



# How can airlines unify their operations and improve performance?









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#### Foreword



A frican economies continue to grow at above global average rates with growth expected to be 4.8% in 2016, according to UNECA. The growth momentum is expected to continue despite uncertainty in the global economy and weakening commodity prices. A number of internal and external risks remain, such as a continued

slow recovery in the developed countries, a slowdown in China, tighter global financial conditions, political instability in a couple of states, terrorism and weather-related shocks.

The global airline industry had another strong year in 2014, solidifying a positive trend in profitability after huge losses during the 2008-2009 global economic recession. According to IATA, net post-tax profit for 2014 was \$16.4 billion. This was the fifth successive year of profitability, and it builds on the \$10.6 billion profit in 2013. The air transport industry's profitability in 2014 is owed primarily to improving global economic conditions, which underpinned robust growth in passenger and air cargo demand.

Jet fuel prices fell substantially during 2014, starting the year at \$130 per barrel and finishing it at \$75 per barrel. The average for the year was \$116.6 a barrel, and although this is still within the high range for the past three years it is some 6% lower than the previous year's average of \$124.5 a barrel. For airlines, however, the benefit of falling fuel prices was partly offset by hedging practices and the appreciation of the US dollar.

According to UNWTO, international tourism arrivals reached 1.133 billion in 2014, supporting the livelihoods of 1 in 11 people worldwide, accounting for about 10% of global GDP and generating more than US\$1.5 trillion in trade income or 30% of the world's services. International tourism relies heavily on air transport which accounts for about 50-55% of tourism travel. This shows the critical importance of tourism and air transport to the sustainable development of global economies. However, Africa's share of global tourism, despite the huge potential is a paltry 4-5% with 56 million visitors in 2014.

Among the factors negatively affecting the air transport and tourism industries were some tragic incidents on the continent in 2014-2015. These included terrorist attacks in Nairobi and Garissa in Kenya, Boko Haram terrorist attacks and abductions of Chibok girls in Nigeria and terrorist attacks at Port El Kantaoui in Tunisia, which all highlights the need for peace to facilitate the development of transport and tourism.

One challenge faced by the airline and tourism industries in 2014/2015 was the Ebola epidemic which was concentrated in 3 West African States namely Guinea, Liberia and Sierra Leone. The aviation and tourism industries suffered from collateral damage arising from the wrong perception in some source markets that view Africa as one country or one contiguous destination. In fact the continent is huge with 54 States where the entire United States of America, India, China and Europe can fit and still leave some space. Many destinations in Africa are thousands of miles from the source of the outbreak which in any case had been successfully isolated and contained with an effective response that had been put in place.

It is necessary to restate here that the disease is now under control and largely eliminated. It is safe to fly to African

countries including those that had been affected by the epidemic. It is not necessary to issue negative travel advisories which adversely affect the growth and development of air transport and tourism, and the economic recovery of the concerned States.

A major challenge facing the African continent is the illegal poaching and illegal trade in wildlife and wildlife products. The thriving bio-diversity across Africa forms the backbone of the tourism sector performance and hence the air transport that brings those tourists to the destinations. All stakeholders need to collaboratively take measures that facilitate sustainable management of our natural resources for posterity. It is critical to note that the loss of bio-diversity not only threatens the entire ecosystem but also negatively affects sustainable local livelihoods of African people. Hence governments and industry need to work together to sensitise all concerned about the need to jealously guard against the illegal poaching of wildlife and for airlines to desist from transporting illegal wildlife products.

As we have often stated, African aviation is heavily taxed and has charges and fees that are way above world standards. With the added challenge of high taxation and fees on tourism, this has the unintended consequence of making African air transport very expensive while making some African tourist destinations uncompetitive.

One way round this challenge is to raise the profile of air transport and tourism at the political level by establishing an institutional presence at the African Union with special focus on air transport, tourism and environment. Currently transport and tourism are under the expansive Commission for Infrastructure and Energy at the African Union Commission.

To facilitate better connectivity and accessibility it is critical that African skies are fully opened by the date that was stipulated by the African Union Heads of States Assembly of 2017. A fully liberalised African air transport environment will facilitate airline consolidation hence the creation of viable operating entities to facilitate greater connectivity. The full liberalisation of African skies needs to be complemented by open border policies with e-visas, e-border and biometric passports being used for security, smooth and faster travel and tourism trade facilitation in line with the ICAO 2020 deadline. Above all safety standards on the continent need to continually improve and reach global standards.

In this report you will find an in-depth review of the state of the African air transport industry in 2014 as well as the prospects for the future. The report also highlights the Secretariat activities which benefit member airlines, the Maintenance, Repair and Overhaul (MRO) centres in Africa as well as training centres, including providers of aircraft simulators to facilitate cooperation among African operators. The report also includes AFRAA member airline profiles as well as those of our valuable partners who are assisting the industry to take advantage of the growing opportunities on the continent.

**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: Highest safety and security standards Co-operation and joint projects Top quality customer orientation Continuous human resource development A learning culture Professionalism and Integrity Responsiveness and flexibility

#### Objectives

To facilitate the establishment of industry best practices in safety and security.

To be the repository of data and its analysis focusing on key issues in the aviation sector.

To provide a platform for consensus building among member carriers.

To facilitate joint projects between member airlines aimed at reducing their costs and increasing their revenues.

To actively contribute in human capital development.

To interact with the regulatory bodies to support and protect the common interests of all African airlines.

To provide forums for members and industry partners to enhance their knowledge base and enhance mutual cooperation.

To facilitate the development of environmental policies in keeping with industry best practices.

To reflect the positive image of the African airlines worldwide.

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#### 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 Sabre Airline Solutions 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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### [TREND REPORT]



## **Building Customer Memory:** How Airlines Can Create A Customer-Centric Digital Experience

Sabre has partnered with respected industry voice Skift, to create a Trend Report highlighting the business and technology challenges faced by airlines in the areas of traveler digital experience, personalization, and retailing. Brand differentiation and customer-centric sales and service are becoming increasingly strategic areas for leading airlines due to their market share and profit potential. In the report, Skift discusses the unique complexities in the

industry, analyzes new findings about investment in digital commerce and engagement technology, and discusses possible solutions to these problems.

As air traffic grows over the coming years, air travel will become a common need for many, and airlines will need to develop more efficient ways to manage their interactions with those millions of flyers. Customer-centric systems will support this transformation.

Read the trend report here: www.sabreairlinesolutions.com/AFRAA\_DigitalExperience



#### SECTION ONE

#### 1.1 Economic performance

Globally, economic growth dropped from 2.6% in 2014 to 2.4% in 2015 (UNECA, World Bank). This drop in growth was amid weak aggregate demand, falling commodity prices and increasing financial market volatility in major economies. Growth moderation in China and declining economic activity in Brazil, the Russian Federation and other commodity-exporting countries weighed on global growth.

The slowing of growth in emerging market economies was

an important contributing factor, with output contracting in Brazil and the Russian Federation, and rebalancing leading to a deceleration of growth in China. The deceleration of activity in emerging markets and developing economies offset a modest recovery in advanced economies (IMF, 2016). Out of the five BRICS economies (Brazil, China, India, Russian Federation, and South Africa), four slowed or even contracted in 2015.

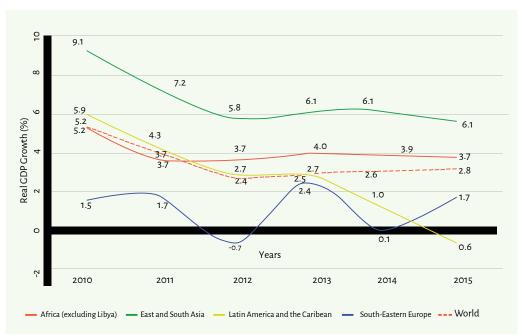


Figure 1.0: Economic growth 2010-2015

Source: ECA calculations based on UN-DESA (2015) and EIU (2015). Note: e=Estimates

World trade growth at 2.6% in 2015 was at its slowest since the global financial crisis, reflecting weak aggregate demand in emerging and developed economies, the US dollar's appreciation; and rising geopolitical tensions in Iraq, Syria, Russia and Ukraine. They affected trade in developing countries, such as those in Africa. China accounted for an estimated 20% of the slowdown in developing and emerging economies' import growth between 2014 and 2015 (UN-DESA, 2016). In 2016, however, global trade growth is projected to accelerate to 4.0%, due to strengthening demand from developed countries, which is expected to lift exports of developing countries in Latin America and Asia.

#### Global outlook

The global outlook in the short term is on balance slightly positive, with growth projected at 2.9% in 2016. But persistent

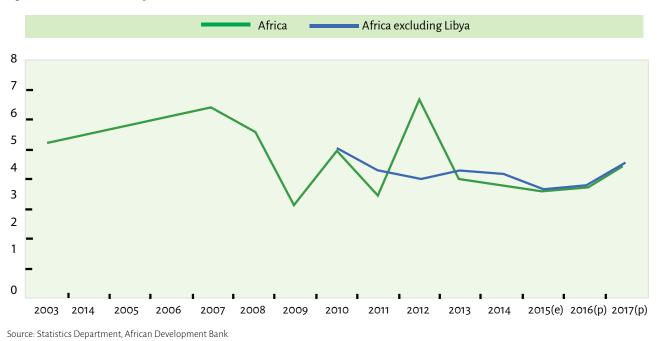
macroeconomic uncertainties and commodity price volatility will continue shaping the medium-term outlook. Exchange rate volatility has become more pronounced against a backdrop of falling commodity prices, subdued global growth patterns, declining trade flows, declining capital flows and diverging monetary policies (UN-DESA,2016).

IMF projects that global growth will pick up to 2.9% in 2017 and 3.1% in 2018 largely reflecting a rebound in Emerging and Developing Economies (EMDEs). Growth in EMDEs is projected to be driven by improvements in the large commodity exporters as commodity prices stabilize. Growth in advanced economies is projected to remain low, averaging 2.0% annually in 2017-18. According to UN's Global Economic Outlook report, these growth prospects face considerable headwinds in the near term, including:

- · Persistent macroeconomic uncertainties and volatility
- · Low commodity prices and declining trade flows
- · Rising volatility in exchange rates and capital flows
- $\cdot$   $\,$  Stagnant investment and diminishing productivity growth
- Continued disconnect between finance and real sector activities

#### 1.2 Africa's Economic Performance

According to the African Development Bank (AfDB), Organisation for Economic Co-operation and (OECD) and United Nations Development Programme (UNDP), average growth of African economies weakened slightly in 2015 to 3.6% (down from 3.7% in 2014). Excluding Libya, where oil production remained volatile, Africa's overall growth reached 3.7% in 2015, down from 4.2% in 2014. The African Economic Report 2016 macroeconomic outlook for Africa's economy assumes a gradual strengthening of the world economy and a slow recovery of commodity prices. Against this international backdrop Africa's average economic growth is expected to remain moderate in 2016 (3.7%), but strengthen in 2017 (to 4.5%) (Figure 1.1). However, given the fragile state of the global economic recovery and the high volatility of commodity prices this forecast is uncertain.



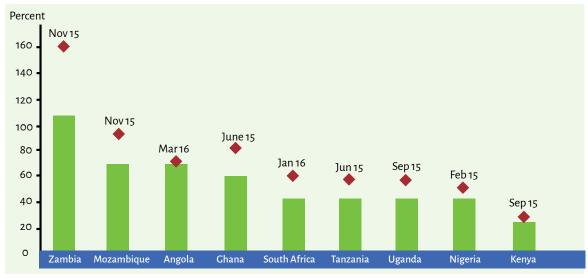
#### Figure 1.1: Africa's economic growth, 2003-17

AfDB et al attribute the main reasons for the slowdown in growth in 2015 to weaker global demand and lower international commodity prices, which adversely affected Africa's resource-rich countries. Despite the slowdown, the African continent remained the second fastest-growing economy in the world. Several African countries (Côte d'Ivoire, Djibouti, Ethiopia, Mozambique, Rwanda and Tanzania) were among the fastest-growing countries in the world with growth between 6% and around 10% (AfDB et al 2016).

All the African sub-regions and economic groups had current account deficits in 2015, driven in part by declining commodity prices. Most African countries exercised tight monetary policy, mainly to curb rising inflation and high fiscal and current account deficits. Inflation increased mainly owing to weaker domestic currencies on declining commodity prices and to rising food prices (UNECA, 2016).

## 1.2.1 Falling reserves and substantial currency depreciations across Africa

According to the World Bank Commodity Market Outlook, the deterioration in the current account deficit led to falling reserves and substantial currency depreciations (figure 1.5). Reserve levels fell across the region, most markedly among oil exporters and in countries defending fixed exchange rates (Angola, Burundi, Nigeria, and Rwanda). Most of the region's currencies sustained large depreciations against the U.S. dollar. The Ghanaian cedi, Mozambican metical, and Zambia kwacha, in particular, weakened considerably. Most currencies stabilized during March 2016 as commodity prices rebounded and the U.S. Federal Reserve signaled a decrease in the number of rate hikes this year.



