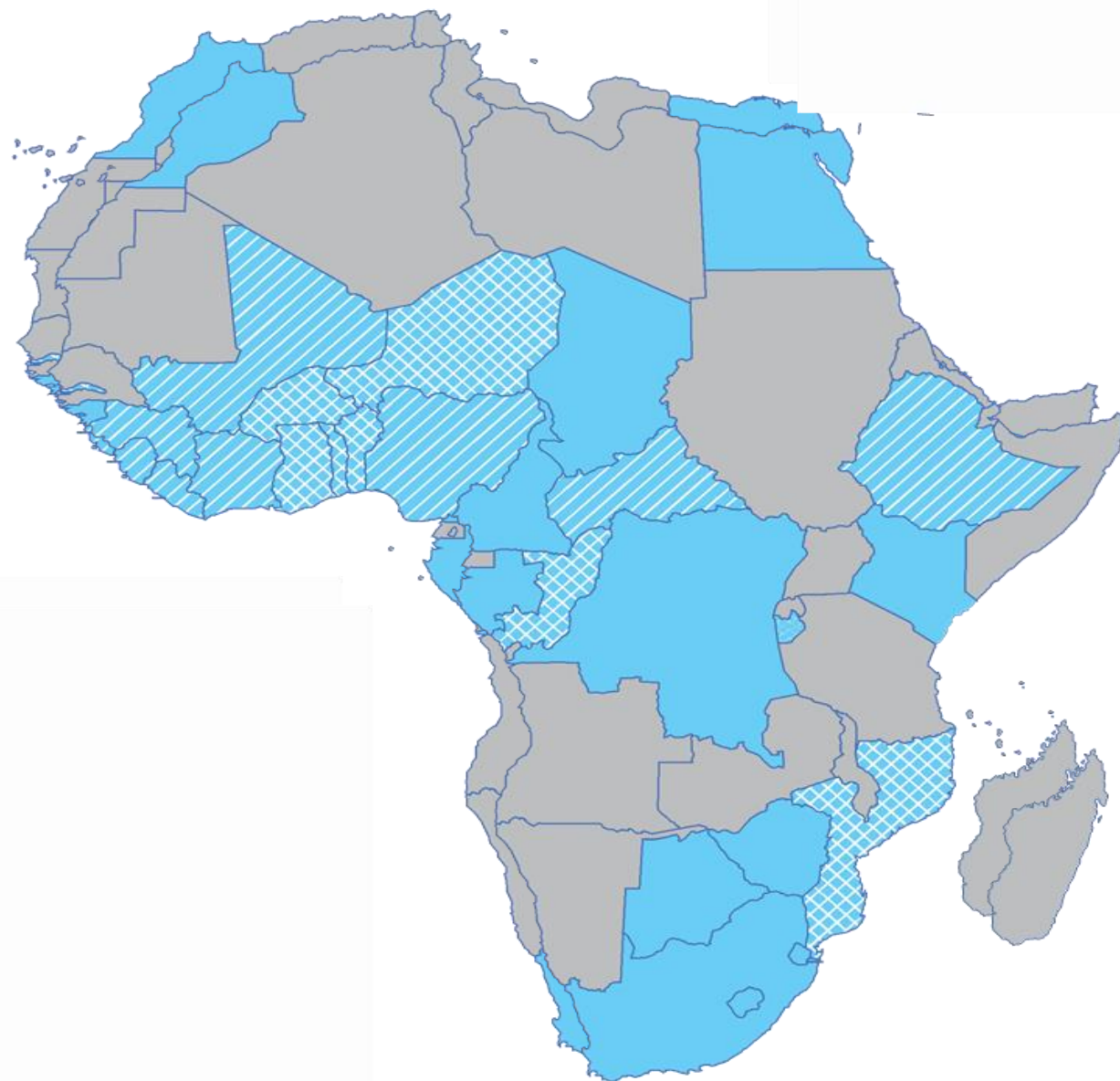


- Air transport's unique benefit is to connect cities that cannot be otherwise timely connected, enabling flows of key economic activities and people.
- About 35% of international trade by value is moved by air transport.
- Countries with better connectivity tend to trade more - 1% better air cargo connectivity is associated with 6% more trade.
- Enhancing air connectivity can help raise productivity, by encouraging investment and innovation and improving business operations and efficiency.

Connectivity and Air Service Impacts - status



- In 2019, only 35% of the Africa routes were operated on a daily basis or better, and only 13% were operated on twice daily or better basis.
- Intra-Africa traffic declined by 66% in 2020 when compared with 2019
- Due to COVID-19 pandemic, the number of unique city pairs connecting Africa within the region and to the rest of the world reduced to under 100 unique city pairs in April 2020 compared to about 970 city pairs during the same period one year earlier.



BASA Analysis

- Liberalization enhances air connectivity
- **Low level of YD BASAs compliance**
- **607 BASAs reviewed, 235 (39%) were YD compliant and 372 (61%) were non-compliant**
- **Some SAATM member States are partially implementing the YD**

Challenges of Intra-Africa connectivity

- ❑ Given Africa's underdeveloped road and rail infrastructure as well as the size of the continent, air transport will be an important means of transport going forward.
- However, for this to be achieved, Africa needs to first facilitate growth in capacity by addressing two major obstacles:
 - high airfares; and
 - the free movement of people.

Challenges of Intra-Africa connectivity

- **Airline operating costs are very high, mainly due to their high exogenous costs (fuel cost, ground services, aircraft financing, etc.).**
- **Restrictive visa policies - 75% of African population need a visa to travel, of which more than 40% require a traditional visa (no eVisa or visa on arrival available) - UNWTO Visa Openness Report**
- **Unequal pace in the implementation of liberalization measures, even between the countries that have committed to SAATM and signed the Mol.**

Improving Intra-Africa Connectivity



- The level of air connectivity of a country depends on various factors that can be grouped into three categories:
 - the size of the country,
 - geographic and demographic factors; and
 - the ease of doing business.
- Only the last element – the ease of doing business - can be directly influenced by governments (political and regulatory reforms) .
- Governments can enhance air connectivity through favorable aviation policies, and in doing so support growth in their economies e.g Ethiopia

Building Blocks to the Attainment of SAATM



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Building Blocks to the Attainment of SAATM

- Need to eliminate all non-physical barriers and restrictions to:
 - 5th Freedom Traffic Rights;
 - Capacity;
 - tariff regulation;
 - Designation and
 - the operation of cargo flights

- Availability of Key Regulatory and Institutional Texts:
 - **Regulations on the Powers, Functions and Operations of the Executing Agency;**
 - **Regulations on Competition; and**
 - **Regulations on the Protection of Consumers of Air Transport Services in Africa**

Building Blocks to the Attainment of SAATM

- Development of the required subsidiary legal and regulatory tools in progress
- KPI and a performance management dashboard tool to measure compliance of member States and African airlines
- AFCAP – is undergoing review
- **Supports being provided to SAATM Member States to boost their EI of ICAO SARPs in safety, security and environmental protection**
- **Technical assistance and support to airlines from SAATM Member States to achieve and maintain ISSA/IOSA certifications**

Benefits of SAATM



- Intra-Africa traffic volume will increase by 51% - IATA
- The average fare levels are projected to decline by 26%
- providing fare savings of US\$ 1.46 billion per annum leading to improved connectivity and travel convenience
- Additional 145 country-pairs receiving direct service and frequencies on existing routes increasing by 27%.
- Enhanced connectivity across the continent, leading to sustainable development of the aviation and tourism industries
- **Affords Airlines a platform to grow and bring more value to passengers, generate more job in the industry and contribute to State/African GDP.**

Recommendations and conclusion



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Beyond the Crisis



- Need to examine the relationship between the levels of connectivity and key economic flows, such as investment, tourism and trade.
- Need to understand how connectivity is evolving over time in order to compare the level of intra-Africa connectivity across different RECs, Countries and Cities.
- The future forecast is not without sunny spots and travel will become greener and more efficient.
- However, captivating the right steps today will help the aviation industry thrive again.

Recommendations



- Greater collaboration and coordination amongst airlines is required in order to unlock intra-regional market potentials
- African airlines must promote and advocate for the liberalization of air transport in the continent and implementation of SAATM.
- Liberalized air services should be complemented with reforms in visa regimes to help the market become more accessible – *RWANDA experience*
- All eligible African airlines should test the functionality of the market within the 35 SAATM member States
- Implore States to sign and implement the SAATM

Conclusion



- Africa is still the least connected region by air in the world.
- Being the fastest growing continent in the world in terms of population, highlights the urgent need to improve air connectivity in the continent.
- With liberalization, it is estimated that frequencies on existing routes will increase by 27%, providing greater convenience and choice for consumers.
- **Within the context of SAATM and AfCFTA, it is expected that SAATM will definitely facilitate trade in Africa**



THANK YOU

CONTACTS

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Website: www.afcac.org



Panel 1

Stakeholders Roundtable on the realisation of industry actions from AFRAA LAB Approach for Africa's aviation industry sustainability



Mrs. Emily Mburu-Ndoria -
Director of Trade in
Services, Investment, IPR
and Digital Trade - AfCFTA
Secretariat



Mr. Prosper Zo'o Minto'o -
Regional Director Western
& Central African Regional
Office - ICAO



Capt. Gilbert Kibe
Immediate Former
Director General – Kenya
Civil Aviation Authority



Mr. Ali Tounsi
Secretary General
ACI Africa



Dr. Gainmore Zanamwe,
Senior Manager (Trade
Facilitation) Intra-African
Trade Initiative –
Afreximbank



