



ANNUAL REPORT

2017





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FOREWORD



In 2016, the global economic growth was estimated at 2.3%, according to the World Bank, the weakest performance since the global financial crisis. This was amid weak aggregate demand in advanced countries, intensified economic stress in many commodity exporters and political instability in some states. The growth is

projected to pick up to 2.7% in 2017, and to an average of 2.9% in 2018-19. After accelerating to 1.9% in 2017, the World Bank projects that growth in advanced economies will grow at an average of 1.8% in 2018-19 and emerging and developing economies at 4.1% in 2017 and 4.5% in 2018.

The United Nations Economic Commission for Africa (UNECA) reported that Africa's growth declined to a decade-low of 1.7% in 2016 from 3.7% in 2015, below both the global rate and that in most other developing regions. The drop in Africa's economic growth in 2016 was attributed mainly to lower commodity prices, with commodity exporters most adversely affected. Despite this trend, the majority of non-commodity exporting African countries maintained positive growth.

Falling export revenues hit African oil-exporting countries' trade balances and current accounts, especially Nigeria, Angola and Algeria, which for the first time this decade recorded trade deficits as reported by the Economic Report on Africa (ERA) 2017.

Several risks and challenges remain to the growth outlook for the African region. On the external front, a reversal of the recent upward trend in global oil prices would result in further growth deterioration in oil-exporting countries. A sharper-than-expected growth moderation in China would weigh on the region's commodity exports. In addition, the uncertainties associated with the coming process of Brexit, with deterioration in the growth outlook for the United Kingdom and Europe, would pose a risk to the trade performance of some African countries.

UNECA reported that Africa's real GDP growth is expected to increase to 3.2% in 2017 and 3.8% in 2018, led by strong domestic demand, particularly in infrastructure. The buoyant service sector, oil-price recovery and oil-exporting economies' focus on non-oil sectors could also contribute to better prospects. Increasing trade and investment ties in Africa and between Africa and emerging economies, alongside the recovery of traditional export markets, particularly the euro area, are also expected to strengthen Africa's outlook.

The UNWTO reported that international tourist arrivals in 2016 grew by 3.9% to reach a total of 1,235 million worldwide, an increase of 46 million over the previous year. It was the seventh consecutive year of above average growth in international tourism following the 2009 global economic crisis.

Demand for international tourism in 2016 followed the positive trend of previous years, with many destinations reporting sound results, although a few faced security incidents, either in their country or in their region. By UNWTO region, Asia and the Pacific led growth in 2016 with a 9% increase in international arrivals, followed by Africa (+8%), which rebounded after two difficult years. In the Americas (+3%) the growth momentum continued. Europe (+2%) showed mixed results, with double-digit growth in some destinations and declines in others and the Middle East (-4%).

In 2016, slightly over half of all overnight visitors travelled to their destination by air (55%), while the remainder travelled by surface transport (45%). The trend over time has been for air transport to grow at a somewhat faster pace than surface transport, thus the share of air transport is gradually increasing.

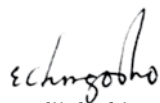
According to UNWTO, international tourist arrivals in Africa increased by an estimated 8% in 2016, representing a strong rebound after a weaker performance in 2014 and 2015 in the wake of various health, geopolitical and economic challenges. The region welcomed 58 million international tourists (5% of the world total), 4 million more than in 2015, earning US\$35 billion in international tourism receipts (3% share), an increase of 8% in real terms.

IATA reported that passenger demand saw another strong year in 2016. More than 3.8 billion passenger segments were flown, an increase of 250 million compared with 2015. The industry-wide passenger load factor remained unchanged at an all-time high of 80.4% while the freight load factor dropped to 46.9%, 0.6 percentage points lower than in 2015.

Despite the recovery in oil prices during the year, the average price of a barrel of jet fuel in 2016 was 22% lower than in the previous year, according to IATA. Jet fuel prices climbed to around US\$60 a barrel at the end of 2016-nearly twice the-year low-point reached in January 2016, although still much lower than average between 2011 and 2014. IATA reported that the operating margin of 8.8% of revenues was up from 8.5% in 2015 and more than three times that achieved in 2012. After allowing for interest charges, taxes and write-downs, the US\$34.8 billion net post-tax profit that airlines generated was slightly down from US\$35.9 billion in 2015. The situation in Africa is in stark contrast to global trends. According to IATA, African airlines made a loss of US\$700 million in 2015, a record loss which is expected to be followed by another significant loss of US\$500 million in 2016.

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. Under the auspices of the African Union, African States should ensure that the vision of a Single African Air Transport Market is realised in 2018. Issues of blocked funds in some states, high taxes on fuel and passengers as well as monopoly service providers at airports should be urgently addressed. 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 2016 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 AFRAA member airlines.


Dr. Elijah Chingosho,
AFRAA Secretary General



VISION

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

MISSION

“To serve African airlines, promote and protect their common interests”

VALUES

AFRAA believes in:

- A learning culture
- Transparency and accountability
- Professionalism and integrity
- Commitment to service excellency
- Teamwork and collaboration
- Openness to change

KEY STRATEGIC OBJECTIVES

AFRAA's key strategic objectives shall be:

- Facilitate the establishment of industry best practices in safety and security.
- To be the repository of data and its analysis focussing on key issues in the aviation sector.
- Representation and lobbying on behalf of member carriers for sustainable development of African aviation including environmental and economic considerations.
- Facilitate joint projects between member airlines aimed at reducing their costs and increasing their revenues.
- Actively contribute in human capital development.
- Do all other acts which are incidental, ancillary or conducive to and are capable of being carried out in conjunction with the provision of air transport services to, from or within Africa.

TABLE OF CONTENTS

Section One	Global Economic performance	1
Section Two	Airline Performance	7
Section Three	Freight Carried and Traffic	16
Section Four	Financial Performance	18
Section Five	African Airports Statistics	21
Section Six	Fleet Composition and Development	24
Section Seven	Employee Productivity	26
Section Eight	Safety	27
Section Nine	AFRAA Secretariat Value Adding Activities	30
Section Ten	FAA or EASA Certified African MROs	35
Section Eleven	FAA or EASA Certified Training Centres	36
Section Twelve	Airlines with Aircraft Simulators	37
Section Thirteen	AFRAA Airlines – Individual Summary Facts	38
Section Fourteen	AFRAA Partners – Profiles and Contacts	52
 ANNEXES		
Annex 1:	AFRAA Member Airline Performance	69
Annex 2:	AFRAA Member Airlines Fleet 2016	70
Annex 3:	AFRAA Member Airlines Commercial Partnerships	71
Annex 4:	MRO Facilities in Africa	72
Annex 5:	Training Institutions	73

APPRECIATION

I would like to express heartfelt appreciation to all industry associations and members who contributed to the publication of this report by responding to our requests for data and to Amadeus for their sponsorship towards the report's publication. AFRAA looks forward to your valuable support towards the preparation of this annual publication.

It is the Association's belief that airlines, partners and other stakeholders will find the content of this report useful and informative. Your feedback and comments are highly appreciated

Maureen Kahonge, Deputy Director Business Development, AFRAA

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LIST OF FIGURES

Figure 1.1	Global Economic Growth	1
Figure 1.2	Economic growth in Africa and emerging and developing countries, 2013-2016	2
Figure 1.3	Africa's growth performance by economic grouping, 2013-2016	2
Figure 1.4	Africa's economic growth, 2013-18	3
Figure 1.5	Africa's growth prospects by sub region, (%) 2015-2018	4
Figure 1.6	RPK Versus World GDP Growth	6
Figure 2.1	Industry passenger and freight load factors	7
Figure 2.2	World Scheduled Passenger Kilometres (RPKs) 2015-2016 (billions)	7
Figure 2.3	Revenue Passenger-Kilometres per Region - IATA Schedule Services 2016	8
Figure 2.4	% share of Passenger-Kilometres Performed per Region - IATA Scheduled Services 2016	8
Figure 2.5	Total Passengers Carried by African airlines scheduled operations: 2007-2016 (millions)	9
Figure 2.6	Percentage Share of Passengers Carried by African airlines: 2012-2016	10
Figure 2.7	African Airlines Passenger Distribution 2016	10
Figure 2.8	Africa's Passenger Traffic and Capacity Annual Percentage Growth: 2011-2016	11
Figure 2.9	2016 RTK growth per region	11
Figure 2.10	Passenger Load Factors of some AFRAA Airlines in 2016 (%)	12
Figure 2.11	ASKs and RPKs of some AFRAA Airlines in 2016	14
Figure 2.12	New Destinations by AFRAA Airlines in 2016	14
Figure 3.1	African Airlines Year-on-Year Freight Carried (tonnes)	16
Figure 3.2	Freight Carried by Region (tonnes) – 2016	16
Figure 3.3	Total Freight Carried by some AFRAA Airlines in 2016 (tonnes)	17
Figure 4.1	Global commercial airline profitability	18
Figure 4.2	Net profit in US\$ billions by region for 2013-2016	19
Figure 4.3	Financial results of some AFRAA airlines (US\$ millions)	19
Figure 5.1	Top African Airports by Passengers Carried in 2015 and 2016	21
Figure 5.2	Top 20 African Airports by total Passengers Carried in 2015 -2016 (000)	22
Figure 5.3	Top 20 African Airports by Total Cargo Handled in 2016	22
Figure 5.4	Top 20 African Airports in 2016 by Aircraft Movement	23
Figure 6.1	Africa fleet composition – 2016	24
Figure 6.2	Africa's 2036 fleet demand forecast	24
Figure 6.3	Fleet of some AFRAA Airlines in 2016	25
Figure 6.4	Africa's 20 year fleet composition forecast	25
Figure 7.1	2016 AFRAA Airlines Employees by Job Type	26
Figure 7.2	AFRAA Airlines Employment by Job Type (2016)	26

LIST OF TABLES

Table 1.1	International tourism receipts	5
Table 2.1	Top 5 passenger countries in Africa in 2016	9
Table 2.2	Passenger and Weight Load Factor for all Regions – 2016	12
Table 2.3	Total Passengers Carried by some AFRAA Airlines in 2016 (000)	13
Table 2.4	New Destinations by 11 AFRAA Airlines in 2016	15
Table 4.1	Worldwide profitability and return on capital	18
Table 4.2	Airline profits per passenger by region	18
Table 6.1	Global aircraft in service in 2016 and additional demand by 2036	24
Table 7.1	Worldwide airline industry employment and employee productivity	26
Table 7.2	Employee Performance Indicators for some AFRAA airlines	26
Table 8.1	World Airline Fatal Accidents in 2016	27
Table 9.1	Courses, Seminars and Workshops conducted during 2017	30

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More choice and
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to increase yields



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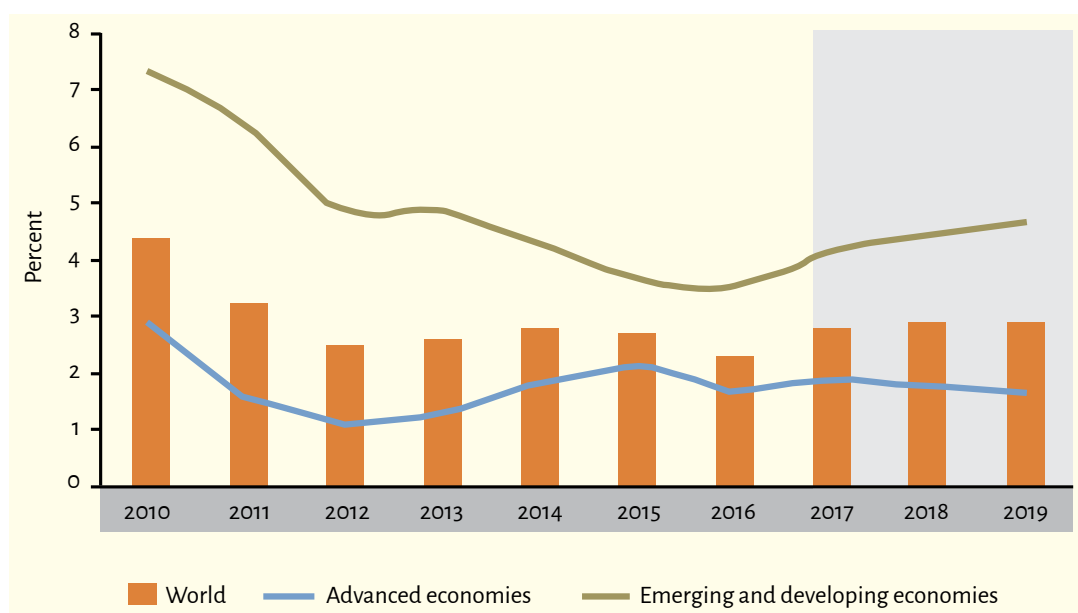
SECTION ONE

1.1 Global Economic Performance

According to World Bank, the global economic growth was estimated at 2.3% in 2016, the weakest performance since the global financial crisis. This was amid weak aggregate demand in advanced countries, intensified economic stress in many commodity exporters and political instability. The growth is projected to pick up to 2.7% in 2017, and to an average of 2.9% in 2018-19 (figure 1.1). Activity in advanced economies is expected to strengthen in 2017, supported by

a projected upturn in the United States. After accelerating to 1.9% in 2017, World Bank projects that growth in advanced economies will grow at an average of 1.8% in 2018-19 and Emerging and developing economies (EMDEs) at 4.1% in 2017 and 4.5% in 2018. Modestly rising commodity prices, a cyclical rebound in investment, and export growth are supporting a gradual recovery in commodity-exporting EMDEs.

Figure 1.1: Global Economic Growth



Source: World Bank

The Economic Report on Africa (ERA) 2017 attributes the subdued global growth prospects to persistently weak fundamentals, mainly in emerging markets and developing economies, mostly due to low commodity prices, diminishing investment, contracting trade, weak demand and rising inflation. Advanced economies struggled to accelerate growth and many commodity exporters were hindered by deteriorating terms of trade. The outlook is subject to substantial downside risks, according to ERA, including a slowing Chinese economy, geopolitical risks and tensions, and heightened macroeconomic problems of commodity exporters if their terms of trade remain unfavourable.

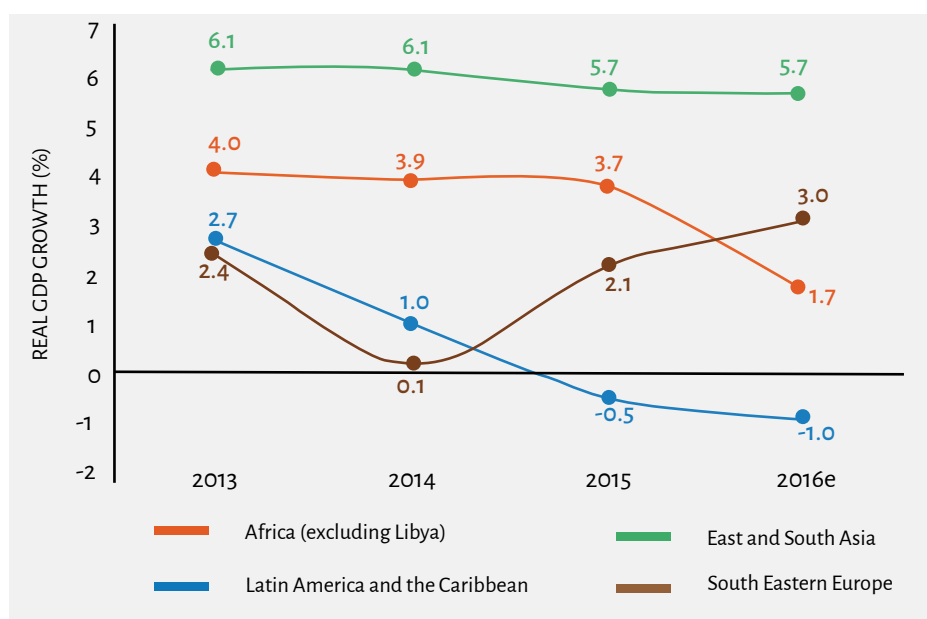
IMF reported that in the second half of 2016, the stronger global momentum in demand, investment in particular, resulted in marked improvements in manufacturing and trade, which were very weak in late 2015 and early 2016. Production of both consumer durables and capital goods rebounded in the second half of 2016. A number of factors

contributed to these developments according to IMF: a gradual global recovery in investment, supported by infrastructure and real estate investment in China, reduced drag from adjustment to lower commodity prices, and the end of an inventory cycle in United States. This projected upturn reflects, to an important extent, a stabilization or recovery in a number of commodity exporters, some of which underwent painful adjustments following the drop in commodity prices, and strengthening growth in India, partially offset by a gradual slowdown of the Chinese economy.

1.2 Africa's Economic Performance

The United Nations Economic Commission for Africa (UNECA) reported that Africa's growth declined to a decade-low of 1.7% in 2016 from 3.7% in 2015, below both the global rate and that in most other developing regions (figure 1.2).

Figure 1.2: Economic growth in Africa and emerging and developing countries, 2013-2016



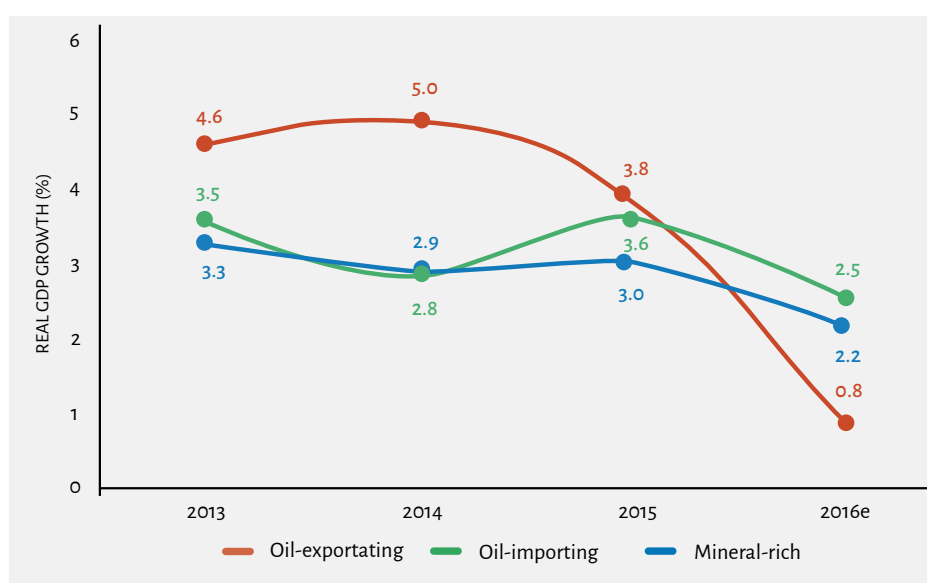
Source: UNDESA (2016) and EIU (2016)

Falling export revenues hit African oil-exporting countries' trade balances and current accounts, especially Nigeria, Angola and Algeria, which for the first time this decade recorded trade deficits as reported by ERA 2017. The external position was further undermined by declining FDI and other capital inflows, leading to policy interventions that depleted foreign exchange reserves and forced the authorities in countries with pegged exchange rate regimes, like Nigeria, to relax them.

ERA 2017 further reported that currency pressures also led

to rising inflation, prompting central banks to raise interest rates and prevent further currency depreciation against the dollar, leading to very low real interest rates in some countries like Nigeria. Other African oil-exporters, like Equatorial Guinea and Republic of Congo, whose currencies are pegged, were unable to devalue their currencies. Their options included departure from monetary union, an adjustment of the currency band at which the Central African CFA franc is pegged to the euro, or a break of the peg altogether.

Figure 1.3: Africa's growth performance by economic grouping, 2013-2016



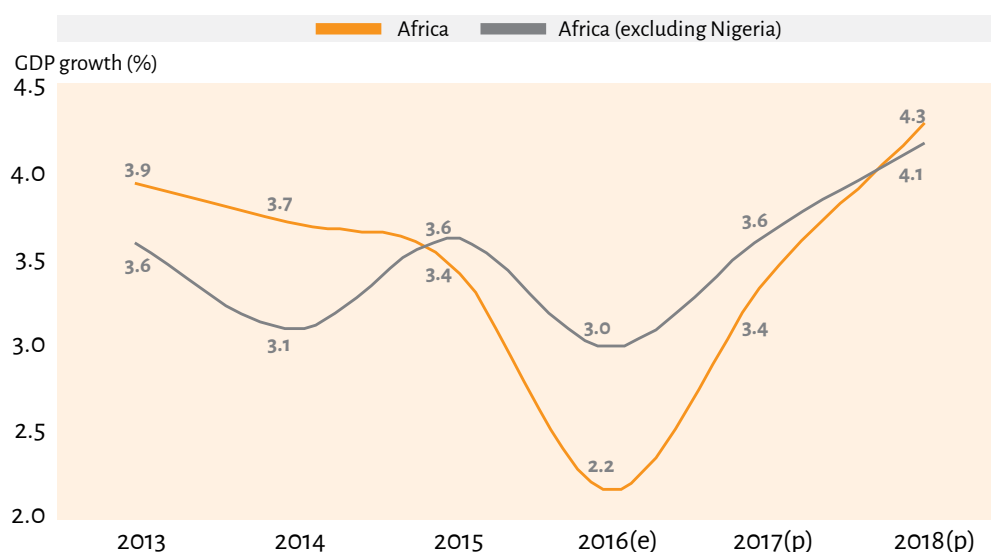
Source: Based on UNDESA (2016a)
Note: e=estimates

The African Development Bank, OECD and UNDP (2017) reported that the fall in Africa's GDP growth underscores the importance of a few big economies on Africa's overall growth performance in 2016. They highlighted that Nigeria carries the largest weight accounting for 29.3% of Africa's GDP. The recession experienced in Nigeria therefore had a more adverse impact on Africa's GDP growth than the recessions in Chad or Libya (figure 1.1). Despite this deterioration, AfDB et al. (2017) expect Africa's growth path

to remain resilient. This is due to stronger domestic demand, improved macroeconomic governance fundamentals and a friendlier business environment.

The drop in Africa's economic growth in 2016 was attributed mainly to lower commodity prices, with commodity exporters most adversely affected. Despite this trend, the majority of non-commodity exporting African countries maintained positive growth.

Figure 1.4: Africa's economic growth, 2013-18



Source: Adapted from AfDS Statistics Department data.
Statlink <http://dx.doi.org/10.1787/8889334744872>

While the slowdown has concentrated mainly in commodity exporters, several factors have contributed to overall lack lustre performance in 2016. These include simmering effects from the Arab Spring, dampening of the global economic recovery including emerging economies (notably, continued slow growth in China, now a major trade partner in several African countries), and pockets of bad weather and drought in a number of African countries.

External shocks compounded by adverse domestic developments have collectively contributed to rising vulnerabilities in many African countries. The prolonged low commodity price environment has intensified fiscal pressures in the region, particularly for the oil and metal exporters, as evidenced in the considerable widening of fiscal deficits in these economies.

Several risks and challenges remain to the growth outlook for the African region. On the external front, a reversal of the recent upward trend in global oil prices would result in further growth deterioration in oil-exporting countries. A sharper-than-expected growth moderation in China would weigh on the region's commodity exports. In addition, the uncertainties associated with the coming process of Brexit, with deterioration in the growth outlook for the United Kingdom and Europe, would pose a risk to the trade performance of countries such as Kenya and South Africa, given the importance of Europe as a major export destination.

The growth outlook for Africa is contingent on the ability of countries to mitigate the impact of external risks while containing domestic vulnerabilities.

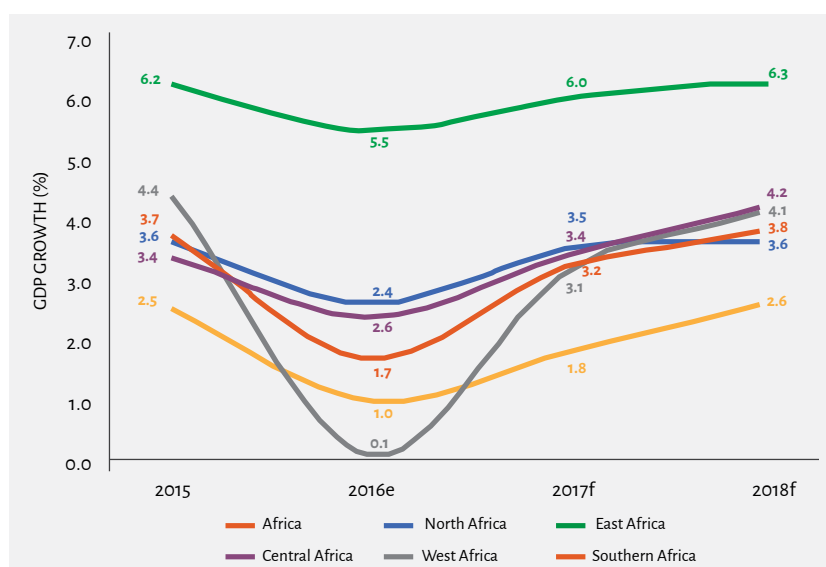
1.3 Regional prospects for Africa: growth expected to recover at a moderate pace

UNECA reported that Africa's real GDP growth is expected to increase to 3.2% in 2017 and 3.8% in 2018 (figure 1.5), led by strong domestic demand, particularly in infrastructure. The buoyant service sector, oil-price recovery and oil-exporting economies' focus on non-oil sectors could also contribute to better prospects. Increasing trade and investment ties in Africa and between Africa and emerging economies, alongside the recovery of traditional export markets, particularly the euro area, are also expected to strengthen Africa's outlook.

According to AfDB, domestic demand continues to drive Africa's growth. Meanwhile, better macroeconomic management, increased diversification and an improved business environment will maintain Africa's growth resilience in 2017-18.

UNECA further reported that Africa's growth could hit 6% in 2017 and 8% in 2018 if global demand shows a decent recovery, major African countries policy reforms run well and the recovery continues in oil and other commodity prices. All the sub-regions are forecast to see real GDP growth in 2017 and 2018.

Figure 1.5: Africa's growth prospects by sub region, (%), 2015-2018



Source: UNDESA (2016a)

The anticipated upward trend in global oil and non-oil commodity prices for the next two years will, to a certain extent, ease fiscal and external pressures for the commodity exporters. Nevertheless, given that global commodity prices are expected to remain well below pre-2014 levels, a strong growth rebound in the highly commodity-dependent countries, including Algeria, Angola and Nigeria, appears unlikely, according to the United Nations. In contrast, the growth outlook is more favourable for countries in the East African Community, including Ethiopia, Kenya and the United Republic of Tanzania, as well as the West African economies of Côte d'Ivoire, Ghana and Senegal. Growth in these economies will continue to be driven by robust private consumption and the continued implementation and completion of large infrastructure projects.

UNECA 2017 and the AfDB give the prospects below for Africa: East Africa: Following robust growth of 5.5% in 2016, East Africa is positioned to remain the fastest growing African sub-region in 2017 and 2018. Growth is projected to accelerate to 6.0% in 2017 and 6.3% in 2018, backed by robust performance in Kenya, Rwanda and Tanzania as they benefit from low oil prices and expanding public investment. In the sub-region's net oil importers such as Kenya and Rwanda, economic activity will continue to benefit from low inflationary pressures, amid a sluggish recovery in oil prices. In addition, the adverse effect of prolonged droughts that dampened 2016 growth in countries such as Ethiopia and Uganda is expected to dissipate in 2017.