**Figure 1.2:** Currency Depreciation Against the Dollar, Selected SSA Countries (percent, based on the LCU/US\$ rate; an increase means a depreciation)

Source: Bloomberg

Note: FX = foreign exchange; LCU = local currency units; SSA = Sub-Saharan Africa

The pass-through of nominal exchange rate depreciation, compounded by the impact of drought on the food supply and the removal of fuel subsidies, contributed to a rise in inflation in several countries. Headline inflation increased sharply in Angola, Nigeria, and South Africa, exceeding the central banks' targets, and was in double digits in Ghana and Zambia. Core inflation also edged upward. However, in some oil-importing countries (Kenya, Tanzania, and Uganda) inflation eased, reflecting strong external disinflationary pressures from lower food and oil prices. In Kenya, inflation fell within the central bank's target as the shilling stabilized. Inflation has also remained low in the CFA franc zone countries where the currency has remained relatively stable thanks to its peg to the euro (AfDB et al, 2016).

#### 1.2.2 Africa: Regional performance and outlook

Economic growth varied across countries and regions, reflecting factors such as differences in income levels, dependence on commodity exports, political and social stability, and macroeconomic and structural policies. In 2015, growth continued to be highest in East Africa, followed by West Africa and Central Africa, and remained lowest in Southern Africa and North Africa. Assuming a gradual improvement in international and domestic conditions, growth is projected to accelerate in all regions in 2016/17 (Table 1.0).

 Table 1.0: Africa's growth by region, 2014-17(Real GDP growth in percent)

	2014	2015(e)	2016(p)	2017(p)
Africa	3.7	3.6	3.7	4.5
Central Africa	6.1	3.7	3.9	5.0
East Africa	6.5	6.3	6.4	6.7
North Africa	1.4	3.5	3.3	3.8
Southern Africa	2.8	2.2	1.9	2.8
West Africa	6.0	3.3	4.3	5.5
Memorandum Items:				
Africa excl. Libya	4.2	3.7	3.8	4.5
Sub-Saharan Africa (SSA)	5.0	3.6	4.0	4.9
SSA excl. South Africa	5.9	4.2	4.7	5.6

Note: (e) estimates: (p) projections

Source: Statistics Department, African Development Bank

East Africa: This was the continent's fastest-growing region in 2015 and is expected to continue its high growth path in 2016/17. The region benefits from large FDI inflows and the strong growth performance in 2015 was widespread with many countries achieving growth of more than 5% (Djibouti, Ethiopia, Kenya, Rwanda, Tanzania and Uganda) and expected to continue on a high growth path in 2016/17.

West Africa: Growth slowed in 2015 due to the sharp fall in commodity prices and the aftermath of the Ebola crisis. In Nigeria, oil production remained low and growth of the non-oil sector weakened as the government cut spending due to lower oil revenues. Private-sector activity was also adversely affected by tighter monetary policy and foreign exchange restrictions, which were implemented to counter depreciation of the currency. Some other countries in the region achieved relatively high growth in 2015 (Benin, Côte d'Ivoire, Mali, Senegal and Togo) and their outlook for 2016/17 remains favourable.

**Central Africa:** Growth weakened in 2015 due to impact of falling oil revenues and reduced infrastructure investment. In the Central African Republic, GDP recovered despite the political conflict and security risks, and with improved security and a normalisation of international co-operation the economy should continue to pick up.

Cameroon continued its trend of solid and broad-based growth driven by agriculture and forestry, construction, industry and oil production, despite security problems in parts of its northern border region. In Gabon, the government continued its investment programme and boosted growth despite lower oil revenues. In the Democratic Republic of the Congo, growth moderated in 2015 but remained solid, driven by agriculture, services and industries, with production increasing in the majority of extractive industries.

**Southern Africa:** Growth slowed down in 2015 and is expected to recover in 2017. Weak international conditions including lower commodity prices, the drought and other factors, such as power shortages, dampened growth in the region in 2015. South Africa continued its low growth trajectory and is expected to weaken further in 2016 before recovering in 2017. Many factors, notably low commodity prices, weak export demand, and power shortages, strikes and the drought in agriculture, are depressing consumer and business confidence and production. As South Africa is an important export destination for neighbouring countries its weakness affects the whole region. In other countries in the region that depend even more on commodity exports, notably Angola (oil) and Zambia (copper) as well as Botswana (diamonds), growth also declined.

**North Africa:** The macroeconomic situation remained uneven. In Libya, disruption in oil production and ongoing political conflicts and uncertainty led to another fall in real GDP. Tunisia achieved only modest growth in 2015 boosted by good harvests, while production in other sectors remained weak. Mining and industry sectors were adversely affected by weak exports and tourism, which had recovered gradually, declined once again after terrorist attacks. In Algeria, growth remained steady thanks to a rebound in oil production. Morocco achieved the highest broad-based growth in the region supported on the demand side by private consumption and investment and on the production side by the construction sector and agriculture. Egypt, growth strengthened as the political scene stabilised and business sentiment improved.

The overall performance of Africa will strongly depend on the recovery momentum in its main trading partners: China and the Euro area. Continued US monetary policy tightening will also have a tendency to attract capital from developing and emerging economies. Africa's medium-term prospects remain positive, despite downside risks such as the drought in the Eastern and Southern parts of the region, which might seriously hit agricultural production since most of the economies are based on agriculture. A still-weak global economy, monetary tightening in the United States and concerns over security and political instability in some countries remain challenges (UNECA, 2016).

#### 1.3 Tourism performance in 2015

According to the World Tourism Organization (UNWTO), the number of international tourist arrivals (overnight visitors) in 2015 reached a total of 1186 million, representing an increase of close to 5% from 2014. In 2015, 54% of all overnight visitors travelled to their destination by air while the remainder travelled by surface transport. The share over time for air transport is gradually increasing. Demand was robust overall, although results were mixed across destinations. The three major factors highlighted by UNWTO that influenced tourism flows in 2015 are: strong exchange rate fluctuations, the decline in the price of oil and other commodities which increased disposable income in importing countries but weakened tourism demand in exporting countries, as well as increased global concern about safety and security.

The UNWTO Tourism Highlights report 2016 indicated that the best results were recorded by South-East Asia (+8%), Oceania, the Caribbean, Central America and Northern Europe (all +7%), followed by North America and South America (both +6%). The report further highlights that international arrivals are expected to continue to grow at a sustained rate of 3.5% to 4.5% worldwide in 2016 according to forecasts prepared by UNWTO in January 2016. By region, Asia and the Pacific and the Americas (both +4% to +5%) are estimated to be leading that growth, followed by Europe (+3.5% to +4.5%). The projections for Africa and the Middle East (both +2% to +5%) are positive, although with a larger degree of uncertainty and volatility.

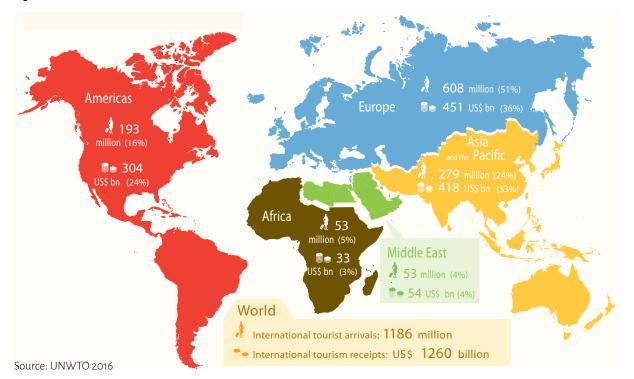


Figure 1.3: International Tourism 2015

## 1.3.1 Tourism in Africa gradually returning to growth

International tourist arrivals in Africa are estimated to have decreased by 3% in 2015 and this was attributed to health challenges, acts of terrorism, decrease in arrivals from some major source markets and slower economic growth due to lower oil and commodity prices. Africa welcomed 53 million international tourists and earned US\$ 33 billion in international tourist (+2% in real terms) to maintain a 5% share in worldwide arrivals and a 3% share in tourist (UNWTO, 2016).

#### Some countries that reported tourism declines include:

Tunisia, Algeria, Morocco, South Africa, Kenya, Togo, Mozambique and Sierra Leone. Countries where tourism performed well in 2015 include: Ethiopia, Seychelles, Mauritius, Madagascar, Reunion, Rwanda, Cabo Verde and Zimbabwe.

#### 1.4 Aviation industry Performance 2015

According to IATA, more than 3.5 billion passenger segments were flown in 2015, an increase of 240 million compared with 2014. On the other hand, industrywide freight tonne kilometres (FTK) increased just 2.3% year on year in 2015. The minimal growth in air freight seen since the global financial crisis has coincided with weakness in world trade growth.

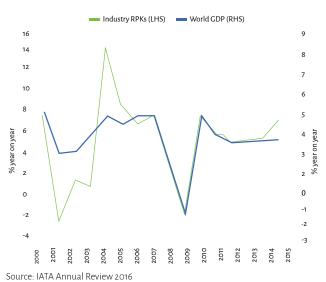
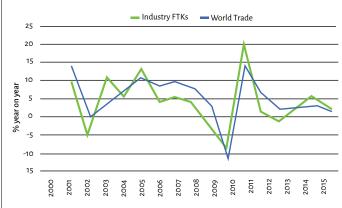


Figure 1.4: RPK versus world GDP growth

#### Figure 1.5: Air freight versus global trade growth



Source: IATA Annual Review 2016

## 1.4.1 Oil price and exchange rates decline impact on aviation in 2015

2015 saw the continued steep decline in jet fuel prices that occurred in late 2014. The IATA Annual Review reported that the average price of a barrel of jet fuel in 2015 was 42% lower than in 2014 and jet fuel prices fell further in the final months of 2015, ending the year at around \$48 a barrel. The declines in jet fuel prices, however, were not felt evenly across airlines and regions globally. This partly relates to different hedging practices within the industry, which can delay the benefits of lower oil prices translating into lower unit costs. Many currencies weakened against the US dollar in 2015 and the exchange rate declines offset the benefits of cheaper US dollar-based oil prices for many airlines. This was particularly the case for Brazil and Russia, whose currencies fell 30%-40% against the US dollar (IATA, 2016).

Adjusting for distortions caused by the strong rise in the US dollar, IATA reported that global airfares fell around 4.5% on average in constant exchange rate terms during 2015 compared with a year earlier. This was largely because competition intensified in markets that did see decreases in local currency fuel costs. IATA estimates that the resulting surge in demand accounted for around half of the annual growth in passenger traffic seen in 2015.

#### 1.4.3 2015: A strong year for industry profitability

The reduction in fuel costs in 2015 lowered the industrywide break-even load factor. Changes in industry structure and more returns-focused behavior on the part of airlines also exerted downward pressure on the break-even load factor and helped to keep load factors at historically high levels. IATA reported that the industry has seen capital productivity trend upward over the past few years, with airlines generating increasing revenue from their capital bases. This widening gap between break-even and achieved load factors has driven the improvement in the industry's financial performance.

IATA reported that 2015 was the first year in which the industry paid its investors a return on capital that exceeded the cost of capital. In 2015, airlines posted their strongest financial performance on record. The \$35.3 billion net, after-tax profit that the industry generated was almost more than double that in 2014. The corresponding operating margin of 8.3% of revenues was also a record for the industry, up from 4.7% in 2014 and almost three times that achieved in 2012. The industry's \$35.3 billion profit still only represented \$9.89 of profit per passenger.



#### **SECTION TWO** >> Airline Performance

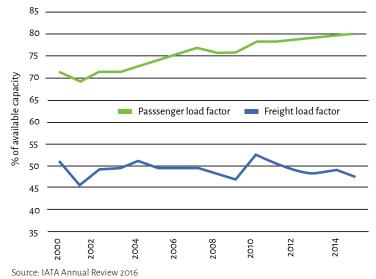
#### **Global Performance**

In 2015, 3.6 billion passengers travelled by air globally on scheduled services, an increase of 7.2 % over 2014. Global passenger air traffic for scheduled operations measured in RPKs improved by 7.4% in 2015 compared to 2014. International markets increased by 7.4% while domestic markets grew by 7.6%. This was the strongest result since the post-Global Financial Crisis rebound in 2010. While economic fundamentals were weaker in 2015 compared to 2014 as highlighted in chapter 1 of this report, passenger

demand was boosted by lower airfares. Global airfares in 2015 were estimated by IATA at 5% lower than in 2014 after adjusting for distortions caused by the rise of the US dollar.

Systemwide, seat capacity (ASKs) increased by 6.7%, represented by 6.8% on international routes and 6.5% on domestic routes. In line with this upward trend, the global average load factor increased from 79.9% in 2014 to an all-time high of 80.4% in 2015.