Mr. Gaoussou Konate,
Consulting Director,
Technical and Operations
AFRAA
Moderator





Sponsored by:



ASECNA

Networking Lunch

13.00-14.00hrs



Presentation 3

Pathway to Recovery: Priorities for Africa for 2022 and Beyond

Ms. Adefunke Adeyemi
Regional Director Advocacy
and Strategic Relations,
Africa IATA

Executive Interview on Cargo

The future of air cargo: Digitalisation, Innovation, cutting edge solutions for air cargo sustainability in Africa



Mr. Glyn Hughes
**Director General - The International Air
Cargo Association (TIACA)**



Mr. Charles Ngwalla
Head of Alliances & Key Accounts
Astral Aviation Limited



Mr. Raphael Kuuchi, Consulting Director
Government, Legal & Industry Affairs
Moderator



Presentation 4

Opportunities and Strategies for Route Planning and Network Repositioning



Mr Geert LeMaire
Market Intelligence and
Consulting Director
Airbus

AFRAA – 10th Aviation Stakeholders Convention
“Beyond the Crisis”



Opportunities and strategies for route planning and network development

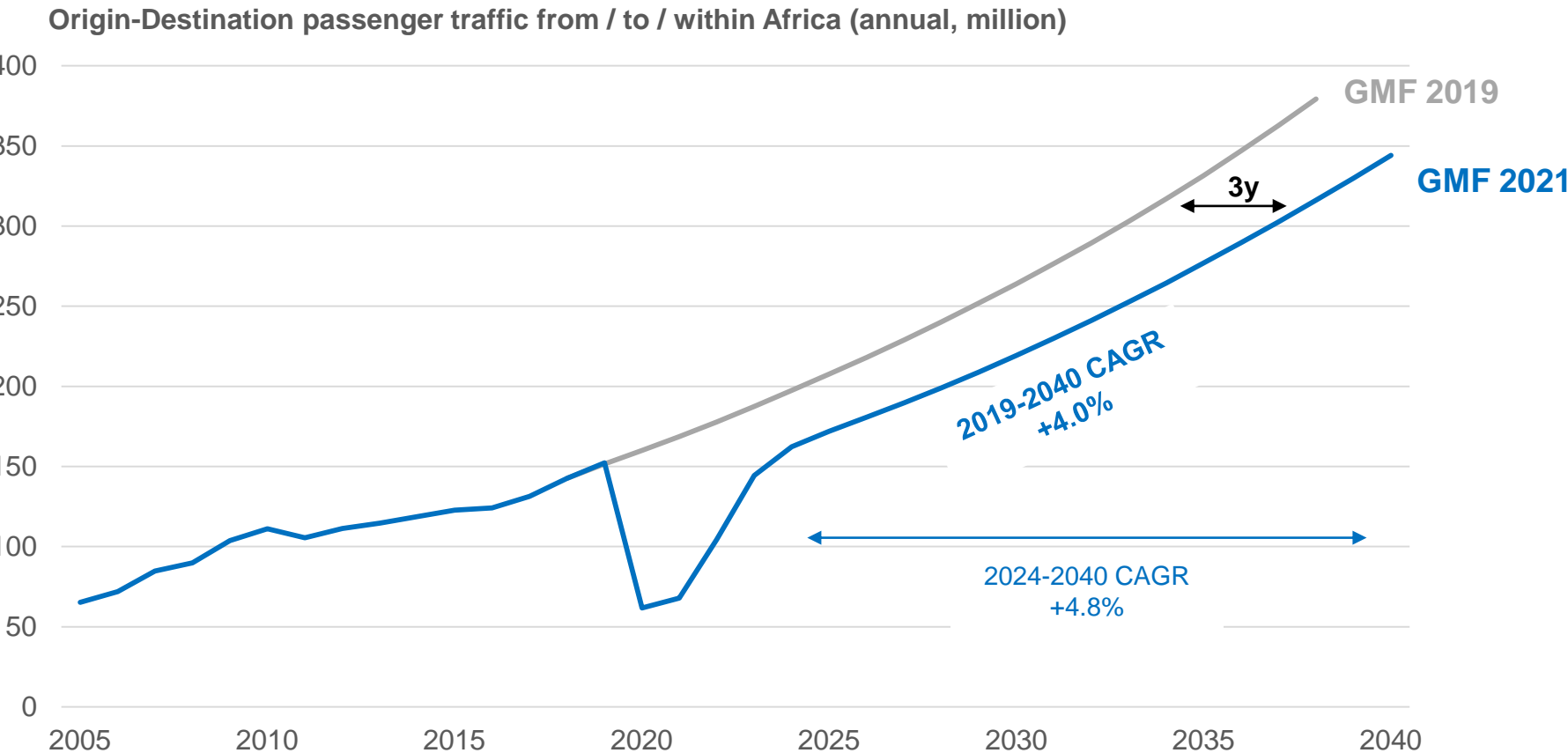
Nairobi
May 2022

Geert Lemaire
Airbus Market Intelligence and Consulting

AIRBUS

Airbus Global Market Forecast – Africa

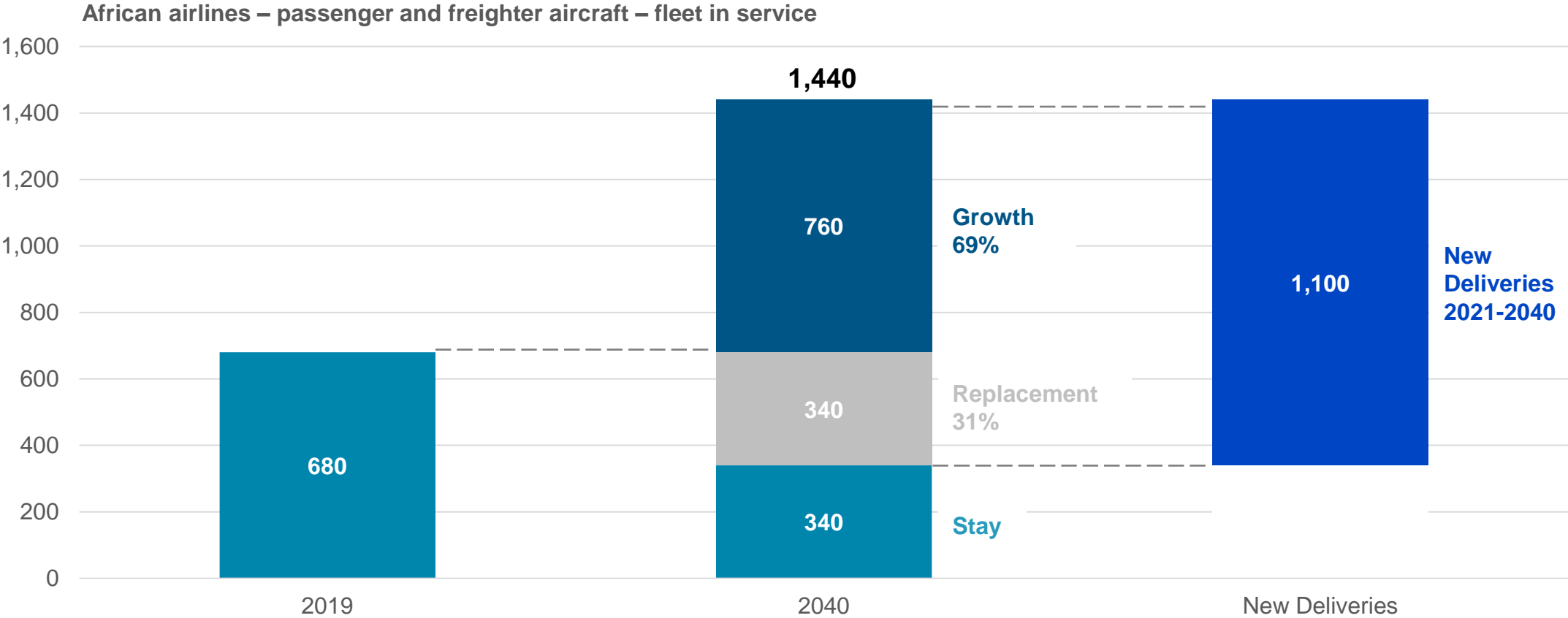
Traffic forecasted to reach 2019 level from Q4 2023 and to grow beyond



Beyond the crisis

- Air traffic forecasted to grow further
- New potential to launch new routes and expand networks

The African airlines' fleet is forecasted to increase by factor 2.1 over 2019-2040



Demand for ~1,100 aircraft for African airlines in the period to 2040



Small: <210 seat, **Medium:** <300 seat, **Large:** >300 seat
Passenger aircraft (≥ 100 seats) | Jet freight aircraft (>10 tons)
Source: Airbus GMF 2021

2019 Traffic Split

Global traffic vs. Traffic to / from / within Africa

Global traffic

Traffic to / from / within Africa

**2019's
intra-regional traffic in
Africa**

-

**Equivalent to only 1/4th of
all passengers travelling
from / to / via
London Heathrow airport
in 2019**

Total (2019): ≈ 175 million passengers

Source: Sabre – Passenger numbers

Africa's intra-regional traffic is still very small – Significant growth potential remains