West Africa: In 2016, West Africa's aggregate GDP virtually stagnated, growing only by 0.1 percent due to a contraction in the Nigerian economy. The sub-region is projected to increase growth to about 3.1% in 2017 and 4.1% in 2018, boosted mainly by an improving economic performance in Nigeria, with its emphasis on diversifying investments into non-oil sectors through an expansionary fiscal policy. The floating exchange rate regime being implemented may encourage investment inflows in the medium term,

and recovery in the oil price and increased oil production will raise public revenues. Ghana has a better growth outlook on improving macroeconomic conditions, increased energy supplies and lower inflation, and Côte d'Ivoire on increased public investment. In Guinea and Liberia, growth in 2017 is expected to strengthen further given the diminishing impact of the Ebola outbreak on economic activity.

North Africa: In 2016, growth in the sub-region slowed to 2.6%. Security threats and social unrest weighed on investor sentiments and adversely affected the sub-region's vital tourism industry, particularly in Egypt and Tunisia. The sub-region's growth is forecast to pick up to 3.5% in 2017 and 3.6% in 2018. Improved political and economic stability – and subsequent increases in business confidence (especially in Egypt and Tunisia), in inflows of external aid and in large infrastructure projects – will buttress growth. However, continuing political challenges in Libya will continue to affect the sub-region's political and economic governance.

Southern Africa: In 2016, growth in the sub-region slowed to 1.0%, as severe droughts adversely affected growth in several countries, including Botswana, Lesotho, Malawi, Namibia and South Africa. The growth outlook for Southern Africa is relatively subdued, with economic activity projected to rise to 1.8% in 2017 and 2.6% in 2018, mainly because of the expected investment increase in non-oil sectors such as electricity, construction and technology; in large infrastructure projects; and in mining.

Central Africa: Growth is expected to strengthen from 2.4% in 2016 to 3.4% in 2017 and improve further to 4.2% in 2018. The recovery in oil prices will revive export revenues and growth, particularly in Congo, Equatorial Guinea and Gabon. However, on-going domestic political unrest in the Central African Republic and Gabon will restrain economic activity in these economies. In Cameroon, the diminishing impact of lower oil revenues and continued strong public investment in infrastructure will support growth going forward.

1.4 Tourism

1.4.1 Positive growth in International tourist arrivals

UNWTO reported that international tourist arrivals (overnight visitors) in 2016 grew by 3.9% to reach a total of 1,235 million worldwide, an increase of 46 million over the previous year. It was the seventh consecutive year of above average growth in international tourism following the 2009 global economic crisis. The global pace of growth was slightly more moderate than in 2015 (4.5%), but in line with UNWTO's long-term forecast of 3.8% per year for the period 2010 to 2020.

Demand for international tourism in 2016 followed the positive trend of previous years, with many destinations reporting sound results, although a few faced security incidents, either in their country or in their region. Some redirection of tourism flows was observed, though most destinations shared in the overall growth due to stronger travel demand, increased connectivity, more affordable air transport and simpler visa procedures in many countries. By UNWTO region, Asia and the Pacific led growth in 2016 with a 9% increase in international arrivals, followed by Africa (+8%), which rebounded after two difficult years.

In the Americas (+3%) the growth momentum continued. Europe (+2%) showed mixed results, with double-digit growth in some destinations and declines in others. Available data for the Middle East (-4%) points to a decline in arrivals, although results vary across destinations. By sub region, the strongest results were recorded in Sub-Saharan Africa (+10%), followed by Oceania, North-East Asia and South-East Asia (all +9%), South Asia (+8%) and South America (+7%).

The 1 billion international arrivals mark in a single year was exceeded for the first time in 2012. This further increased to 1.2 billion in 2016, with 305 million more international tourist arrivals recorded compared to 930 million in the pre-crisis year of 2008, according to UNWTO. Slightly more travel by air than surface transport. In 2016, slightly over half of all overnight visitors travelled to their destination by air (55%), while the remainder travelled by surface transport (45%) – whether by road (39%), rail (2%) or water (4%). The trend over time has been for air transport to grow at a somewhat faster pace than surface transport, thus the share of air transport is gradually increasing.

Table 1.1: International tourism receipts

	International tourism receipts Local currencies, constant prices (% change)				Market share (%)	Receipts (US\$)			
	13/12	14/13	15/14	16*/15		(billion)			per arrival
	2014	2015	2016*	2016*		2014	2015	2016*	2016*
World	5.6	4.3	4.1	2.6	100	1,252	1,196	1,220	990
Europe	4.1	4.4	2.7	0.9	36.7	513.7	449.6	447.3	730
Asia and the Pacific	8.5	1.5	2.5	4.8	30.1	359.0	349.4	366.7	1,190
Americas	6.6	6.7	8.2	2.7	25.7	288.9	305.6	313.2	1,570
Africa	2.5	3.7	0.5	8.3	2.9	36.5	32.8	34.8	600
North Africa	-2.1	8.3	-8.8	2.6	0.7	11.0	8.9	9.1	490
Sub-saharan Africa	4.3	1.9	4.5	10.5	2.1	25.5	23.9	25.6	650
Middle East	1.9	5.1	1.3	-2.0	4.7	53.6	58.2	57.6	1,080

Source: World Tourism Organization (UNWTO)

1.4.2 International tourism receipts

Expenditure by international visitors in tourism destinations reached US\$ 1,220 billion (euro 1,102 billion) in 2016, representing an increase of 2.6% from 2015. In real terms, tourism receipts increased by 8% in Africa, 5% in Asia and the Pacific, 3% in the Americas and 1% in Europe, while they declined 2% in the Middle East.

In addition to the tourism receipts earned in the destinations, international tourism also generated US\$ 216 billion in exports through international passenger transport services rendered to non-residents in 2016. Added to the US\$ 1,220 billion in tourism receipts in destinations, the value of tourism exports amounted to US\$ 1.4 trillion, or US\$ 4 billion a day on average.

International tourism (comprising both earnings in destinations and passenger transport) represents 30% of the world's services exports. It also accounts for 7% of overall exports in goods and services.

In terms of outbound tourism, Europe currently still remains

the world's largest source region for outbound tourism, generating almost half of the world's international arrivals (48%), followed by Asia and the Pacific (26%), the Americas (17%), the Middle East (3%) and Africa (3%).

1.4.3 Africa – A strong rebound for tourism in 2016

According to UNWTO international tourist arrivals in Africa increased by an estimated 8% in 2016 according to the comparatively limited data available to date, representing a strong rebound after a weaker performance in 2014 and 2015 in the wake of various health, geopolitical and economic challenges. The region welcomed 58 million international tourists in 2016 (5% of the world total), 4 million more than in 2015, earning US\$ 35 billion in international tourism receipts (3% share), an increase of 8% in real terms.

Sub-Saharan Africa (+10%) led the region's recovery, with the highest increase across all world sub-regions. South Africa, the sub-region's top destination, enjoyed 13% growth

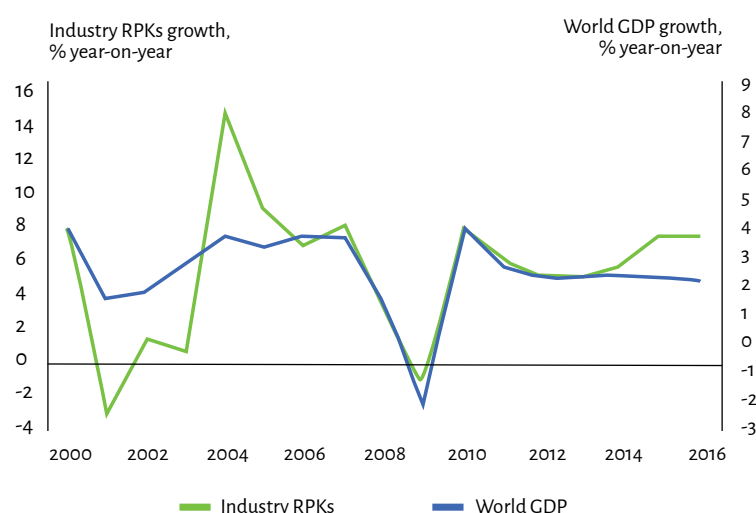
in international arrivals, partly thanks to simpler visa procedures. Kenya (+17%) and Tanzania (+16%) also boasted double digit growth in 2016, rebounding from weaker figures in 2015. Island destinations Madagascar (+20%), Cabo Verde (+15%), Mauritius (+11%) and the Seychelles (+10%) also posted double-digit growth, supported by improved air and sea connectivity.

In North Africa (+3%) the recovery started in the third quarter of 2016, thanks to a change in trend in Tunisia (+7%) and Morocco (+2%). The strengthening of security, as well as the gradual recovery of the Russian market and the redirection of tourism flows from other troubled destinations, contributed to these results.

1.5 Airline performance

IATA reported that passenger demand saw another strong year in 2016 while air freight accelerated in the second half of the year. Industry-wide revenue passenger kilometres (RPKs) grew 7.1% in 2016, reflecting a strong performance above the 10-year average growth rate of 5.5%. More than 3.8 billion passenger segments were flown in 2016, an increase of 250 million compared with 2015. The industry-wide passenger load factor remained unchanged at an all-time high of 80.4% while the freight load factor dropped to 46.9%, 0.6 percentage points lower than in 2015. Industry-wide freight tonne kilometres (FTKs) grew 3.6% in 2016, which is nearly double the five-year average pace of 2.0%.

Figure 1.6: RPK Versus World GDP Growth



Source: IATA WATS

1.5.1 Passenger demand

According to IATA, the upward trend in seasonally-adjusted passenger traffic moderated during the first six months of the year. This was due to a combination of headwinds from numerous terrorist attacks, political instability, and a subdued economic backdrop. Traffic on the Asia-Europe market was particularly sensitive to the terror-related disruption in Europe.

The second half of the year, however, saw an acceleration in the growth trend, with RPKs growing at an annualized pace of nearly 9% between June and December. This pick-up reflected a combination of passengers choosing to disregard terrorist efforts to scare people off travel and tourism as well as a moderate upturn in the global economic cycle.

IATA also reports that passenger demand was also supported by lower yields during 2016. Despite the recovery in oil prices during the year, the average price of a barrel of jet fuel in 2016 was 22% lower than in the previous year, according to IATA. Jet fuel prices climbed to around \$60 a barrel at the end of 2016-nearly twice the-year low-point reached in January 2016, although still much lower than average between 2011

and 2014. Large shifts in foreign exchange markets meant that movements in global jet fuel prices were not felt evenly across airlines and regions. In a mirror image of the case in 2015, limited recoveries in a number of emerging market currencies against the US dollar-notably the Russian Rouble, Brazilian Real, and the South African Rand-partially shielded airlines in such countries from the full rise in US dollar-based jet fuel prices. By contrast, sharp falls in the Mexican Peso and the Turkish Lira, exacerbated the rise in fuel prices, particularly in late-2016 (IATA WATS 2017).

1.5.2 2016—Another year of record operating profits

IATA reported that the operating margin of 8.8% of revenues was up from 8.5% in 2015 and more than three times that achieved in 2012. After allowing for interest charges, taxes and write-downs, the \$34.8 billion net post-tax profit that airlines generated was slightly down from \$35.9 billion in 2015. Nonetheless, the industry's highly-leveraged balance sheets will in most cases take a prolonged period of better profits to improve.

SECTION TWO >> AIRLINE PERFORMANCE

Global Performance

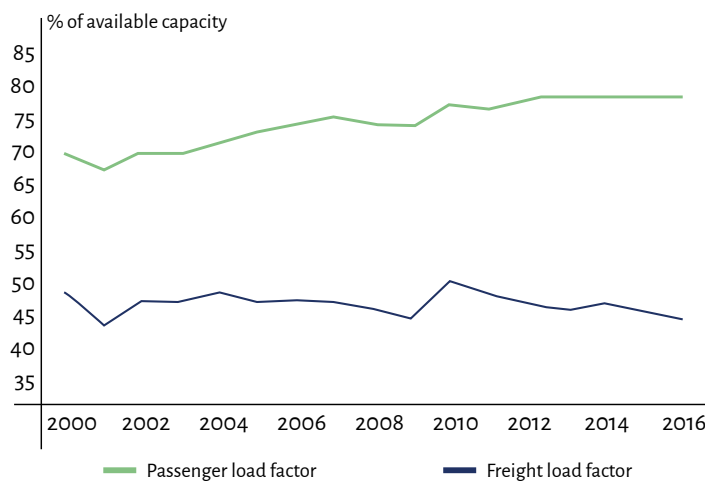
3.6 billion passengers travelled by air globally on scheduled services in 2016, reflecting a 7% growth over 2015. Global passenger air traffic for scheduled operations measured in RPKs improved by 7.4% in 2016 from 2015. International markets increased by 7.8% while domestic markets grew by 6.8%. This growth was the same as recorded in 2015 and has been the strongest result since the post-Global Financial Crisis rebound in 2010. With the weak economic growth which saw the weakest performance since the global financial crisis as highlighted in chapter one of this report,

terrorist attacks and political instability, passenger traffic slowed down during the first six months of 2016.

The second half of the year saw an acceleration of the growth trend and a very strong performance. IATA reported that more than 3.8 billion passenger segments were flown in 2016 compared to 2015, representing a 7.04% increase.

Systemwide, seat capacity (ASKs) increased by 7.5%, represented by 8.1% on international routes and 6.3% on domestic routes. The global average load factor remained unchanged from 2015 at 80.4%.

Figure 2.1: Industry passenger and freight load factors

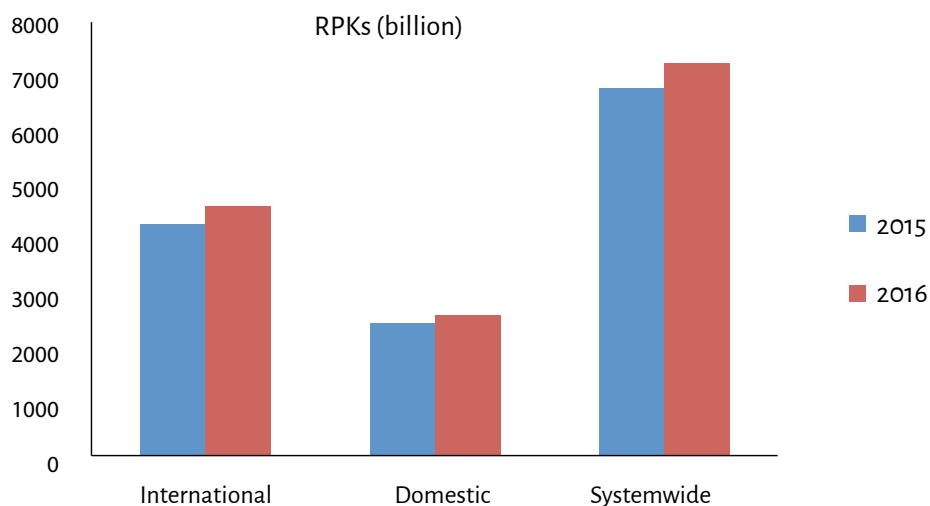


Source: IATA Annual Review 2016

Scheduled global freight traffic (FTKs) increased by 3.6% and Available Freight Tonne Kilometres increased by 4.9% in 2016 compared to 2015. The increased growth in freight capacity was as a result of airlines' additions to belly-hold

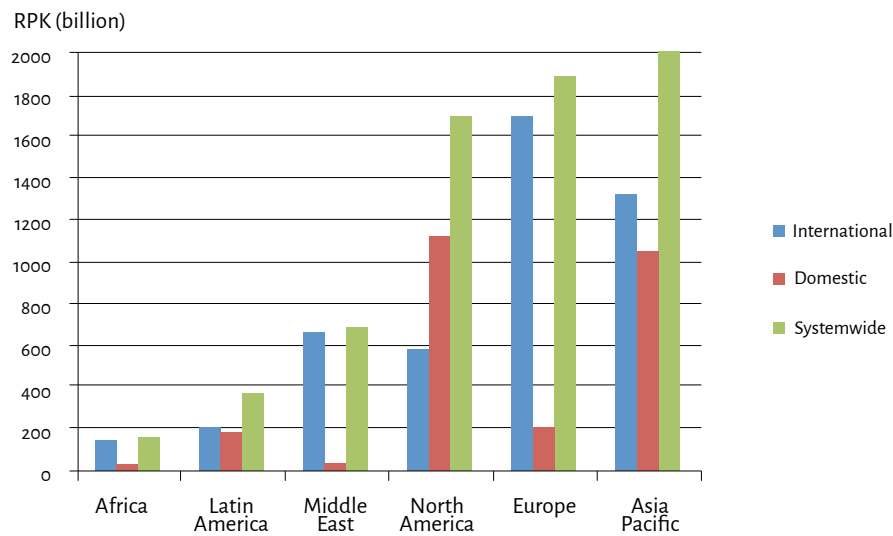
capacity in the passenger fleet and subsequently, the cumulative freight load factor for all freight and mixed operations dropped to 46.9%, the lowest annual average since 2009.

Figure 2.2: World Scheduled Passenger Kilometres (RPKs) 2015-2016 (billions)



Source: IATA WATS/AFRAA

Figure 2.3: Revenue Passenger-Kilometres per Region - IATA Schedule Services 2016

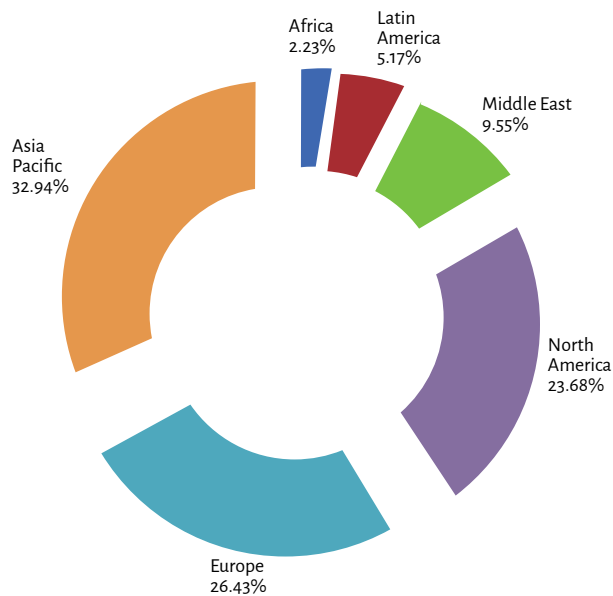


Source: IATA WATS/AFRAA

Asia Pacific region was the world's biggest air transport market in 2016 by RPKs and RTKs performed (32.94% of RPKs and 33.59% of RTKs), followed by Europe (26.43% of RPKs and 26.12% of RTKs), North America (23.68% of RPKs

and 22.81% of RTKs), Middle East (9.55% of RPKs and 10.75% of RTKs), Latin America (5.17% of RPKs and 4.54% of RTKs) and Africa (2.23% of RPKs and 2.20% of RTKs).

Figure 2.4: % share of Passenger-Kilometres Performed per Region - IATA Scheduled Services 2016



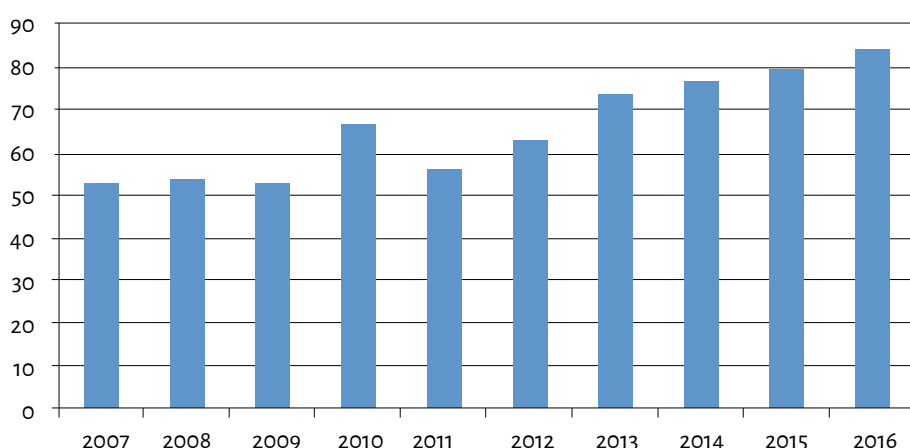
Source: IATA WATS/AFRAA

African Airlines Performance

Passengers Carried

All regions experienced positive traffic growth in 2016 with carriers in the Asia-Pacific region accounting for one-third of the total annual increase in traffic; African airlines represented 2.2% of the market share carrying 83.89 million

passengers. This was up by 5.5% from 2015. Since 2011 when the passenger numbers dipped as a result of the Arab spring in parts of North Africa, passenger numbers by African carriers has grown consistently year on year.

Figure 2.5: Total Passengers Carried by African airlines scheduled operations: 2007-2016 (millions)

Source: IATA

51.6 million scheduled passengers were carried on international routes, while 32.29 million were carried on domestic routes by African carriers in 2016 as reported by IATA. The 22 AFRAA airlines that reported their passenger

numbers carried a total of 51.84 million passengers in 2016 or 61.8% of total passengers carried by all African airlines. The top 5 passenger countries in Africa in 2016 are: South Africa, Egypt, Morocco, Nigeria and Algeria.

Table 2.1: Top 5 passenger countries in Africa in 2016

	2015 Passenger numbers	% growth from 2014
South Africa	23,605,550	5.3
Egypt	19,396,780	-3.6
Morocco	14,346,955	1.5
Algeria	9,958,057	19.8
Nigeria	8,109,128	-4.1

Source: IATA WATS

In terms of route area, the top 10 passenger airport pairs between Africa and other regions are as follows:

Rank	Airport pair	2016 Passenger numbers	% growth from 2015
1	Cairo-Jeddah	1,853,851	-4.09
2	Cairo Riyadh	907,926	12.28
3	Cairo-Kuwait	779,563	13.19
4	Algiers-Paris Orly	749,790	-1.39
5	Cairo-Dubai	658,706	2.84
6	Alexandria-Jeddah	637,438	-4.18
7	Algiers-Paris-De Gaulle	636,739	38.94
8	Cairo-Yanbo	523,195	96.94
9	Johannesburg-London Heathrow	515,656	-2.68
10	Cairo-Medinah	498,653	28.14

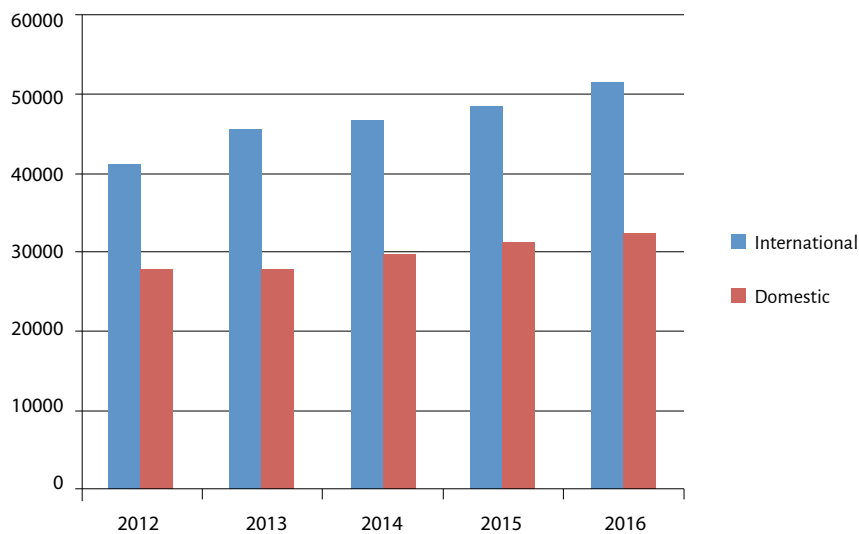
Source: IATA WATS

Domestic and Intra-Africa Passengers

Scheduled domestic passenger numbers carried by all African airlines in 2016 increased by 3.4% to 32.29 million. The rising middle class, high rate of urbanisation in the

continent and the aggressive route expansion by some African airlines to enhance intra African connectivity continue to stimulate demand.

Figure 2.6: Percentage Share of Passengers Carried by African airlines: 2012-2016



Source: AFRAA

For the 22 AFRAA members that reported their data, the domestic and intra-Africa passenger numbers stood at 50.17% of the total number of passengers carried in 2016.

There is huge potential for aviation in Africa. Major developments have taken shape on the liberalisation of African skies which has been a huge constraint to the growth of air travel to, from, and within the continent. The quest for the full liberalisation of African skies received a major boost when African Heads of States at their Summit in January 2015 made a solemn commitment to the implementation of the Yamoussoukro Decision towards the establishment of a single African air transport market by 2017. The number of States that have so far declared their solemn commitment to the immediate and unconditional implementation of the Yamoussoukro Decision towards the establishment of a Single African Air Transport Market has

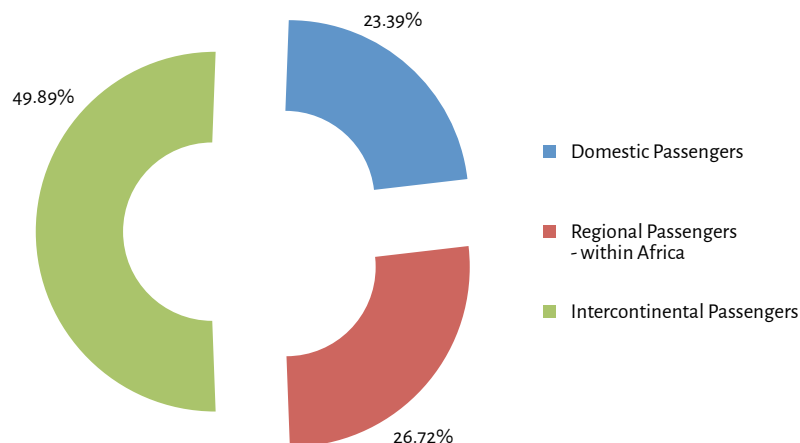
reached to date. The Single African Air Transport market is expected to be officially launched by the African Union Heads of State at their Summit in January 2018.

The liberalisation of African skies is expected to usher a new era in African aviation and these positive developments have been complemented by more States removing non-physical barriers to travel such as visa requirements. Removal of non-physical barriers to travel is a vital step forward towards a more integrated Africa.

Passenger Distribution

For AFRAA member airlines, intercontinental passenger market segment remains the biggest with 49.9% of all passengers travelling between Africa and other regions of the world. The domestic market segment represented 23.4% while the intra-Africa market represented 26.7%.