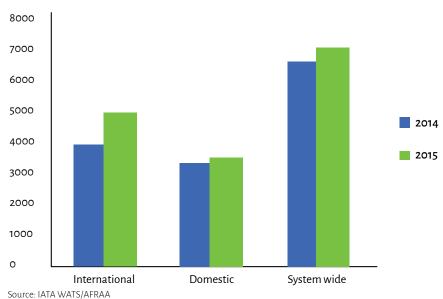




Scheduled global freight traffic (FTKs) increased by 2.3% and Available Freight Tonne Kilometres increased by 5.8% in 2015 compared to 2014. The increased growth in freight capacity was as result of airlines' additions to

belly-hold capacity in the passenger fleet and subsequently, the cumulative freight load factor for all freight and mixed operations dropped to 47.4%, the lowest annual average since 2009.





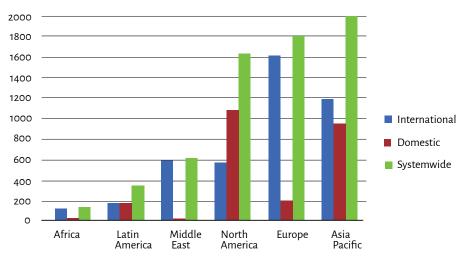


Figure 2.3: Revenue Passenger-Kilometres per Region – IATA Schedule Services 2015

Source: IATA WATS/AFRAA

Asia Pacific region was the world's biggest air transport market in 2015 by RPKs and RTKs performed (32.06% of RPKs and 33.13% of RTKs), followed by Europe (26.89% of RPKs and 26.28% of RTKs), North America (24.39% of RPKs and 23.42% of RTKs), Middle East (9.20% of RPKs and 10.37% of RTKs), Latin America (5.28% of RPKs and 4.67% of RTKs) and Africa (2.18% of RPKs and 2.13% of RTKs).

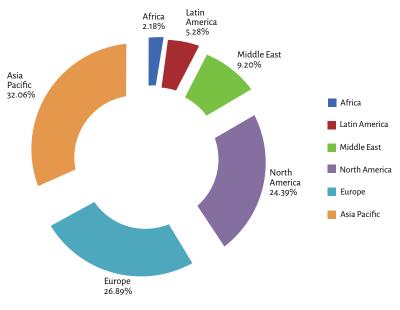


Figure 2.4: % share of Passenger-Kilometres Performed per Region – IATA Scheduled Services 2015

Source: IATA WATS/AFRAA

#### African Airlines Performance

#### Passengers Carried

While all regions experienced positive traffic growth in 2015 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 79.5 million passengers carried. This was up by 1.8% from 2014. 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.

African airlines had the slowest annual demand growth in 2015 up by 3.0%, from the 0.9% annual growth achieved in 2014. International traffic in Africa rose strongly in the second half of 2015, in conjunction with a jump in trade activity to and from the region.

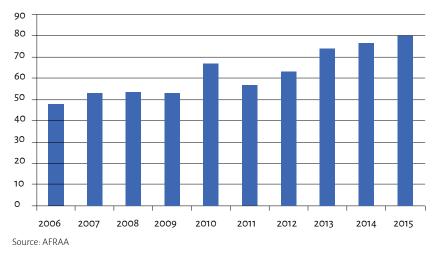


Figure 2.5: Total Passengers Carried by Market: 2006-2015

48.29 million scheduled passengers were carried on international routes, while 31.21 million were carried on domestic routes in 2015. The 24 AFRAA airlines that reported their passenger numbers carried a total of 49.77

million passengers in 2015 or 62.6% of total passengers carried by all African airlines. The top five passenger countries in Africa in 2015 are: South Africa, Egypt, Morocco, Nigeria and Algeria.

Table 2.1: Top 5 passenger countries in Africa in 201	Table 2.1:	Top 5 passenge	r countries in	Africa in 2015
---	------------	----------------	----------------	----------------

	2015 Passenger numbers	% growth from 2014
South Africa	22,485,844	8.5
Egypt	20,119,261	11.7
Morocco	14,177,413	2.5
Nigeria	8,503,033	-0.8
Algeria	8,309,833	10.6

Source: IATA WATS

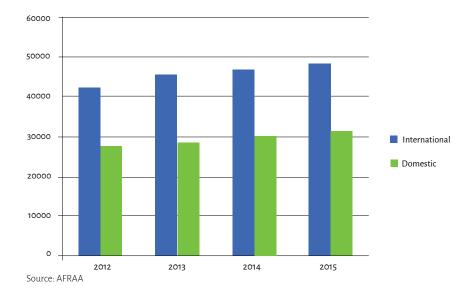
In terms of route area, the top 10 passenger airport pairs between Africa and other regions are as follows:

Rank	Airport pair	2015 Passenger numbers	% growth from 2014
1	Cairo-Jeddah	1,935,325	24.4
2	Cairo Riyadh	807,571	14.6
3	Algiers-Paris Orly	768,317	6.3
4	Cairo-Kuwait	674,754	12.4
5	Alexandria-Jeddah	666,476	13.0
6	Cairo-Dubai	632,571	-1.3
7	Johannesburg-London Heathrow	536,497	2.6
8	Tunis-Paris Orly	501,229	8.5
9	Lagos-London Heathrow	485,896	-3.3
10	Khartoum-Jeddah	483,005	29.4

Source: IATA WATS

#### Domestic and Intra-Africa Passengers

Scheduled domestic passenger numbers carried by all African airlines in 2015 increased by 4.83% to 31.2 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. The demand in air travel is further stimulated by low cost carriers that continue to aggressively promote and attract more passengers, some of whom have never flown by air.



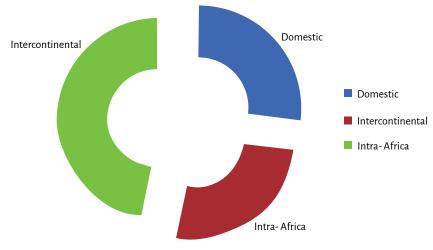
#### Figure 2.6: Percentage Share of Passengers Carried by African airlines: 2012-2015

On international routes, passenger numbers carried by African airlines increased to 48.23 million in 2015 representing a 3.09% increase from 2014. For the AFRAA members that reported their data, intra-Africa passenger numbers stood at 25.57% of the total number of passengers carried in 2015.

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. By June 2016, the number of African States declared their solemn commitment to immediately and unconditionally fully implement the Yamoussoukro Decision rose to 14, with more states having expressed their readiness prior to the formal deposition of the required documentation with the AU. These positive developments have been complemented by more States removing non-physical barriers to travel such as visa requirements. Visa openness is a vital step forward towards a more integrated Africa. According to the World Bank Visa Openness Report 2016, 13 African States countries offer liberal access (visa free or visa on arrival) to all Africans and 9 African countries offer eVisas. 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.

#### Passenger Distribution

For AFRAA member airlines, intercontinental passenger market segment remains the biggest with 47.6% of all passengers travelling between Africa and other regions of the world. The domestic market segment represented 26.82% while the intra-Africa market represented 25.57%.



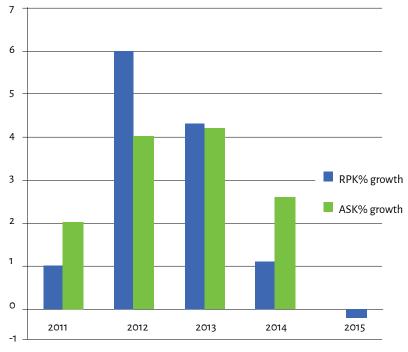


#### Passenger Traffic and Capacity

For global scheduled passenger and freight traffic growth in 2015 compared with 2014, Middle East was the region that had the highest ASK growth of 12.9% followed by Asia Pacific at 8.4%, Latin America at 6.9%, North America at 5% and Europe at 4.8%. Africa saw no market growth in terms of ASKs for scheduled operations in 2015. In terms of RTKs, Middle East realised the highest RTK growth of 11.4% followed by Asia Pacific at 7.5%, Latin America at 6.1%, Europe at 4.3%, North America at 4.2%, and Africa at 0.1%.

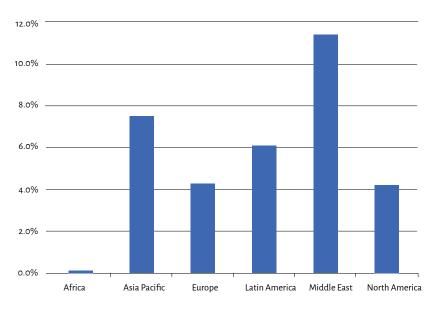
IATA reported that the industry-wide revenue passenger kilometres (RPK) grew 7.4% in 2015. This was the greatest increase since the rebound from the depth of the global financial crisis in 2010 and well above the long-run average of 5.5%. Africa still saw the smallest market growth in terms of RPKs in 2015.

Figure 2.8: Africa's Passenger Traffic and Capacity Annual Percentage Growth: 2011-2015



Source: AFRAA/IATA





Source: AFRAA/IATA

#### Passenger Load Factor

There was slow traffic growth for African airlines in 2015 which was mainly attributed to health challenges, acts of terrorism, political instability, decrease in arrivals from some major source markets and slower economic growth due to lower oil and commodity prices.

Many African airlines continue to record low load factors due the imbalance of capacity and demand, limited commercial cooperation 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 2015. Average passenger load factors (PLF) for African carriers scheduled passenger traffic in 2015 was 68.2%, as was recorded in 2014. This compared unfavourably to the global average load factors that rose to 80.4% in 2015. Passenger load factor for African carriers in domestic routes was 73.8% while intercontinental routes recorded 67.4%.

The top 5 AFRAA member airlines with the highest average passenger load factors in 2015 were: Badr Airlines (79%), Air Mauritius (77.8%), South African Airways (77%), Nile Air (75.1%) and ASKY (70.8%).

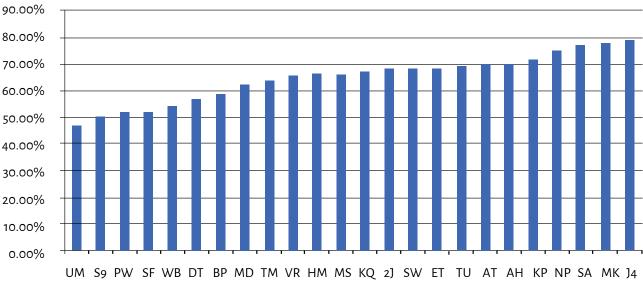


Figure 2.10: Passenger Load Factors of some AFRAA Airlines in 2015 (%)

Source: AFRAA

North America was the world's region with the highest passenger load factor of 83.9% in 2015 followed by Europe

at 82.3%, Latin America at 79.6%, Asia Pacific at 78.8% and Middle East at 76.2%.

	Passenger LF	% Change	Weight LF	% change
Africa	68.2%	0.1	56.7%	-0.6
Asia Pacific	78.8%	1.3	70.5%	0.4
Europe	82.3%	1.0	72.5%	0.2
Latin America	79.6%	0.5	67.8%	-0.6
Middle East	76.2%	-1.7	63.4%	-1.0
North America	83.9%	0.2	63.4%	-0.8
Industry Average	80.4%	0.6	67.9%	-0.2

Table 2.2 Passenger and Weight Load Factor for all Regions – 2015

Source: AFRAA

#### AFRAA Airlines Passenger Traffic

AFRAA airlines that reported performance for 2015 carried a total of 49.77 million passengers comprising of 26.82% domestic, 25.65% intra-Africa and 47.53% intercontinental passengers. The biggest airline by number of passengers carried in 2015 was EgyptAir, with over 8.8 million passengers transported.

#### Table 2.3: Total Passengers Carried by some AFRAA Airlines in 2015 (000)

	Domestic Passengers (000)	Regional Passengers – within Africa (000)	Intercontinental Passengers (000)	Total Passengers Carried (000)
Air Algérie	1,719	368	3,451	5,538
Air Burkina	4	115	_	119
Air Botswana	76	150	_	227
Air Madagascar	235	80	101	416
Air Mauritius	155	550	765	1,470
Air Namibia	92	357	112	561
Air Seychelles	193	129	186	508
Air Zimbabwe	115	79	_	194
ASKY	482	_	_	482
Badr	143	81	14	237
Egyptair	1,813	832	6,191	8,836
Ethiopian Airlines	1,047	3,004	2,951	7,002
Kenya Airways	682	1,946	1,008	3,636
Lam Mozambique	497	190	1	688
Nile Air	-	4	602	606
Precisionair	219	155	-	375
RwandAir	13	470	59	542
Royal Air Maroc	855	1,429	3,913	6,197
South African Airways	3,153	1,980	1,503	6,636
Starbow	252	_	_	252
TAAG Angola	611	227	424	1,262
TACV	339	210	_	549
Tassili	652	37		689
Tunisair	_	370	2,374	2,744
TOTAL	13,347	12,764	23,654	49,766

Source: AFRAA

The 24 reporting AFRAA airlines for 2015 performance put a total capacity of 171.49 billion ASKs in 2015 compared to 167.14 billion in 2014. Total reported RPKs for the 24 carriers for 2015 was 116.87 billion up from 113.34 billion in 2014. The overall average passenger load factor reported for the 24 airlines in 2015 was 64.68%.