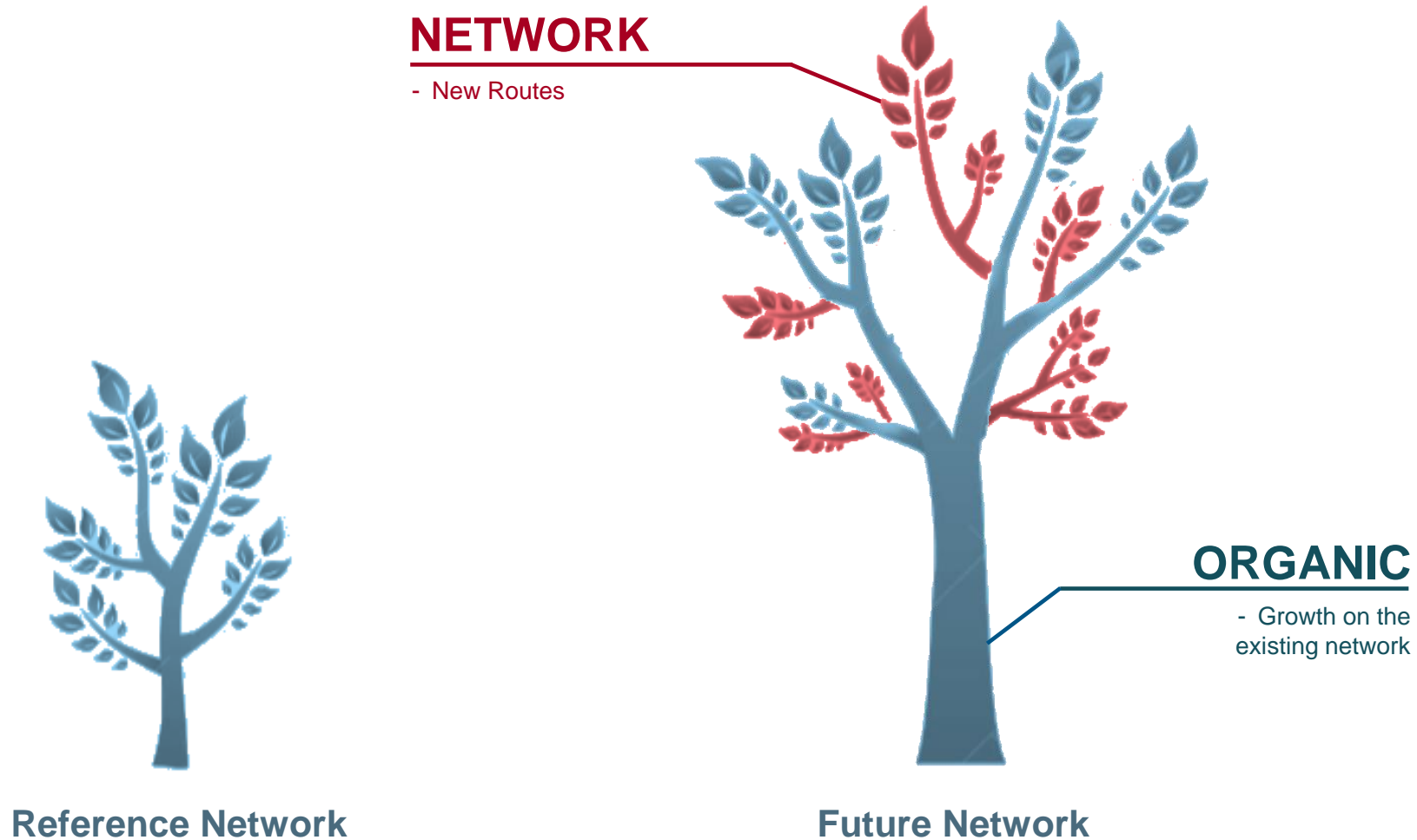
Africa's Integration : promising prospect for intra-African air transport growth

African Union initiatives



- Increased trade inside Africa
- People moving abroad for education, work, living, medical treatment, etc.
- Simplify travel and reduce the cost of travel
- Add choice to organise travel

So what is the growth we need to gear up for?



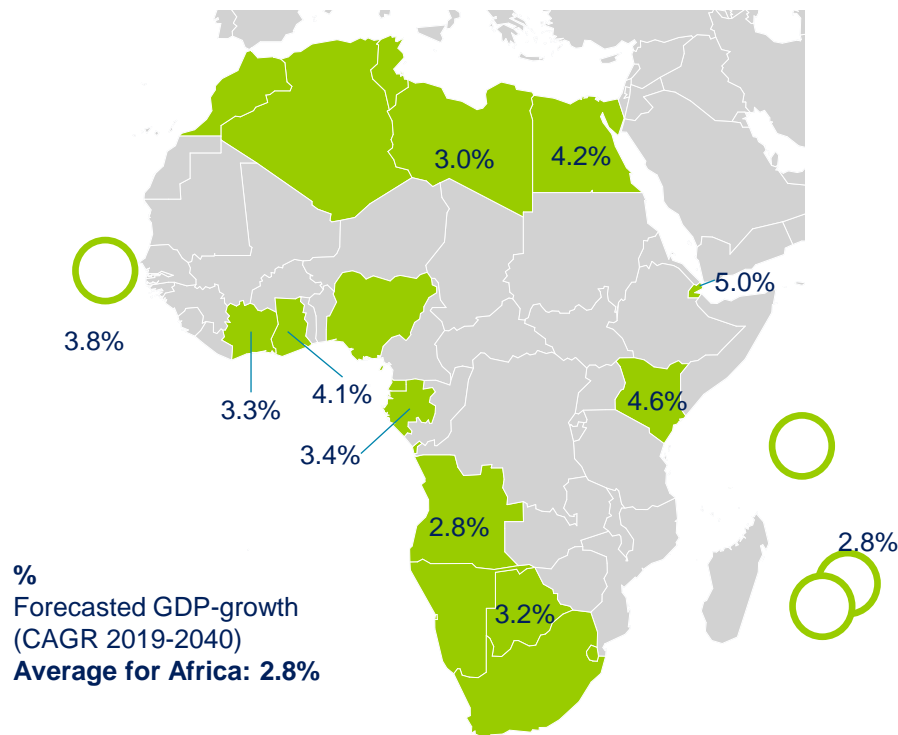
Fundamental drivers for air transport development

Focus on Africa

Economic growth, middle class growth

Top 20 African countries by GDP per capita

Source: IHS markit, 2019

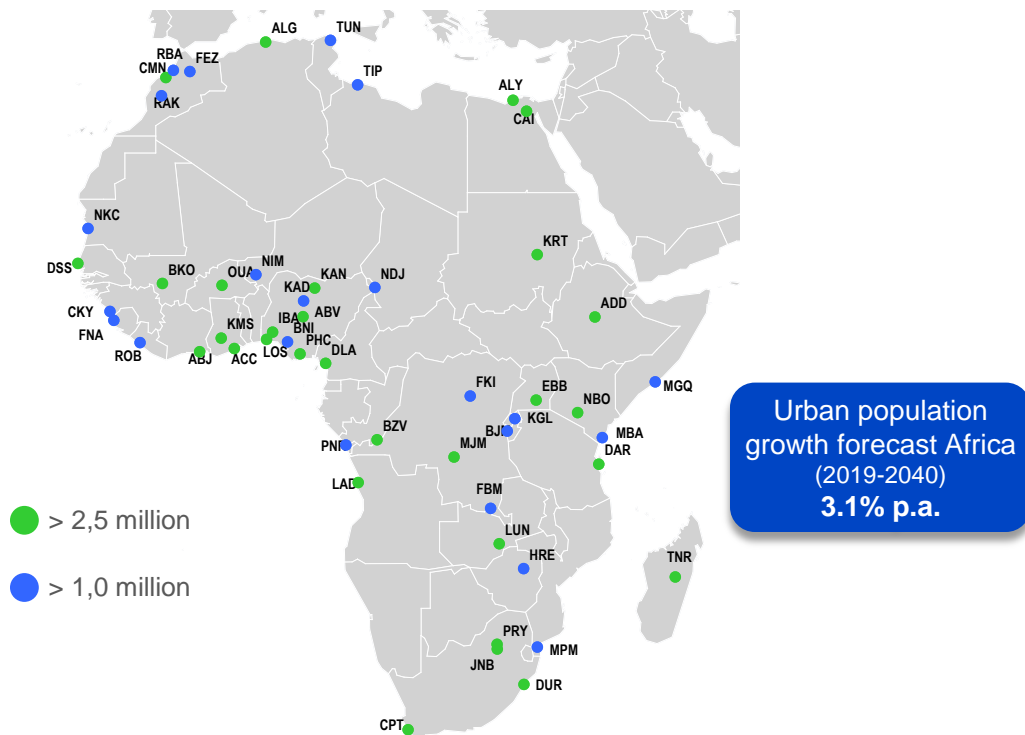


Propensity for travel will grow fastest in the identified countries

Population density and growth, urbanisation

Urban Agglomerations in Africa with Population above 1.0 million

Source: United Nations, 2018



Large and densely populated centres
generate and attract air traffic

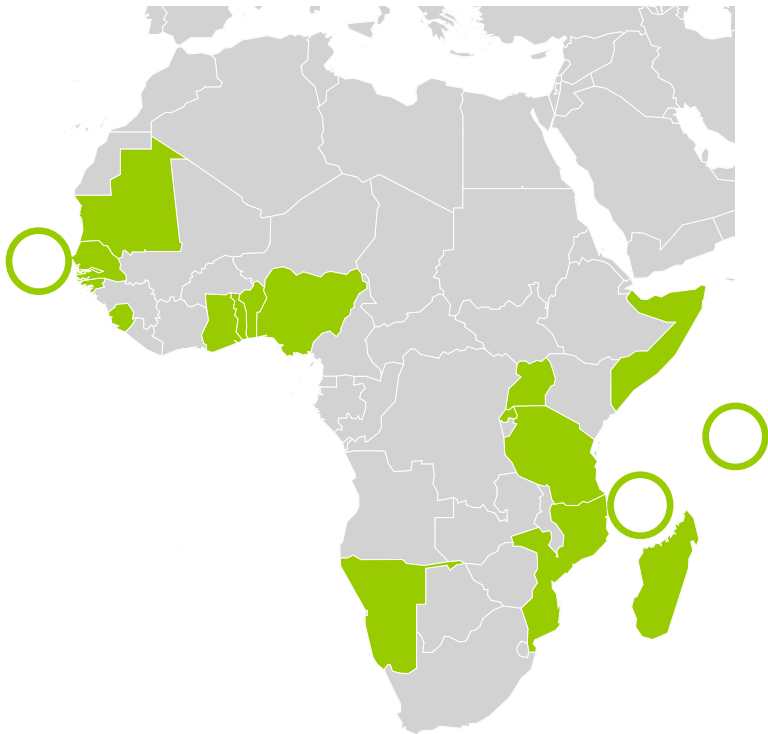
Fundamental drivers for air transport development