Figure 2.7: African Airlines Passenger Distribution 2016



Source: AFRAA

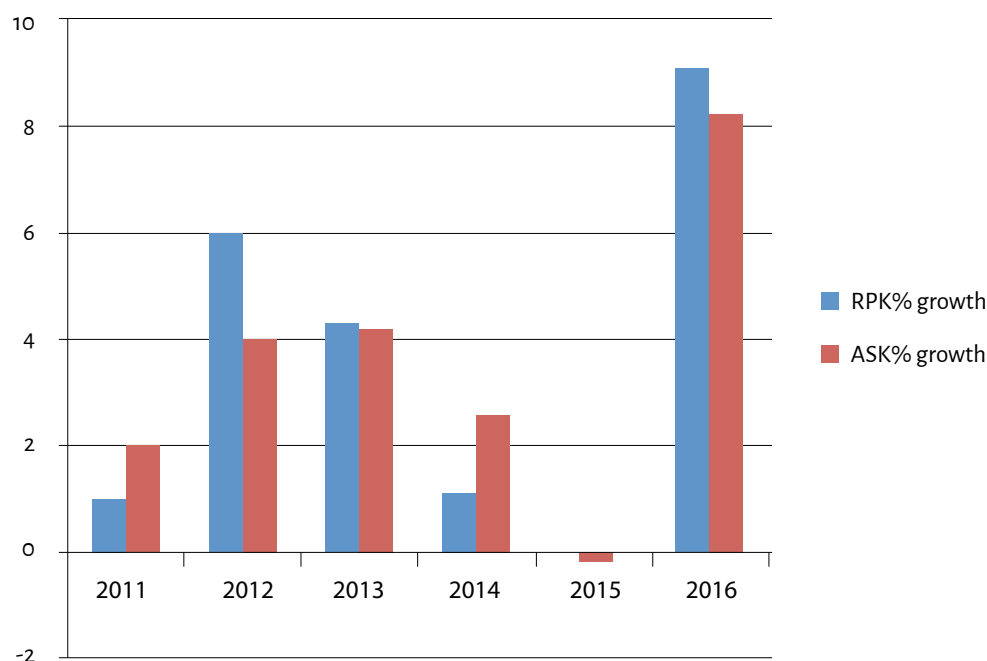
Passenger Traffic and Capacity

Middle East was the region that realised the highest ASK growth worldwide for scheduled passenger traffic in 2016 compared with 2015 at 13.1%. This was followed by Asia Pacific region at 9.9%, Latin America at 9.9%, Africa at 8.2%, Europe at 5.7% and North America at 4.6%. Latin American carriers saw the lowest market growth in terms of ASKs for scheduled operations in 2016 at 3.4%. In terms of RTKs, Middle East realised the highest RTK growth in 2016 of 9.9% followed by Africa at 8.9%, Asia Pacific at 8.3%,

Europe at 5.5%, North America at 3.6%, and Latin America at 3.3%.

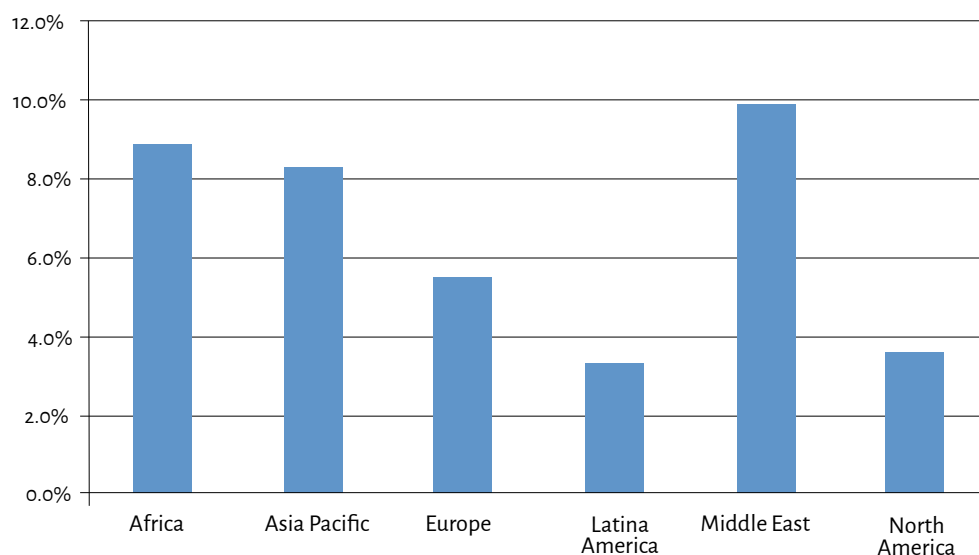
IATA reported that the industry-wide revenue passenger kilometres (RPK) grew 7.4% in 2016. This was the same increase recorded in 2015, both years are the greatest increase since the rebound from the depth of the global financial crisis in 2010 and well above the long-run average of 5.5%. Africa saw a significant smallest market growth in terms of RPKs at 9.4% in 2016.

Figure 2.8: Africa's Passenger Traffic and Capacity Annual Percentage Growth: 2011-2016



Source: IATA WATS

Figure 2.9: 2016 RTK growth per region



Source: AFRAA/IATA

Passenger Load Factor

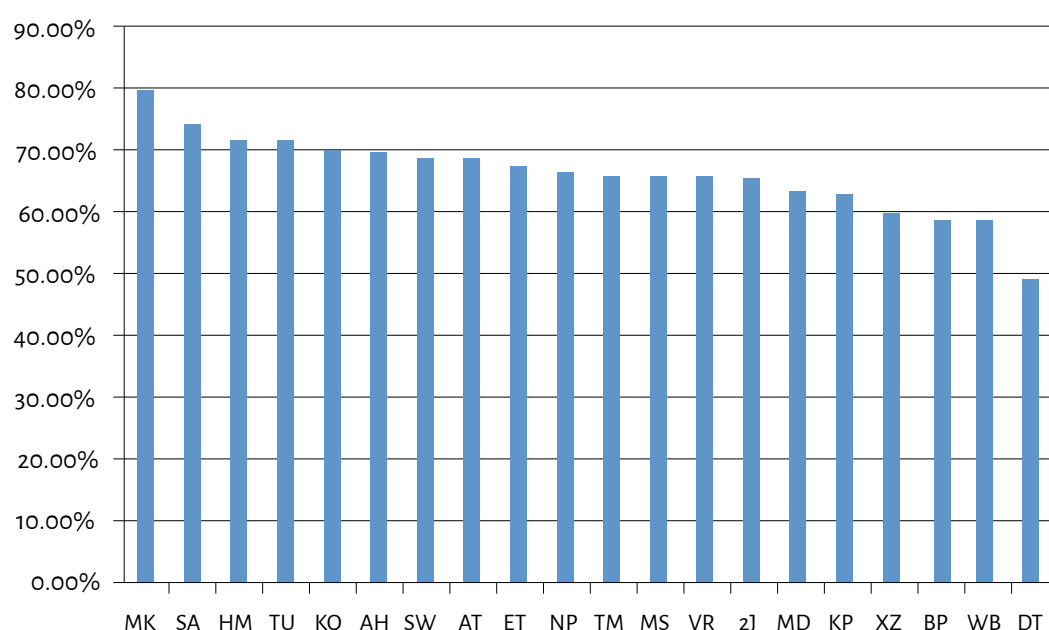
Many African airlines continue to record low load factors due to the imbalance of capacity and demand, limited commercial cooperation, limited connectivity and uncoordinated intra-African networks with other African operators and this has seen the average load factors for African airlines being the lowest globally. Some airlines however have been able to achieve adequate load factors in 2016.

Average passenger load factors (PLF) for African carriers scheduled passenger traffic in 2016 increased marginally

to 68.8% from 68.2% recorded in 2015. This compared unfavourably to the global average load factors at 80.4% in 2016. Passenger load factor for African carriers in domestic routes was 74% while international routes recorded 67.9%.

The top 5 AFRAA member airlines with the highest average passenger load factors in 2016 were: Air Mauritius (80.2%), South African Airways (74.2%), Air Seychelles (72%), Tunisair (72%) and Kenya Airways (70.69%).

Figure 2.10: Passenger Load Factors of some AFRAA Airlines in 2016 (%)



Source: AFRAA

North America was the world's region with the highest passenger load factor of 83.5% in 2016 followed by Europe

at 81.9%, Latin America at 80.4%, Asia Pacific at 79.8% and Middle East at 75.0%.

Table 2.2: Passenger and Weight Load Factor for all Regions – 2016

	Passenger LF	% Change	Weight LF	% change
Africa	68.8%	0.7	56.6%	0.8
Asia Pacific	79.8%	0.7	70.6%	0.3
Europe	81.9%	-0.2	72.6%	0.2
Latin America	80.4%	0.9	66.8%	0.2
Middle East	75.0%	-1.2	62.4%	-1.0
North America	83.5%	-0.4	63.1%	-0.3
Industry Average	80.4%	0.0	67.8%	0.0

Source: AFRAA/IATA WATS

AFRAA Airlines Passenger Traffic

AFRAA airlines that reported performance for 2016 carried a total of 51,723 million passengers comprising of 23.39% domestic, 26.72% intra-Africa and 49.89% intercontinental

passengers. The biggest airline by number of passengers carried in 2016 was Ethiopian Airlines, with over 8.153 million passengers transported.

Table 2.3: Total Passengers Carried by some AFRAA Airlines in 2016 (000)

	Domestic Passengers (000)	Regional passengers – within Africa (000)	Intercontinental Passengers (000)	TOTAL
Air Algérie	1,963	400	3,755	6,118
Air Botswana	82	173	-	254
Air Burkina	7	117	-	125
Air Madagascar	308	72	58	437
Air Mauritius	177	577	1,128	1,882
Air Namibia	83	344	153	580
Air Seychelles	229	161	190	580
Air zimbabwe	104	91	-	195
ASKY	-	488	-	488
EgyptAir	497	846	6,009	7,352
Ethiopian Airlines	1,271	3,412	3,470	8,153
Kenya Airways	687	2,084	1,000	3,771
LAM Mozambique	499	141	-	640
Nile Air	69	18	843	930
Royal Air Maroc	914	1,568	4,365	6,847
RwandAir	22	494	69	586
South African Airways	3,129	1,955	1,492	6,576
South African Express	1,013	220	-	1,233
TAAG Angola	548	226	409	1,183
TACV – Cabo Verde Airlines	368	28	174	570
Tassili Airlines	129	-	99	228
Tunisair	-	406	2,591	2,997
TOTAL	12,099	13,820	25,805	51,723

Source: AFRAA

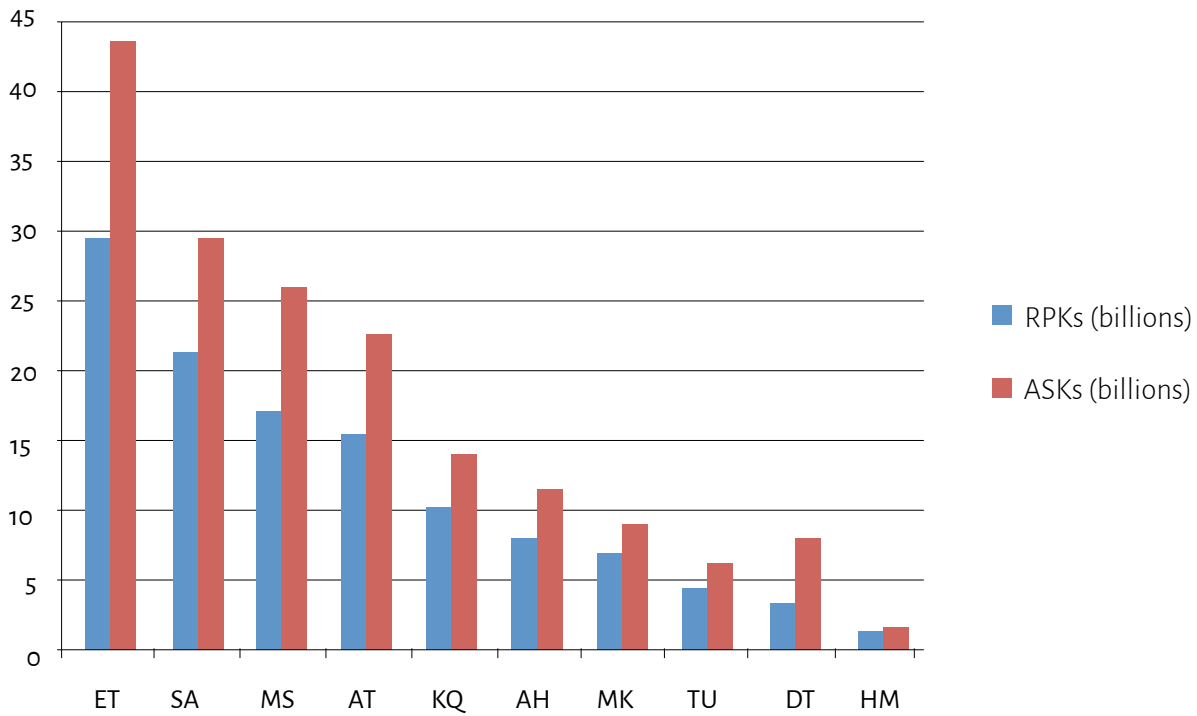
The 20 reporting AFRAA airlines for 2016 performance put a total capacity of 170.3 billion ASKs in 2016 compared to 168.4 billion ASKs in 2015. The overall average passenger load factor reported for the 20 airlines in 2016 was 65.6%.

In terms of ASKs, the top 5 largest African carriers in 2016 are: Ethiopian Airlines (41.616 billion), South African Airways

(28.051 billion), EgyptAir (25.74 billion), Royal Air Maroc (22.137 billion) and Kenya Airways (14.039 billion).

In terms of RPKs, the top 5 largest African carriers in 2015 are: Ethiopian Airlines (28.967 billion), South African Airways (20.816 billion) EgyptAir (16.9 billion) Royal Air Maroc (15.274 billion) and Kenya Airways (9.924 billion).

Figure 2.11: ASKs and RPKs of some AFRAA Airlines in 2016



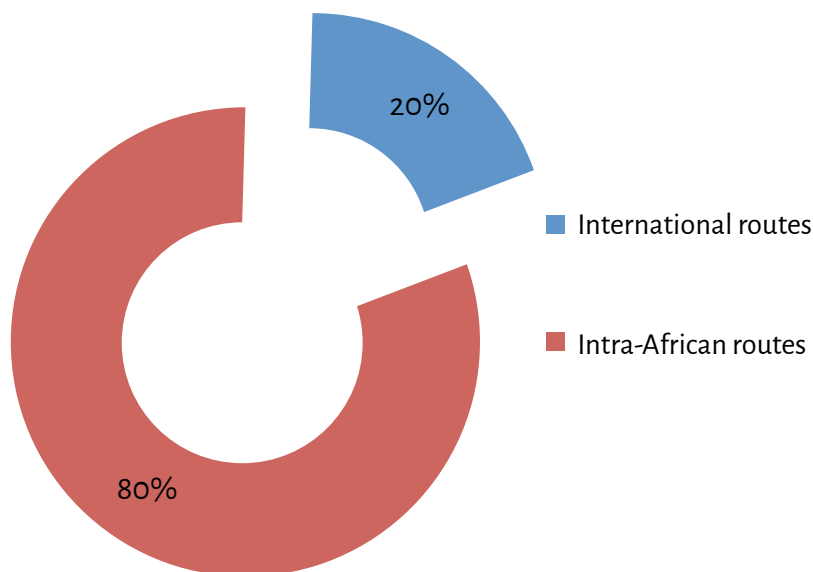
Source: AFRAA

New Routes

AFRAA airlines in 2016 expanded their networks on both intra-Africa and intercontinental routes. A total of 30 new routes were launched by 11 AFRAA member airlines to

domestic, intra-Africa and intercontinental destinations. Of these, 6 destinations were intercontinental while 24 new routes were within the continent.

Figure 2.12: New Destinations by AFRAA Airlines in 2016



Source: AFRAA

Table 2.4: New Destinations by 11 AFRAA Airlines in 2016

	Origin	Destination		Origin	Destination
1	Addis Ababa	Hahaya	16	Kigali	Cotonou
2	Addis Ababa	Windhoek	17	Kigali	Abidjan
3	Addis Ababa	Lomé	18	Kinshasa	Kananga
4	Algiers	Nantes	19	Kinshasa	Mbandaka
5	Algiers	Strasbourg	20	Lomé	Newark
6	Bunia	Kisangani	21	Luanda	Maputo
7	Bunia	Lubumbashi	22	Lubumbashi	Goma
8	Casablanca	Nairobi	23	Lubumbashi	Kananga
9	Casablanca	Washington Dulles	24	Mauritius	Maputo
10	Casablanca	São Paulo	25	Mauritius	Dar es Salaam
11	Dar es Salaam	Nairobi	26	Tunis	Montreal
12	Durban	Mauritius	27	Tunis	Prague
13	Harare	Dar es Salaam	28	Tunis	Niamey
14	Johannesburg	Abuja	29	Windhoek	Gaborone
15	Kalemie	Goma	30	Windhoek	Durban

Source: AFRAA

Passenger Traffic Forecast

According to the IATA and Tourism Economics forecasting service, the number of global air passenger journeys is expected to grow at an annual average rate of 3.7% over the 2015-2035 period. ICAO's forecasts an annual increase

in RPKs of 4.6% over 2013-2023 period. Airbus, Boeing and Embraer made downward revisions on their long-term forecasts for annual passenger demand growth in terms of RPKs to 4.5%, 4.8% and 4.7%.

SECTION THREE

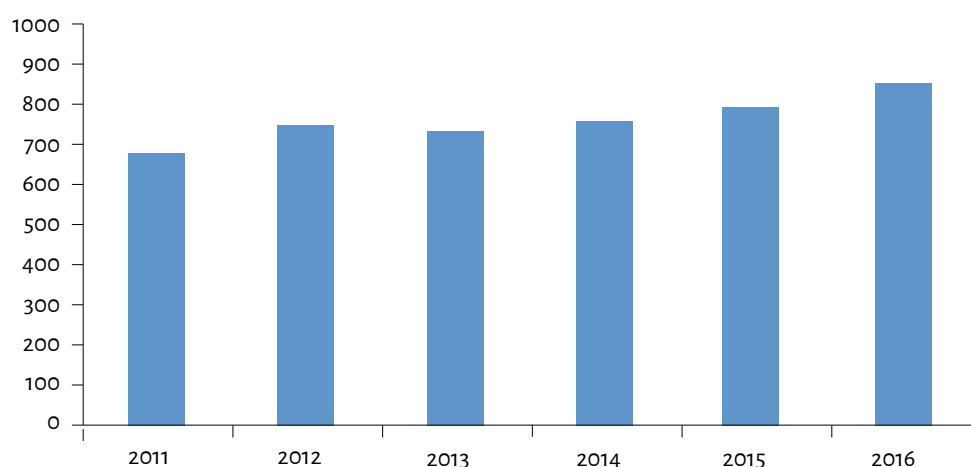
Freight Carried and Traffic

Air freight saw an accelerated growth during the second half of 2016. IATA reported that industrywide freight tonne kilometres (FTKs) increased by 3.6% in 2016, nearly double the five-year average pace of 2.0%. The freight load factor remained low at 46.9% while capacity measured in Available Freight Tonne Kilometres increased by 4.9%, outstripping demand and resulting to pressure on freight yields.

Air freight carried by African airlines scheduled operations increased by 6.1% in 2016, with a total of 866,000 tonnes. Scheduled freight operations by African airlines in 2016 represented 1.6% of total global freight carried.

In terms of FTKs, performance by African airlines increased by 4.3% year on year in 2016. Across all regions, Middle East carriers recorded the highest year-on-year growth of 7.4% in air freight carried in 2016, according to IATA.

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

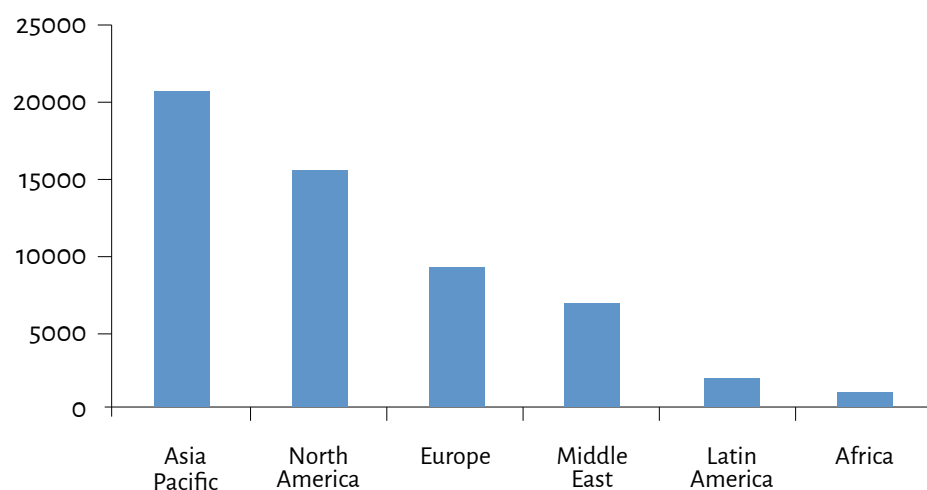


Source: AFRAA/IATA WATS

2016 was a year of many challenges for air cargo with headwinds such as weak global trade and competition from other modes of transport. This is expected to change as global trade improves. Intra-Africa air freight is expected to grow from the increase in regional trade as markets open up and this will give rise to cross investments

among African countries. Enhancing trade can contribute significantly to growth of air cargo within the African continent. Further, the underdeveloped cargo component of African airlines' operations has led to dominance of the intercontinental sector by non-African airlines and competition by other forms of transport such as rail or road.

Figure 3.2: Freight Carried by Region (tonnes) – 2016

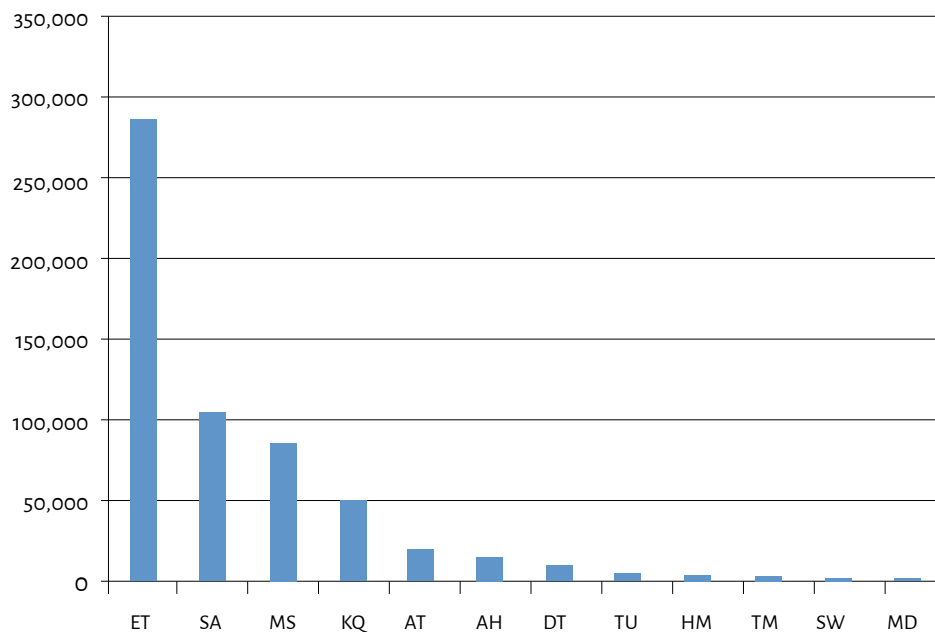


Source: AFRAA/IATA WATS

16 reporting AFRAA airlines together moved 608,184 tonnes in 2016, representing 70.2% of the scheduled freight by African carriers. 75.2% of the freight traffic was carried on intercontinental routes, while 24.2% of the freight traffic was carried on routes within Africa. Ethiopian

Airlines carried the largest portion of freight at 293,526 tonnes followed by South African Airways at 106,854 tonnes, EgyptAir at 90,265 tonnes, Kenya Airways at 52,634 tonnes and Royal Air Maroc at 20,165 tonnes.

Figure 3.3: Total Freight Carried by some AFRAA Airlines in 2016 (tonnes)



Source: AFRAA

Freight Traffic Forecast

In spite of the fact that air freight had a strong growth in the second half of 2016, various challenges still face air freight and long term growth forecasts were downgraded from those made in 2016. IATA's five year forecast indicates

that international air freight tonnes are expected to increase by 3.9%. Airbus and Boeing forecast air freight to grow at an annual rate of 4.4% and 4.2% respectively for the period 2015-2035.

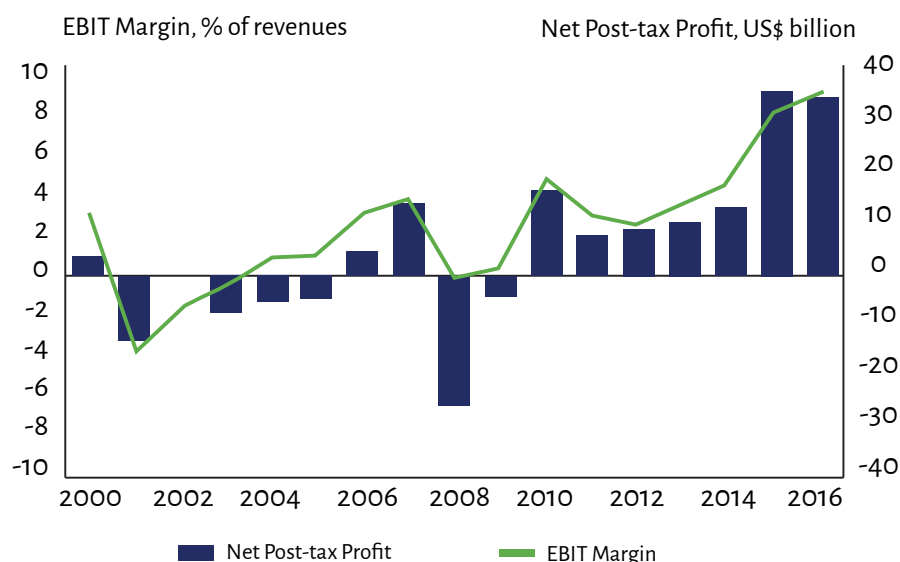
SECTION FOUR

Financial performance

Following the record profits made by airlines globally in 2015 which were the strongest in history, there was a slight drop in 2016 net performance according to IATA. Globally, airlines posted US\$34.8 billion after-tax profit from US\$35.9

billion made in 2015. The operating margin of 8.9% of revenues in 2016 was up from 8.6% in 2015 and more than three times that achieved in 2012.

Figure 4.1: Global commercial airline profitability



Source: IATA WATS

Operating profits in 2016 were up slightly in 2016 at US\$62 billion from 61.8 billion reported in 2015. The drop in the net tax level was attributed to higher non-operating expenses. The industry has seen capital productivity trend upward over the past few years and for only the second time on record, in 2016 the air transport industry's return on capital exceeded its cost of capital. The industry generated a return

on invested capital (ROIC) of 9.9%, which, for the second consecutive year, adequately rewarded equity owners. The industry's profit however only represented US\$9.13 of profit per passenger. The strongest financial performance is being delivered by airlines in North America at US\$18.15 per passenger in 2016 while the weakest region is Africa with an estimated US\$1.45 loss per passenger in 2016.