In terms of ASKs, the top five largest African carriers in 2015

are: Ethiopian Airlines (36.589 billion), South African Airways (28.672 billion), EgyptAir (27.102 billion), Royal Air Maroc (19.717 billion) and Kenya Airways (14.372 billion).

In terms of RPKs, the top five largest African carriers in 2015 are: Ethiopian Airlines (25.084 billion), South African Airways (20.844 billion) EgyptAir (17.857 billion) Royal Air Maroc (13.577 billion) and Kenya Airways (9.597 billion).



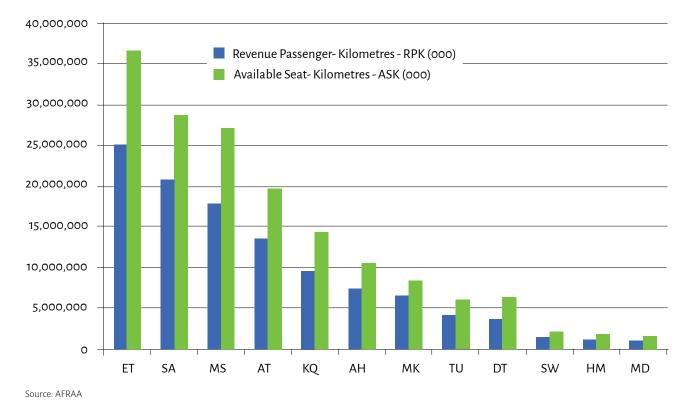


Figure 2.11: ASKs and RPKs of some AFRAA Airlines in 2015

#### New Routes

AFRAA airlines in 2015 expanded their networks on both intra-Africa and intercontinental routes. In 2015, 37 new routes were launched by 14 AFRAA member airlines to

domestic, intra-Africa and intercontinental destinations. Of these, 16 destinations were intercontinental with the remaining 21 new routes within the continent.

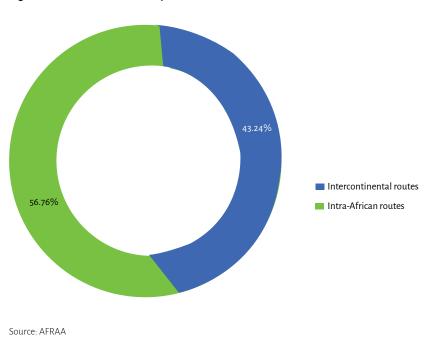


Figure 2.12: New Destinations by AFRAA Airlines in 2015

	Origin	Destination		Origin	Destination
1	Algeria	Sabiha	20	Abu Dhabi	Rabat
2	Casablanca	Nairobi	21	Cairo	Bamako
3	Casablanca	Washington	22	Cairo	Port Harcourt
4	Casablanca	Rio de Janeiro	23	Bourgas	Abuja
5	Khartoum	El Obied	24	Cologne Bonn	Cotonou
6	Khartoum	N'Djamena	25	Cairo	Al-Ahsa
7	Addis Ababa	Токуо	26	Cairo	Port Sudan
8	Addis Ababa	Dublin	27	Cairo	Bagdad
9	Addis Ababa	Los Angeles	28	Cairo	Sakaka Al Jouf
10	Addis Ababa	Gaborone	29	Dar es Salaam	Tabora
11	Addis Ababa	Cape Town	30	Dar es Salaam	Musoma
12	Addis Ababa	Manila	31	Johannesburg	Abu Dhabi
13	Addis Ababa	Yaounde	32	Tunis	Prague
14	Addis Ababa	Goma	33	Tunis	Niamey
15	Addis Ababa	Durban	34	Tunis	Montreal
16	Mahe	Beijing	35	Harare	Lusaka
17	Nairobi	Bangui	36	Entebbe	Nairobi
18	Mauritius	Chengdu	37	Lusaka	Johannesburg
19	Cairo	Sarajevo			

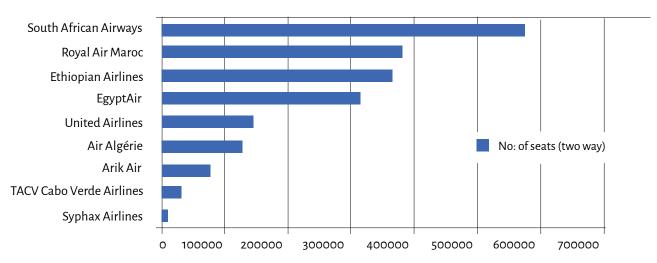
Table 2.4: New Destinations by 14 AFRAA Airlines in 2015

Source: AFRAA

#### North America Operations

Delta Airlines dominated the Africa-North American operations with 26.9% of the passenger capacity. South African Airways was ranked second with a market share of 20.8%. The market share by North American carriers was 32.11% of all scheduled flights across the Atlantic to Africa, representing a drop by 5.89 percentage points from 2014. Eight African airlines together operated 6,643 flights (two-way) across the Atlantic in 2015 with a seat capacity of 67.9% of the market share on the route.

#### Figure 2.13: Operators Market Share on the Africa-USA route in 2015





#### Table 2.5: Africa to North America Capacity Share 2015

Operating Carrier	% share (seats)
Syphax Airlines	0.20%
TACV Cabo Verde Airlines	1.14%
Arik Air	2.77%
Air Algérie	4.63%
United Airlines	5.23%
EgyptAir	11.36%
Ethiopian Airlines	13.24%
Royal Air Maroc	13.75%
South African Airways	20.80%

Source: AFRAA/OAG Schedules

#### 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 long-term outlook on the other

hand, shows an estimated growth of 4.5% for the period 2011-2030. Airbus, Boeing and Embraer long-term forecast for annual passenger demand growth in terms of RPKs is 4.6%, 4.90% and 4.90%.

#### SECTION THREE

#### Freight Carried and Traffic

Industrywide freight tonne kilometres (FTKs) increased marginally by 2.3% year on year in 2015. The marginal growth in air freight reflected the weak world trade growth. The freight load factor remained low at 47.4% while capacity measured in Available Freight Tonne Kilometres increased by 5.8%, outstripping demand and resulting to pressure on freight yields (IATA, 2016).

Air freight carried by African airlines' scheduled operations

dropped by 2% in 2015, with a total of 817,000 tonnes reported by IATA. Scheduled freight operations by African airlines in 2015 represented 1.56% of total global freight carried.

In FTKs, performance by African airlines dropped by 1.4% year on year in 2015. Across all regions, Middle East carriers recorded the highest year-on-year growth of 13.1% in air freight carried in 2015.

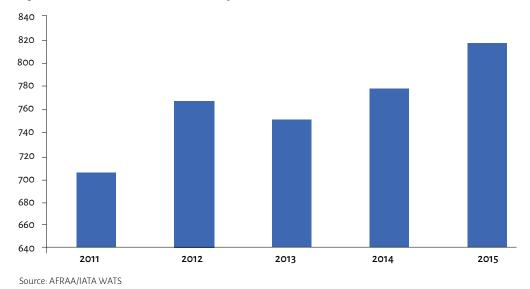


Figure 3.1: African Airlines Year-on-Year Freight Carried (tonnes)

2015 was a year of many challenges for air cargo with decrease in global trade and the average growth of African economies weakened slightly. This is expected to change as global trade improves. The World Bank projects that commodity prices will generally level out in 2016,

with a recovery in 2017 projected from stronger demand, and potentially supply disruptions. Intra-Africa air freight is expected to grow from increase in regional trade and cross investments among African countries.

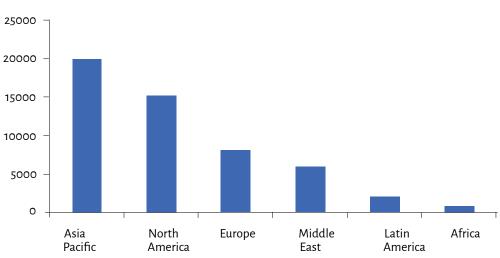


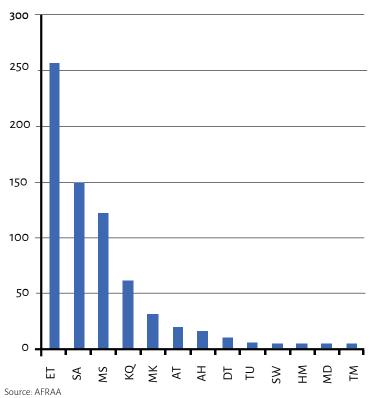
Figure 3.2: Freight Carried by Region (tonnes) – 2015

Source: AFRAA/IATA WATS

Trade barriers have impacted negatively to cargo growth and development in Africa. For instance, intra-African trade according to the World Trade Organisation currently stands at 12-15% of total trade, compared to 60% for Europe, 40% for North America, and 30% for ASEAN (Association of South East Asian Nations). Enhancing trade can contribute significantly to growth of air cargo within the 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.

16 reporting AFRAA airlines together moved 696,275 tonnes in 2015. 88.8% of the scheduled freight by African carriers was carried on international routes, with 11.2% on domestic routes. Ethiopian Airlines carried the largest portion of freight at 257,718 tonnes followed by South African Airways at 150,311 tonnes, EgyptAir at 122,162 tonnes, Kenya Airways at 61,923 tonnes and Air Mauritius at 30,755 tonnes.

Figure 3.3: Total Freight Carried by some AFRAA Airlines in 2015 (tonnes)



#### Freight Traffic Forecast

In spite of the challenges facing air freight, positive prospects are expected in the long run with slightly weaker short term forecasts. IATA's 5-year forecast indicates that

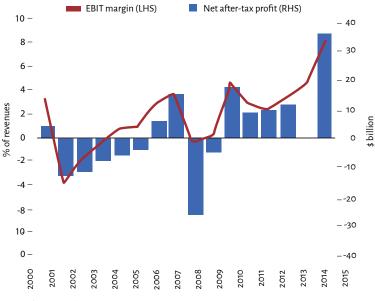
international air freight tonnes are expected to increase by 3.9%. Airbus and Boeing forecast air freeing demand growth at an average annual rate of 4.4% and 4.7% respectively.

#### SECTION FOUR

#### Financial performance

In 2015, airlines posted their strongest financial performance on record. Globally, airlines posted US\$35.3 billion aftertax profit from US\$13.7 billion in 2014 with corresponding

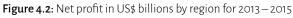
Figure 4.1: Global commercial airline profitability

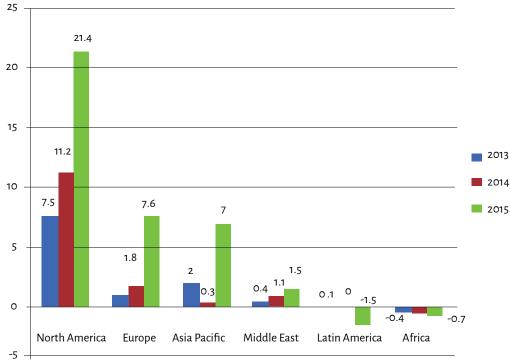


operating margin of 8.3% up from 4.7% in 2014 and almost three times that achieved in 2012.

Source: (IATA, ICAO)

IATA reported that the industry has seen capital productivity trend upward over the past few years, with airlines generating increasing revenue from their capital bases. This widening gap between break-even and achieved load factors has driven the improvement in the industry's financial performance. However, the industry's US\$35.3 billion profit still only represented US\$9.89 of profit per passenger.





Source: IATA

The strongest financial performance was delivered by airlines in North America which generated a net profit of US\$21.4billion in 2015. European, Asia-Pacific and Middle East airlines generated net profits of US\$7.6 billion, US\$7.0 billion US\$1.1 billion respectively in 2015. Latin American and African airlines posted net after-tax losses of US\$1.5 billion andUS\$0.7 billion respectively in 2015 due to challenging economic conditions in many economies as outlined in chapter 1 of this report.

The sharp decline in oil prices is a significant driver of improved profitability with fuel accounting for 29% of total airline operating costs, according to IATA. The declines in jet fuel prices, however, were not felt evenly across airlines and regions globally. The fall in the oil was also reinforced by airline efforts that raised load factors, increased ancillary revenues, and improved aircraft utilization. Another factor that had impact on costs was the strengthening of the US dollar against other currencies. Many currencies weakened against the US dollar in 2015 and the exchange rate declines offset the benefits of cheaper US dollar – based oil prices for many airlines.