Focus on Africa

Front runners for VISA-openness

Top 20 African countries by Visa Openness Ranking

Source: African Union, African Development Bank Group, visaopenness.org, 2021

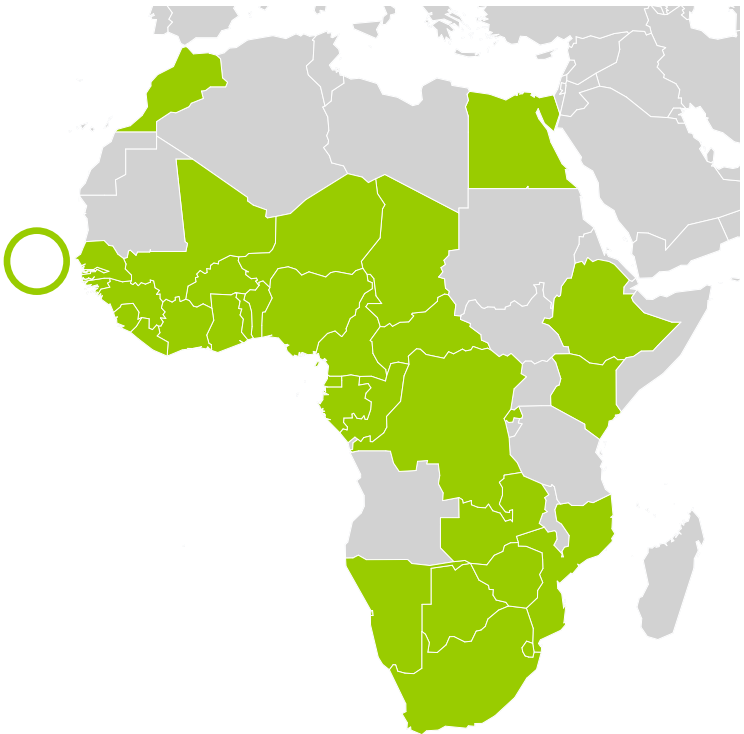


VISA-openness removes barriers and simplifies travel

Single African Air Transport Market

Signatory African Union member states

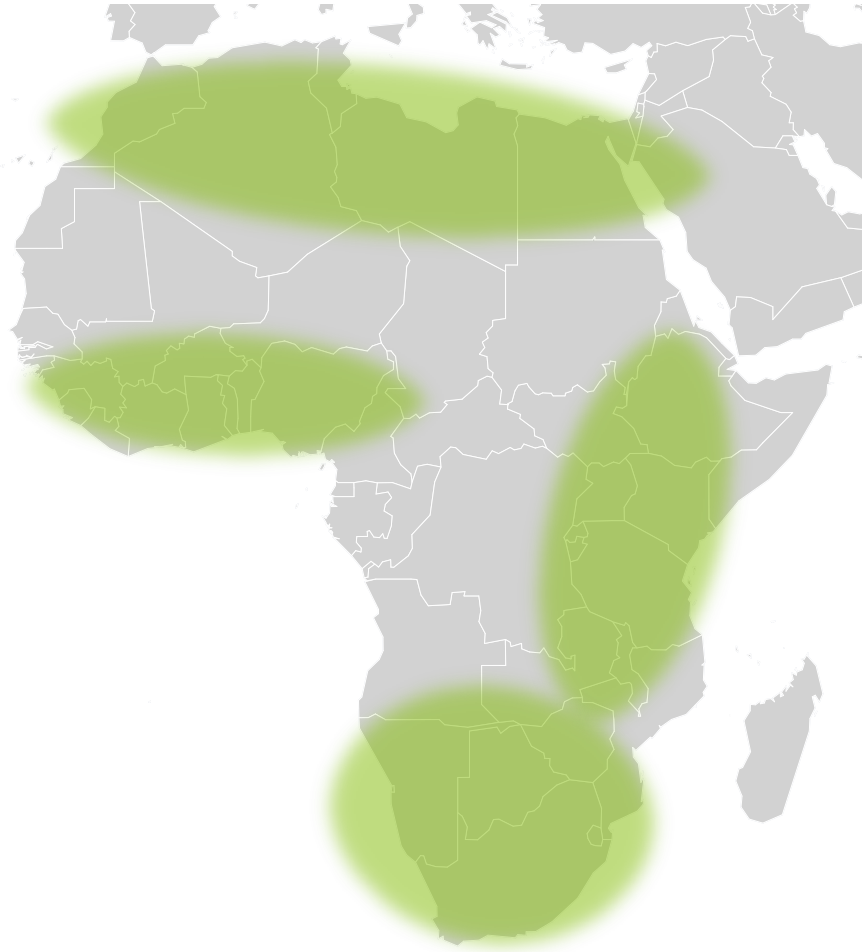
Source: African Union, 2022



Less restrictions, more choice for travel,
more competition, lower fares

Combining all elements allows identifying Africa's future aviation key zones

Drivers of the future intra-regional air transport demand growth

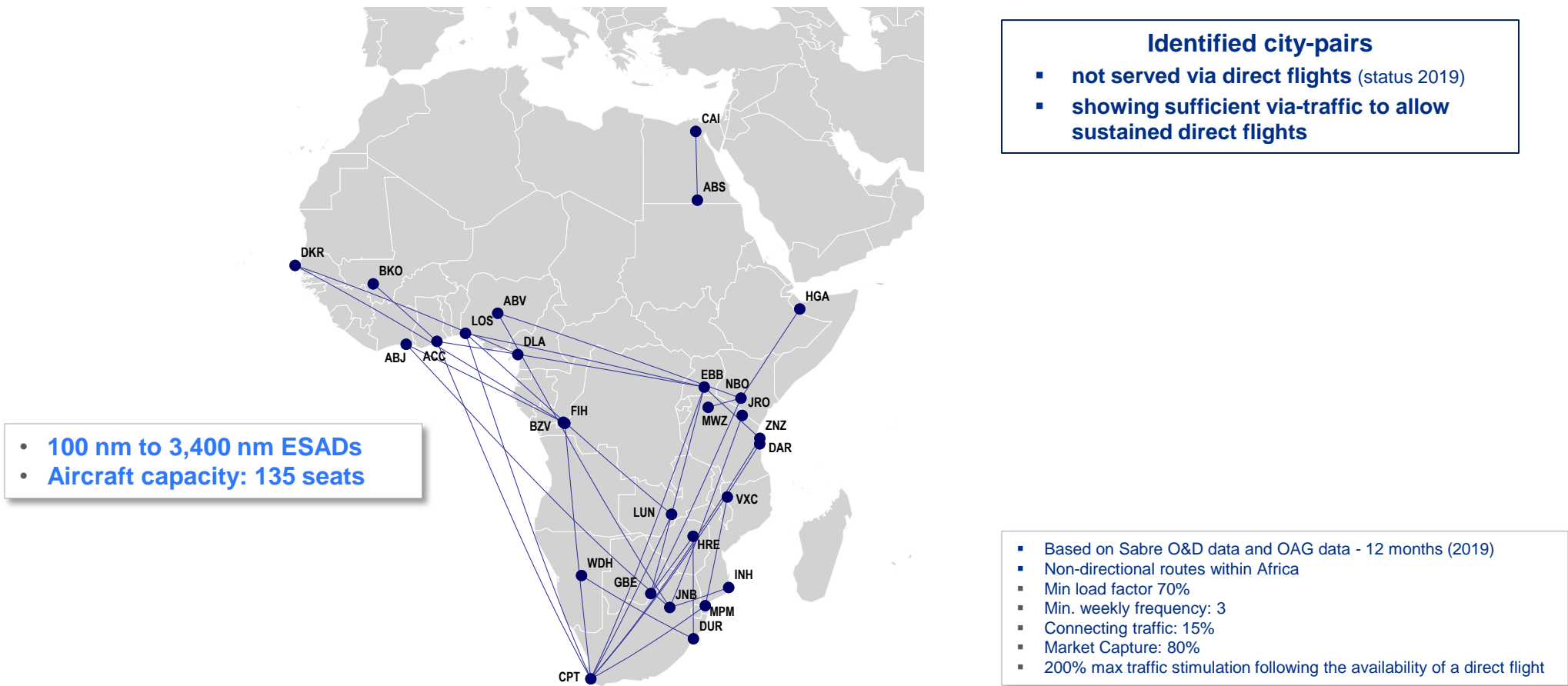


**Intra-regional air transport demand
in Africa is all set to gear up between:**

- **Northern region**
- **West Africa**
- **East / South-East Africa**
- **Southern region**