Table 4.1: Worldwide profitability and return on capital

Worldwide airline Industry	2015	2016
ROIC, % invested capital	9.9%	9.9%
Net post-tax profits, \$billion	35.9	34.8
\$ per passenger	10.08	9.13

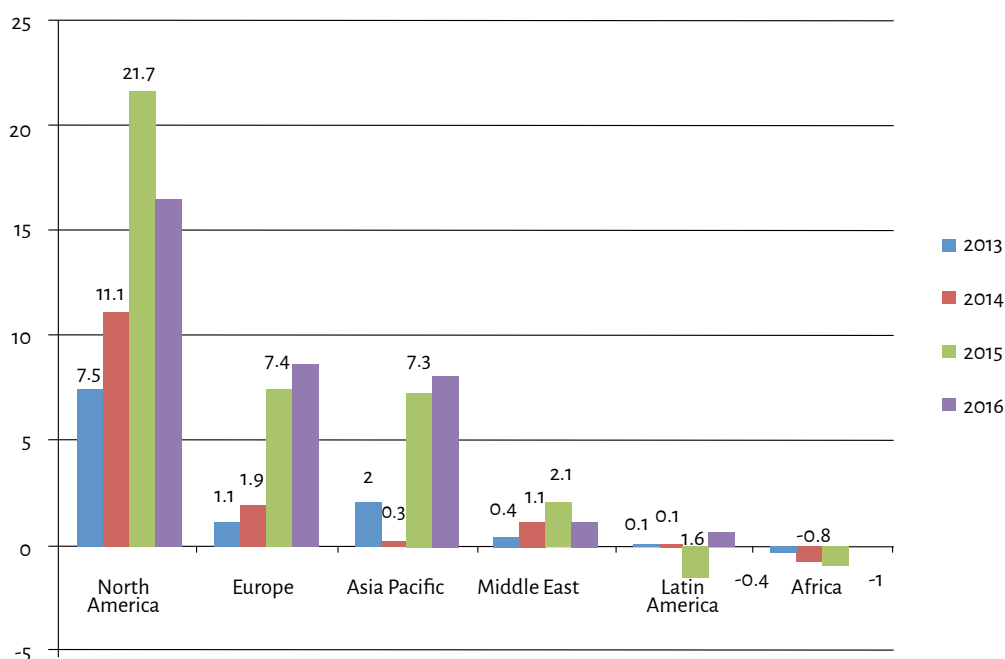
Source: IATA

Table 4.2: Airline profits per passenger by region

Region	Profit per passenger 2015 (US\$)	Profit per passenger 2016 (US\$)
North America	24.57	18.15
Europe	7.91	8.67
Asia-Pacific	6.03	6.03
Middle East	11.05	5.31
Latin America	-6.03	2.15
Africa	-12.55	-1.45

Source: IATA

Figure 4.2: Net profit in US\$ billions by region for 2013-2016



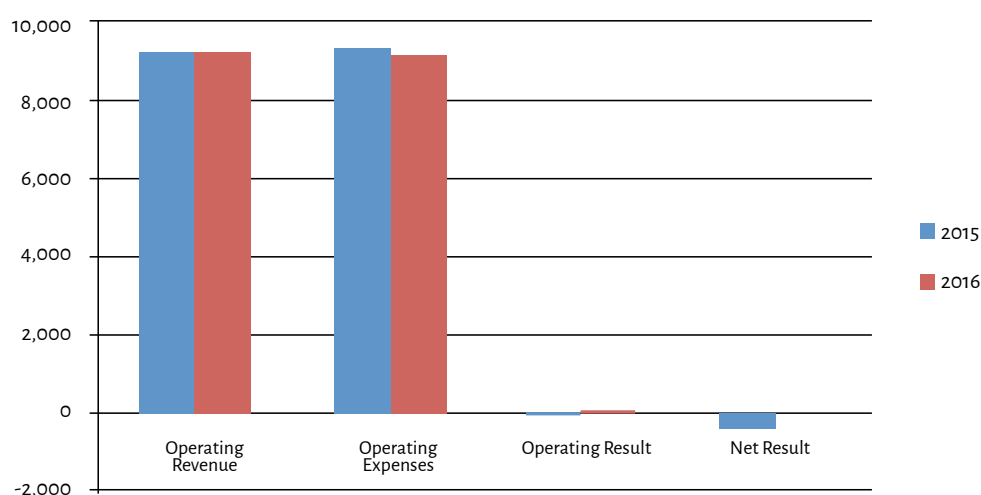
Source: IATA

The strongest financial performance was delivered by airlines in North America which generated a net profit of US\$ 16.5 billion in 2016. European, Asia-Pacific, Middle East and Latin American airlines generated net profits of US\$ 8.6 billion, US\$ 8.1 billion, US\$ 1.1 billion and US\$ 0.6 billion respectively in 2016. African airlines posted net after-tax losses of US\$ 0.1 billion in 2016 due to challenging economic conditions in many economies as outlined in chapter 1 of this report.

Operating revenue and expenses for african carriers

This analysis is limited to 16 AFRAA airlines that reported their financial results for 2016 and 2015. The 16 AFRAA carriers' total operating revenue was US\$ 9.24 billion in 2016 compared to US\$ 9.25 billion in 2015. Operating expenses for 2016 was US\$ 9.15 billion resulting to a net loss of US\$ 54.25 million. Of the 16 participating airlines, 5 reported net profit. Ethiopian airlines was the largest African carrier in 2016 in terms of profits with operating revenue at US\$ 2.55 billion and net profit at US\$ 272.4 million.

Figure 4.3: Financial results of some AFRAA airlines (US\$ millions)



Source: AFRAA

African airlines' financial performance improved in 2016 but the region still generated losses. African airlines are expected to post a net loss of US\$100 million in 2017 according to IATA. Breakeven load factors are relatively low, as yields are a little higher than average and costs are lower. The weak performance by African airlines is mainly attributed to various challenges facing African airlines such as regional conflict, the impact of low commodity prices, blocked funds in some African States, currency fluctuation particularly for oil exporters which will limit the benefits of lower fuel prices.

In 2016, the difficulty of repatriation of funds from some African States was a major challenge faced by several airlines in Africa. One of the main reasons behind the blocked funds was the unavailability of foreign exchange, especially

in countries largely reliant on oil exports for their foreign currency earnings. These States were significantly affected by the steep fall in oil prices from 2014 when the average price per barrel was \$116.6 with oil prices currently hovering around \$50.00 per barrel and at one time went as low as \$30.00 per barrel.

The inaccessibility of funds coupled by the lack of foreign currency led to rapid currency depreciation and foreign exchange losses for airlines operating in the affected States. In Africa, the countries seriously affected are Angola, Algeria, Nigeria and Sudan. Having large amounts of blocked funds is adversely affecting the cash flows of airlines that fly to the affected countries.

SECTION FIVE

African Airports Statistics

According to ACI Africa airport data, African airports carried 182.2 million passengers in 2016. Of these, 62.5% were international passengers, having slightly reduced from 63% in 2015.

The biggest air transport markets in Africa are South Africa, Egypt, Morocco and Ethiopia featuring a total of 8 out of the top 20 busiest airports in Africa. In terms of total

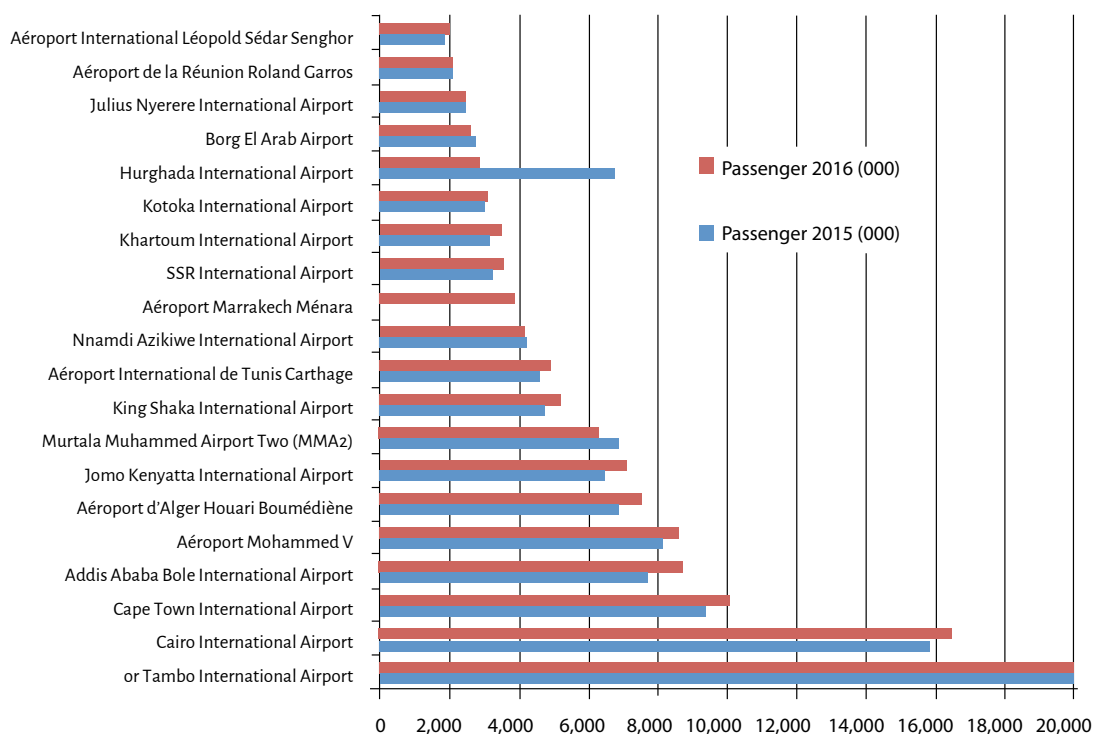
passenger numbers, O.R. Tambo International Airport is the busiest airport in Africa (20.8 million passengers) followed by Cairo International Airport in Egypt (16.5 million passengers), Cape Town International Airport in South Africa (10.1 million passengers), Addis Ababa Bole International Airport in Ethiopia (8.7 million passengers) and Aéroport Mohammed V in Morocco (8.6 million passengers).

Figure 5.1: Top African Airports by Passengers Carried in 2015 and 2016

	City	Country	Airport	International Passengers		Domestic Passengers	
				2015	2016	2015	2016
1	Egypt	Cairo	Cairo International Airport	13,009,578	13,920,270	2,211,177	1,925,931
2	South Africa	Johannesburg	or Tambo International Airport	9,583,760	9,892,657	10,384,653	10,829,119
3	Morocco	Casablanca	Aéroport Mohammed V	7,379,899	7,742,464	795,760	862,105
4	Ethiopia	Addis Ababa	Addis Ababa Bole International Airport	6,644,555	7,397,879	1,096,981	1,332,721
5	Algeria	Algiers	Aéroport d'Alger Houari Boumédiène	4,996,065	5,465,504	1,883,565	2,107,190
6	Tunisia	Tunis	Aéroport International de Tunis Carthage	4,325,629	4,693,520	254,216	206,507
7	Kenya	Nairobi	Jomo Kenyatta International Airport	3,913,778	4,254,143	1,403,009	1,639,530
8	Morocco	Marrakech	Aéroport Marrakech Ménara	3,764,979	3,654,797	177,407	202,364
9	Mauritius	Plaine Magnien	SSR International Airport	3,038,043	3,353,716	159,265	181,977
10	Sudan	Khartoum	Khartoum International Airport	2,602,157	2,949,344	513,986	551,959
11	Nigeria	Lagos	Murtala Muhammed Airport Two (MMA2)	3,023,478	2,785,785	3,778,086	3,455,895
12	Egypt	Borg El Arab	Borg El Arab Airport	2,652,233	2,536,892	135,268	103,952
13	Egypt	Hurghada	Hurghada International Airport	6,226,114	2,424,667	540,230	461,874
14	Ghana	Accra	Kotoka International Airport	2,158,108	2,297,054	712,869	548,567
15	Réunion	Saint-Denis	Aéroport de la Réunion Roland Garros	2,057,251	2,087,617	180	543
16	South Africa	Cape Town	Cape Town International Airport	1,713,047	1,990,621	7,694,328	8,099,797
17	Senegal	Dakar	Aéroport International Léopold Sédar Senghor	1,696,767	1,864,428		
18	Côte D'Ivoire	Abidjan	Aéroport Felix Houphouet Boigny	1,427,287	1,624,691	41,357	88,301
19	Uganda	Entebbe	Entebbe International Airport	1,375,144	1,401,579	14,934	14,169
20	Algeria	Oran	Aéroport International d'Oran Es-Sénia	1,201,304	1,324,787	468,117	522,692

Source: AFRAA/ACI-Africa

Figure 5.2: Top 20 African Airports by total Passengers Carried in 2015 -2016 (000)

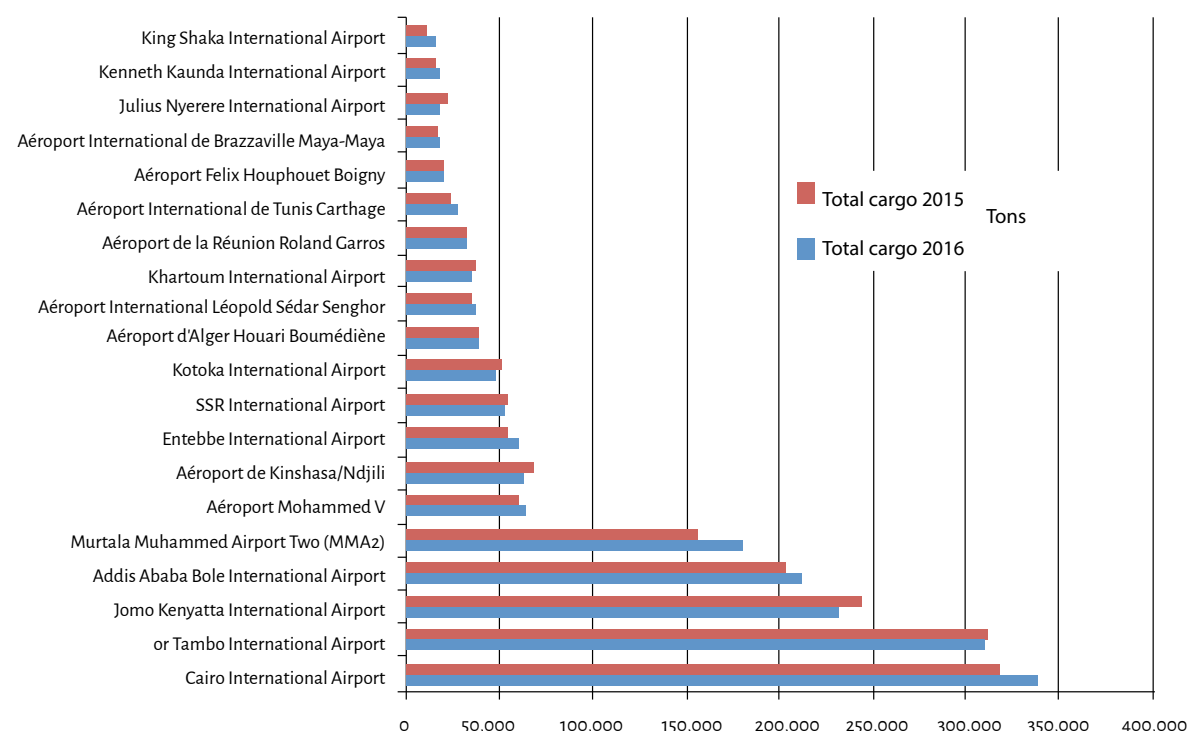


Source: AFRAA/ACI-AFRICA

Freight traffic at African airports increased by 1.5% to 2.06 million tonnes in 2016, compared to 2.03 million tonnes in 2015. Cairo International Airport in Egypt was the major cargo airport in 2016 accounting for 338,344 tonnes. The other cargo hubs among the top 5 in the continent include:

or Tambo International Airport (310,084 tonnes), Jomo Kenyatta International Airport (231,798 tonnes), Addis Ababa Bole International Airport (211,710 tonnes) and Murtala Muhammed International Airport (180,816 tonnes).

Figure 5.3: Top 20 African Airports by Total Cargo Handled in 2016

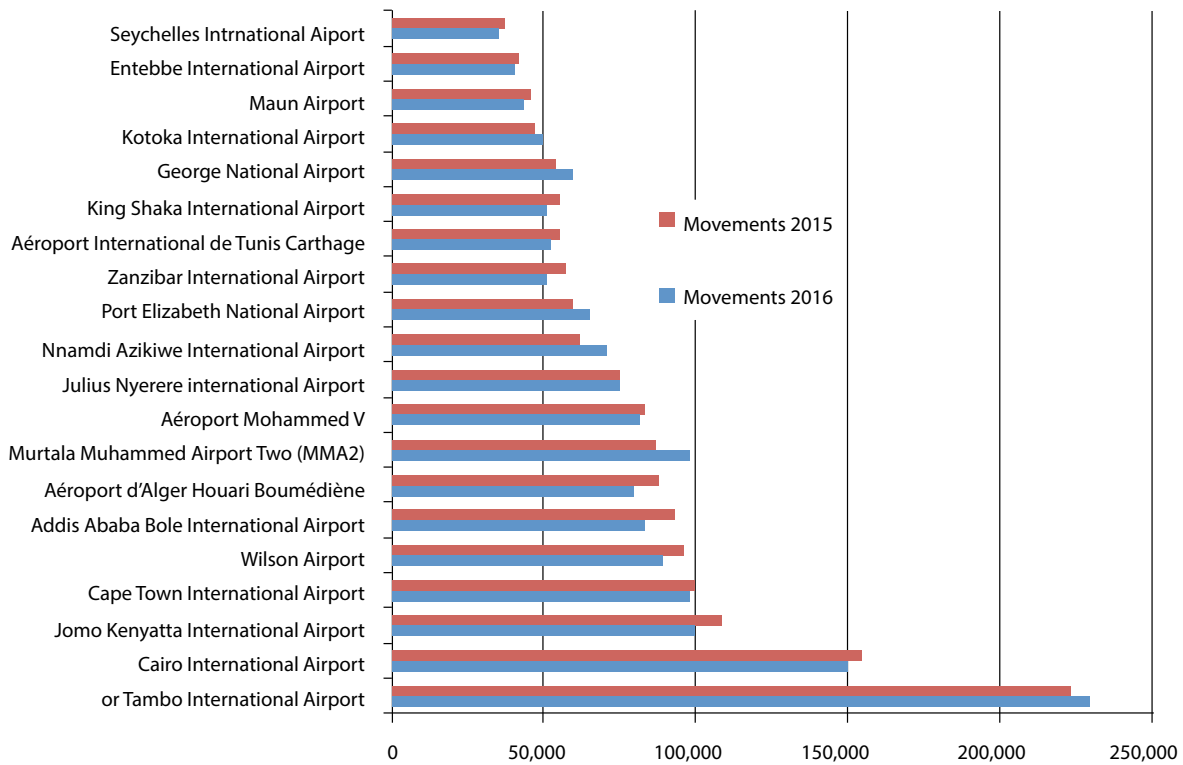


Source: AFRAA/ACI-AFRICA

Aircraft movements at African airports decreased slightly 0.04% in 2016. The top 5 African airports ranked by aircraft movements in 2016 are: or Tambo International

Airport (223,424), Cairo International Airport (154,760), Jomo Kenyatta International Airport (108,563), Cape Town International Airport (99,981), and Wilson Airport (95,981).

Figure 5.4: Top 20 African Airports in 2016 by Aircraft Movement



Source: AFRAA/ACI-AFRICA

SECTION SIX

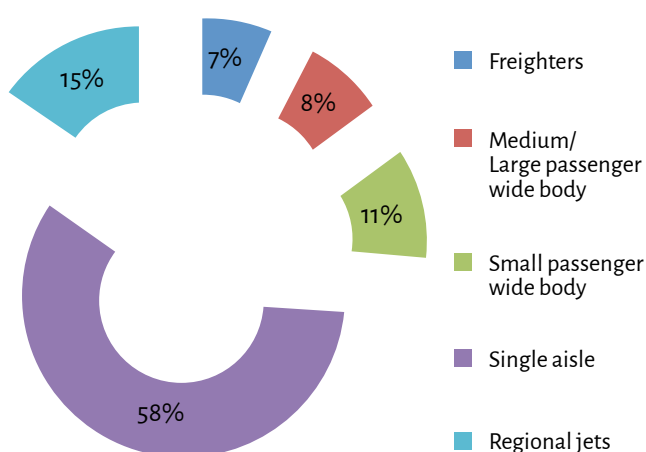
Fleet Composition and Development

Worldwide aircraft deliveries in 2016 was estimated at 1,700 new aircraft, representing an investment by the industry of over \$180 billion and a 3.8% increase in the number of in-service fleet to 27,585 aircraft in 2016 according to IATA. The trend improvement in average returns in the industry has given the confidence to invest on this scale. IATA further reported that about a half of the deliveries in 2016

replaced existing fleet, making a significant contribution to increasing fleet fuel efficiency.

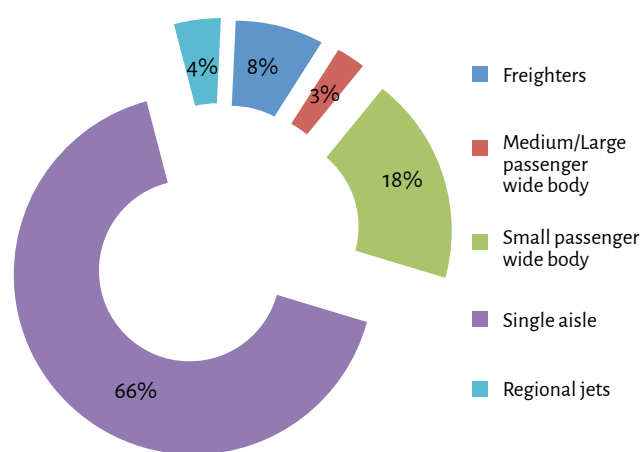
For scheduled airline operations, the number of seats available in the fleet rose to 3.9 million in 2016, adding 6.2% capacity to the market globally and it is estimated that by the end of 2017 there will be 4.2 million available seats.

Figure 6.1: Africa fleet composition – 2016



Source: Boeing Market Outlook

Figure 6.2: Africa's 2036 fleet demand forecast



Source: Boeing Market Outlook

Africa currently has 720 aircraft which makes up 4.1% of the total global fleet. AFRAA airlines in 2016 operated a total of 685 aircraft or 95% of total African commercial fleet (see details in annex 2).

Table 6.1: Global aircraft in service in 2016 and additional demand by 2036

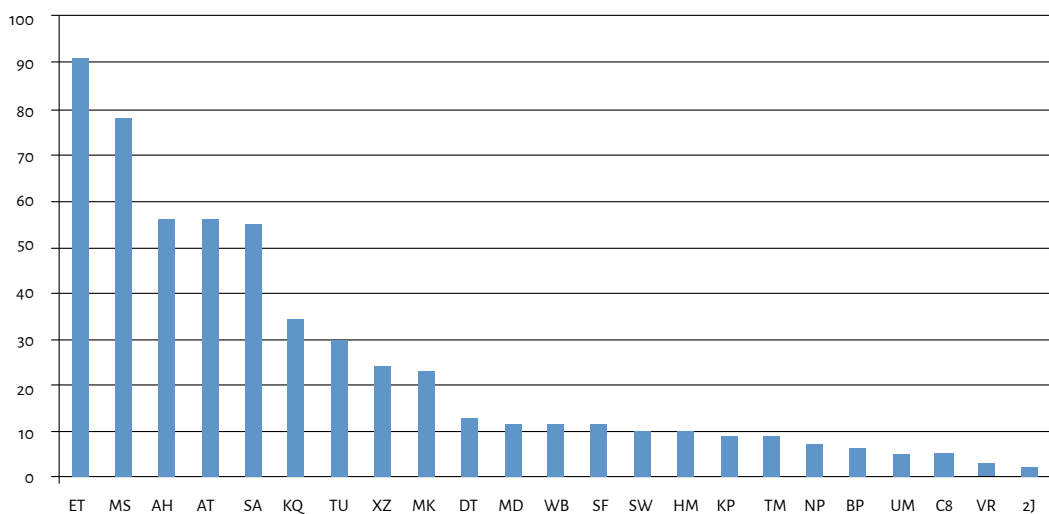
	2016	2036	New Planes	Value (2016 \$B catalog prices)
Regional jets	2,540	2,600	530	110
Single aisle	15,030	32,190	3,470	3,180
Small passenger wide body	2,240	5,710	5,100	1,340
Medium/Large passenger widebody	1,860	3,420	28,140	1,160
Freighters	1,810	3,030	2,380	260
Total	23,480	46,950	39,620	6,050

Source: Boeing Market Outlook

Currently, 418 (58%) aircraft in operation in Africa are made up of single aisle type. The other aircraft sizes are represented by: freighters (7%), Medium/Large passenger widebody aircraft (8%), small passenger wide body aircraft (11%) and

regional jets (15%). The top 5 AFRAA airlines with the largest fleet size in 2016 are Ethiopian Airlines (91 aircraft), EgyptAir (78 aircraft), South African Airways (55 aircraft), Air Algérie (56 aircraft) and Royal Air Maroc (56 aircraft).

Figure 6.3: Fleet of some AFRAA Airlines in 2016



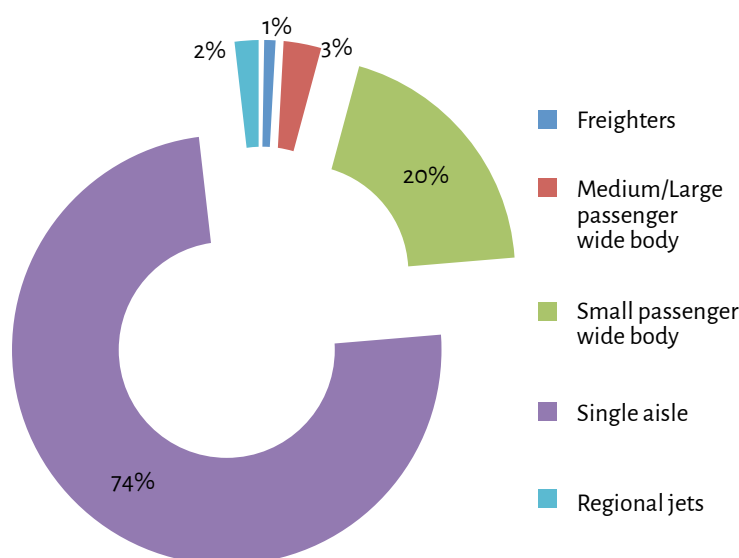
Source: AFRAA

Fleet Forecast

Over the next 20 years, the number of in-service aircraft worldwide according to Boeing is expected to grow at an average annual growth rate of 3.3% to reach 47,000 aircraft in 2036. Consistent with the demand forecasts in commercial aviation, Boeing forecasts that 41,000 new aircraft will be added to or replace some existing fleet in operation between 2016 and 2036. The total cost of the additional fleet

is estimated at over US\$6 trillion. According to the Boeing Market Outlook, by 2036, it is estimated that approximately 40% of all new airplanes will be delivered to airlines based in the Asia region. An additional 40% will be delivered to airlines in Europe and North America combined, with the remaining 20% delivered to the Middle East, Latin America, CIS, and Africa.