## Operating revenue and expenses for African carriers

This analysis is limited to 17 AFRAA airlines that reported their financial results for 2015 and 2014. The 17 AFRAA carriers' total operating revenue was US\$8.56 billion in 2015 compared to US\$10.46 billion in 2014. Operating expenses for 2015 was US\$.8.56 billion resulting to a net loss of US\$280.9 million. Of the 14 participating airlines, six reported net profit. Ethiopian airlines was the largest African carrier in 2015 in terms of profits with operating revenue topping US\$2.4 billion and net profit at US\$119 million.

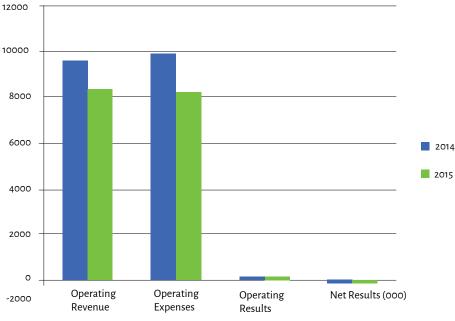


Figure 4.3: Financial results of some AFRAA airlines (US\$ millions)

Source: AFRAA

Africa is the weakest region in financial performance and African airlines are expected to post a net loss of US\$500 million in 2016 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. The difficulty of repatriation of funds from some African States is a major challenge being faced by several airlines in Africa. One of the main reasons behind the blocked funds was the unavailability of foreign exchange, especially in oil-exporting States that were negatively affected by the continued low global oil prices and drop in commodity prices. 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.

#### SECTION FIVE

#### African Airports Statistics

According to ACI Africa airport data, in 2015, African airports carried 179.8 million passengers. International passengers constituted 63% of the total passengers carried in African airports 2015.

The biggest air transport markets in Africa are South Africa, Egypt, Morocco and Ethiopia featuring a total of 9 out of

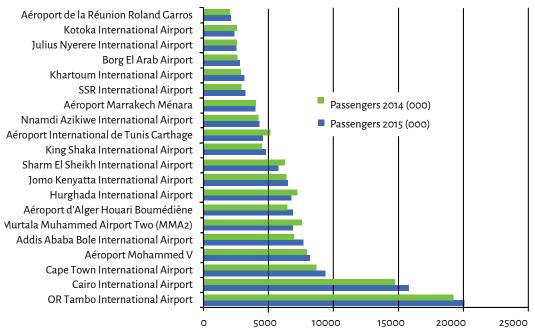
the top 20 busiest airports in Africa. In terms of total passenger numbers O.R. Tambo International Airport is the busiest airport in Africa numbers followed by Cairo International Airport in Egypt, Cape Town International Airport in South Africa, Aéroport Mohammed V in Morocco and Addis Ababa Bole International Airport in Ethiopia.

	City	Country	Airport	Domestic Passengers		Domestic Passengers International Passengers		
			-	2015	2014	2015	2014	
1	Cairo	Egypt	Cairo International Airport	2,211,177	2,039,265	13009578	11803350	
2	Johannesburg	South Africa	OR Tambo International Airport	10,384,653	9,468,988	9583760	9559981	
3	Casablanca	Morocco	Aéroport Mohammed V	795,760	783445	7379899	7163059	
4	Addis Ababa	Ethiopia	Addis Ababa Bole International Airport	1,096,981	845614	6644555	6085430	
5	Hurghada	Egypt	Hurghada International Airport	540,230	530240	6226114	6692896	
6	Algiers	Algeria	Aéroport d' Alger Houari Boumédiène	1,883,565	1,730,128	4,996,065	4727667	
7	Sharm El Sheikh	Egypt	Sharm El Sheikh International Airport	845,762	801,132	4,918,576	5434732	
8	Tunis	Tunisia	Aéroport International de Tunis Carthage	254,957	250,820	4,326,316	4867141	
9	Nairobi	Kenya	Jomo Kenyatta International Airport	1,403,009	1,313,097	3,913,778	3991981	
10	Marrakech	Morocco	Aéroport Marrakech Ménara	177,407	183,837	3,764,979	3817626	
11	Lagos	Nigeria	Murtala Muhammed Airport Two (MMA2)	3,778,086	4,007,314	3,023,478	3361767	
12	PlaineMagnien	Mauritius	SSR International Airport	159,265	132,410	2,939,601	2,688,201	
13	Borg El Arab	Egypt	Borg El Arab Airport	135,268	137,278	2,652,233	2,364,426	
14	Khartoum	Sudan	Khartoum International Airport	513,986	496,623	2,602,157	2,323,361	
15	Saint-Denis	Réunion	Aéroport de la Réunion Roland Garros	180	2,537	2,057,251	1,987,846	
16	Cape Town	South Africa	Cape Town International Airport	7,682,509	7,067,382	1,713,047	1,568,912	
17	Dakar	Senegal	Aéroport International Léopold Sédar Senghor			1,696,767	1,663,790	
18	Accra	Ghana	Kotoka International Airport	565,166	719,018	1,666,780	1,650,520	
19	Abidjan	Côte D'Ivoire	Aéroport Félix Houphouët Boigny	41,357	7,008	1,427,287	1184,116	
20	Entebbe	Uganda	Entebbe International Airport	14,934	22,789	1,375,144	1,332,499	

Figure 5.1: Top African Airports by Passengers Carried in 2015 and 2014 (000)

Source: AFRAA/ACI-Africa





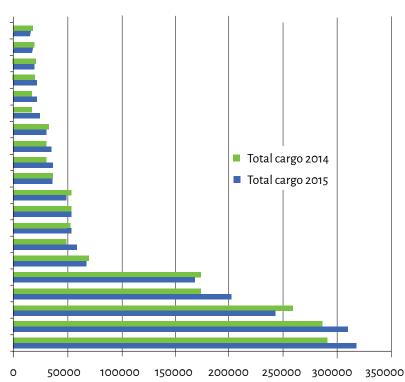
Source: AFRAA/ACI-AFRICA

In 2015, freight traffic at African airports increased by 4.13% to 2 million tonnes compared to 2014. Cairo International Airport in Egypt was the major cargo airport in 2015 accounting for 318,425 tonnes. The other cargo hubs among the top 5 in the continent include: OR Tambo

International Airport (311,576 tonnes), Jomo Kenyatta International Airport (243,873 tonnes), Addis Ababa Bole International Airport (203,620 tonnes) and Murtala Muhammed International Airport (169,878 tonnes).

Figure 5.3: Top 20 African Airports by Total Cargo Handled in 2015

Aéroport International de Brazaville Aéroport International de Douala Aéroport Felix Houphouet Boigny Julius Nyerere International Airport Aéroport International de Tunis Margaret Ekpo Int'l Airport Calabar Aéroport de la Réunion Roland Garros Aéroport International Léopold Séddar Khartoum International Airport Aéroport d'Alger Houari Boumédiéne Kotoka International Airport SSR International Airport Entebbe International Airport Aéroport de Kinshasa/Ndjili Murtala Muhammed Airport Two Addis Ababa Bole International Airport Jomo Kenyatta International Airport **OR** Tambo International Airport Cairo International Airport



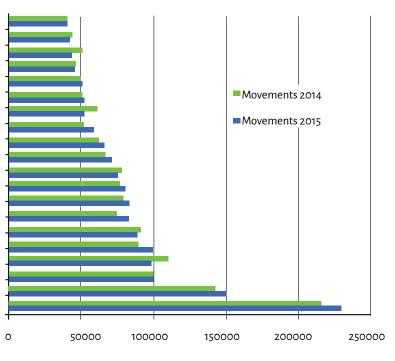
Source: AFRAA/ACI-AFRICA

Aircraft movements at African airports increased by 0.5% in 2015. The top five African airports ranked by aircraft movements in 2015 are: OR Tambo International Airport (229,945), Cairo International Airport (149,579),

Jomo Kenyatta International Airport (100,260), Murtala Muhammed International Airport (98,764), and Cape Town International Airport (98,514).

#### Figure 5.4: Top 20 African Airports in 2015 by Aircraft Movement

Entebbe International Airport Sharm El Sheikh International Maun Airport Hurghada International Airport King Shaka International Airport Zanzibar International Airport Aéroport International de Tunis George National Airport Port Elizabeth National Airport Nnamdi Azikiwe International Julius Nyerere International Airport Aéroport d'Alger Houari Boumédiène Aéroport Mohammed V Addis Ababa Bole International Airport Wilson Airport Murtala Muhammed Airport Two Jomo Kenyatta International Airport Cairo International Airport OR Tambo International Airport



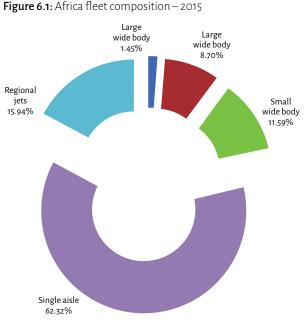
Source: AFRAA/ACI-AFRICA

#### SECTION SIX

#### Fleet Composition and Development

Worldwide aircraft deliveries in 2015 were more than 1,700 new aircraft, representing an investment by the industry of over \$180 billion and a 3.6% increase in the number of in-service fleet to 26,788 aircraft in 2015 according to IATA.

Overall for scheduled operations, the number of seats available in the fleet rose to 3.7 million in 2015, adding 5.3%



Source: Boeing Market Outlook

Africa currently has 690 aircraft which makes up (3.1%) of the total global fleet. AFRAA airlines in 2015 operated a

capacity to the market globally and it is estimated that by the end of 2016 there will be 3.9 million available seats.

Between 2015 and 2035, 39,620 new aircraft are expected to be added to or replace some existing fleet in operation. The total cost of the additional fleet is estimated at over US\$5,930 billion.

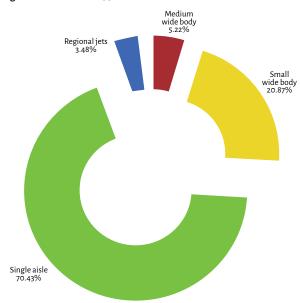


Figure 6.2: Africa's 2035 fleet demand forecast

Source: Boeing Market Outlook

total of 630 aircraft or 91.36% of total African commercial fleet (see details in annex 2).

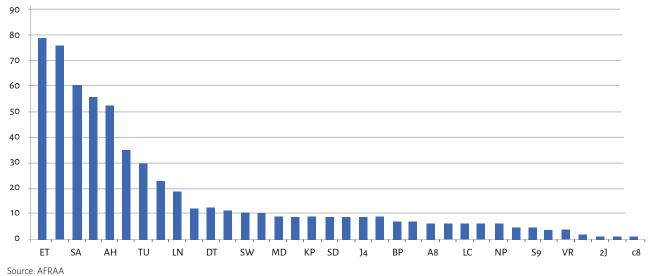
#### Table 6.1: Global aircraft in service in 2015 and additional demand by 2035

	2015	2035	New Planes	Value (2015 \$B catalog prices)
Large wide body	740	670	530	220
Medium wide body	1,640	3,800	3,470	1,250
Small wide body	2,660	5,800	5,100	1,350
Single aisle	14,870	30,630	28,140	3,000
Regional jets	2,600	2,660	2,380	110
Total	22,510	43,560	39,620	5,930

Source: Boeing Market Outlook

Currently, 430 (62.32%) aircraft in operation in Africa are made up of single aisle type. The other aircraft sizes are represented by: regional jets (15.94%), small wide body (11.59%), medium wide body (8.7%) and large wide body (1.45%). The top 5 AFRAA airlines with the largest fleet size in 2015 are Ethiopian Airlines (78 aircraft), EgyptAir (75 aircraft), South African Airways (61 aircraft), Royal Air Maroc (55 aircraft) and Air Algérie (54 aircraft).

#### Figure 6.3: Fleet of some AFRAA Airlines in 2015



#### Fleet Forecast

Over the next 20 years, the number of in-service aircraft worldwide according to Boeing is expected to reach 45,240. To achieve this number, 39,620 new airplanes will be needed, 71.02% of which will be single-aisle planes, 12.87% small wide body aircraft, 8.76% medium wide body aircraft, 6.01% regional jets and 1.34% large wide body aircraft. The airline industry needs an approximate net annual increase in fleet size of 4%, and an approximate replacement rate of 3% to meet the growing global growth rate.

On air freight, lower-hold cargo capacity on passenger flights has been expanding as airlines deploy new aircraft with enhanced cargo capability. However, dedicated freighters are often superior to passenger aircraft for cargo. As a result, freighters are expected to continue carrying more than half of global air cargo to satisfy the demanding requirements of that market. Air cargo traffic in revenue tonne-kilometres, is projected to grow at an average of 4.2% per year over the next 20 years. Boeing estimates that the replacement of aging airplanes, plus the industry's growth requirements will create a demand for 2,370 freighter deliveries over the next 20 years. Of these, 1,440 will be passenger airplane conversions. The remaining 930 airplanes, valued at \$270 billion, will be new. The overall freighter fleet will increase by more than half from 1,770 airplanes in 2015 to 3,010 by 2035.