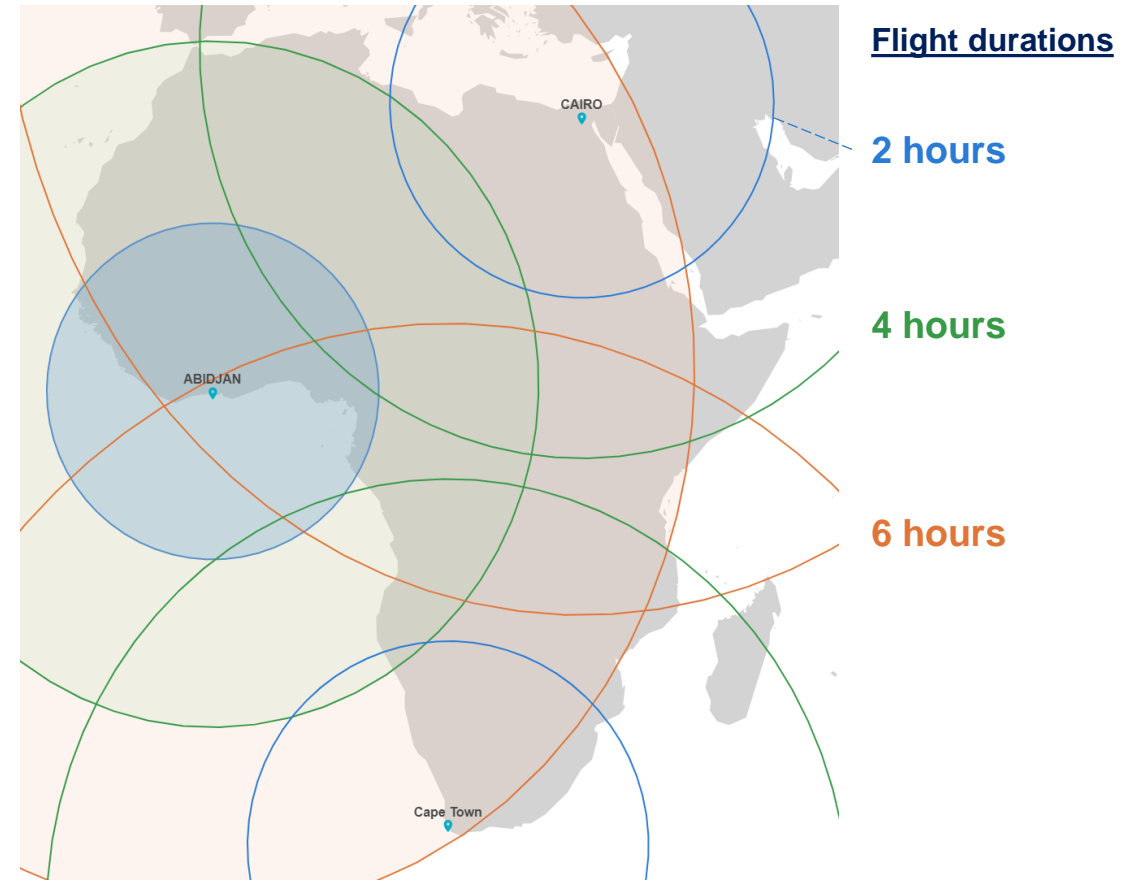
Unserved city-pairs in Africa featuring sufficient traffic to allow sustained direct flights

Status in 2019



Notes:
- Identified routes are O&D pairs for which no direct flight existed in 2019, but for which sufficient traffic exists (i.e. connecting traffic as identified by means of 2019 traffic data) to allow operating a direct flight with a widebody aircraft, based on the listed assumptions.
- ESAD: equivalent still air distance - O&D: origin & destination

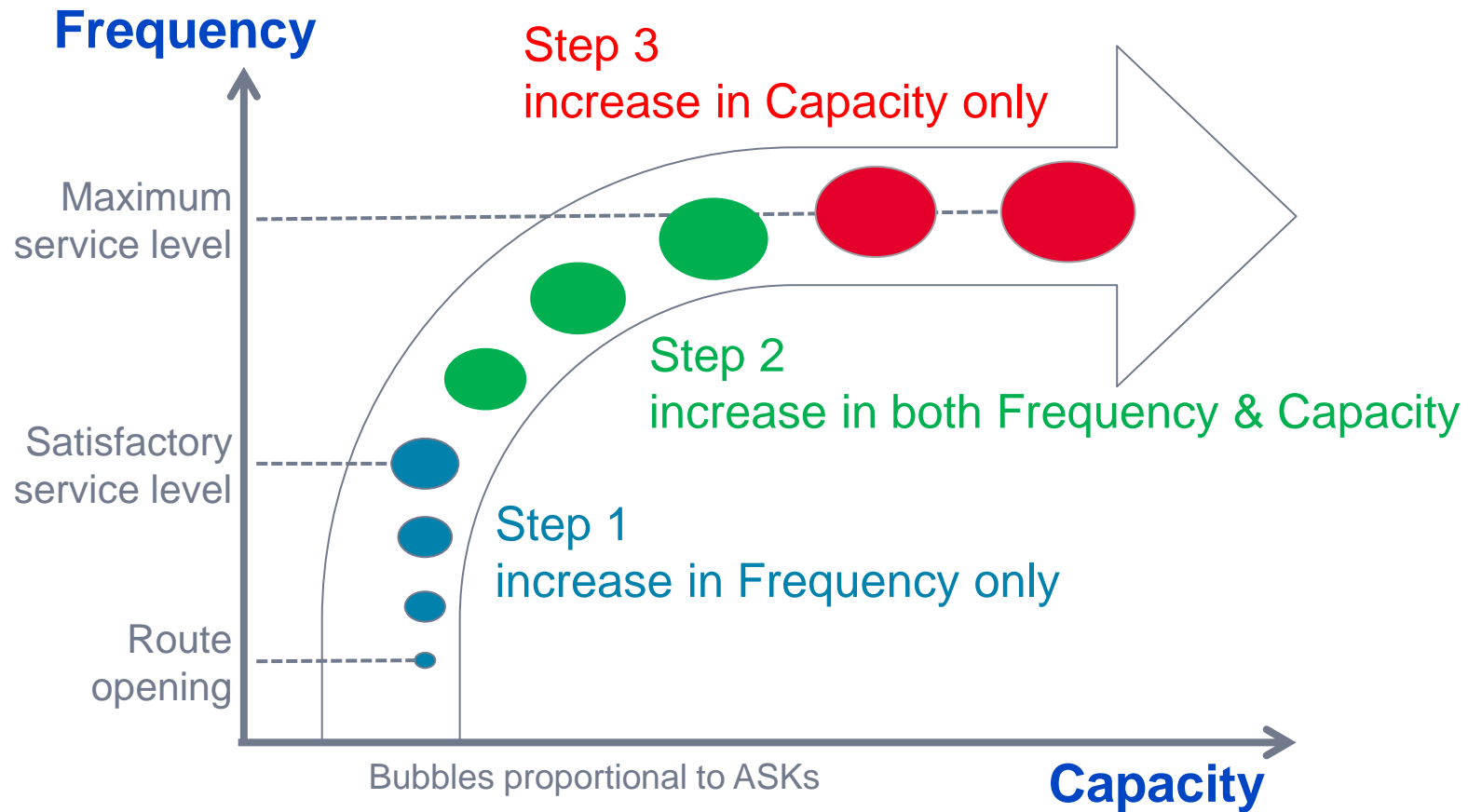
Drivers of the future intra-regional air transport demand growth



68

The route-planner's mantra

Build-up frequency first, then increase capacity



Note:
- ASK: available seat kilometer

So what strategy to adopt?

Challenge

- Launch new routes
- Rather long flight times
- Rather low traffic levels at launch
- Stimulate traffic
 - ⇒ need to quickly build-up frequencies
- Profitability is key

Solution

Newest generation of single aisle aircraft

- Superior performance and range capability
- Superior cabin comfort-level
- Best in-class operating economics
- Versatility

Example: Air Canada

Montreal - San Francisco



Calendar year 2022
Up to 3 daily frequencies one way
A220 operations only

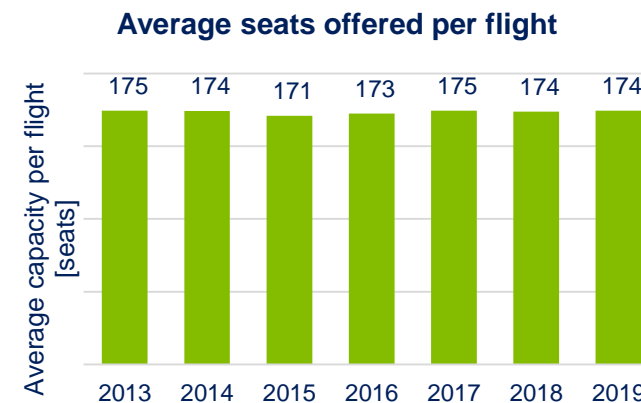
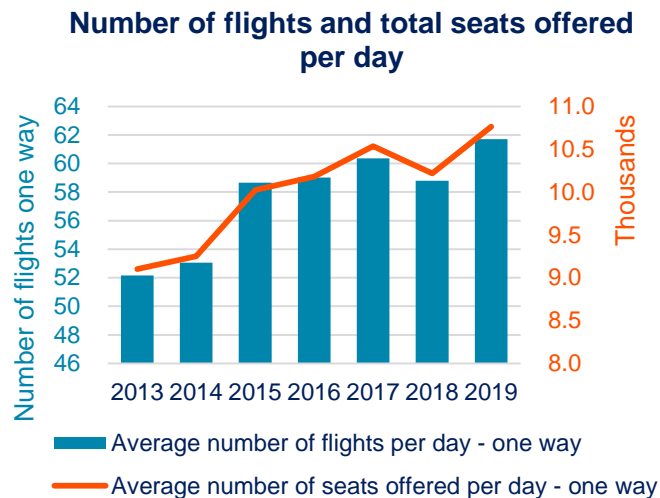