Figure 6.4: Africa's 20 year fleet composition forecast



Source: Boeing Market Outlook

According to Boeing, African airlines will need 1,220 new airplanes over the next 20 years to accommodate the traffic growth forecasts. Of this aircraft demand forecast, 74% of the deliveries to African airlines will be single-aisle

airplanes, 23% will be widebody airplanes and regional jet deliveries will total less than 3%. In dollar terms, Africa will invest almost \$180 billion in new airplanes.

SECTION SEVEN

Employee Productivity

IATA estimated that total employment by airlines reached 2.65 million in 2016, a gain of 4.0% compared to 2015 and it is estimated to increase by 4.8% to reach 2.78 million in 2017. Productivity measured in ATKs generated per employees was 490,542 in 2016 compared to 479,674 in 2015 and is

expected to increase to 496,252 in 2017. Unit labour costs are now rising significantly and IATA forecasts an average rise of 2.8% in 2017. Along with rising fuel costs employee costs are one of the major contributions to the upward pressure on unit costs.

Table 7.1: Worldwide airline industry employment and employee productivity

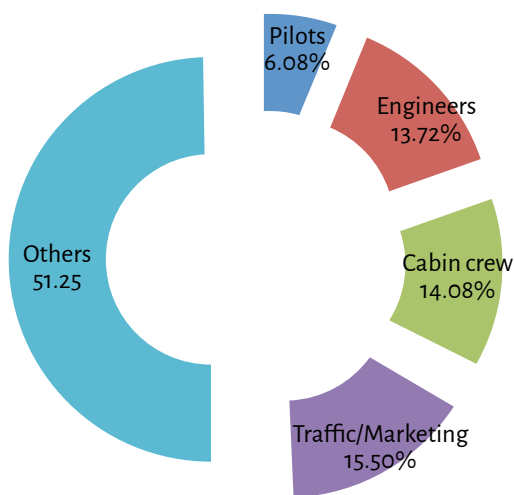
	2015	2016
Labour costs, US\$ billion	150	160
Employment (million)	2.55	2.65
Productivity (ATK/employee)	476,674	490,542
Unit labour cost: \$/ATK	0.123	0.123

Source: IATA, ICAO, ATAG, Oxford Economics

The analysis below is based on the reported data by 21 AFRAA member airlines.

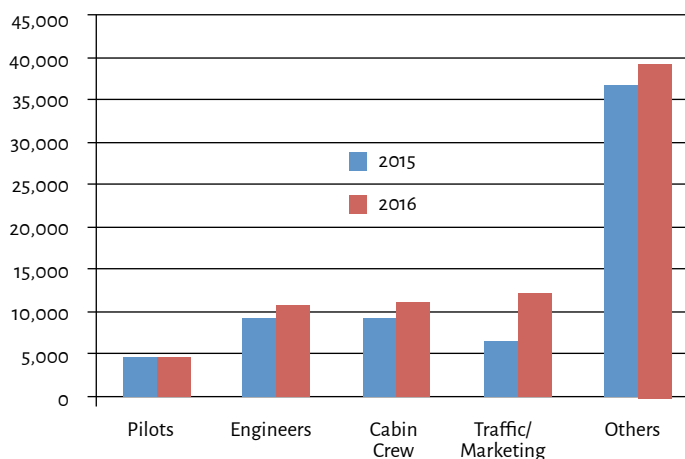
The total number of people employed directly by the 21 AFRAA member airlines that reported their data in 2016 increased by 19.4% from 64,932 in 2015 to 77,542 in 2016.

Figure 7.1: 2016 AFRAA Airlines Employees by Job Type



Source: AFRAA – Reported AFRAA airlines only

Figure 7.2: AFRAA Airlines Employment by Job Type (2016)



Source: AFRAA

Table 7.2: Employee Performance Indicators for some AFRAA airlines

	2015	2016
ATK/employee	389,626	412,281
RTK/employee	227,581	231,551
Number of passengers/employee	652	625
Employee/aircraft	154	151

Source: AFRAA – Reported AFRAA airlines only

The figures show that employee productivity of AFRAA member airlines in terms of ATK/employee is below worldwide average in 2016 by 17%. This may be an indication of overmanning in African airlines.

SECTION EIGHT

Safety

The Aviation Safety Network released the 2016 airline accident statistics showing a total of 20 fatal airline accidents, resulting in 322 fatalities. Despite several high profile accidents, 2016 was among the safest years ever, in terms of fatalities.

Table 8.1: World Airline Fatal Accidents in 2016

Serial	Date	Type	Operator	Fatalities	Age of aircraft	location
1	8/1/16	Canadair CL-600 CRJ-200PF	West Air Sweden (Cargo)	2	23	Near Akkajaure, Sweden
2	2/2/16	Airbus A321-111	Daallo Airlines	1	19.1	Near Mogadishu (explosion)
3	24/2/16	DHC-6 Twin Otter 400	Tara Air	23	2	Dana, Nepal
4	9/3/16	Antonov 26B (cargo)	True Aviation	3	32	Near Cox's Bazaar Airport, Bangladesh
5	19/3/16	B737-8	flydubai	62	5.25	Rostov Airport, Russia
6	1/4/16	Cessna 208B Caravan	TADSA (charter)	3	7	Near Tayoltita, Mexico
7	13/4/16	BN-2T Islander	Sunbird Aviation PNG	12	32.5	W of Kiunga Airport, Papua New Guinea
8	19/5/16	A320-232	EgyptAir	66	12.8	200 km N of Egyptian Coast, Med. Sea
9	20/7/17	Cessna 208B Grand Caravan (charter)	Toy General Aviation	5	2	Off Jinshan Beach, China
10	3/8/16	B777-300	Emirates	1	13.5	Dubai Airport
11	16/8/16	Cessna 550 Citation II	U/K	2	37	Near Charallave Oscar Machado Zuloaga Airport, Venezuela
12	31/8/16	Cessna 208B Grand Caravan	Ravn Connect	3	3	10 km NW of Russian Mission Airport, AK, USA
13	30/9/16	Cessna 208 Grand Caravan	Llanera de Aviacion	4	24	Near San Antonio de Prado, Colombia
14	2/10/16	Cessna 208 Grand Caravan	Ravn Connect	3	21	19 km W of Togiak, AK, USA
15	13/10/16	Cessna 500 Citation I	Norjet	4	42	N of Kelowna Airport, BC, Canada
16	31/10/16	DHC-4 Caribou	Puncak Regency Admin (cargo)	4	34	11 km S of Ilaga Airport, Indonesia
17	28/11/16	Avro RJ 85	LaMia	71	17.7	18 km S of Rionegro/ Medellin Colombia
18	5/12/16	SA227-AC Metro III (cargo)	Key Lime Air	1	26	N of Pelham, GA, USA
19	7/12/16	ATR-42-500	PIA	47	9.6	Near Havelian, Pakistan
20	20/12/16	B727-2J0F (cargo)	Aerosucre Colombia	5	41.3	16 km W. of Puerto Carreno-Cumaribo Airport, Colombia
Total				322	20.24	

Source: Aviation Safety Network (<http://aviation-safety.net/>)

There were two fatal accidents in Africa and both were likely cases of terrorism. In February, one passenger was killed when a bomb detonated in the cabin of an Airbus A321 that had just departed from Mogadishu, Somalia. While investigation is still on-going, the Egyptian authorities stated that they found traces of explosives after the accident of an EgyptAir Airbus A320 that crashed in the Mediterranean Sea in May with 66 fatalities. This translates to zero safety related airline accidents in Africa in 2016.

The average age of aircraft involved in the accidents was 20.2 years.

In 2015, there were 19 fatal airline accidents worldwide with 580 fatalities of which 2 were in Africa or 10.5% of the total with 53 fatalities.

The low number of accidents in Africa is a continuation of a trend of improving safety standards in the continent due to the efforts by various stakeholders including Governments, civil aviation authorities, airlines, airports, ground handlers, ICAO, IATA, AFCAC, AFRAA, ACI and others. These efforts need to continue to be enhanced. We would like to see all eligible African airlines obtain IOSA certification and ground handlers ISAGO registration to assure the customers that African aviation adheres to industry best practices in safety, security and operations.

IOSA

As of May 2017, Africa had 45 airlines on the IOSA registry comprising almost all the major carriers on the continent. In the past year between May 2016 and April 2017, seven more airlines acquired IOSA registration whilst a similar number were not able to renew their IOSA registration.

Below is the list of African airlines on the IOSA registry (45):

- Africa World Airlines (Ghana)
- Air Algérie
- Air Austral (Reunion Islands)
- Air Botswana
- Air Burkina
- Air Cairo (Egypt)
- Air Madagascar
- Air Mauritius
- Air Namibia
- Air Peace Ltd (Nigeria)
- Air Seychelles
- Allied Air (Nigeria)

- Almasria Universal Airlines (Egypt)
- Arik Air (Nigeria)
- Cameroon Airlines Corporation
- CemAir (Pvt) Ltd (South Africa)
- Comair (South Africa)
- Compagnie Aérienne ASKY
- Dana Airlines (Nigeria)
- EgyptAir
- Ethiopian Airlines
- FlyEgypt
- Kenya Airways
- LAM Mozambique Airlines
- Mango Airlines (South Africa)
- Mauritania Airlines International
- Med-View Airlines (Nigeria)
- Nesma Airlines
- Nile Air (Egypt)
- Nouvelair (Tunisia)
- Nova Airways (Sudan)
- Overland Airways Ltd (Nigeria)
- Precision Air Services
- Royal Air Maroc
- RwandAir
- SAFAIR (Proprietary) Ltd
- South African Airlink
- South African Airways
- South African Express Airways
- Starbow (Ghana)
- TAAG Angola Airlines
- TACV Cabo Verde Airlines (Cape Verde)
- Tassili Airlines (Algeria)
- Trans Air Congo (Congo Republic)
- Tunisair

ISAGO

AFRAA urges all ground handling companies to adopt the IATA Safety Audit for Ground Operations (ISAGO) as a vehicle to ensure quality, safety and security including adopting the IATA airport ground handling manual. The basis for this is that AFRAA member airlines are required to be IOSA certified and therefore the ground handlers are also expected to adopt similar quality and safety standards.

	Ground Services Provider	No. of Stations GSP is Registered
1	Aero Services (Egypt)	2
2	Air Mauritius	1
3	ASAM S.A. Assistance Aeroportuaire du Mali	1
4	Aviance Ghana	1
5	BidAir	3
6	Congo Handling	2
7	DAS Handling (Uganda)	1
8	EgyptAir	6
9	Egyptian Aviation Services	3
10	Entebbe Handling Services Ltd	1
11	Global Load Control	3
12	Handling Partner Gabon	1
13	Ground Handling Assistance (Angola)	1
14	Ground2Air (Equity Aviation Indian Ocean Ltd) (Mauritius)	1
15	International Aviation Business (Cairo)	1
16	Kenya Aerotech	1
17	Kenya Airways	2
18	Lilongwe Handling Company	1
19	Link Aero Trading Agency (Egypt)	2
20	MAKS Aviation Services Co. Ltd	1
21	Menzies	14
22	National Handling Services (Zimbabwe)	3
23	New Star Aviation services	1
24	Nigeria Aviation Handling Co.	2
25	RACGAE (Burkina Faso)	1
26	RAM Handling	1
27	RwandAir Ltd	1
28	Senegal Handling Services	1
29	Siginon Aviation (Kenya)	1
30	Skyway Aviation Handling Co. Ltd	3
31	SS Air Aviation Ground Services & Logistics	3
32	Swissport	29
33	TAV Tunisie	1
34	Tradewinds Aviation Services Ltd	2
35	ZAS (Z-Aviation Services) (Egypt)	2
Total		100

It is heartening to note that the number of African stations with ISAGO registration has increased from 84 in May 2016 to 100 by April 2017. AFRAA will continue to work to increase the momentum to get more companies on the ISAGO registry.

SECTION NINE >> AFRAA SECRETARIAT VALUE ADDING ACTIVITIES

9.1 Safety

9.1.1 IOSA Registered Airlines

Safety standards in Africa have increased significantly in the past few years. In 2016, there were no accident related fatal airline accidents in Africa.

The sharply improved safety standards in Africa shows that the various efforts by AFRAA, IATA, AFCAC, ICAO, civil aviation authorities, airports, governments and other stakeholders to enhance a safety culture is yielding positive results. These efforts need to continue to be enhanced.

As of September 2017, Africa had 45 airlines on the IOSA registry comprising almost all the major carriers on the continent. Seven more airlines acquired IOSA registration in

the past year (between October 2016 and September 2017), whilst a similar number were not able to renew their IOSA registration. Among the airlines that failed to renew their IOSA registration are Aero Contractors (Nigeria), Afriqiyah Airways, ALS Ltd (Kenya), Equajet (Congo Republic), Firstnation Airlines (Nigeria) and Sudan Airways. The following airlines were added to the IOSA registry: Air Peace Ltd (Nigeria), CemAir (Pvt) Ltd (South Africa), Dana Airlines (Nigeria), FlyEgypt, Mango Airlines (South Africa), Med-View Airlines (Nigeria) and Overland Airways (Nigeria).

9.1.2 ISAGO (IATA Safety Audit for Ground Operations)

The IATA Safety Audit for Ground Operations (ISAGO) is an important programme for assessing the operational management and control systems of an organisation that provides ground handling services for airlines. The implementation of ISAGO aims to improve safety and cut airline costs by drastically reducing ground accidents and injuries. Among other benefits, ISAGO registration scheme seeks to offer ground handling and airport businesses improved safety oversight, improved quality standards,

safer ground operations, fewer accidents and injuries, harmonised standards, uniform audit process, harmonized auditor training and qualifications, elimination of redundant audits from airlines and reduced costs arising from less damage and less audits.

The number of ground handling service providers with ISAGO registration in Africa continues to grow, increasing from 75 in October 2016 to 100 by September 2017.

9.2 Training and Human Capital Development

In 2017, AFRAA offered various courses, workshops/seminars for purposes of capacity building within African aviation industry to promote safety and security within the

continent. Over 430 participants attended the training as tabled below:

Table 9.1 Courses, Seminars and Workshops conducted during 2017

	Course Name	Dates	Host	Number of Participants
AFRAA Courses				
1	Safety Management Systems for Airline Executives	20 -23 June	SW	18
2	Safety Management Systems for Airlines			14
3	Weight & Balance	26 June - 4 July	BP	5
4	Dangerous Goods Regulations (refresher, 5 sessions)			58
5	Aviation Internal Audit	14 - 18 August	TC	16

AFRAA in conjunction with IATF courses under the IATF Regional Training Partnership

	Course Name	Dates	Host	Number of Participants
6	Airline Document Systems & Control	30 May - 2 June	AFRAA	19
7	Aviation Internal Audit	17 - 21 July	DANA	31
8	Root Cause Analysis	11 - 15 Sept	DANA	23
9	Ground Operations Management	4 - 8 December	AFRAA	25

Workshops and Seminars

10	Seminar/ Workshop	Dates	Host	Number of Participants
11	Training Managers Seminar	13 - 14 February	AFSAC	32
12	CORSIA Workshop	14- 15 February	AFRAA headquarters in conjunction with IATA	22
13	Airline & Blocked Funds Forum	4th April	AFRAA headquarters	55
14	AFRAA/IATA Security Workshop	1 - 2 Aug	KQ Pride Center	75
15	AFRAA/SABRE Commercial Workshop	21 - 22 Aug	AFRAA headquarters	38

9.3 Seeking to Fully Open African Skies

9.3.1 Full Liberalization of African skies

To push for the long delayed full liberalisation of African skies, the Heads of State of the African Union at their Summit in Addis Ababa in January 2015 made a solemn commitment to fully open African skies by 2017. At that Summit 11 States declared their solemn commitment to fully open their skies in conformity with the Yamoussoukro Decision immediately without restrictions.

The original 11 states were joined by 11 more to make it to 22 by September 2017 namely: Benin; Botswana; Cape Verde; Cote d'Ivoire; Egypt; Ethiopia; Gabon; Ghana; Kenya; Liberia; Mali; Mozambique; Nigeria; Republic of Congo; Rwanda; Sierra Leone; South Africa; Swaziland; The Republic of Guinea; Togo and Zimbabwe.

The lack of full liberalization of African skies has been a

major stumbling block to the development of the African aviation industry.

What is significant is that almost all the major aviation states are included in the 22 states constituting over 85% of all traffic movements in the continent.

The far-sighted vision of a Single African Aviation market will help spur the development of aviation which currently accounts for less than 3% of global traffic and where intercontinental traffic is dominated by non-African carriers.

Some significant progress has been achieved in the liberalisation process and those countries that have embraced full implementation of the YD towards a single African sky are realising significant economic benefits.

9.3.2 Removal of non-physical Barriers to Movement of People and Goods

Linked to the liberalization of Africa skies is the need to facilitate the movement of goods and people across our borders. Visa restrictions will not make sense in a fully liberalised operating environment.

AFRAA continues to advocate for the removal of visa requirements among African States and where they are required, for visas to be able to be obtained at the port of entry into a country. Likewise, customs clearance procedures and processes need to be much streamlined and faster to facilitate intra-Africa trade and development.

The African passport was launched at the 27th African Union

(AU) Summit in Kigali, in July 2016 as the African Union forges ahead with its thrust to enhance free movement of people, goods and services. This is set to foster increased intra-Africa trade, integration and socio-economic development.

About 13 states including Ghana, Mauritania, Seychelles and Rwanda are allowing citizens from all African countries who need a visa to be able to obtain it at the port of entry. Other countries have significantly increased the number of countries which visa requirements are relaxed or citizens can get their visas at the point of entry. The momentum needs to be kept up.

9.4 AFRAA Projects

9.4.1 AFRAA Fuel Project

The AFRAA Fuel Tender for the year 2018 kicked off in August 2017. The project was boosted by inclusion of two new member airlines namely Timbis Air Services and Camair-Co. The first round negotiations were conducted in September 2017 and saw a large turnout by the representatives of the participating member airlines which highlights the

importance of the project to the members. The project has been growing each year and from the first round of bids, the airlines are optimistic of even bigger savings on jet fuel costs for their airlines. The project will be concluded in November 2017 with issuance of award letters to winning suppliers at each of the locations.

9.4.2 AFRAA/IATA campaigns against high fuel charges and taxes

AFRAA and IATA continue to work closely together to campaign against high fuel taxes and charges. Through the newly formed IATA-Africa Fuel Working Group (AFWG) where AFRAA has representation, the locations with major

challenges with regards to high fuel taxes and charges, supply disruptions and lack of foreign currency have been identified and prioritised. The locations include Lagos, Abuja, Casablanca, Gaborone, Lusaka, Bujumbura and Dar es Salaam.

During the AFWG meeting at the IATA Fuel Forum in St. Petersburg in 2017, it was agreed that the IATA Fuel Team embarks on the development of a communications and data repository tool that gives airlines prompt and convenient access to current and historical information on IATA commercial fuel activities in various locations – the same type of information that is made available through the Quarterly Updates. With the tool, airlines will be able

to receive updates on individual IATA commercial fuel activities promptly (instead of waiting for the Quarterly Update to be issued) and be able to access historical information on each activity to understand its background or track its progress. The members of the AFWG will then be given access rights to access the tool. This will largely boost monitoring of the progress of lobbying efforts at each of the target locations.

9.4.3 Route Network Coordination Project

Following the relaunch of the AFRAA Route Network Coordination Project in 2014, significant progress on commercial cooperation amongst the participating airlines has been achieved up to 2016. Several airline pairs realized 20 Interline Electronic Ticketing Agreements, 10 codeshares and 16 Special Pro-rate Agreements on various routes. AFRAA is working with Milanamos as the data partner for the Project. Milanamos' tool, PlanetOptim. Future, is being used to provide scenarios on viable routes for schedule realignment, network rationalization, codeshares and other commercial and tactical partnerships among airlines. The tool is also useful for conducting demand and costs/benefits analysis on selected city-pairs therefore maximizing

traffic and revenues for airlines. Milanamos also works with AFRAA to avail reports on request for interested airlines on market analysis.

The major achievement was the launch of the first North West Africa/East Africa Route Casablanca/Nairobi with Royal Air Maroc Operating and Kenya Airways participating carrier on 31 March 2016. The Route was operating on a triple weekly basis. AT added a 3rd frequency for the winter IATA season 2016/2017. The example needs to be duplicated by other participants in order to recapture maximum market share.

Another major achievement has been EgyptAir – Kenya Airways Codeshares on 7 points and beyond.

9.4.4 AFRAA Ground Handling Project

Now in its fourth year, the AFRAA Ground Handling Project was launched with the objective of facilitating beneficial ground handling cooperation among airlines with the view to adopt and implement cost-effective common solutions that will address some of the handling challenges being faced by airlines.

In 2017, the Project intensified its lobbying efforts for the reduction of high charges and taxes and for the opening up of markets to competition. The project also established a

link with IATA Ground Handling Council with the aim of pooling members' varied and valuable input to the ground operations industry agenda and attainment of mutual cooperation on ground handling operations. With regards to building capacity through training in areas relevant to ground handling operations and ground handling tender process, AFRAA in conjunction with IATA Airline Training Fund (IATF) conducted training for the participating airlines on ground handling operations management.

9.4.5 AFRAA Cargo Project

The AFRAA Cargo Task Force was formed in 2015, with the main objective to identify areas where African airlines could cooperate to reduce costs and enhance revenues in collaboration with other relevant stakeholders.

In September 2016, the AFRAA Secretariat brought together Heads of Cargo of its member airlines for the launch of the Cargo Steering Committee which has been included among the projects of the Association. The meeting, which was held in Nairobi, reviewed the concept paper

and discussed in detail the proposed areas of mutual support and beneficial cooperation among members on cargo operations with the aim to develop and grow the members' cargo business in Africa and beyond.

Eng. Walaa Yousri, Vice President Cargo Operations at EgyptAir is the Chairman of the Project and Mr. Sanjeev Gadhia, Chief Executive Officer at Astral Aviation is the Vice Chairman.

9.5 Blocked Funds

A major challenge facing airlines is that of blocked funds in some states. Blocked funds are monies generated by an airline in foreign operations that cannot be moved from that country to another for any reason. Some governments – notably those which were largely reliant on oil exports for their foreign currency earnings were greatly affected by the steep fall in oil prices from 2014 when the average price per barrel was \$116.6 with oil prices having remaining below \$55.00 per barrel since then and at one time went as low as \$30.00 per barrel.

The countries seriously affected are Nigeria, Angola and Sudan (whose oil revenues were also affected by the secession of South Sudan which became independent in July 2011 where most of the oil fields are located). The lack of foreign currency is causing the local currency to depreciate rapidly resulting in the creation of parallel exchange rate and eroding the value of sales in the affected States.

AFRAA is working closely with the governments of Nigeria, Angola and Sudan. In this regard, AFRAA is collaborating closely with various stakeholders including IATA, AASA,

airlines, regional airline Boards of Airline Representatives (BAR associations) and the relevant civil aviation authorities so that our combined lobbying can have much more impact.

Due to these sustained collaborative efforts, we have managed to reduce the amount of blocked funds in Nigeria and Egypt. However, success has been limited with the price of oil expected to remain low for some time which is likely to result in foreign currency issues persisting in some of those States. The lobbying efforts are however continuing where we are highlighting the positive economic and

social contributions of air transport realised through better connectivity, trade and tourism and thus urging the affected states to give airlines priority in the allocation of foreign exchange.

It is in everybody's interest to ensure that airlines are paid on-time, at fair exchange rates and in full. Air connectivity is vital to African economies. The struggling African airlines cannot afford not to receive the funds they generate from their operations. So the efficient and timely repatriation of revenues is critical for airlines to be able to play their role as a catalyst for economic activity.

9.6 Development of AFRAA Land

Significant progress was made in 2017 towards the development of AFRAA parcel of land located at its headquarters in Nairobi. The site hand over took place on 07 September 2017 and was presided over by Land plan consortium, the lead architect team where the signing of construction contract between AFRAA the (client) and Roofspec & Allied Works (main contractor) was done. The project contract period is 54 weeks from the date of

commencement and the completion date is scheduled for 2 October 2018. The defect liability period will be six months from the practical completion date and the official construction commenced on 18 September 2017. The contract has been registered with the Kenya Revenue Authority as required by law.

Development of the land will generate additional revenue for the Association for the benefit of its members.

9.7 AFRAA Aviation Stakeholders Convention

AFRAA in partnership with Tunisair hosted the 6th Aviation Stakeholders Convention in Hammamet, Tunisia from 7-9 May 2017 at the Medina Mediterranea in Yasmine Hammamet – Tunisia. The Convention's aim is to foster dialogue between stakeholders in order to build sustainable networks in supply chain management and create a competitive environment for aviation business in the continent. The three-day conference was convened under the high patronage of the Ministry of Transport of the

Republic of Tunisia and was held under the theme "Collaboration for sustainable aviation growth in Africa". Over 350 registered delegates from 43 countries across the world participated at the Convention. The event had 14 sponsors and 26 exhibitors.

Air Tanzania kindly offered to host the next Convention scheduled to take place from in April 2018 in Zanzibar. Both teams have kicked off preparations for the 2018 edition of the event.

9.8 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 five member airlines and five partners that joined AFRAA in 2017. The new member airlines are: Express Air Cargo, Jubba Airways, Libyan Wings, Nouvelair Tunisie and Timbisair. The new partners are

CellPoint Mobile, Derichebourg Atis, Palma Holding, US Aviation Services and V1 Aviation.

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.

9.9 ISO 9001: 2015 Certification for AFRAA

The review and documentation process for the ISO 9001:2015 standard was completed in July 2017. The new quality manual and the departmental risk profile were finalized. Internal audits and management review meeting were done in line with the new standard. AFRAA expects to be fully certified under the new standard after the surveillance audits to be conducted by Bureau Veritas in November this year.

AFRAA will have transited to the new standard well ahead of the June, 2018 deadline set by the certifying body (Bureau Veritas) for all organizations to have transited. Attainment of the new standard 9001:2015 will greatly improve the internal systems within AFRAA and therefore boost the effectiveness of the organization in achieving its objectives on behalf of the member airlines

9.10 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 resources and assistance that benefits members, protecting their interest and provides support for better economic environment for their operations.



amadeus

1

Fuel efficiencies with more accurate calculations:

- Average savings potential between **\$3-\$6 million** annually
- **76% decrease** in number of flights with overestimated zero-fuel weight (ZFW) compared to other providers
- Flights within 1% ZFW increased from **75% to 94%**

2

Boost productivity:

Over **50 loadsheets** per load controller 8h shift (up to 75 in some instances)

3

Cargo optimization:

Anticipate revenue opportunities through better payload forecasting

More **efficient departure** management and **reduced delays***

*delays associated to miscalculations in load planning

Note: Figures are based on analysis conducted by Amadeus of aggregated airline customer data. Actual results may differ by airline. Carriers should contact Amadeus to discuss their potential savings.