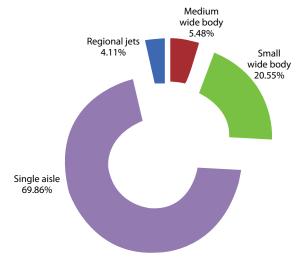


Figure 6.4: Africa's 20 year fleet composition forecast

#### Source: Boeing Market Outlook

The long term traffic growth prospects for Africa coupled with the need to replace the region's aging fleet will result in a demand for 1,150 new airplanes by 2035 and the total number of commercial aircraft to be in operation in Africa for the 20-year period are estimated to increase by about 112% to 1,460 according to Boeing. Of this aircraft demand forecast, about 70.43% of aircraft will be single aisle aircraft, 20.87% small wide body aircraft, 5.22% medium wide body aircraft, 3.48% will be regional jets.

#### SECTION SEVEN

#### Employee Productivity

IATA estimated that total employment by airlines reached 2.54 million in 2015, a gain of 2.8% compared to 2014 and it is estimated to each 2.61 million in 2016. Productivity measured in ATKs generated per employees was 479,745

in 2015 compared to 463,996 in 2014. The trend in improvement in productivity is helping airlines to keep unit labour costs under control however unit labour costs are expected to increase slightly in 2016. by 0.5% in 2015.

Table 7.1: Worldwide airline industry employment and employee productivity

	2014	2015
Employment (million)	2.47	2.54
Productivity (ATK/employee)	463,996	479,745
Unit labour cost: \$/ATK	0.125	0.118

Source: IATA, ICAO, ATAG, Oxford Economics

The analysis below is based on the reported data by 24AFRAA member airlines

The total number of people employed directly by the 24 AFRAA member airlines that reported their data in

2015 dropped by 2.48% from 81,960 in 2014 to 79,928 employees in 2015.

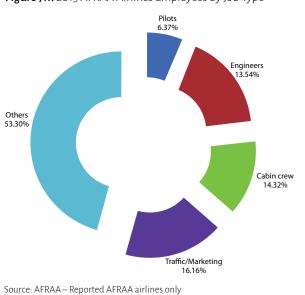
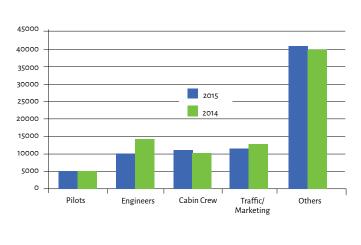


Figure 7.1: 2015 AFRAA Airlines Employees by Job Type

Figure 7.2: AFRAA Airlines Employment by Job Type (2015)



Source: AFRAA

Table 7.2: Employee Performance Indicators for some AFRAA airlines

	2014	2015
ATK/employee	350,789	393,121
RTK/employee	217,308	228,177
Number of passengers/employee	595	623
Employee/aircraft	154	151

Source: AFRAA – Reported AFRAA airlines only

The figures show that employee productivity of AFRAA member airlines is below global average at 71% of the

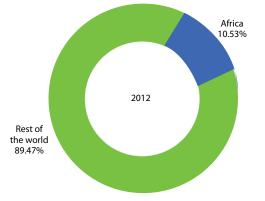
worldwide average in 2014. This may be an indication of overmanning in African airlines.

#### SECTION EIGHT

#### Safety

There were 19 fatal airline accidents worldwide in 2015 with 580 fatalities of which two were in Africa or 10.5% of the total with 53 fatalities. In 2014, there were 24 fatal airline accidents worldwide with 991 fatalities. In Africa in 2014, there were seven airline accidents or 29% of the total

Figure 8.1: Africa-vs-Rest of the World Accidents – 2015



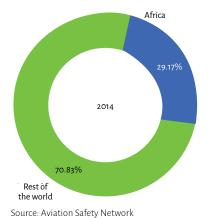
Source: Aviation Safety Network

The average age of aircraft involved in fatal accidents worldwide in 2015 was 31.75 years whilst that in Africa

Table 8.1 World Airline Fatal Accidents in 2015

with 125 fatalities. The accident rate in Africa in 2015 is the lowest for a long time. This shows that the various efforts by AFRAA, IATA, AFCAC, ICAO and other stakeholders to enhance a safety culture is yielding positive results.

Figure 8.2: Africa-vs-Rest of the World Accidents - 2014



was 37 years. The two accidents in Africa involved cargo aircraft.

	Date	Туре	Operator	Locations	Fatalities	Age
1	20 January	Antonov 2 (Charter)	Olimp Air	Near Shatyrkkul, Kazakhstan	6	41.5
2	2 February	ATR-72-600	TransAsia Airways	Taipei, Taiwan	43	0.833
3	11 February	Beechcraft 1900c (Ferry/positioning)	Aeropanamericano	Miami, USA	4	26
4	24 March	Airbus A320-211	Germanwings	17 km SW of Barcelonnette, France	150	24.33
5	26 March	Antonov 2R	Agrotekhservice	Promin, Ukraine	2	36
6	13 April	SA226-TC-Metro II (cargo)	Carson Air	N of Vancouver, BC, Canada	2	37
7	9 May	Airbus A 400 Atlas (test Flight)	Airbus Industrie	Near Sevilla, Spain	4	U/K
8	16 May	Antonov 2R (Ferry/ Positioning)	KlaipedosAvialinijos	Off Klaipeda, Lithuania, Baltic Sea	2	33
9	20 May	Hawker 800	U/K	Off Puerto, Colombia	4	U/K
10	2 June	SA226-TC-Metro II (Test Flight)	Aeronaves	Near Queretaro Airport, Mexico	5	34
11	25 June	De Havalland DHC-3	Promech Air	Near Lake Misty Fjords National Monuments, USA	9	57
12	31 July	Embraer EMB-505 Phenom 300	Salem Aviation	Blackbushe Airport, UK (from Italy)	4	4
13	16 August	ATR-42-300	Trigana Air Service	Between Jayapura & Oksibil, Indonesia	54	27
14	15 September	DHC-3T	Rainbow King Lodge (Charter)	E. of Iliamna, AK, USA	3	61
15	2 October	DHC-6 Twin Otter	AviatarMandiri	Mt Latimojong, Indonesia	10	34
16	31 October	Airbus A 321-231	Metrojet, Russia	Central Sinai, Egypt	224	18.5
17	4 November	Antonov 12BK (cargo)	Allied Services Ltd	Juba Airport, S. Sudan	41	44
18	11 December	Cessna 2008B Grand Caravan (cargo)	Wasaya Airways	N.E. Pickle Lake Airport, ON, Canada	1	U/K
19	24 December	Airbus A310-304F (Cargo)	SAervice Air	Mbuji-Mayi Airport, DRC	4+8	29.83
	Total				580	31.75

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

AFRAA in conjunction with several relevant stakeholders will continue to work diligently in various areas of aviation to ensure improved safety in the region. The results from recent years show major improvements. All stakeholders need to continue to be vigilant and avoid complacency in view of the significant improvement of safety standards in the past few years.

We are confident that these efforts plus the efforts by ICAO and AFCAC to strengthen the oversight capacity of African States will continue to help to raise the safety culture in African aviation to global standards.

#### IOSA

As of September 2016, Africa had 45 airlines on the IOSA registry comprising almost all the major carriers on the continent. It is important for an airline to have IOSA registration as this demonstrates that the carrier complies with the most stringent of rules and practices governing aviation safety. Accident statistics consistently reveal that IOSA certified airlines in Africa have accident rates that are at par with global average.

Table 8.2: List of African airlines on the IOSA registry:	

1.	Aero Contractors Nigeria	2.	Firstnation Airlines (SS) Ltd (Nigeria)
3.	Africa World Airlines (Ghana)	4.	Kenya Airways
5.	Afriqiyah Airways	6.	LAM Mozambique Airlines
7.	Air Algérie	8.	Mauritania Airlines International
9.	Air Austral (Reunion Islands)	10.	Nesma Airlines
11.	Air Botswana	12.	Nile Air (Egypt)
13.	Air Burkina	14.	Nouvelair (Tunisia)
15.	Air Cairo (Egypt)	16.	Nova Airways (Sudan)
17.	Air Madagascar	18.	Precision Air Services
19.	Air Mauritius	20.	Royal Air Maroc
21.	Air Namibia	22.	RwandAir
23.	Air Seychelles	24.	Tunisair
25.	Air Zimbabwe	26.	SAFAIR (Proprietary) Ltd
27.	Allied Air (Nigeria)	28.	South African Airlink
29.	Almasria Universal Airlines (Egypt)	30.	South African Airways
31.	ALS Limited (Kenya)	32.	South African Express Airways
33.	Arik Air (Nigeria)	34.	Starbow (Ghana)
35.	Cameroon Airlines Corporation	36.	Sudan Airways
37.	Comair (South Africa)	38.	TAAG Angola Airlines
39.	CompagnieAérienne ASKY	40.	TACV Cabo Verde Airlines (Cape Verde)
41.	EgyptAir	42.	Tassili Airlines (Algeria)
43.	Equajet (Congo Republic)	44.	Trans Air Congo (Congo Republic)
45.	Ethiopian Airlines		

#### 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.

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

#### **ISAGO** Registry

The ISAGO registry lists all ground handling companies that have undergone an ISAGO audit and have cleared all findings.

	Ground Services Provider	No. of Stations GSP is Registered
1	Aero Services (Egypt)	3
2	Air Mauritius	1
3	BidAir	3
4	Congo Handling	2
5	DAS Handling (Uganda)	1
6	EgyptAir	5
7	Egyptian Aviation Services	4
8	Entebbe Handling Services Ltd	1
9	Ground Handling Assistance (Angola)	1
10	Ground2Air (Equity Aviation Indian Ocean Ltd (Mauritius)	1
11	International Aviation Business (Cairo)	1
12	Kenya Aerotech	1
13	Kenya Airways	2
14	Link Aero Trading Agency (Egypt)	2
15	Menzies	12
16	National Handling Services (Zimbabwe)	3
17	Nigeria Aviation Handling Co.	2
18	RAM Handling	1
19	Senegal Handling Services	1
20	Siginon Aviation (Kenya)	1
21	Skyway Aviation Handling Co. Ltd	3
22	Swissport	25
23	TAV Tunisie	1
24	Tiger Aviation Services (Egypt)	3
25	Tradewinds Aviation Services Ltd	2
26	ZAS (Z-Aviation Services) (Egypt)	3

 Table 8.3:
 Ground Service Providers in Africa on the ISAGO registry

It is heartening to note that the number of African stations with ISAGO registration has increased from 48 in May 2015 to 75 by May 2016. AFRAA will continue to facilitate more ground handling companies to be on the ISAGO registry. AFRAA encourages member airlines to patronize ISAGO registered handlers to encourage more handlers to adopt ISAGO. AFRAA will redouble efforts to ensure that more ground handling companies obtains ISAGO registration.

## **SECTION NINE** >> AFRAA Secretariat Value Adding Activities

## 9.1 Safety

## 9.1.1 IOSA Registered Airlines

There has been significant improvement in safety following the adoption of the aviation safety targets under the Abuja Declaration endorsed by the AU Assembly of Heads of State and Government of January 2013. African States are, however below the global average in the implementation of the ICAO eight critical elements of a safety oversight system. African operators need to complement the ongoing efforts by the various stakeholders for enhanced safety, efficiency, security, and environmental performance.

As a way to advance and accelerate the implementation of the ICAO No Country Left Behind campaign, as operators, we also want No Airline to be left Behind in the adoption of best practices in safety, security, operations and sustainable development of the aviation industry. In this regard, although tremendous progress has been made in getting African operators to obtain the IATA Operational Safety Audit (IOSA) registration with 45 airlines being on the register currently, AFRAA continues to push for the rest of eligible airlines to get this critical registration.

As of October 2015, Africa had 45 airlines on the IOSA registry. AFRAA urges all African airlines to have IOSA registration as this demonstrates that the carrier complies with the most stringent of rules and practices governing aviation safety. Accident statistics consistently reveal that IOSA certified airlines in Africa have accident rates that are at par with global average.