Africa will also need the largest single aisle aircraft

Africa's top 10 routes based on passengers carried in 2019



Cape Town - Johannesburg



Adding frequencies beyond 62 flights per day one way may no longer be viable

A transition to the largest single aisle aircraft becomes the most logical way forward

Conclusion

- Intra-African air transport development may well become the next BIG thing in commercial aviation
- Significant potential identified to grow by opening new routes:
 - all fundamental drivers for air transport development are present
 - future removal of currently-present barriers will accelerate air traffic growth
- Enablers to launch these new routes: newest generation of single aisle aircraft
 - performance
 - comfort-levels
 - operating economics
 - versatility
- Use of the largest single aisle aircraft: next logical step to cater for growth on the trunk routes in the continent

Presentation 5

Commercial Market Update & the Pathway to African Aviation Growth



Mr Kuljit Ghata-Aura
President of Boeing Middle
East, Turkey and Africa



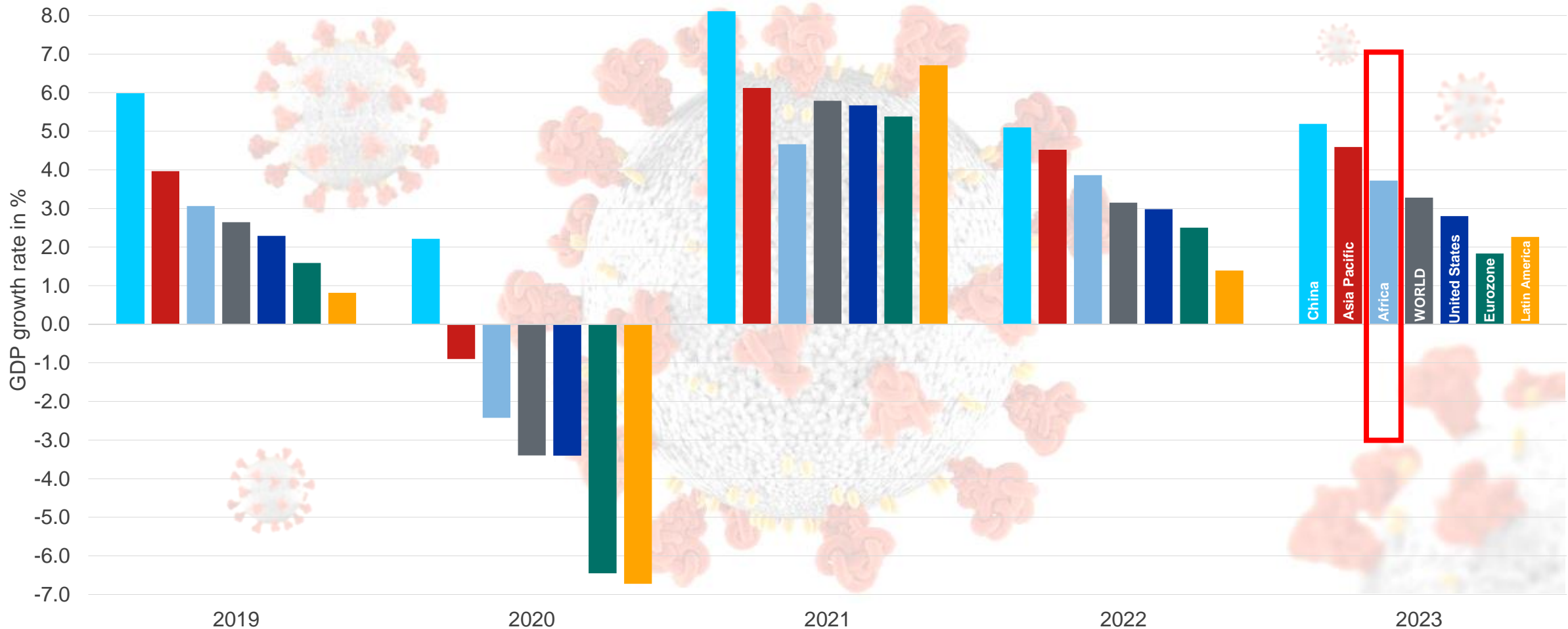
Commercial Market Update & The Pathway to African Aviation Growth

Kuljit Ghata-Aura, President
Boeing Middle East, Turkey and Africa

May 2022

The statements contained herein are based on good faith assumptions and are to be used for general information purposes only. These statements do not constitute an offer, promise, warranty or guarantee of performance.

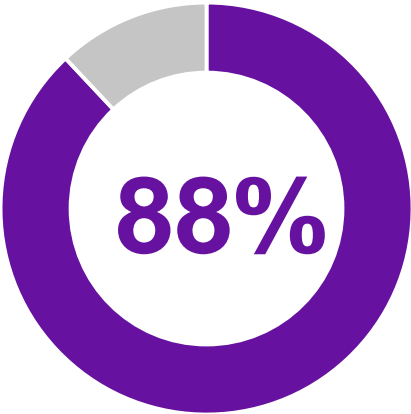
The global economy has bounced back from COVID-19 recession and Africa is projected to grow above world average in 2022 and 2023



Africa aviation is recovering in line with global trends



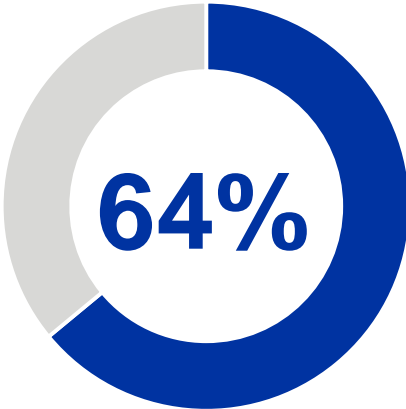
Active Fleet



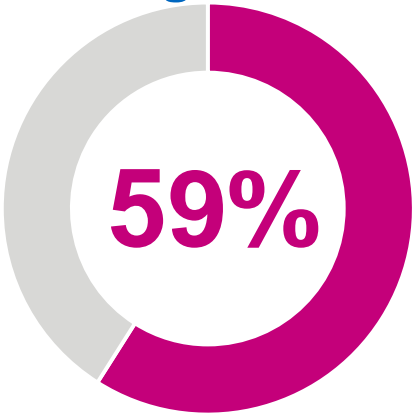
Flights



Capacity

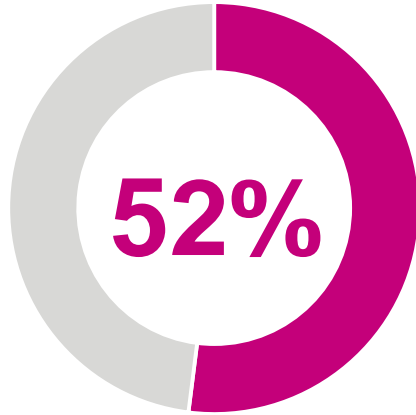
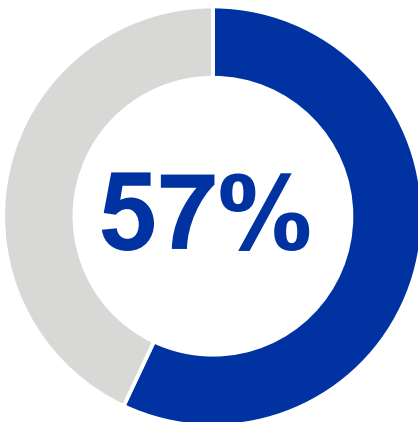
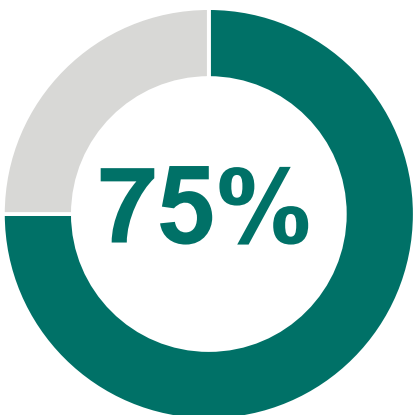
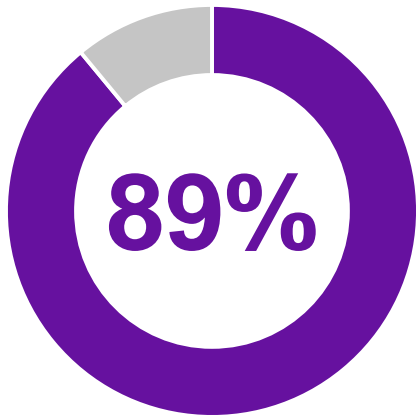