Amadeus Flight Management

Efficient load planning for better business results

Read more at www.amadeus.com/Airlines

SECTION TEN >> FAA OR EASA CERTIFIED AFRICAN MROs



Aerotechnic Industries (ATI)

Contact:
Tel: France: +33 (0)6 60183080
Tel: Morocco: +212 66 16 85 344
Fax: +212 52 2539733
Email: doleplat@airfrance.fr



Air Algérie 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



EgyptAir Maintenance and Engineering

Contact: Office: +20 2-22674512
Email: contatctus_me@egyptair.com;
www.egyptair-me.com



Ethiopian Airlines

Contact: Nebil Mohammed
Director MRO Sales
NebilM@ethiopianairlines.com
Tel: +251 115 14708130



Kenya Airways Engineering & Maintenance

Contact: Mr. Cornelius Mayende
Manager Technical Sales & Marketing
Tel: +254 738 006458
Email: technical.sales@kenya-airways.com
www.kqmro.com



South African Airways Technical

Contact: Mr. Mike Kenny
Executive Manager Business Development
& Sales
Tel: +27 119789993
Email: mikekenny@flysaa.com /
SATMarketing@flysaa.com



Sabena Technics

Contact: Chedly Damergi
Sabena technics MIR
General Manager
Tel: +216 73520750
Mobile: +216 29993010
Fax: +216 73520746
Email: chedly.damergi@sabentechnics.com.tn



Sneema Engine Services

BP 87
Aéroport Mohammed V
Shannon Industrial Estate
Nouasser Casablanca
MarocTel +212 522 536 900
Email: sneema.morocco@sneema.ma



Tunisair Technics

Complexe technique aéroport Tunis Carthage
2035 Tunis
Tel: +216 71 751 500
Email: Contact@TunisairTechnics.com

SECTION ELEVEN >> FAA OR EASA CERTIFIED TRAINING CENTRES



EgyptAir Training Center

Contact:

Tel: +202 22674660

Email: vptrainingcenter@egyptair.com



Ethiopian Aviation Academy

Contact: Tigist Terefe

Manager Sales & Business Development

Tigistte@ethiopianairlines.com

Tel: +251 115 174013



Kenya Airways Pride Centre

Contact: Dr. Mbithe Anzaya

Head of Learning and Development

Tel: +254 020 264 22846/64.

Email: learning.development@kenya-airways.com



RAM Academy

Contact: Campus Royal Air Maroc

Casablanca, Maroc 20200

Tel.: +212 522 420 700/02

Fax: + 212 22 91 25 81

Email: azamrane@royalairmaroc.com / mroudani@royalairmaroc.com



South African Airways Learning & Development

Contact: Ms. Nivy Moodley

Head of SAA Learning & Development

Email: NivyMoodley@flysaa.com



Tunisair Training Centre

Contact: Boutheina Klass

Directrice du Centre de Formation Tunisair

Tel: +216 70 837 000 Ext 2958

Email: boutheina.khlass@tunisair.com.tn

SECTION TWELVE >> AIRLINES WITH AIRCRAFT SIMULATORS



Aviation Training Center of Tunisia (ATCT)

2 A320 aircraft simulators

Contact: Mr. Mohammed Mzah
Chief Executive Officer
or

Capt. Akram Sellami

Head of Training

Tel: +216 71911811

Fax: +216 71911606

Email: atct@atct.com.tn



EgyptAir Training Center

A320, A330, A340, B737NG and B777 full flight simulators

Tel: +202 22651440

Fax: +202 2265 6240

Email: a_sowedan@egyptair.com



Ethiopian Aviation Academy

B737NG and B757/B767 full flight simulator trainings

Tigist Terefe

Manager Sales & Business Development

Tigistte@ethiopianairlines.com

Tel: +251 115 174013



Kenya Airways Pride Centre

B737 NG full flight simulator

Contact: Dr. Mbithe Anzaya

Head of Learning and Development – Pride Centre

Tel: (254) 020 264 22846/64

Email: learning.development@kenya-airways.com



CasaAero S.A.S

B737-400/500C and B737-700/800NG full flight simulators

Direction de la Formation Technique

Email: dft@royalairmaroc.com

Tel: +212 5 22 91 25 38

Fax: +212 5 22 91 28 94

SECTION THIRTEEN >> AFRAA AIRLINES – INDIVIDUAL SUMMARY FACTS



MR. AYAD BOURHANE
Chief Executive Officer

ADDRESS

Avenue Ali Soilihi
Moroni, Malouzi Union des Comoros
Tel: +2697739570
www.flyabaviation.com

IATA CODE: Y6

ICAO CODE: CIK

AFRAA MEMBERSHIP

Became member in 2017
Established in 2013

OWNERSHIP STRUCTURE

Privately Owned

COMMERCIAL PARTNERSHIP

N/A

DESTINATIONS SERVED

Domestic	4
Intra-Africa	2

EMPLOYEES

FLEET

Embraer 120	2
Boeing 737	1



MR. ABUBAKER ELFORTIA
General Manager

ADDRESS

PO Box 83428, Ali Khalifa Zaidi St,
Tripoli, Libya
Tel: +218 21 444 4409
Fax: +218 21 4449128
SITA: TIPABXH
www.afriqiyah.aero

IATA CODE: 8U

ICAO CODE: AAW

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

1086

FLEET

Airbus A300-600RF	1
Airbus A319-100	3
Airbus A320-200	5
Airbus A330-200	2
Airbus A330-300	1



CAPT. BAKHOUCHE ALLECHE
Director General

ADDRESS

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

IATA CODE: AH

ICAO CODE: DAH

AFRAA MEMBERSHIP

Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Aigle Azur
Royal Air Maroc
Tunisair
Turkish Airlines

DESTINATIONS SERVED

Domestic	29
Intra-Africa	9
International	35

EMPLOYEES

9 016

FLEET

Airbus A330-200	8
Boeing B767-300	3
Boeing B737-800	25
Boeing B737-600	5
ATR72-500	12
LC-100-30	1
Boeing 737-700F	2



MS. AGNES KHUNWANA
General Manager

ADDRESS

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

IATA CODE: BP

ICAO CODE: BOT

AFRAA MEMBERSHIP

Became member in 1991
Established in 1947

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	4
Intra-Africa	4

EMPLOYEES

411

FLEET

ATR42-50	3
ATR72-500	1



CAPT. BLAISE SANOU
Chief Executive Officer

ADDRESS

29, Avenue de la Nation, BP 1459
Ouagadougou, Burkina Faso
Tel: +226 50492323
Fax: +226 50317174
www.air-burkina.com

IATA CODE: 2J

ICAO CODE: VBW

AFRAA MEMBERSHIP

Became member in 2002
Established in 1967

OWNERSHIP STRUCTURE

AKFED/IPS Consortium (Part of
the Aga Khan Network): 88%
Government: 5%
Other: 7%

DESTINATIONS SERVED

Domestic	1
Intra-Africa	5

EMPLOYEES

229

FLEET

Embraer 170	2
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MR. H. NIRINA RAKOTOMALALA
President & Chief Executive Officer

ADDRESS

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

IATA CODE: MD

ICAO CODE: MDG

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 Austral
Air Mauritius
Air Seychelles
Air France

DESTINATIONS SERVED

Domestic	12
Intra-Africa	4
International	3

EMPLOYEES

1,017

FLEET

Airbus 340-300	2
Boeing 737-800	1
DHC6-300	3
ATR72-500	2
ATR72-600	2



MR. SOMAS APPAVOU
Chief Executive Officer

ADDRESS

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

IATA CODE: MK

ICAO CODE: MAU

AFRAA MEMBERSHIP

Became member in 1985
Established in 1967

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Air France
Air Madagascar
Emirates
Air Austral
Malaysia Airlines
Hong Kong Airlines
Air India
Kenya Airways
South African Airways
Singapore Airlines
Virgin Australia Airlines
China Eastern
KLM Royal Dutch Airlines

DESTINATIONS SERVED

Domestic	1
Intra-Africa	9
Intercontinental	16

EMPLOYEES

2753

FLEET

Airbus 340-300	4
Airbus 340-300E	2
Airbus 330-200	2
ATR72-500	3

FLEET ON ORDER

Airbus 350-900 XWB6	
Airbus 330-900 Neo	2
Airbus 319-100	2
A350-900 XWB	2



ADVOCATE MANDI E. SAMSON
Ag. Managing Director

ADDRESS

Air Namibia (Pty) Ltd,
PO Box 731, Windhoek, Namibia
Tel: +264 61 2996002
Fax: +264 61 2996003
www.airnamibia.com.na

IATA CODE: SW

ICAO CODE: NMB

AFRAA MEMBERSHIP

Became member in 2000
Established in 1946

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Kenya Airways
Ethiopian Airlines
Air Botswana
Etihad Airways
Air Mauritius
South African Airways
Air Seychelles
Hainan Airlines
Cathay Pacific /Dragon Air
Egypt Air
Delta Airways
Emirates Airlines
El Al Israel
Air Baltic
Air France
Alitalia
Austrian Airlines
British Airways
Condor Airlines
CSA Czech Airlines
Estonian Air
Finn Air
KLM Dutch Airlines
Scandinavian Airlines
Ukraine International Airlines
Turkish Airways

DESTINATIONS SERVED

Domestic	8
Regional	8
Intercontinental	1

EMPLOYEES

668

FLEET

Airbus A319-100	4
Airbus A330-200	2
Embraer ERJ 135	4



MR. ROY KINNEAR
Chief Executive Officer

ADDRESS

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

IATA CODE: HM

ICAO CODE: SEY

AFRAA MEMBERSHIP

Became member in 1993
Established in 1978

OWNERSHIP STRUCTURE

Government: 60%
Etihad Airways: 40%

COMMERCIAL PARTNERSHIP

Air Mauritius
British Airways
Air Berlin
Ethiopian Airlines
Alitalia
Emirates
Qatar Airways
Kenya Airways
Etihad Airways
South African Airways
Air Serbia
Turkish Airline
Air France
Scandinavian Airlines
Jet Airways
Condor Flugdienst
Air Madagascar
Hahn Airlines

DESTINATIONS SERVED

Domestic	6
Intra-Africa	4
Intercontinental	4

EMPLOYEES

789

FLEET

DHC-6-400	6
Airbus 320-200	2
Airbus 330-200	2



ENG. LADISLAUS EVERIST MATINDI
Chief Executive Officer

ADDRESS

Air Tanzania
PO Box 543, Dar es Salaam, Tanzania
Tel: +255 22 2113329
Fax: +255 22 2134069
www.airtanzania.com

IATA CODE: TC

ICAO CODE: ATC

AFRAA MEMBERSHIP

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

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	10
Regional	2

EMPLOYEES

196

FLEET

Bombardier Dash 8-Q300	1
Bombardier Dash 8-Q400	3

FLEET ON ORDER

Bombardier CS300	2
Boeing B787	1



Chief Executive Officer

ADDRESS

Air Zimbabwe Corporation,
PO Box AP 1 Harare, Zimbabwe
Tel: +263 4 58202300
Fax: +263 4 575468
www.airzimbabwe.aero

IATA CODE: UM

ICAO CODE: AZW

AFRAA MEMBERSHIP

Became member in 1981
Established in 1946

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	3
Intra-Africa	2

EMPLOYEES

426

FLEET

Boeing B767-200ER	2
Boeing B737-200	1
Airbus A320-200	1
MA 60	1



MR. AHADU SIMACHEW
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
www.flyasky.com

IATA CODE: KP

ICAO CODE: SKK

AFRAA MEMBERSHIP

Became member in 2010
Established in 2009

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

APG Airline
Aigle Azur
Starbow
Air France
KLM

DESTINATIONS SERVED

Domestic	
Intra-Africa	19

FLEET

Boeing 737-700	3
Boeing 737-800	1
Dash 8 Q400	4



MR. SANJEEV GADHIA
Chief Executive Officer

ADDRESS

Jomo Kenyatta International Airport,
PO Box 594, Nairobi 00606 - Kenya
www.astral-aviation.com

IATA CODE: 8V

ICAO CODE: ACP

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

Fully owned by Kenyans

COMMERCIAL PARTNERSHIP

Air Arabia
Egypt Air
Air Mauritius
Air Uganda
ANA Aviation UK
Atlas Air USA
British Airways
Brussels Airlines
Emirates
Emirates Cargo
Ethiopian Airlines
Etihad
Kenya Airways
KLM Air France Group
Korean Airlines
Lufthansa Cargo
Precision Air
Qatar Airways
Rwanda Air
Saudia Airlines Cargo
Swissair
Singapore Airlines Cargo
Virgin Atlantic
South African Airways

DESTINATIONS SERVED

Domestic	4
Intra-Africa	9
Intercontinental	2

Charters to over 50 destinations in Africa

EMPLOYEES

30

FLEET

Boeing 747-400F	1
DC-9-34F	1
Boeing 727-200F	2
Fokker F27	1



ENG. AHMED OSMAN MOHAMED
AHMED ABU SHAIRA
Chief Executive Officer

ADDRESS

PO Box 6899
Arkweet Block 65, Bldg #393
Mamoun Bahaire Strt. Khartoum, Sudan
Tel: +249912327000
www.badrairlines.com

IATA Code: J4

ICAO Code: BDR

AFRAA MEMBERSHIP

Became member in April 2016
Established in 2004

OWNERSHIP STRUCTURE

100% Private
Mr. Ahmedosman Abushaer 50%
Mr. Hashim Yousif ElDigair 50%

COMMERCIAL PARTNERSHIP

Sudan Airways

DESTINATIONS SERVED

Domestic	7
Regional	2
International	2

EMPLOYEES

348

FLEET

Boeing 737-300	1
Boeing 737-500	4



MR. ERNEST DIKOU
Chief Executive Officer

ADDRESS

Immeuble La Rotonde-Boulevard
de la liberté
BP 4852 Douala-Cameroun
Tel: +237 33 422010 / 33 4220 13
Fax: +237 33 422030 / 33 42 30 15 /
33 422980 / 33 422985
www.camair-co.cm

IATA CODE: QC

ICAO CODE: CRC

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	6
Intra-Africa	2

EMPLOYEES

FLEET

Boeing 737-700	2
Boeing 767-300	1
MA60	2



MR. BIENVENIDO ESONO
Chief Executive Officer

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

IATA CODE: C2
ICAO CODE: CEL

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 4
Intra-Africa 10
Intercontinental 1

FLEET
ATR 42-500 1
ATR 72-500 2
Boeing 737-800 3
Boeing 777-200 2



MR. DESIRE BALAZIRE BANTU
Chief Executive Officer

ADDRESS
130 Boulevard du 30 juin
Immeuble Elembo
Kinshasa, R D Congo
www.congoairways.com

IATA CODE: 8Z
ICAO CODE: CGA

AFRAA MEMBERSHIP
Became member in November 2016
Established in 2014

DESTINATIONS SERVED
Domestic 9
Intra-Africa

EMPLOYEES
365

FLEET
Airbus 320 - 216 2
Bombardier Q400 2



MR. ANDREAS KAIAFAS
Chief Executive Officer

ADDRESS
C/ENRIQUE NVO
S/N Amanda Building N°89 - Malabo
Bioko Norte - Equatorial Guinea
Tel: +240 333 09 04 71
Email: info@cronosair.com
www.cronosair.com

IATA CODE: C8
ICAO CODE: CRA

AFRAA MEMBERSHIP
Established in 2007
Became member in 2015

DESTINATIONS SERVED
Domestic 3
Intra-Africa 6

EMPLOYEES
157

FLEET
BAE 146 - 1
EMBRAER 135 - 2
EMBRAER 145 - 2



A STAR ALLIANCE MEMBER



MR. SAFWAT MUSALLAM

Chairman & Chief Executive Officer
EgyptAir Holding Co.

ADDRESS

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

IATA CODE: MS

ICAO CODE: MSR

AFRAA MEMBERSHIP

Established in 1932
Became member in 1968

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Star Alliance

DESTINATIONS SERVED

Domestic	8
Intra-Africa	17
Intercontinental	43

EMPLOYEES

29753

FLEET

Airbus 330-200	6
Airbus 330-300	4
Airbus 320-200	4
Airbus 321-200	4
Boeing 737-800	26
Boeing 777-200	1
Boeing 777-300	6

FLEET ON ORDER

Boeing 737-800	3
----------------	---



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

IATA CODE: ET

ICAO CODE: ETH

AFRAA MEMBERSHIP

Founded 21 December 1945
Started operation in 1946
Became member in 1968

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Air Namibia
Sichuan Airlines
Azul Linhas
Alaska Airlines
Aereas Brazil
Afrijet Business svc
Jubba Airways
Nova Air
APG Airlines

DESTINATIONS SERVED

Domestic	20
Intra-Africa	55
Intercontinental	42

EMPLOYEES

10702

FLEET

Boeing 777-300ER	4
Boeing 777-200LR	6
Boeing 787-8	19
Boeing 767-300ER	6
Boeing 737-800	15
Bombardier Q400	19
Boeing 737-700	9
Boeing 757-260F	2
Boeing 777-200LRF	6
Airbus 350-900	5

FLEET ON ORDER

Airbus 350-900	19
Boeing 787-900	4
Boeing 737-MAX8	30
Boeing 777-200LRF	2
Bombardier Q400	5



MR. ANIS RIAHI

Chief Executive Officer

ADDRESS

21 Rue des Entrepreneurs Charguia 2 -
2035 Tunis - Tunisie
Tel: +27 11 622 7281
www.express-aircargo.com

IATA CODE: 7A

ICAO CODE: XRC

AFRAA MEMBERSHIP

Became member in 2016
Established in 2015

OWNERSHIP STRUCTURE

Privately owned

DESTINATIONS SERVED

Domestic
Intra-Africa
Intercontinental

FLEET

Boeing 737-300 QC	1
Boeing 737-300F	1



MR. ABDULLAHI DIRIA WARSAME
Chief Executive Officer

ADDRESS

Ground Floor, Panari Sky Centre
Mombasa Rd, Nairobi, Kenya
www.jubbaairways.com

IATA CODE: 3J

ICAO CODE: JUB

AFRAA MEMBERSHIP

Established in 2008
Became member in 2017

OWNERSHIP STRUCTURE

Private Company Limited

COMMERCIAL PARTNERSHIP

Jubba Airways-Somalia
Daallo Airlines

DESTINATIONS SERVED

Intra-Africa	9
Intercontinental	2

EMPLOYEES

300

FLEET

Airbus A321 - 100	1
Fokker 50	1



MR. SEBASTIEN MIKOSZ
Group Managing Director &
Chief Executive Officer

ADDRESS

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

IATA CODE: KQ

ICAO CODE: KQA

AFRAA MEMBERSHIP

Became member in 1977
Established in 1997

OWNERSHIP STRUCTURE

Individual Kenyan shareholders: 55.24%
KLM: 26.73%
Government: 29.8%

COMMERCIAL PARTNERSHIP

KLM
Air Mozambique
Etihad Airways
Garuda Indonesia
Vietnam Airlines
Korean Airways
Jet Airways
China Southern
Air France
Precision Air
Comair
Air Mauritius
Air Burkina
China Eastern
Aeroflot
Air Namibia
Royal Air Maroc
JamboJet
Hongkong Airways
Egypt Air

DESTINATIONS SERVED

Domestic	2
Intra-Africa	39
Intercontinental	10

EMPLOYEES

3596

FLEET

Boeing 787-8	7
Boeing 737 - 700	2
Boeing 737 - 800	8
Embraer 190	15
Boeing 737 -300F	2



DR. ANTONIO PINTO
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

IATA CODE: TM

ICAO CODE: LAM

AFRAA MEMBERSHIP

Became member in 1976
Established in 1936

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Ethiopian Airlines
Kenya Airways
South African Airways
TAAG Angola Airlines
KLM
British Airways
Qatar Airways
Etihad Airways
Emirates
Air France
Hann Air
Air Botswana
Cathay Pacific
Thai Airways
Delta Airlines
Turkish Airlines
Air Mauritius

DESTINATIONS SERVED

Domestic	11
Intra-Africa	4

EMPLOYEES

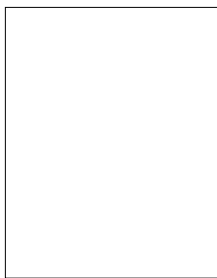
909

FLEET

Boeing 737-700	1
Boeing 737-500	1
Embraer 190	2
Embraer 145	3
Bombardier Q400	2

FLEET ON ORDER

Bombardier Q400	2
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CAPT. FATHI R. SHATTI
Chief Executive Officer &
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

IATA CODE: LN
ICAO CODE: LAA

AFRAA MEMBERSHIP
Became member in 1968
Established in 1965

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	8
Regional	9
International	8

FLEET

Airbus 320-200	6
Airbus 330-200	4
Bombardier CRJ900	6
ATR 42-500	2

FLEET ON ORDER

Airbus 350-900	6
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MR. MOHAMED RADHY OULD BENNAOUI
Chief Executive Officer

ADDRESS
PO Box 7991
Nouakchott Airport
Mauritania
Tel: +222 45241253
www.mauritaniaairlines.mr

IATA CODE: L6
ICAO CODE: MAI

AFRAA MEMBERSHIP
Established in 2010
Became member in 2015

DESTINATIONS SERVED

Domestic	2
Intra Africa	8
International	1

FLEET

Boeing 737-500	2
Boeing 737-700	1
ERJ145	1

FLEET ON ORDER

Boeing 737 Max 8	1
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MR. AHMED ALY
Chief Executive Officer

ADDRESS
Cairo International Airport, Terminal 1
4 Obour Buildings Salah Salem St., Cairo
7 Aswan Square 7 Behind Atlas Hotel
Mohandseen - Giza - Egypt
Contact Info:
Inside Egypt 19415
Outside Egypt (+20) 2 26968000
www.nileair.com

IATA CODE: NP
ICAO CODE: NIA

AFRAA MEMBERSHIP
Established in 2012
Became member in April 2016

COMMERCIAL PARTNERSHIP
Pegasus

DESTINATIONS SERVED

Domestic	4
Intra-Africa	1
International	14

EMPLOYEES
665

FLEET

Airbus 320-200	5
Airbus 321-200	2

FLEET ON ORDER

Airbus 320-200	1
Airbus 321-200 Neo	1



MR. CHOKRI ZARRAD
Chief Executive Officer

ADDRESS
One Touristique Dkhila 5065 Monastir
Tunis, Tunisia
www.nouvelairtunisie.com

IATA CODE: BJ
ICAO CODE: LBT

AFRAA MEMBERSHIP
Became member in 2017
Established in

OWNERSHIP STRUCTURE
Privately Owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Domestic 4
Intra-Africa 1
Intercontinental 16

EMPLOYEES
614

FLEET
Airbus 320-200 9



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

IATA CODE: PW
ICAO CODE: PRF

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
LAM Mozambique
Kenya Airways
RwandAir

DESTINATIONS SERVED
Domestic 8
Intra-Africa 3

EMPLOYEES
509

FLEET
ATR 72 5
ATR 42 4



MR. DEANA CHUCK
Managing Director

ADDRESS
Centro de Trabajo Arcangel, Barrio de
Paraiso, s/n Crta Aeropuerto km³
Malabo, Equatorial Guinea

IATA CODE: ZR
ICAO CODE: PUN

AFRAA MEMBERSHIP
Founded in 2013
Became member in 2015

DESTINATIONS SERVED
Domestic 2
Intra-Africa 4

EMPLOYEES

FLEET
Embraer 145 3



MR. ABDELHAMID ADDOU
Chairman & Chief Executive Officer

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

IATA CODE: AT
ICAO CODE: RAM

AFRAA MEMBERSHIP
Became member in 1977
Established in 1957

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

COMMERCIAL PARTNERSHIP
Iberia
TAAG Angola Airlines
Etihad Airways Kenya Airways
Saudi Arabia
SN Brussels
Turkish Airlines Aeroflot
Qatar Airways
JetBlue Airways
Omanair
Apg Airlines
Onur Air

DESTINATIONS SERVED
Domestic 19
Intra-Africa 33
International 48

EMPLOYEES
2263

FLEET
Boeing 787-8 5
Boeing 747-400 1
Boeing 767-300 4
Boeing 737-700 6
Boeing 737-800 30
Embraer 190 4
Boeing 737-300F 1
ATR-600 5

FLEET ON ORDER
Boeing 737-800MAX 4



COL. CHANCE NDAGANO
Ag. Chief Executive Officer

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

IATA CODE: WB
ICAO CODE: RWD

AFRAA MEMBERSHIP
Became member in 2009
Established in 2002

OWNERSHIP STRUCTURE
Government: 99%
Bayigamba Robert: 1%

COMMERCIAL PARTNERSHIP
Turkish Airlines Inc
South African Airways
Brussels Airlines
Ethiopian Airlines
Kenya Airways
Qatar Airways
Etihad Airways
Apg Airlines
Hahn Air Lines GmbH
KLM Royal Dutch Airlines
Askya
Delta Airlines Inc
Royal Air Maroc
British Airways PLC
Air Botswana
Air India
Air Mauritius
Accessrail
Jet Airways
Germania Fluggesellschaft
Saudi Arabian Airlines

DESTINATIONS SERVED
Domestic 1
Intra-Africa 17
International 1

EMPLOYEES
749

FLEET
Airbus 330-200 1
Airbus 330-300 1
Boeing 737-800 4
Boeing 737-700 2
Bombardier Q400 2
Bombardier CRJ900 2



MR. MOHAMED ADEN NOOR
Chief Executive Officer

ADDRESS
PO Box 59200-00200
Nairobi, Kenya

IATA CODE:
ICAO CODE:

AFRAA MEMBERSHIP
Became member in 2016
Established in 2007

DESTINATIONS SERVED
Intra-Africa 26
Intercontinental 1

FLEET
Boeing 727-2Q9
Fokker 50
Fokker 27-300
HS 748
Barron 55
Caravan



MR. VUYANI JARANI
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

IATA CODE: SA

ICAO CODE: SAA

AFRAA MEMBERSHIP

Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Air Mauritius
Air Seychelles
All Nippon Airways
Emirates
Etihad Airways
Jet Airways
JetBlue Airways
LAM Mozambique
Mango
RwandAir
SAS
TAM Airlines
US Airways
Virgin Atlantic Airways
Virgin Australia
Star Alliance

DESTINATIONS SERVED

Domestic	5
Intra-Africa	25
International	8

EMPLOYEES

5267

FLEET

Airbus 319	7
Airbus 320	12
Airbus 330 - 200	6
Airbus 330 - 300	5
Airbus 340- 600	9
Airbus 340-300	8
Boeing 737 - 800	6
Boeing 737-300F	2



MR. DITHORISO VICTOR XABA
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

IATA CODE: XZ

ICAO CODE: EXY

AFRAA MEMBERSHIP

Became member in 2003
Established in 1994

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

LAM Mozambique Airlines
SA Airlink
Congo Express

DESTINATIONS SERVED

Domestic	4
Intra-Africa	11

EMPLOYEES

1015

FLEET

Bombardier CRJ 200ER	10
Bombardier CRJ 700	4
Bombardier Dash 8-Q400	10



MR. JAMES ERIC ANTWI
Chief Executive Officer

ADDRESS

832 First Street
PO Box Ko26 Kanda,
Accra – Ghana
Tel: +233 245000000 or 18181 on MTN
www.flystarbow.com

IATA CODE: S9

ICAO CODE: IKM

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	5
Regional	4

EMPLOYEES

226

FLEET

BAe 146	1
ATR 72	1
Bombardier Q400	1

FLEET ON ORDER

Bombardier CRJ100	1
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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