## 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

## 9.2 Training and Human Capital Development

In 2016, AFRAA Secretariat put emphasis on the promotion of safety for African airlines. The following

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 52 in October 2015 to 75 by October 2016.

courses were conducted in the training calendar in 2016:

	I. AFRAA Courses		
	Course	Course date	Host
1	Air Worthiness	9 - 13 May	Rwanda
2	Implementing Safety Management Systems	25 - 27 May	AFRAA
3	Flight Operations Inspector	28 May - 1 June	Rwanda
4	Airline Document Systems & Control	21 - 24 June	AFRAA
5	Airline Accident & Incident Investigation	18 -22 July	AFRAA
6	Airline Emergency Planning and Response Management	16 - 19 August	AFRAA
7	Shipping Lithium Batteries by Air (session 1)		
8	Shipping Lithium Batteries by Air (session 2)		
9	Refresher Dangerous Goods Regulations (cat 7)	5 - 16 October	Detauren-
10	Refresher Dangerous Goods Regulations (cat 8)		Botswana
11	Refresher Dangerous Goods Regulations (cat 9)	]	
12	Refresher Dangerous Goods Regulations (cat 10)		

Table 9.1: Courses, Seminars and Workshops conducted during 2016

II. Courses in conjunction with other organizations offered to member airlines at no cost			
	a. IATA Courses for Committees		
13	IOSA Programme Workshop	11 - 12 April	AFRAA
14	Aviation Lead Auditor	13 - 15 April	AFRAA
15	Station Ground Handling Management	6 - 10 June	AFRAA
16	Business Aviation Handling & Fixed-Base Operations	23 - 25 August	AFRAA
17	Aviation Fuel Management	4 - 6 October	AFRAA
	b. Engen		
18	Basics on Jet Fuel	21 - 23 March	Mauritius
III. Workshops and Seminars			
20	AFRAA/IATA/ICAO/AFCAC Aeropolitical Forum	23 November	Victoria Falls

## 9.3 Seeking to Fully Open African Skies

## 9.3.1 Full Liberalization of African skies

The Secretariat is working with the African Union Commission (AUC) and AFCAC to facilitate the full liberalisation of African skies which 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 (YD) towards the establishment of a single African air transport market by January 2017.

The number of States that declared their solemn

#### 9.3.2 Visa Requirements

With full liberalisation of African skies gaining momentum, the Secretariat continues to lobby for removal of nontariff barriers to the movement of people and goods in the continent. For example, visa requirements for entering each other's country are often unnecessarily stringent, expensive and often take a long time to process in several states which adversely impact the number of customers patronising air transport. Often, states do not exchange embassies requiring one to travel to another country to get a visa. AFRAA is lobbying for visa requirements to be either removed, streamlined or facilitation of receipt of visas at destination ports of entry.

#### 9.4 AFRAA Projects

#### 9.4.1 AFRAA Fuel Project

AFRAA Fuel Committee conducted its sixth joint tender for the purchase of fuel in 2016. The tender process was concluded in November 2016 with the notification of the commitment to the immediate and unconditional implementation of the YD towards the establishment of a single African air transport market by 2017 has increased from 11 in 2015 to 14. The 14 states are Benin, Cape Verde, Egypt, Ethiopia, Ghana, Ivory Coast, Kenya, Namibia, Nigeria, Republic of Congo, Rwanda, Sierra Leone, South Africa, and Zimbabwe. Several other States have similarly expressed their commitment but have not formally made the required depositions with the AUC.

These positive developments have been complimented by more States removing non-physical barriers to travel such as visa requirements. Currently 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 in which visa requirements are relaxed or citizens can get their visas at the point of entry.

awards to the successful fuel suppliers. The participating airlines have realized cost savings over the years since commencement of the Project.

## 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. With the support of CITA Petroleum Nigeria, an industry-wide meeting took place in May 2016 in Lagos to discuss the short-term and long-term measures to address the supply reliability issues across the country. Efforts are being made to stabilize the frequent disruptions and fuel shortages in Nigeria. AFRAA is also closely monitoring the foreign currency issues in Nigeria which are currently unstable. AFRAA and IATA contacted the governments of Zambia for the removal of Jet Fuel duty and removal of the Strategic Reserve Fund which had a negative impact on the cost of fuel in Zambia. AFRAA and IATA have also continued to hold meetings with SIR Refinery on the price reduction in Abidjan. There are also joint campaigns in Angola, Burkina Faso, Cameroon, DRC, Equatorial Guinea, Ethiopia, India, Sudan and Zambia and it has been noted that the joint efforts have been very effective as they present a united front.



## 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, 8 codeshares and 15 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

#### 9.4.4 AFRAA Ground Handling Project

Now in its third 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 2016, the Project conducted its third tender for the procurement of ground handling services at selected airports and intensified its lobbying efforts for the reduction of high charges and taxes and for the opening up of markets to competition. The project also

#### 9.5 AFRAA Cargo Project

The AFRAA Cargo Task Force was formed following AFRAA Cargo days conference held on 30 September – 1 October 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.

#### 9.6 Blocked Funds

Several airlines in Africa are facing challenges of repatriating funds from some States. Among the reasons for the blocked funds is the unavailability of foreign exchange in some States, especially those that were to a large extent dependant on oil revenues and were thus negatively affected by the continued low global oil prices. Such countries include Angola, Nigeria, and Sudan. These States have over \$1.4 billion of blocked funds for airlines as of June 2016. In some cases the problem is arising from the economic challenges within the States including problems arising from political issues. In the case of Sudan the situations is compounded by sanctions on the country by some major economies. In many of the States concerned aviation is not considered a priority in the allocation of foreign exchange despite the proven huge economic benefits of aviation in the countries.

#### 9.7 Development of AFRAA Land

Significant progress was made in 2016 towards the development of AFRAA parcel of land located at its headquarters in Nairobi.

Selection of the main contractors, mechanical and electrical contractors was done and approvals from Nairobi City County (NCC) and National Environment Management Authority (NEMA) were sought following 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 double 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.

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 courses for the participating airlines on various subject areas in ground handling operations.

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 EgytptAir was elected as the Chairman of the Project and Mr. Sanjeev Gadhia, Chief Executive Officer at Astral Aviation was elected as Vice Chairman.

The inaccessibility of these funds is creating cash flow problems affecting mainly African carriers. In addition, 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.

Some service providers such as fuel suppliers, ground handling and catering companies are demanding that payment be made in hard currency. Some countries do not allow airlines to sell tickets in foreign currency, such as Senegal even though fuel companies in that country are required to receive payment in foreign currency. This has exposed airlines to make sales in local currency which is depreciating and which some service providers do not accept.

which the ground breaking for phase one of the project will take place. A clerk of works was recruited for the development of the project which is being overseen by a Committee comprised of Kenya Airways, RwandAir, Precision Air and South Africa Airways.

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

## 9.8 AFRAA Aviation Stakeholders Convention

AFRAA Secretariat in partnership with RwandAir successfully staged the 5th Aviation Stakeholders Convention from 7-9 May 2016 at the Serena Kigali Hotel in Rwanda. The conference was convened under the high patronage of Honourable James Musoni, the Minister of Infrastructure of the Republic of Rwanda and was held under the theme "Winning together through Innovation and Collaboration". The event gathered 406 high profile delegates from 43 countries across the world.

As part of the conference, there were presentations and panel discussions on trendy subjects in aviation, networking opportunities and one-to-one appointment sessions. In

## 9.9 New Members and Partners

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

We warmly welcome the three member airlines and two partners that joined AFRAA in 2016. The new member airlines are: Badr Airlines (Sudan), Nile Air (Egypt) and

## 9.10 ISO 9001: 2015 Certification for AFRAA

AFRAA attained ISO 9001:2008 certification in early 2016 in recognition of the need for industry best practices in corporate governance of the Association and the need for world-class quality of Secretariat activities. Adopting ISO 9001 certification was meant to improve the Association's internal management and operational processes. AFRAA has called upon all airlines in the continent to obtain IOSA registration, so it makes sense for the Association to have its equivalent of IOSA. AFRAA is the only airline association with this prestigious award. We are now working towards the ISO9001:2015 certification.

## 9.11 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,

## 9.12 Environmental Issues and ICAO 39th Assembly

The Executive Committee deliberated on the developments by African States that have taken place in regards to the Global Market Based Measures (GMBM) scheme for international aviation in preparation for the 39th ICAO Assembly. The Committee discussed the design and implementation principles of GMBM that had been agreed upon by African states. In the calculation of MBM, the Committee recommended that RTKs be used instead

## 9.13 Black Economic Empowerment South Africa

In South Africa there is a programme by the government to empower the disadvantaged communities. The programme has got two dimensions, namely the internal dimension for companies which operate in the country as well as external one for multinationals and entities like airlines which are based outside the county but provides services within the country. addition to the conference plenary sessions, the following master classes were conducted:

- i. Total Revenue Optimization Driving Value to Your Commercial Organization by Sabre Airline Solutions;
- ii. An Overview of Leasing: an introduction to leasing, regional trends and leasing versus buying by Boeing;
- iii. UAV: The new kid in town. How drones will change your business by Lufthansa Consulting.

Tunisair kindly offered to host the next Convention scheduled to take place in May 2017 in Tunis. Both teams have kicked off preparations for the 2017 edition of the event.

Safe Air Company Limited (Kenya). The new partners are CHAMP Cargosystems and FLYHT Aerospace Solutions Ltd.

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.

ISO 9001:2015 is the latest edition of ISO 9001, ISO's quality management systems standard, published in September 2015. The earlier versions of ISO 9001 were quite prescriptive, with many requirements for documented procedures and records. In the 2000 and 2008 editions, the focus was more on managing processes, and less on documentation. The ISO 9001:2015 is even less prescriptive than its predecessor, focusing instead on performance. This was achieved by combining the process approach with risk-based thinking, and employing the Plan-Do-Check-Act cycle at all levels in the organization.

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.

of Gross National Income (GNI) to cater for countries with high income but low level of aviation development. The Committee directed the Secretariat to align AFRAA position with that of IATA which then should be articulated by members to their governments in writing.

The Committee agreed that exemptions should be sought for African States in view of the fact that African States were not among the most polluting countries in aviation.

As the policy is going to impact airlines, the Secretariat will be meeting with the relevant authorities to understand how airlines are supposed to participate and how it would impact their operations and to ensure that the interests of airlines are protected.



# The Customer-Centric Airport Redefining The Airport Customer Experience

Reinventing the customer experience has significant implications for airlines and airports, especially as many of the challenges are particularly critical on the day of travel. During the day of travel, an airline's operational focus is on passenger movement and on-time flight departures, as well as to increase throughput and streamline processes, such as baggage processing, customer check-in and boarding, all while maximizing revenue per passenger. Sabre Airline Solutions is excited to release a whitepaper detailing the challenges that airlines face in enhancing the airport experience and presents significant opportunities — for both airlines and airports — to remove travelers' stress and improve the overall customer experience. Learn more about the airport and airline technology advancements that will radically change the day-of-travel and airport journey today, tomorrow and in the future.

Read the whitepaper here: www.sabreairlinesolutions.com/AFRAA\_ServiceRecovery



# AFRAA

## **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



## 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: +27119789993 Email: mikekenny@flysaa.com / SATMarketing@flysaa.com



#### EgyptAir Maintenance and Engineering

Contact: Eng. Abou Taleb Tawfik Chairman of Egyptair Maintenance & Engineering Co. Office: +202 22656855/202 22657445

Fax: +202 22656873/202 22685749 Email: chairman\_me@egyptair.com http://www.egyptair-me.com



#### Ethiopian Airlines

Contact: Mr. Zemene Nega Director MRO Sales & Marketing Email: ZemeneN@Ethiopianairlines.com

Mr. Aman Siraj Manager Sales & Business Development Tel: +251 115 174013 Fax: +251 116 651200 Email: Amans@ethiopianairlines.com



#### **Snecma Engine Services**

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



#### TunisAir Technics

Nejmeddine Tebourski TunisAir Technics Maintenance Training Manager Tel: +216 71 942-340 Email: nejmeddine.tebourski@tunisair.com.tn

## **SECTION ELEVEN** >> FAA or EASA Certified Training Centres



EgyptAir Training Center Contact: Capt. Mohamed Manar Anaba VP EgyptAir Training Center Tel: +20 10 661 5367 Email: technical.traininggm@egyptair.com



Ethiopian Aviation Academy

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



#### Kenya Airways Pride Centre

Contact: Dr. Mbithe Anzaya Head of Learning and Development Tel: +254 020 264 22846/64. Email: learning.development@kenya-airways.com



RAM Academy Contact : Campus Royal Air Maroc Casablanca, Maroc 20200 Tel: + 212 22 91 25 43 Fax: + 212 22 91 25 81



#### South African Airways Learning & Development

Contact: Ms. Nivy Moodley Head of SAA Learning & Development Email: NivyMoodley@flysaa.com



#### **Tunisair Training Centre**

Contact: Mr. Charfeddine Bessaadi Director, Training Centre Tel: +216 70 837 000 Ext. 2958 Email: charfeddine.bessaadi@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 2265 6262 Fax: +202 2265 6240 Email: trainingcenter@egyptair.com



#### **Ethiopian Aviation Academy**

B737NG and B757/B767 full flight simulator trainings

Contact: Mr. Tewodros Balcha Managers Sales & Business Development Tel: +251 116 651191 / +251 116 651192 Fax: +251 116 651200 Email: TewodrosB@ethiopianairlines.com



#### Kenya Airways Pride Centre

B737 NG full flight simulator

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



#### CasaAero S.A.S

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

Zone Urbaire de Nouaceur Casablanca Maroc BP 98 Nouaceur Tel: +212 522 420700/02 Email: azamrane@royalairmaroc.com mroudani@royalairmaroc.com