Passenger Traffic



GLOBAL

AFRICA



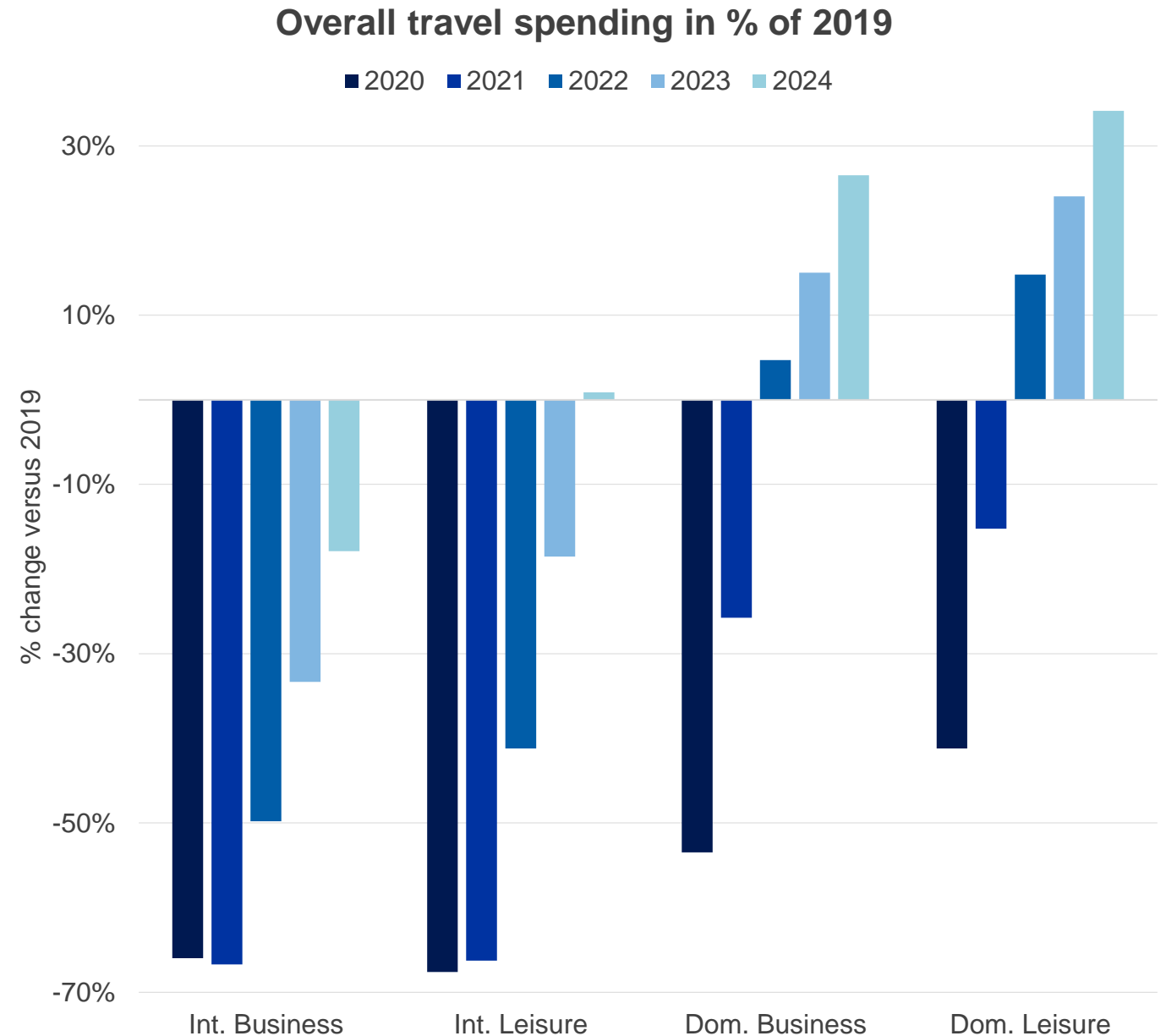
SOURCES: FR24, IATA, as of March 2022, compared to 2019 levels

Global commercial aviation recovery led by leisure travel demand

Total leisure travel forecast to improve through 2024 - domestic leisure travel projected 30%+ above 2019

Business travel picking up as well - initially in domestic markets, reaching 2019 levels this year

International business travel remains dependent government and corporate policies