IATA CODE: SD

ICAO CODE: SUD

AFRAA MEMBERSHIP

Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE

Government: 51%
Private: 49%

COMMERCIAL PARTNERSHIP

Nasair

FLEET

Airbus A300B4-600R2	
Airbus A320-200	1
Fokker 50	4
Boeing 737-300	1
Boeing 737-500	1



DR. JOAQUIM CUNHA

President & Chief Executive Officer

ADDRESS

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

IATA CODE: DT

ICAO CODE: DTA

AFRAA MEMBERSHIP

Became member in 1978
Established in 1938

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Air France
British Airways
Brussels Airlines
KLM
Lufthansa
Royal Air Maroc
Kenya Airways
LAM-Linhas Aéreas de Moçambique
South African Airways

DESTINATIONS SERVED

Domestic	12
Intra-Africa	14
Intercontinental	12

EMPLOYEES

3268

FLEET

Boeing 737-700	5
Boeing 777-200ER	3
Boeing 777-300ER	5



MR. JOSE LUIS SA NOGUEIRA

Chief Executive Officer

ADDRESS

Avenida Amilcar Cabral
No. 1 Praia
Republic of Cabo Verde
www.flytacv.com

IATA CODE: VR

ICAO CODE: TCV

AFRAA MEMBERSHIP

Became member in 2014
Established in 1958

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	7
Intra-Africa	2
Intercontinental	5

EMPLOYEES

444

FLEET

Boeing 757-200	1
ATR72-500	2



M. BELKACEM HARCHAOUI
Chief Executive Officer

ADDRESS

BP319, Route de Oued Smar,
Dar El Beida
Algiers, Algeria
Tel: 00213 (0) 21754867
Fax: 00213 (0) 21754866
www.tassiliairlines.dz

IATA CODE: SF

ICAO CODE: DTH

AFRAA MEMBERSHIP

Became member in 2014
Founded in 1997
Commenced operations in 1998

OWNERSHIP STRUCTURE

100% owned by Sonatrach (an Algerian government-owned company)

DESTINATIONS SERVED

Domestic	48
International	5

EMPLOYEES

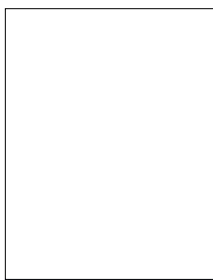
1338

FLEET

Boeing 737-800	4
Bombardier Q400	4
Bombardier Q200	4

FLEET ON ORDER

Boeing 737-800



CAPT. RABEE IBRAHIM
Chief Executive Officer

ADDRESS

25 Trio Estate - Off Limuru Road
PO Box 19264 - 00501
Nairobi, Kenya
Tel: +254 53 8010651
Fax: +254 53 8010652

IATA CODE:

ICAO CODE:

AFRAA MEMBERSHIP

Became member in 2017
Established in 2009

OWNERSHIP STRUCTURE

Privately Owned

FLEET

AN-12F	2
AN-26F	1
Bombardier CRJ100/200	2
Ilyshin-76TD (Cargo)	2
MD-82F	1



MR. ILYES MNAKBI
Chairman & Chief Executive Officer

ADDRESS

Boulevard Mohamed Bouazizi
2035 Tunis Carthage, Tunisia
Tel: +216 7083 7000
Fax: +216 7083 6100
www.tunisair.com

IATA CODE: TU

ICAO CODE: TAR

AFRAA MEMBERSHIP

Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE

Government: 74%
Others: 26%

COMMERCIAL PARTNERSHIP

Middle East Airlines

DESTINATIONS SERVED

Intra-Africa	9
Intercontinental	34

EMPLOYEES

3579

FLEET

Airbus 330-243	2
Airbus 320-200	16
Airbus 319-114	2
Boeing 737-600	7

FLEET ON ORDER

Airbus 320 neo	5
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SECTION FOURTEEN >> AFRAA PARTNERS – PROFILES AND CONTACTS



Accelya is a leading global provider of technology products and services to the travel and transport industry. Founded in 1976, Accelya delivers financial, commercial, cargo and analytics solutions designed for a world on the move. Formed through the merger of Accelya and Mercator, Accelya provides the mission critical solutions that account

for and manage more than 5 billion financial transactions and 75 million tonnes of cargo annually. Accelya is headquartered in Barcelona, with offices around the world, and serves as a strategic partner for more than 400 airlines, travel agents and shippers.

For more information please visit www.accelya.com

Key contact:

Michele Drummond
Head of Marketing
Tel: +971 4 203 3135
Mobile: +971 56 999 3316
Email: michele.drummond@mercator.com
Al Maktoum Street – EGT dnata building
PO Box 686 Deira-Dubai UAE



Airbus helps shape the future of air transportation and drive sustainable growth around the world. Based on a deep understanding of ever-changing market needs, Airbus pioneers incremental innovative technological solutions and seeks the most efficient sourcing and manufacturing possible – so airlines can grow and people can connect. Airbus, headquartered in Toulouse, France, today consistently captures about half of all commercial airliner orders.

Airbus' comprehensive product line comprises highly successful families of aircraft ranging from 100 to more than 600 seats: the single-aisle A320 Family (including A320neo, the best-selling aircraft in aviation history); the wide-body long-range A330 Family (including the A330-200 Freighter, the A330-based MRTT, and the recently launched A330-800 and -900); the all-new next generation A350 XWB Family; and the flagship A380. Across all its aircraft families Airbus' unique approach ensures that aircraft share the highest commonality in airframes, on-board systems, cockpits and handling characteristics. This reduces significantly operating costs for airlines.

Dedicated to assisting airlines enhance the profitability of

their fleets, Airbus also delivers a wide range of customer services in all areas of support, tailored to the needs of individual operators all over the world.

Employing around 55,000 staff world-wide, Airbus is a truly global enterprise with fully-owned subsidiaries in the United States, China, Japan, India and in the Middle East, and spare parts centres in Hamburg, Frankfurt, Washington, Beijing, Dubai and Singapore. Airbus also has engineering and training centres in Toulouse, Miami, Mexico, Wichita, Hamburg, Bangalore, Beijing and Singapore, as well as an engineering centre in Russia. There are also 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 7,700 suppliers all around the world.

Airbus is the first aeronautics company in the world to have earned the ISO 14001 environmental certification for all production sites and products for the entire life cycle. Airbus seeks to ensure that air transport continues to be an eco-efficient means of transport, delivering economic value while minimizing its environmental impact.

Key contacts:

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

AIRBUS

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



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 Jo 'burg for an aileron because of a food truck damage, our location gives as global reach unmatched by many.

Key contacts:

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

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 honoured 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.

Mr. Dahir Mohammed
V.P. Sales & Marketing

Aero Industrial Sales Company, (AIS)

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Fax: +718 949-9898
Email: dahir@aeroindustrialsales.com

AMADEUS

Amadeus powers travel. Amadeus' solutions connect travellers to the journeys they want through travel agents, search engines, tour operators, airlines, airports, hotels, cars and railways.

Technology has always been critical to developing global travel, increasing scale and access. Mobile devices, artificial intelligence and data analytics are continuing that evolution, giving people ever more ideas, options and control over their journey.

We develop technology every day, harnessing intelligent use of data, integrating new devices and architectures to deliver personalised and integrated journeys. Our technology ensures transparency, choice and simplicity for travellers.

We are one company with a global mindset and a local presence wherever our customers need us. We help connect over 1.5 billion people a year to local travel providers in over 190 countries. We are open in how we work, innovating and collaborating with customers and partners to move fast, deliver on new possibilities and solve problems.

Key contact:

Mr. Maher Koubaa
Vice President Airlines
Middle East and Africa
Amadeus IT Group SA Dubai BR
Dubai Festival City
Festival Tower-16th floor

Our purpose is to shape the future of travel. We are committed to using technology to help global travel have a positive impact on communities and grow sustainably around the world.

Amadeus' presence in Africa and our investment to build cultural proximity and local presence is helping to better cater for African carriers' needs. We've been leading the way in the continent since 1992 and today Amadeus is present in 100% of the territory across 48 countries. As such, Amadeus is proud to be working very closely with the airlines in the region, listening to their experience and supporting them in their strategy. Our technology is present in areas that are relevant for growth – from meeting distribution needs, to embracing digital commerce, building solutions to help with the management of passenger services, and developing the new airport infrastructure to enable the full potential of the region.

Find out more at www.amadeus.com/airlines

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Email : maher.koubaa@amadeus.com



AMERICAN
GENERAL
SUPPLIES, INC.

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 35+ 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, Summit Aerospace, SWITLIK, the Stinar Corporation, Clyde Machines and TAM Durabus 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, and our partner Summit Aerospace of Miami, Florida;

- 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 programmes, 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!

Key contact:

Teddy Kassa
SVP Sales and Purchasing
American General Supplies, Inc.
7840 Airpark Road Gaithersburg, MD 20879
Tel: 301-590-9200
Fax: 301-590-3069
Email: TeddyM@agsusa.com



APG Network is the world's largest network for commercial and distribution services for airlines, providing its 200+ airline clients with a range of services aimed at increasing incremental revenue. With its headquarters in Paris, APG has a network of +110 worldwide offices, covering 176 countries across all continents. The organisation is headed by Richard Burgess, as President of the network, and Sandrine de Saint Sauveur, as President of APC's commercial operations. In addition to the Board and Regional Vice Presidents, each product and region also has its own commercial head.

The organisation's key goals are to help airlines exploit small and medium-sized markets on a "variable cost" basis, to generate more revenue for less cost, and to maximize an airline's distribution network with a comprehensive approach based on a tailored portfolio of solutions. APG has been a market leader in developing new distribution solutions for airlines, building on its roots as a GSA airline representation company, a service which still remains at the heart of its operation.

Key contacts:

Mrs. Sandrine de Saint Sauveur
President & Chief Executive Officer
APG Inc | 66 Champs-Élysées | 75008 Paris | France
Tel: +33 153 77 13 16 | Fax: +33 1 53 77 13 05
www.worldconnect.apg-ga.com
Email: s.de-saint-sauveur@apg-ga.com
www.apg-ga.com

In developing such products, APG works closely with key industry organisations such as IATA with whom APG developed the highly successful IBCS product, which gave many more airlines viable access to BSP participation in most of the world's BSPs. APG also operates an e-ticket interline hub, APG IET, now with over 100 participating airlines, which is marketed and supported through its global network. APG IET operates with airline code, GP, which belongs to APG Airlines, APC's own scheduled airline. APG will also base its new NDC product on its GP code.

In line with its commitment to play a strong role in the aviation industry, APG is also looking at ways to support the industry. As part of this, APG is developing an APG Academy which offers online training to aviation personnel at all levels. APG continues to invest in new products for the future all with the aim of assisting airlines improve their distribution worldwide.

APG already partners with many airlines from Africa and is proud to be an AFRAA Member.

Mr. Ibra Wane
Business Development Director
Middle East & Africa
APG Inc | 66 Champs-Élysées | 75008 Paris | France
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ATPCO is the world leader in the distribution of fare and ancillary data for the airline industry. Our purpose and passion is to help airlines lower costs and increase revenues by efficiently getting their fare products to the marketplace.

Our solutions make it easy for an airline to seamlessly reach the entire marketplace, transmitting consistent data to global distribution systems, pricing systems, governments, and related travel organizations. We give airlines choice and control over how they distribute their content.

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We are the industry source for fare data, including rules, routings, ancillary services, baggage, taxes, and branded fares. Our dependable industry standards ensure that content is processed as it was intended, helping the whole industry run more smoothly.

ATPCO currently works with more than 400 airlines and systems worldwide. We hold over 160 million fares with an average of 3.5 million fare changes a day and handle more than 99% of the industry's intermediated fare data.



Founded in 1981, the regional turboprop manufacturer ATR has become the market leader for regional aircraft with 90 seats or less. The 50-seat ATR 42 and the 70-seat ATR 72 are the preferred choice of regional airlines all over the world, providing the lowest fuel operating costs and the highest versatility among all regional aircraft. ATR models equip the fleets of some 200 airlines in nearly 100 countries. Since its creation, ATR has sold over 1,500 aircraft and as of today, some 110 ATR aircraft are operated in Africa and the Middle East. ATR has an established presence in Africa

for over three decades, manifesting a long term commitment to the region. Through the Johannesburg training center, ATR develops tomorrow's African aviation professionals, building pilots and coaching executives from small and medium sized airlines. ATR is an equal partnership between two major European aeronautics players, Airbus Group and Leonardo. Its head office is in Toulouse. ATR is ISO 14001 certified. For additional information, log onto www.atraircraft.com

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Boeing is the world's largest aerospace company and leading manufacturer of commercial jetliners and defense, space and security systems. A top U.S. exporter, the company supports airlines and U.S. and allied government customers in 150 countries. Boeing is organized into three business units: Commercial Airplanes; Defense, Space & Security; and Boeing Global Services, which began operations 1 July 2017. Supporting these units is Boeing Capital Corporation, a global provider of financing solutions.

Boeing has been the premier manufacturer of commercial jetliners for decades. Today, the company manufactures the 737, 747, 767, 777 and 787 families of airplanes and the Boeing Business Jet range. New product development efforts include the Boeing 787-10 Dreamliner, the 737 MAX, and the 777X. More than 10,000 Boeing-built commercial jetliners are in service worldwide, which is almost half the world fleet. The company also offers the most complete family of freighters, and about 90% of the world's cargo is carried onboard Boeing planes.

Boeing Global Services delivers innovative, comprehensive and cost-competitive service solutions for commercial, defense and space customers, regardless of the equipment's original manufacturer. With engineering, digital analytics, supply chain and training support spanning across both the government and commercial service offerings, Boeing Global Services' unsurpassed, around-the-clock support keeps our customers' commercial aircraft operating at high efficiency, and provides mission assurance for nations around the world.

Boeing Capital Corporation (BCC) is a global provider of financing solutions for Boeing customers. Working closely with Commercial Airplanes and Defense, Space & Security, BCC ensures customers have the financing needed to buy and take delivery of their Boeing products. With a year-end 2016 portfolio value at approximately \$4.1 billion, BCC combines Boeing's financial strength and global reach, detailed knowledge of Boeing customers and equipment and the expertise of a seasoned group of financial professionals.

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BOMBARDIER

the evolution of mobility

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.

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CellPoint Mobile: Mobile Commerce Solutions to Make Travel Easier and More Profitable

CellPoint Mobile builds travel commerce solutions specifically for mobile devices, allowing airline customers to easily book, pay and manage their travel, while providing airlines and other travel companies with the mobile architecture needed to drive more transactions and higher revenues with less IT investment.

CellPoint Mobile solutions can be swiftly deployed and scaled, meeting an important need of African airlines and travel companies, which operate in a rapidly expanding market and serve an increasingly mobile-connected customer base. By minimizing airlines' reliance on legacy systems and their limitations and embracing mobile as a standalone channel, CellPoint Mobile is helping airlines – regardless of their fleet size – meet their passengers' needs wherever they are, quickly.

CellPoint Mobile has been developing solutions for the global airline industry since 2007, offering innovative mobile technology that drives commerce, payments, ancillary retail, customer loyalty and tourism.

CellPoint Mobile's solutions are easy to implement and

manage and are highly secure (PCI DSS Level 1 certified). The company's mobile-first PSP solution called Velocity, comes in three versions (Engage, Accelerate, Advance), allowing for flexibility and scalability, and features global and regional APMs, acquirers, pay-by-link, currency conversions, split-tender payments, voucher bank, reporting and much more.

CellPoint Mobile has vital relationships with leading payment partners, including M-Pesa, PayPal, Visa Checkout, Android Pay, Apple Pay, and dozens more across the globe.

As the mobile solutions partner for African airlines, CellPoint Mobile is dedicated to helping the region's carriers increase transaction volumes with their customers, expand their share of the global travel market, implement mobile-first strategies immediately and build the architecture that will power passenger travel as they book, pay, and manage their travel.

With offices in Dubai, Copenhagen, London, Pune, Singapore and Miami, find out how CellPoint Mobile makes travel easier for your passengers and more profitable for your airline.

Visit www.cellpointmobile.com to learn more.



CHAMP Cargosystems provides the most comprehensive range of integrated IT solutions and distribution services for the air cargo transport chain. The portfolio spans core management systems, messaging services, and eCargo solutions. These include applications to meet customs and security requirements, quality optimization as well as e-freight and mobility needs. The products and services

are well known under the Cargospot, Traxon, and Logitude brands. CHAMP Cargosystems is headquartered in Luxembourg and operates offices in London, Zurich, Frankfurt / Main and Manila. For further information see: www.champ.aero

CHAMP Cargosystems – connected thinking for the air cargo community.



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 Safran Aircraft Engines 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 the production of the LEAP engine, which is powering 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 all 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 core, comprising the high-pressure compressor, combustor and high-pressure turbine. Safran Aircraft Engines 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 Safran Aircraft Engines at Villaroche (near Paris, France).

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Commercial Aviation

Embraer, a global Brazilian company, is the world's leading manufacturer of commercial jets that seat up to 130+ passengers. The E-Jets family, that includes four state-of-the-art aircraft, (E170, E175, E190 and E195), sets the standard in their category: advanced engineering, high efficiency, spacious and ergonomic cabins with no middle-seat, combined with the best operating cost in its category.

Currently in Africa there are 150 Embraer aircraft operated by 43 airlines in 22 African countries. In terms of operators, Embraer is proudly currently supporting 29 turboprops, 70 ERJs and 51 E-Jets.

Embraer is also ready for the future and will launch the E-Jets E2 in 2018, which will feature 3 family members (175-E2, E190-E2, E195-E2), ranging from 80 to 140+ seats, setting a new benchmark in terms of performance, economics and innovative cabin designs. The E2 programme has been very successful so far, with all targets achieved since the launch of the programme and an impressive progression of the flight test campaign.

Supporting a fleet of 2,000 aircraft, Embraer Commercial Aviation has 37 service centers worldwide servicing jets and turboprops. The Embraer global Services & Support new business unit provides prompt responses to a full range of needs, including field and technical support, material and spare parts, flight and maintenance operations consulting, aircraft upgrades and modifications and comprehensive crew and personnel training. It also incorporates eSolutions, a platform of web-based tools on the FlyEmbraer website, which is a single point that connects Embraer customers with a digital portfolio of services at any time, on any device. One of those state of the art tools is AHEAD-PRO, Embraer's health monitoring system that is designed to maximize aircraft productivity and reduce delays through both corrective and preventive maintenance.

For news and more information, please follow us on Twitter @EmbraerSA or visit our website www.embraercommercialaviation.com

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FLYHT's mission is to improve aviation safety, efficiency and profitability (located in Calgary, Canada; publicly traded as: FLY:TSX.V; FLYLF:OTCQX). Airlines, leasing companies, fractional owners and original equipment manufacturers have installed the Automated Flight Information Reporting System (AFIRSTM) on their aircraft to capture, process and stream aircraft data with real-time alerts. AFIRS sends this information through satellite networks to the UpTime™ cloud-based data centre, which provides aircraft operators with direct insight into the operational status and health of their aircraft and enables them to take corrective action to maintain the highest standard of operational control.

FLYHT has been an AFRAA member for many years and has supported airlines in Africa for over a decade. FLYHT's technology is particularly beneficial to non-ACARS operators, airlines that operate in remote areas and where ground-based infrastructure is a challenge or unavailable. The many benefits of the technology enable airlines to be proactive with their maintenance, improve dispatch reliability and on-time performance and automate processes to save time and money on the manual gathering of data. FLYHT's AFIRS solution can also assist airlines in complying with the ICAO GADSS flight following mandate, coming into effect November 2018.

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GE Aviation is a world-leading provider of jet engines, components and integrated systems for commercial and military aircraft. GE Aviation has a global service network to support these offerings.

From the turbosupercharger to the world's most powerful commercial jet engine, GE's history of powering the world's aircraft features more than 90 years of innovation.

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For more than 15 years, Hahnair are experts in providing global distribution solutions for its airline partners. With more than 300 air & rail partners and access to 95,000 travel agencies in over 190 markets, we are the designated choice to exploit high yield incremental revenue streams for you. Whether you are already participating in a GDS or not and regardless of your business model, Hahn Air is your ticketing expert for global, secure sales and optimised revenue.

Our services in a nutshell:

- We take the complexity out of your global indirect sales while increasing your revenue.

- We manage your distribution niches worldwide – risk-free and cost-efficient.
- We connect your airline to a global network of 95,000 travel agencies.

Connect with our ticketing platform and join our global network. Today, every 7 seconds a passenger checks in with a Hahn Air ticket at one of almost 4,000 boarding points worldwide.

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JLTSL (JLT Specialty Limited) is one of the world's leading aviation insurance brokers with a proven reputation for innovation, client-focused service and performance. We have a wealth of experience in this challenging, highly specialist market.

In line with our continued growth we have won more than 200 new aviation clients since 2009. While our client portfolio is expanding, importantly we continue to maintain high retention rates and retain our existing and long-term clients resulting in JLTSL currently representing 40% of the world's airlines.

Our success is down to our ability to deliver outstanding levels of performance to the satisfaction of our clients.

We are committed to building our aviation capabilities and continue to invest in recruiting specialist aviation staff, expanding our expertise in all sectors of the business.

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Our strength lies in our people with JLT Group employing over 260 aviation insurance specialists located throughout the world.

Our culture allows our specialists to solve complex risk issues with creativity and collaboration. We are 'client-first' and put our clients at the centre of everything we do. We understand that success requires focus and when specialty and expertise are aligned we achieve exceptional results for our clients.

Noted for our innovation, negotiating skills and integrity we are well placed to achieve market leading combinations of price and coverage. Our philosophy is to create long-term partnerships with our clients and deliver insurance solutions based on a thorough understanding of their strategies and business objectives.

Our on-going success and development has been recognised within the insurance industry and has seen us win a number of prestigious industry awards, most recently JLT won the "Best Lloyd's Insurance Broker 2017" award.

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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 25 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.

Drones can potentially benefit strategical sectors such as agriculture, energy and transportation profit. Lufthansa Consulting is already helping customers, corporations as well as authorities to understand the role of UAVs and how they can be integrated not only into their business or the countries' economical activities but also in harmony with other airspace users.

As an independent subsidiary of Lufthansa German Airlines, Lufthansa Consulting is in the unique position to develop and offer customized management consulting services and comprehensive business solutions to all sectors of the African aviation industry.

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Lufthansa Systems: Know-how, expertise and innovative IT solutions for the airline industry

Lufthansa Systems GmbH & Co. KG is one of the world's leading providers of IT services in the airline industry. It draws its unique strengths from an ability to combine profound industry know-how with technological expertise and many years of project experience.

The company offers its more than 300 airline customers an extensive range of successful and in many cases market-leading products for the aviation industry. The innovative IT products and services in this portfolio offer customers a wide range of economic benefits while also contributing to improving efficiency and competitiveness. In addition, Lufthansa Systems also supports its customers both within and outside the Lufthansa Group with consulting services and the experience it has gained in projects for airlines of every size and business model.

Lufthansa Systems offers airlines a unique range of products covering all of an airline's business processes – in the cockpit, in the cabin and on the ground. Furthermore, its portfolio is focused on meeting the respective demands of different airline business models. Network airlines, regional airlines and low-cost carriers all benefit from solutions that

are customized to their respective needs. The portfolio is divided into different categories:

- Commercial Solutions
- Operations Solutions
- Flight Deck Solutions
- Finance Solutions
- In-Flight Entertainment/BoardConnect

As a full-service provider, Lufthansa Systems offers the development, implementation, maintenance and operation of these products and customized software, as well as consulting and IT-related services.

Lufthansa Systems GmbH & Co. KG at a glance

Company headquarters Raunheim near Frankfurt/Main, Germany

Executive management Stefan Auerbach (Chief Executive Officer) and
Olivier Krueger (Chief Commercial Officer)

Employees Around 1,900 worldwide

Locations Berlin, Frankfurt am Main
(Raunheim/Kelsterbach), Hamburg
Bangkok, Beijing, Budapest, Buenos Aires,
Dallas, Gdansk, Delhi, Dubai, Hong Kong,
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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 26,600 colleagues who collaborate to provide advice and transactional capabilities to clients in over 130 countries.

Marsh is a wholly owned subsidiary of Marsh & 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 55,000 employees worldwide and annual revenue exceeding US\$12.3 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 43 of the 53 countries in Africa, Marsh is a regional leader for aviation insurance and risk advisory services.

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MILANAMOS

Big Data Insight for the Travel Industry

Milanamos makes use of the latest innovation in Big Data and data science to deliver disruptive and innovative network planning solutions to airlines, airports, railway operators, consultancy firms and bus operators. Milanamos has been recognised among the top 110 companies by the World Innovation Challenge for its vision of transportation in 2030.

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Contact Milanamos to create your own market studies and simulations based on a unique massive database that aggregates multimodal traffic and revenue data and complex mathematical forecasting models. Analyse the past and forecast the future in a comprehensive user interface that helps concentrating on results and not on data. Build strategic development plans, optimise fleet utilisation and identify multimodal partners with the first multimodal competitive intelligence solution!



Unrivalled engine solutions

MTU Maintenance is the world's largest independent provider of engine services and a trusted OEM network partner. In short, we are engine experts. And our business is minimizing costs and maximize engine value for our customers – across the entire lifecycle.

As a division of MTU Aero Engines, we look back on more than 36 years of MRO experience, 17,000 shop visits, and over 80 years of cooperation with engine OEMs. This multi-faceted history gives us priceless insight into aero engines of all ages. Add our lessor and asset manager experience to the mix, and MTU Maintenance is in a unique position to deliver great alternative solutions for operators and asset owners.

The entire package

MRO is both our root and our core. And we're exceptional at it. Our global network serves more than 30 engine types and we are continually expanding it. We have extensive in-house repair capabilities and also develop alternative repairs. Furthermore, we offer a comprehensive range of services to keep your operations hassle free, such as on-site and on-wing services, engine trend monitoring, and accessory and LRU management.

But we do so much more than just MRO. We also have

financial experts, whose skills range from leasing and engine pooling to asset management. So whichever stage of life your engine is in, we find the right combination of services for you.

We listen to our customers, understand their needs, and develop solutions with them – that is what being a true alternative means to us.

www.mtu.de/maintenance/

Portfolio

Turboprops:
PT6A, PW100/150¹
Helicopters:
PT6B/C/T1, PW200

Business jets:
CF34-1/-3, JT15D1, PW300, PW500, PW6001
Regional jets: CF34-3/-8/-10E
Narrowbodies:
CFM56-2/-3/-5B/-7, PW1100G-JM, PW2000, PW6000, V2500
Widebodies:
CF6-50/-80C2, GENx2, GE90-110/-115B, GE9X2/3, GP72004
1) P&WC Customer Service Centre Europe,
2) Turbine Center Frame,
3) Planned,
4) Low Pressure Turbine

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Mitsubishi Aircraft Corporation, “Mitsubishi Aircraft” commenced operations in April 2008, to conduct the designed, type certification, sales & marketing and customer support for the Mitsubishi Regional Jet (MRJ). Headquartered in Nagoya, Japan, Mitsubishi Aircraft has two overseas subsidiaries in the U.S and Europe. Mitsubishi Aircraft is capitalized at 100 billion yen, with financing furnished by, among others, Mitsubishi Heavy Industries Ltd., Mitsubishi Corporation, Toyota Motor Corporation, Sumitomo Corporation and Mitsui & Co. Ltd.