20-year outlook - African commercial returns to long term trends



**Economic
growth (GDP)**

3%



**Airline traffic
growth (RPK)**

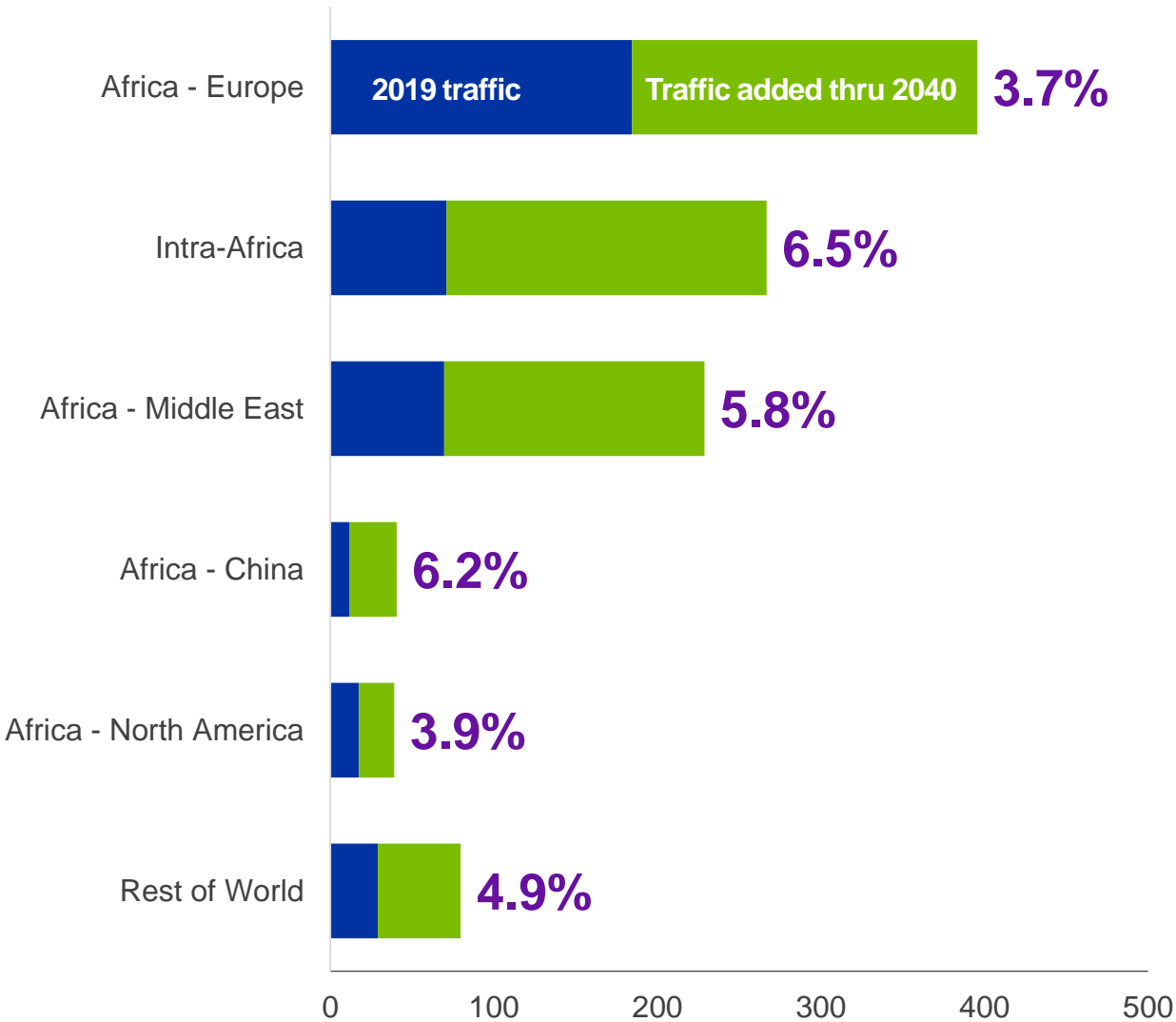
5.4%



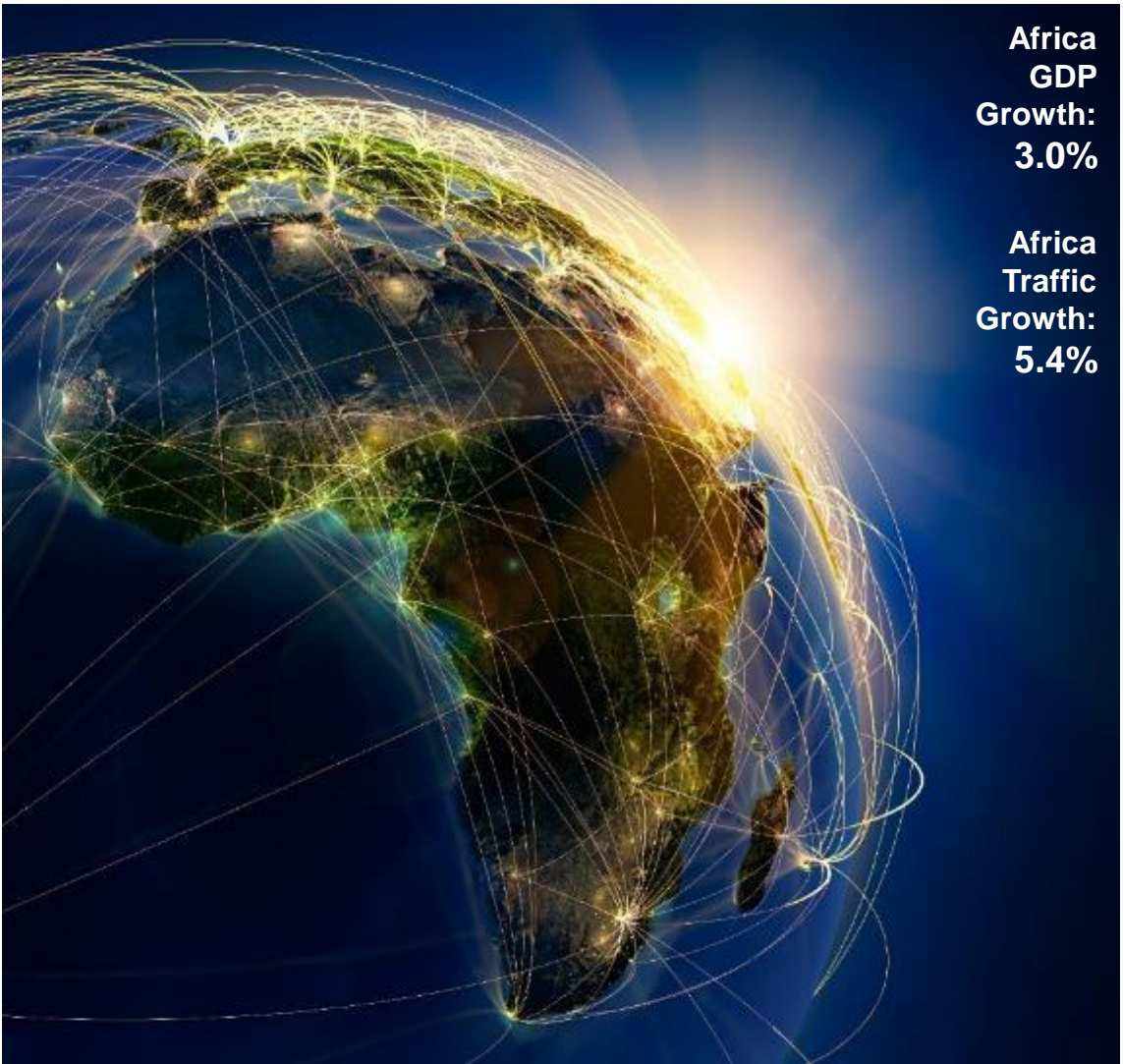
**Airline fleet
growth**

3.4%

Intra-Africa traffic will be the highest growth African market over 20 years



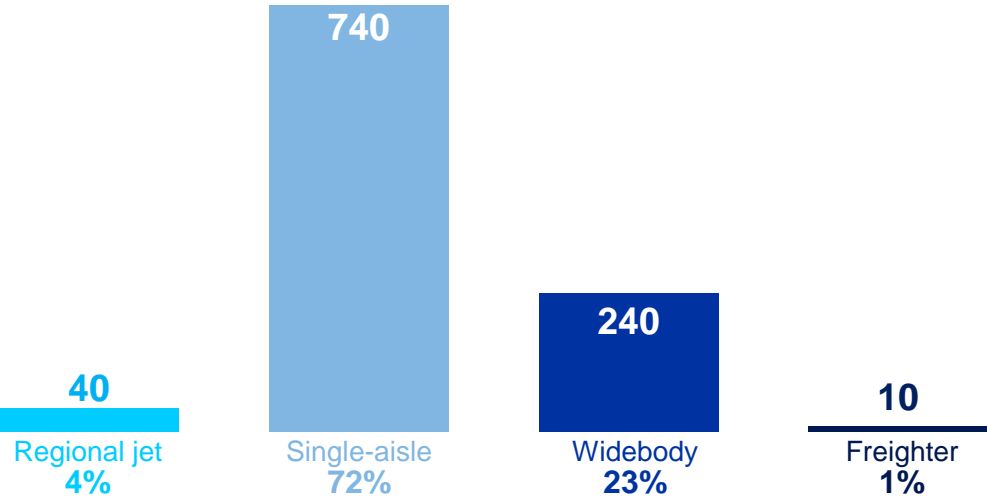
RPKs (billions)



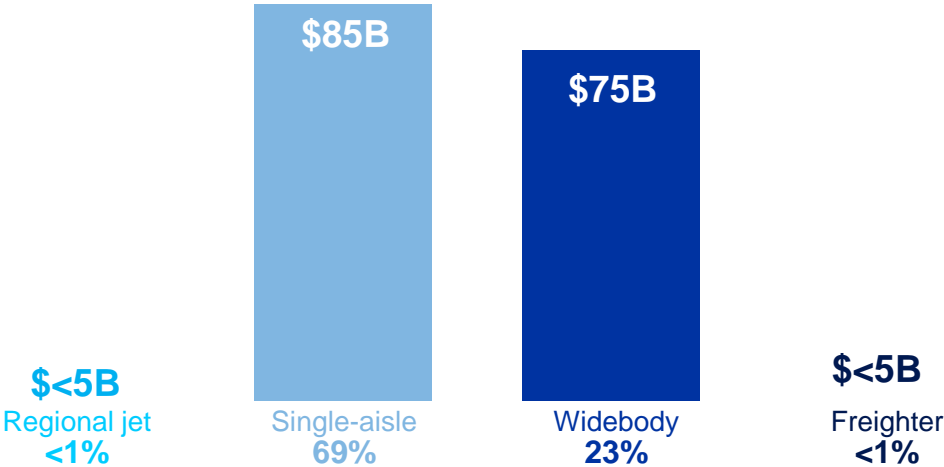
Africa will need over 1,000 new airplanes valued at \$160 billion



New airplane deliveries: **1,030**



New airplane values: **\$160B**



African carriers can capture more of this growth for themselves if structural challenges can be overcome



Talent Pipeline



Developing and retaining skilled pilots, maintainers, and managers

Financing



Reducing risk perception and sharing the African growth story with investors

Competitiveness



Achieving market liberalization and expanding business-friendly policies and programs

Safety



Implementing and upholding equivalent safety standards in Africa as the rest of the world

Operational Efficiency



Reducing operating costs, enhancing service quality, and strengthening profitability

Boeing's Commitment to Support the Growth of the Industry in Africa



 **25**

Boeing employees and field service representatives in Africa

 **66%**

of the in-service airplane market in Africa is represented by Boeing

 **1,000**

new airplanes African carriers over the next 20 years

 **\$41M+**

in work value across six countries generated by eight supplier partnerships

 **70+**

humanitarian flights delivering aid to Africa through nonprofit partners

 **\$12.1M+**

investment to improve education and alleviate poverty in Africa since 2006

 **\$5M**

investment in the first Ka-band antenna system facility in South Africa

Boeing Community Engagement in Africa

Boeing is focused on providing systemic improvements in education and economic empowerment for those in poverty, to develop 21st-century skills such as digital employability, entrepreneurship and STEM.

STEM Education | Employability Programs | Coding Schools | Entrepreneurship Programs

Boeing and ThinkYoung partner to teach 21st century skills to youth in Sub-Saharan Africa



Boeing to transform the lives of 1,620 entrepreneurs in Tanzania with Hand in Hand International

01 Dec 2020



Extending Boeing's partnership with Injaz-Junior Achievement to empower youth in Tanzania, Mozambique, Mauritania, Nigeria, Sudan, Madagascar and the Democratic Republic of the Congo

Boeing is enabling the transition to a carbon neutral aerospace sector



Creating Efficient Products for Fleet Renewal

15-25% efficiency improvement per generation

Improving Operational Efficiency

- Optimized Route Planning
- APU usage
- Sustainable consumables
- Reduce weight

Investing in Renewable Energy

- Aircraft will be 100% Sustainable Aviation Fuel certified by 2030
- Carbon neutral growth from 2020 and reducing emissions to half of 2005 levels by 2050

Investing in Advanced Technology

- World's first fuel cell manned flight
- All electric vertical takeoff and landing
- Unpiloted liquid hydrogen-powered flight

The 737 MAX is the most efficient single aisle airplane



Back in service since
December 2020

554 aircraft in service with **41** airlines

Over **400,000** revenue flights

Over **1,000,000** flight hours

Designed for efficiency
and sustainability

50%

Smaller noise footprint

Innovative 737 MAX family
provides superior economic
performance

20%

reduction in fuel consumption

787 Dreamliner efficiencies bring the world together



Superior economic performance across the 787 family

25%

reduction in fuel consumption



Designed for efficiency & sustainability

50%

smaller noise footprint



A more comfortable travel experience

6.5x

Higher passenger preference

Things to remember

Africa will need 1,000 new airplanes; More than three-quarters are for growth

A strong talent pipeline; enhanced operational efficiency; and an efficient regulatory environment are critical to the success of Africa's aviation industry

Boeing's versatile products are the most efficient solutions to support Africa market growth, fleet renewal, and contribute to a carbon-neutral future





777X: The ideal replacement for large widebodies



Profitable airlines

20%

reduction in fuel consumption



Designed for efficiency
& sustainability

20%

smaller noise footprint



• Premier brands

16 inch

Wider cabin

777-8F: Next generation economics for the air freight industry



Flexible operations

118 tonnes

Structural payload capability

Highest twin-engine payload and long-range capability

Innovative airplanes

25%

Less fuel use & carbon emissions

Technologies that deliver a more sustainable future

- Profitable airlines

Up to 25%

Lower operating costs

Lowest operating costs per tonne for more profit

Networking Coffee Break

16.00-17.00hrs



10TH AVIATION
STAKEHOLDERS
CONVENTION

8 – 10 May 2022 | Nairobi, Kenya



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