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The MRJ is a family of 70-90 seat next-generation aircraft featuring the Pratt & Whitney's revolutionary PurePower® engine and state-of-the-art aerodynamics to drastically reduce fuel consumption, noise and emissions, while offering top-class operational benefits, an outstanding cabin designed for heightened passenger flying comfort, and large overhead bins.

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The leading global provider of digital flight information, OAG provides accurate, timely and actionable information and applications across the travel sector to the world's airlines, airports, government agencies, aircraft manufacturers, consultancies and travel related companies.

OAG has the world's largest network of air travel data, including the definitive schedules database of more than 900 airlines and over 4,000 airports, and the most extensive flight status information database in the market. Their data experts provide unprecedented insight into scheduling

and planning, flight status and day-of-travel updates, post-journey analysis and on-time performance.

Through an unmatched global network of tools, high-quality data, experts and relationships, OAG unlocks hidden sources of value, enabling customers to innovate and advance their businesses and deliver up-to-the-second actionable solutions, shape smart applications and optimise business operations to enhance their customers' experience.

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Today, Pratt & Whitney develops game-changing technologies for the future, such as the PurePower® PW1000G engine, with patented Geared Turbofan engine technology. The company's worldwide large commercial engine maintenance, repair and overhaul network provides innovative services that add value and delight customers around the globe. Pratt & Whitney's large commercial engines power more than 25 percent of the world's mainline passenger fleet. 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.

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Pratt & Whitney has built a long and distinguished record of providing top-of-the-line military engines to 29 armed forces around the world. Our engines power front line fighters, such as the F-15 Eagle, F-16 Fighting Falcon, F-22 Raptor and F-35 Lightning II, as well as the C-17 Globemaster III military transport and Boeing's KC-46 Tanker.

Pratt & Whitney Canada has produced more than 80,000 engines, of which there are currently more than 50,000 engines in service by more than 10,000 operators in 200 countries.

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Rolls-Royce's vision is to be the market-leader in high performance power systems where our engineering expertise, global reach and deep industry knowledge deliver outstanding customer relationships and solutions. We operate across five businesses: Civil Aerospace, Defence Aerospace, Marine, Nuclear and Power Systems.

Rolls-Royce has customers in more than 120 countries, comprising more than 400 airlines and leasing customers, 160 armed forces, 4,000 marine customers including 70 navies, and more than 5,000 power and nuclear customers.

We have three common themes across all our businesses:

- Investing in and developing engineering excellence

- Driving a manufacturing and supply chain transformation which will embed operational excellence in lean, lower-cost facilities and processes
- Leveraging our installed base, product knowledge and engineering capabilities to provide customers with outstanding service through which we can capture aftermarket value long into the future.

Annual underlying revenue was £13.4 billion in 2015, around half of which came from the provision of aftermarket services. The firm and announced order book stood at £76.4 billion at the end of 2015.

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Sabre is the leading technology provider to the global travel industry. Sabre's software, data, mobile and distribution solutions are used by hundreds of airlines and thousands of hotel properties to manage critical operations, including passenger and guest reservations, revenue management, flight, network and crew management and data analytics.

Sabre's Airline Solutions division is a leading SaaS-based business serving the global airline industry, providing comprehensive technology solutions that give airlines the freedom to better market their airline, sell their products, serve their customers and efficiently operate the way they want.

The breadth of the Airline Solutions portfolio provides a unique opportunity to help airlines solve complex market problems. Our investments typically focus on areas identified

in partnership with airlines through regular and frequent engagement at all levels of customer organisations. Primary investment areas include Airline Retailing, Customer Experience, Data and Analytics, and the Connected Airline. Deep industry knowledge, leading operations research, and targeted professional services complement our technology to drive meaningful value for our customers.

Supporting over 225 global airline customers, Airline Solutions is proud to partner with some of the world's leading, network, hybrid and low cost carriers. Sabre's operational solutions track over 100,000 flights per day – and our reservation systems handle reservations for 511M+ passengers boarded traveling within 195 countries per year. Airlines around the globe rely on us to help increase revenues, decrease costs and improve customer service.

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Seabury Consulting, now part of Accenture, offers a unique range of expertise specific to the aviation industry that complements Accenture's global capabilities, solutions and services to help propel airlines into the future. Earlier this year, Accenture completed its acquisition of the corporate advisory and aviation consulting businesses of Seabury Group, strengthening Accenture's ability to help the world's leading airlines achieve transformational change.

Accenture (NYSE: ACN) is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology

and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions – underpinned by the world's largest delivery network – Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With more than 394,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives.

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SITA is the communications and IT solution provider that transforms air travel through technology for airlines, at airports and on aircraft. The company's portfolio covers everything from managed global communications and infrastructure services, to eAircraft, passenger management, baggage, self-service, airport and border management solutions. Owned 100% by more than 400 air transport industry members, SITA has a unique understanding of its needs and places a strong emphasis on technology innovation.

Nearly every airline and airport in the world does business with SITA and its border management solutions are used by more than 30 governments. With a presence at more

than 1,000 airports around the world and a customer service team of 2,000+ staff, SITA delivers unmatched service to more than 2,800 customers in more than 200 countries.

SITA has been awarded two times 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.

In 2016, SITA had consolidated revenues of US\$1.5 billion. SITA's subsidiaries and joint ventures include SITAONAIR, CHAMP Cargosystems and Aviareto.

For further information, go to www.sita.aero

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The Training Center for Aviation Professionals, formerly known as TCAP, is an IATA Regional training Partner, owned and run by a committed team of managers with a wealth of experience in specialist training and events business. The centre is a subsidiary of Poulina Group Holding.

We provide products and services based on content, intelligence and connections to aviation and cargo specialist communities worldwide. TCAP has 3 divisions: IATA RTP, Global Exhibitions and Networking events.

Our programme of specialist courses ensures you receive the most up-to-date, fully accredited training, compliant with the industry standards. Whatever your training needs are, we can provide training solutions to meet your specific business needs. Being an IATA Regional Training Partner, TCAP provides mainly trainings in Cargo and Dangerous Goods Regulations, Fares and Ticketing, Finance and Accounting, Safety, Ground Operations, Security, Law and Regulations. The courses are available in English and French.

TCAP facilities are designed to make your training experience as pleasant as possible in a very charming and

lively environment at Medina Mediterranea in Yasmine Hammamet. The center is a spacious and exceptional-designed training venue and highly equipped.

Conferences

We organize high-quality, content-driven events and we offer you the opportunity to explore real world case studies, to learn and connect with the leading companies and experts in your community.

Global Exhibitions

TCAP has over 20 years of experience in organizing and managing all types of business events, professional congress, corporate meetings and delegate management. Our team is supported by specialists in programme development, marketing, design, customer service, hospitality, attendee registration and sponsorship sales.

About Poulina Group Holding

PGH is the first private group in Tunisia established in seven countries and operating in different core businesses such as tourism, real estate, several industrial manufacturing, agro & food nutrition, supermarket chain.

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Wirecard AG is a global technology group that supports companies in accepting electronic payments across all sales channels. Our Multi-Channel Payment Gateway, which is linked to more than 200 international payment networks (banks, payment solutions, card networks), provides payment and acquiring acceptance via the Wirecard Bank and global banking partners. This comprises integrated risk, fraud management systems and tokenization services as well. At present, we provide financial technology to more than 25,000 customers around the world, including many airlines. Wirecard also has effective connections and partnerships with all key industry-specific providers in the travel segment. For example, Wirecard is a strategic partner of both IATA and AFRAA.

Wirecard is unique in offering a portfolio featuring a flexible combination of technology, services and banking solutions, while also operating our own acquiring service for airline customers, including eCommerce, BSP acquiring and POS acquiring. We currently accept more than 140 different currencies and facilitate direct settlement in more than

20 currencies. In addition to our Principal Membership with Visa and MasterCard, acquiring licence agreements are also in place with JCB, American Express, Discover/Diners, UnionPay and UATP. Banking services such as foreign exchange management supplement the outsourcing of financial processes.

Our expertise in issuing solutions enables us to switch pure airline loyalty cards into payment cards. Wirecard also issues branded loyalty prepaid payment cards, mostly Visa and MasterCard. Furthermore, we provide mobile payment systems – i.e. for public transportation systems, apps, mPOS and more.

Our flexible end-to-end solutions are integrated in almost all airline booking and reconciliation systems. This range of versatile integration options and plug-ins can be easily added to booking platforms and corporate processes. With our solutions all available via a single interface, airlines are therefore able to simplify their processes.

More on www.wirecard.com

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US Aviation Services represents many aviation operations and seeks on behalf of our customers the best possible offer, when it comes to the quality, prices, service and warranties. We have the necessary experience to take the guess, the risks and surprises out of any aviation's business transaction. Our team is composed of experienced professionals in the aviation field including Military, Civilian, JAA, FAA, Airplanes and Helicopters.

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Other members are experienced Academia and aviation legal consultants. We strive to always offer the best and most complete services to our valued customers.

More on <http://www.usaviationservices.com>

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ANNEX 1: AFRAA MEMBER AIRLINE PERFORMANCE

TRAFFIC DATA	Air Algeria	Air Burkina	Air Botswana	Air Madagascar	Air Mauritius	Air Namibia	Air Seychelles	Air Zimbabwe	ASKY	Cronos	EgyptAir	Ethiopian Airlines	Kenya Airways	Lam Mozambique	Nile Air	RwandAir	Royal Air Maroc	South African Airways	South African Express	TAAAG Angola	TACV- Cabo Verde Airlines	Tasili Airlines	Tunis Air
Domestic Passengers (ooo)	1,963	7	82	308	177	83	229	104			497	1,271	687	499	69	22	914	3,129	1,013	548	368	129	-
Regional Passengers – within Africa (ooo)	400	117	173	72	577	344	161	91	488		846	3,412	2,084	141	18	494	1,568	1,955	220	226	28	0	406
Intercontinental Passengers (ooo)	3,755	NIL	0	58	1,128	153	190	NIL		118	6,009	3,470	1,000	0	843	69	4,365	1,492	-	409	174	99	2,591
Total Passengers Carried (ooo)	6,118	124	255	438	1,882	580	580	195	488	118	7,352	8,153	3,771	640	990	585	6,847	6,576	1,233	1,183	570	228	2,997
Domestic Freight Carried (ooo)	731	NIL	88	862	0	31	23	136			285	680	1,465	3,261	0		1,052	27,062		1,395			-
Regional Freight Carried (ooo)	1,024		506	75	13	1,102	1,984	271			5,912	54,643	14,384	578	0		5,120	25,795		2,492			-
Intercontinental Freight Carried (ooo)	13,793	NIL	0	1,180	20	1,653	2,206	n/a		50	84,068	238,203	36,785	3	0		13,993	53,997		5,843			5,420
Total Freight Carried (ooo)	15,548	0	594	2,117	33	2,786	4,213	407	0	50	90,265	293,526	52,634	3,842	0	0	20,165	106,854	0	9,730	0	0	5,420
Revenue Passenger-Kilometres - RPK (ooo)	8,076,466		120,886	663,638	7,058,587	1,574,401	1,323,732	263	521,272		16,900,128	28,967,505	9,924,317	668	1,145,027		15,274,340	20,816,220	891,710,385	3,399	657,377		4,318,325
Available Seat-Kilometres - ASK (ooo)	11,565,348	176,943	204,218	1,038,622	8,804,204	2,185,437	1,827,442	636	824,708		25,740,476	42,616,457	14,039,913	1,006	1,711,661		22,136,952	28,050,772	1,479,388,163	7,786	996,446		6,207,515
Passenger Load Factor - PLF (%)	69.83%	66%	59%	63.90%	80.20%	69%	72%	41.32%	63.20%	75%	66%	61.97%	70.69%	66.40%	66.90%	59%	69%	74%	60.00%	49%	1	1	72%
Passenger Tonne-Kilometres - PTK (ooo)	726,882	116,826	11,032,524	63,148	636,123	121,788,107	138,838	19,461			1,654,557	3,654,230	894,400	60	136,013		1,428,326	1,822,561	89,171,039	306		12030300	432,152
Freight & Mail Tonne-Kilometres - FTK (ooo)	8,432		190,163	12,760	161,006	18,765,523	20,605	634,857			242,339	1,568,733	235,465	5	0		52,343	950,866		43		-	9,123
Revenue Tonne-Kilometres - RTK (ooo)	735,314		2,581,337	75,908	797,130	141,184,273	159,443	641,220			1,896,896	5,230,592	1,129,865	65	136,013		1,480,669	2,584,992		349,461	59,163	-	479,908
Available Tonne-Kilometres - ATK (ooo)	1,060,854		3,063,270	129,375	1,308,654	293,411,891	270,296				3,678,337	8,592,122	1,752,926	101	171,166		3,733,888	4,773,015	65,120	1,264,960	114,041	30,380,800	678,250
Weight Load Factor - WLF (%)	69.31%		84.00%	58.67%	61%	48%	59%				52%	60.98%	64.46%	63.80%	79.50%		40%	55%	28%	28%	52%	-	64.60%
EMPLOYEES DATA																							
Pilots	456	12	40	55	181	92	86	29	51	13	755	585	444	49	62		519	741		108	48	103	271
Engineers	1,468	35	40	151	138	15	78	120	7	9	4,716	2,197	462	10	101		393	21		343	62	217	-
Cabin Crew	1,237	20	39	156	490	157	149	134	95	10	2,238	2,032	544	97	134		219	1,694		465	81	119	756
Traffic/Marketing	4,206	110	47	99	408	84	313	76	176		2,576	1,620		146	29			13		809		88	1,150
Others	1,649	47	245	556	1,536	346	163	67	125	125	19,468	4,268	2,146	607	339		1,132	2,798		1,543	253	811	1,402
Total No. of Employees	9,016	224	411	1,017	2,753	694	789	426	454	157	29,753	10,702	3,596	909	665		2,263	5,267		3,268	444	1,338	3,579
DESTINATIONS SERVED																							
Domestic – within the country	29	1	4	12	1	8	6	3		3	8	20	2	11	4	1	19	5		12	2	0	-
Intra-Africa - within Africa	9	7	4	4	9	8	4	2	19	6	17	55	39	4	1	17	33	25		14	5	5	9
Intercontinental - Africa to other Regions	35	NIL	0	3	16	1	4	NIL			43	42	10	0	14	1	48	8		12			32
New Destinations (all markets)						2	2					13											
FLEET IN OPERATION																							
	59	2	4	7	13	10	9	5	8		55	74	34	13	6	11	56	49		13	4	12	28

ANNEX 2: AFRAA MEMBER AIRLINES FLEET – 2017

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ANNEX 3: AFRAA MEMBER AIRLINES COMMERCIAL PARTNERSHIPS

	AH	AT	BP	ET	KQ	LC	MD	MK	MS	PW	SA	SW	TC	TM	TU	UM	WB	2J	8U	HM	KP	8V	QC	C2	D6	LN	XZ	S9	SD	DT	VR	SF	J4	8Z	NP	BJ	L6		
Air Algerie	AH	I		I	I	I			I						I				I																				
Royal Air Maroc	AT	I	I	IS	C	IS			IS	I	I	I			I		I	I	I		I			I	I							IS							
Air Botswana	BP	I	I	I	I			I			I	I	I	I			I	I			S										I								
Ethiopian Air	ET	I	IS	I		S				I					I		I	I																					
Kenya Airways	KQ	I	C	I	I	S	I	I	I/C	I	I	I	I	I	I	I	I	C		I	I		I	I	I	I				I	I								
Ecair	LC	I	IS	S	S												I				S																		
Air Madagascar	MD				I		I/S/C													I/C																			
Air Mauritius	MK		I	I	I	I	I				I									I																			
EgyptAir	MS	I	IS		I					I				I					I																				
Precision Air	PW		I	I	I				I		I	I	I				I																						
South African Airways	SA	I	I	I	I	I	I	I		I							I			C	I						I												
Air Namibia	SW	I	I	C	I					I							I																						
Air Tanzania	TC		I														I																						
LAM Mozambique	TM		I	I	I					I	I						I																						
TunisAir	TU	I	I	I	I	I			I									I	I	I						I				S									
Air Zimbabwe	UM				I																										I							I	
RwandAir	WB	I	I	I	I	I				I	I	I	I	I						I																			
Air Burkina	2J	I	I	IS	C						IS				IS						S/C																		
Afriqiyah	8U	I	I						I						I											I													
Air Seychelles	HM				I			I		I																													
Askya Airlines	KP	I	I	S		S				I	I				I				S/C			I								I	I							S/C	
Astral Aviation	8V																																						
Camair - Co	QC																																						
Ceiba Intercontinental	C2	I																																					
Interair SA	D6	I		I	I																																		
Libyan Airways	LN				I										I																								
South African Express	XZ				I						I																												
Starbow Airlines	S9																																						
Sudan Airways	SD																																						
TAAG ANGOLA	DT		C	I	I									S	I						I																		
TACV Airlines	VR		IS	I	I																I																		
Tassili Airlines	SF																																						
Badr Airlines	J4																																						
Congo Airways	8Z																																						
Nile Air	NP																																						
Nouvelair	BJ																																						
Mauritania Airlines	L6	I	IS												I						S/C																		

I – AFRAA members cooperating on IET basis
S – AFRAA members cooperating on SPA basis
C – AFRAA members cooperating on Codeshare basis

ANNEX 4: MRO FACILITIES IN AFRICA

MRO	Country	National Approval Type	Maintenance Capability			Training School	Engines Overhaul & Testing			Website
			Airbus	Boeing	Other A C					
AeroContractors	Nigeria	EASA, Nigeria CAA		B737-300, 400 & 500						http://www.acn.aero
Aeronexus Technical	South Africa	South Africa CAA		B707, B727, B737-200 & B767	DC8, DC9, MD80, Fokker 28					www.aeronexus.aero
Aerotech	Zimbabwe	South Africa CAA, Zambia DCA Zimbabwe CAA, South Africa CAA, Malawi (DCA)			Cessna, Beechcraft					www.aerotech.co.zw.
Aerotechnic Industries (ATI)	Morocco	EASA 145, Moroccan DAC	A320	B737-NG						http://www.royalairmaroc.com/corporate/Group-RAI/Industrie
Air-Tech	Mauritius & South Africa	South Africa CAA			L410 UVP-E20, L420, Beechcraft 90/200 & PAC 750XL					http://www.air-tecm.com/
Air Algerie Technics	Algeria	EASA 145	A330	B737NG, B767 and B777	L100-30C, ATR72, Fokker 27					www.airalgerie.dz/
AirQuarius Aviation Maintenance	South Africa	South Africa CAA, Tanzania CAA			Fokker F-28					http://www.airquarius.com
Air Express Algeria	Algeria	EASA, Algerian Directorate of Civil Aviation, South Africa CAA			LET 410, Beechcraft 1900-D, PC-6					http://airexpressdz.com
Air Mauritius	Mauritius	JAR 145 - France DGAC, Mauritius DCA, EASA 145, EASA 147	A320 Series, A330 & A340		ATR72-500					www.airmauritius.com/
Air Zimbabwe	Zimbabwe	Zimbabwe CAA, Malawi DCA, Botswana CAA		B707, 767, 737 Classic	BAe146 and MA60					airzimbabwe.aero
Denel Aviation Transport Aircraft Maintenance	South Africa	United States FAA, South Africa SACAA, AS 9100, EASA Europe, ISO 9001:2000		B707, B727, B737	C130, L100, BAe146					http://www.denel.co.za/
Egyptian Company for Aircraft Maintenance	Egypt	Egyptian CAA	A320	737-200/300/400/500, 707						www.ecam-egypt.com
Egypt Air Maintenance & Engineering Company	Egypt	Egypt ECAA, EASA 145, FAA, EASA 147	A320, A321, A330, A340	B737 (Classic & NG), B767, B757, B777-200 /-300	Embraer E170/190					http://www.egyptair-me.com/
Ethiopian Airlines	Ethiopia	EASA 145, EASA 147, FAA, Ethiopia CAA, Saudi CACA, UAE CCAA, Kenya CAA, Gambia CAA, Tanzania CAA, Jordan CAA		Boeing 737 Classic & NG, B757, B767, B777	Fokkers, DHC-8 Q400, MD-11, DA40/42					www.ethiopianairlines.com
ExecuJet Maintenance	South Africa and Nigeria	ISO 9002, United Arab Emirates GCAA, Bermuda BDCA, South Africa SACAA, Botswana DCA, Angola DGCA, EASA 145, Namibia CAA			Bombardier, Beechcraft, Dassault, Gulfstream, Embraer Aircraft					www.execujet.net
Fields Airmotive	South Africa	South Africa CAA, FAA								http://www.fieldsairmotive.com
Global Aerotech	South Africa	South Africa CAA								http://www.global-aviation.com/
Horoug Aircraft Maintenance & Ground Services	Libya	Libyan CAA, Mali CAA, United Arab Emirates CCAA		B707, 727						www.horoug.com
Interjet (AMETA)	South Africa	South Africa CAA, Angola DGCA, Botswana CAA, Namibia CAA			Embraer, King Air, Learjets, Beechcraft, Challengers & Gulfstreams					www.interjet.co.za
Kenya Airways	Kenya	EASA 145, Kenya CAA, Tanzania CAA, CAA Uganda, Zambia DCA		B737-NG, 757, 767, B777	E170, 190					www.kqmmo.com
Libyan Aircraft Engineering & Maintenance (LAEM)	Libya	EASA 145, Libyan CAA	A300-600, A310-200							www.laem.ly
Linhas Aereas de Moçambique LAM	Mozambique	Mozambique CAA								www.lam.co.mz
National Airways Corporation	South Africa	South Africa CAA, ISO 9001:2008 & BARS		B737-200/500						www.nac.co.za
QSA Aeronautical Engineering Services	Morocco	EASA 145, Morocco DAC, Egypt CAA, UAE GCAA, Qatar QCAA	A318/A319/A320/A321/A330-200/300/A340-500/600	B737 Classic & NG, B747-400, B767-200/300/400ER, B777-200/300						http://qsamorocco.com/
Sabena Technics	Tunisia	EASA, FRA 145, Tunisia DGCA, South Africa CAA, Canada TCAC	A300 B2-B4, A300-600, A310, A320, A330, A340	B737 CC & NG, B747/747-400, B757, B767, B777	DC 10, MD 11, MD80, MD 90, ATR 42, ATR 72, Bae 146, CRJ 100/200, CRJ 700, ERJ 135, ERJ 145, F70, F100					http://www.sabenatechnics.com/
SAFAIR Technical (JetWorx)	South Africa	FAA, EASA 145 and SACAA		B737, B727	DC-9, MD80, Hercules L382					www.jetworx.co.za/
Solenta Aviation	South Africa	South Africa CAA, Cote d'Ivoire CAA, Zambia DCA			ATR42, B1900, B200 King, and Cessna					www.solenta.com
SNECMA Morocco Engine Services	Morocco	EASA 145, FAR 145, Moroccan DAC		B737 (Classic & NG)						www.sneema.com
South African Airways Technical	South Africa	FAA, SACAA, Angola DGCA, EASA 145	A319, A320, A321, A330 and A340	B737 Classic/NG, B747, B767	MD11					www.flysaa.com/saa_technical
Tunisair Technics	Tunisia	EASA 145, Tunisia DGAC	A300-600, A319/320/321, A330-600	B737-NG	ATR 42-200/300, ATR72-100/200					www.tunisair.com

ANNEX 5: TRAINING INSTITUTIONS

Major AFRAA Airline Training Centers						
Name	Maintenance Training	Crew Training	Simulator Training	EASA/FAA certification	Other Training Capabilities	Website
Air Algérie	Aircraft/ engine basic and recurrent training on B737NGs, A330 and ATR 72	Basic and recurrent pilot and cabin crew training	Full flight CAE for B737NG and B747-8	EASA 145	Safety/ Security, Managerial/ leadership, commercial (Marketing, Cargo, Finance etc.) and ground handling	www.airalgeriedz
Air Botswana	Aircraft/ engine basic and recurrent training on ATR 42/ 72, BAe 146	—	—	—	—	www.airbotswana.co.bw
Air Madagascar	Aircraft/ engine basic and recurrent training on ATR 42/ 72, B737-200 and B767, A340	Flight and Cabin crew training on B737/ B767 and ATR 42/ 72	—	EASA 145	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	—	—	EASA 145	IATA authorised training center	www.airmauriti.us
Air Zimbabwe	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 - Classic & NG, ATR 42- 300/500 and ATR 72- 500	Pilot & cabin crew, dispatcher basic & recurrent training	B737 classics & NG and ATR 47/72 full flight simulator	EASA 145 EASA 147	Safety, Security and Commercial courses	http://www.comair.co.za/
EgyptAir	Basic type, overhaul, boroscope and engine module courses on B737NG, B757, B767, B777, A320 series and A330	Pilot, Cabin crew	A320, A330, B727NG & B777 full flight simulator training	EASA 145 EASA 147	Safety, Security, Cargo, Ground services, commercial and IATA courses (IATA authorized center)	http://training.egyptair.com
Ethiopian Airlines	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	EASA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training (IATA authorized training center)	http://www.ethiopianairlines.com
Kenya Airways	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic and recurrent cabin crew training	B777NG full flight simulator	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training (IATA authorized training center)	www.kenya-airways.com
LAM Mozambique	Aircraft/ engine basic and recurrent training on B737 - 200 and Embraer 190	—	—	—	—	http://www.lam.co.mz
Royal Air Maroc	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic pilots, basic and recurrent cabin crew training	B737 Classic & NG & B757/ B767 full flight simulator	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	http://www.royalairmaroc.com
South African Express	Q400 refresher training	—	—	—	—	www.flyexpress.aero
South African Airways	Aircraft/ engine basic and recurrent training on B737 - 200 and Embraer 190	Basic pilots, basic and recurrent cabin crew training	—	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	www.flysaa.com
TAAG Angola Airlines	Aircraft/ engine basic system and recurrent training on B737 classic/ NG and B777 aircraft	Basic and recurrent cabin crew training	—	—	Safety, Security and Commercial courses	www.taag.com
Tunisair	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	Safety, Security and Commercial courses	www.tunisair.com

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

AFRAA MEMBER AIRLINE TWO-LETTER CODES

AB Aviation	Y6	Kenya Airways	KQ
Afriqiyah	8U	LAM Mozambique	TM
Air Algérie	AH	Libyan Airlines	LN
Air Botswana	BP	Mauritania Airlines	L6
Air Burkina	2J	Nile Air	NP
Air Madagascar	MD	Nouvelair Tunisie	BJ
Air Mauritius	MK	Precisionair	PW
Air Namibia	SW	Punto Azul	ZR
Air Seychelles	HM	Royal Air Maroc	AT
Air Tanzania	TC	RwandAir	WB
Air Zimbabwe	UM	Safe Air	K3
ASKY	KP	South African Airways	SA
Astral	8V	South African Express	XZ
Badr	J4	Starbow	S9
Camair-co	QC	Sudan Airways	SD
Ceiba Intercontinental	C8	TAAG Angola Airlines	DT
EgyptAir	MS	TACV	VR
Ethiopian Airlines	ET	Tassili Airlines	SF
Express Air Cargo	7A	Tunisair	TU
Jubba Airways	3J		

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