## **SECTION THIRTEEN** >> AFRAA Airlines – Individual Summary Facts





**Mr. Abubaker Elfortia** General Manager

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

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

1,086

FLEET
Airbus 319-100

Airbus 320-200	3
Airbus 330-300	1

2

FLEET ON ORDER

Airbus 350-900 10





**Mr. Mohamed Abdou Bouderbala** Chief Executive Officer

ADDRESS 1 Place Maurice Audin, Alger, Algérie 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 Aeroflot Finnair Luxair Syrian Air Kuwait Airways DESTINATIONS SERVED Domestic 31

Domestic 31 Intra-Africa 10

International 29 EMPLOYEES 9,095 FLEET Airbus A330-200 8 Boeing B767-300 3

Airbus A330-200 8 Boeing B767-300 3 Boeing B737-800 21 Boeing B737-700 1 Boeing B737-600 5 ATR72-500 12 ATR72-600 3 Cargo Lockheed L100-130 1

FLEET ON ORDER Boeing 787-800 B737-700 Cargo 3





**Ms. Agnes Khunwana** Ag. 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 Intra-Africa

4

8

EMPLOYEES 615

FLEETATR42-5003ATR72-5002British Aerospace BAe 146-1002





**Mr. Abderahmane Berthé** Chief Executive Officer ADDRESS 29, Avenue de la Nation, BP 1459 Ouagadougou, Burkina Faso

Tel: +226 5049 2323 Fax: +226 50317174 www.air-burkina.com

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 Development Network): 88% Government: 5% Other: 7%

COMMERCIAL PARTNERSHIP Air Côte d'Ivoire Kenya Airways

DESTINATIONS SERVED Domestic 2 Intra-Africa 7

EMPLOYEES 254

FLEET Embraer E170 2

FLEET ON ORDER Embraer E170





**Mr. Gilles Filiatreault** President & Chief Executive Officer

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

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 France Kenya Airways South African Airways Thai Airways Air Austral

DESTINATIONS	SERVED
Domestic	11
Intra-Africa	5
International	2
EMPLOYEES	
1,182	
FLEET	
AIRBUS A340	2
B737-300	1
B737-800	1
ATR72-600	2
ATR72-500	2
ATR42-500	1

air mauritius



**Mr. Megh Pillay** 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 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 Virgin Australia Airlines DESTINATIONS SERVED Domestic 1 Intra-Africa 12 Intercontinental 28 **EMPLOYEES** 2,841 FLEET A340-300 4 A340-300E 2 A330-200 2 A319-100 2 ATR72-500 3 FLEET ON ORDER A350-900 XWB 6





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 DESTINATIONS SERVED

Domestic 8 Regional 7 Intercontinental 1 **EMPLOYEES** 658 FLEET Airbus A319-100 4 Airbus A330-200 2 Embraer ERJ 135 4

## Seychelles



Mr. Roy Kinnear Chief Executive Officer

ADDRESS Air Seychelles Seychelles International Airport PO Box 386, Victoria, Mahe, 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 Austral Airberlin Alitalia Cathay Pacific Etihad Airwys South African Airways

#### DESTINATIONS SERVED

D Lotin a monto o Lite	••
Domestic	8
Intra-Africa	4
Intercontinental	4
EMPLOYEES 727	
FLEET	
DHC-6-300	2
DHC-6-400	4
Airbus 220 200	~

Airbus 320-200 2 Airbus 330-200 1





Eng. Johnson Mfinanga Ag. Managing Director & Chief Executive Officer

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

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 Regional

**EMPLOYEES** 196

FLEFT Bombardier CRJ 100 1 Bombardier Dash 8-Q300 1

FLEET ON ORDER Bombardier Q400

2

4

2





Capt. Ripton Muzenda Chief Executive Officer

#### ADDRESS

Air Zimbabwe Corporation PO Box AP 1 Harare, Zimbabwe Tel: +263 4 575111 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 4 Intra-Africa 2

EMPLOYEES 543

#### FLEET

Boeing B767-200ER	2	
Boeing B737-200	3	
Airbus A320-200	2	
MA60	1	





Mr. Henok Teferra 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, SAKHUMNOTHO Group Holding and other West and Central African private investors

COMMERCIAL PARTNERSHIP Ethiopian Airlines

DESTINATIONS SERVED Domestic Intra-Africa 23 FLEET Boeing 737-700 3 Boeing 737-800 1 Bombardier Dash 8 Q400 4 Boeing 737-400 F 1





Mr. Sanjeev Gadhia Chief Executive Officer

ADDRESS Jomo Kenyatta International Airport PO Box 594, 00606, Nairobi, 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 DC-9-34F Boeing 727-200F Fokker F27 Cessna 208 Caravan	1 1 1 2	
FLEET ON ORDER Boeing 737-400F MD-83F	4 3	

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**Eng. Ahmed Osman Mohamed Ahmed Abu Shaira** Chief Executive Officer

#### ADDRESS

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

IATA Code: ]4 ICAO Code: BDR

AFRAA MEMBERSHIP Became member in April 2016

OWNERSHIP STRUCTURE 100% Private Mr. Ahmedosman Abushaera: 50% Mr. Hashim Yousif ElDigair : 50%

COMMERCIAL PARTNERSHIP Sudan Airways

#### DESTINATIONS SERVED

Domestic	5
Regional	2
International	1
EMPLOYEES 348	
FLEET	
B737-300	1
B737-500	4
IL-76TD	2
Dornier 328	1
FLEET ON ORDER	
B737-800	1

## 🕝 Camair-Co



**Mr. Ernest Dikoum** Chief Executive Officer

ADDRESS Immeuble La Rotonde- Boulevard de la liberté BP 4852 Douala-Cameroun Tel: +237 33 42 20 10 / 33 42 20 13 Fax: 33 42 20 30 / 30 15 / 33 42 29 80 / 85 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	4
Intra-Africa	7
Intercontinental	1

## 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: +240333098149 /+240222013663 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	11
Intercontinental	1
FLEET	
ATR 42-320	1
ATR 42-500	1
ATR 72-500	2
B737-800	3
B767-300	1
B777-200	2





**Mr. Andreas Kaiafas** Chief Executive Officer

ADDRESS C/ ENRIQUE NVO S/N Amanda Building No. 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 2 Intra-Africa 4

FLEET BAE 146 – 2

FLEET ON ORDER ER]135 LR - 2 ER]145 LR - 1

## SECAir



**Mrs. Fatima Beyina-Moussa** Director General

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

### IATA CODE: LC

AFRAA MEMBERSHIP Established in 2011 Became member in 2012

#### OWNERSHIP STRUCTURE

EMPLOYEES 475

#### DESTINATIONS SERVED Domestic 3 Intra-Africa 8

Intercontinental	4
FLEET	
Boeing B737-300	2
Boeing B737-700	2
Boeing B757-200	2
Boeing B767-300	1

## FLEET ON ORDER

Boeing 787

1



A STAR ALLIANCE MEMBER 🖈



**Mr. Safwat Musallam** Chairman & Chief Executive Officer, EgyptAir Holding Co.

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

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	10	
Intra-Africa	21	
Intercontinental	56	

EMPLOYEES 30,184

F	LE	Ē	Т	

Airbus 330-200	7
Airbus 330-300	4
Airbus 320-200	11
Airbus 321-200	4
Boeing 737-800	20
Boeing 737-500	1
Airbus 340	3
Boeing 777-200	4
Boeing 777-300	6
Embraer 170	12

FLEET ON ORDER Boeing 737-800

9







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 ASKY Airlines Star Alliance

#### DESTINATIONS SERVED

Domestic	20
Intra-Africa	35
Intercontinental	49

EMPLOYEES

9,305

FLEET	
Boeing 777-300ER	4
Boeing 777-200LR	6
Boeing 787-8	16
Boeing 767-300ER	6
Boeing 737-800	15
Boeing 737-700	8
Bombardier Q400	17
Boeing 777F	6
Boeing 757F	2
Airbus 350-900	2
FLEET ON ORDER	
A350-900	12
Boeing 787-900	4
Boeing 787-8	3
Boeing 737-MAX8	30
Bombardier Q400	2

Kenya Airways 🌍



Mr. Mbuvi Ngunze 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 Air Burkina Air Mauritius Air Namibia Etihad Airways Jet Airways LAM Mozambique Precision Air SkyTeam

## DESTINATIONS SERVED

Domestic4Intra-Africa45Intercontinental14

#### EMPLOYEES 4,002

FLEET Boeing 787-8 7 Boeing 737 - 300F 2 Boeing 737 - 700 4 Boeing 737 - 800 8 Embraer 190 15





**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 PrecisionAir South African Airways South African Express TAP Portugal TAAG Angola Airlines

DESTINATIONS SERVED Domestic 10 Intra-Africa 5

EMPLOYEES 695

FLEET Boeing 737-500 Bombardier Q400 Embraer 190

1

3

2





**Eng. Khaled Ben Alewa** 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 10 Regional 4 International 9

FLEET

Airbus 320-200	7	
Airbus 330-200	2	
Bombardier CRJ900	8	
ATR 42-500	2	
FLEET ON ORDER		
Airbus 350-900	6	





**Mr. Mohamed Radhy Ould Bennahi** 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

FLEET	
B737-500	2
B737-700	1
ER]145	1





**Mr. Ahmed Aly** Chief Executive Officer

## ADDRESS

Cairo International Airport, Terminal 1 4 Obour Buildings Salah Salem St., Cario 7 Aswan Square7 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

## DESTINATIONS SERVED

Domestic	2
Intra-Africa	2
International	14
FLEET	
A320-200	5
A321-200	1



PrecisionAir



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 10 Intra-Africa 1

EMPLOYEES 509

FLEET	
ATR 72	5
ATR 42	4

## punto 🔛 azul



Mr. Deana Chuck Managing Director

ADDRESS Centro de Trabajo Arcangel, Barrio de Paraiso, s/n Crta Aeropuerto km<sup>3</sup> 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

3

EMPLOYEES

FLEET ER]145





**Mr. Abdelhamid Addou** Chief Executive Officer

## ADDRESS

Aeroport 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 Aeroflot Etihad Airways Iberia SN Brussels TAAG Angola Airlines Turkish Airlines

DESTINATIONS SERVED Domestic 20 Intra-Africa 26 International 44

EMPLOYEES 2175

FLEET ATR 72 5 Boeing 737-300F 1 Boeing 737-800 30 Boeing 767-300ER 4 Boeing 737-700 6 Boeing 787-8 4 Embraer E190 4 Boeing 747-400 1

FLEET ON ORDER Boeing 787-8 1



## RwandAir



Mr. John Mirenge 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 Brussels Airlines Precision Air Services

DESTINATIONS SERVED Domestic Intra-Africa International	1 15 1
EMPLOYEES 749	
FLEET	
Airbus 330	1
Boeing 737-700	2
Boeing 737-800	2
Bombardier CRJ900 Next Gen	2
Bombardier Dash 8-Q400	2
FLEET ON ORDER	
Airbus 330	1





**Mr. Mohamed Aden Noor** Chief Executive Officer

ADDRESS Cargo Centre Jomo Kenyatta International Airport 2nd Floor, Entrance B, Room S60 PO Box 59200, 00200 Nairobi, Kenya

IATA CODE: K3 ICAO CODE: SAQ

AFRAA MEMBERSHIP Became member in 2016 Established in 2007

DESTINATIONS SERVED Intra-Africa 26 Intercontinental 1

FLEET B727-2Q9 Fokker 50 Fokker 27-300 HS 748 Barron 55 Caravan





**Mr. Musa Zwane** Chief Executive Officer

ADDRESS 5th Floor, 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 14 Intra-Africa 24 International 12 EMPLOYEES 11,491 FLEET B737-800 16 A319-100 8 A320-200 12 6 A330-200 8 A340-300 A340-600 9 **B737-Freighters** 2





**Mr. Inati Ntshanga** Chief Executive Officer

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

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 1,015

FLEETBombardier CRJ 200ER10Bombardier CRJ 7004Bombardier Dash 8-Q40010

## Starbow



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	4	
Bombardier Q400	1	
FLEET ON ORDER		
CR]100	1	

Liber Lipelant



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

DESTINATIONS SERVED

 FLEET

 Airbus A300B4-600R2

 Airbus A320-200
 1

 Fokker 50
 4

 Boeing 737-300
 1

 Boeing 737-500
 1

TAG 
INHAS AEREAS DE ANGOLA
INGOLA JURLINES



**Mr. Peter Hill** 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 Air Namibia British Airways Brussels Airlines Iberia Lufthansa LAM Mozambique Kenya Airways

DESTINATIONS SERVED

Domestic	12
Intra-Africa	13
Intercontinental	11

## EMPLOYEES

3,631

FLEET	
B737-700	5
B777-200ER	3
B777-300ER	5





**Mr. Jose Luis Sa Nogueira** Chief Executive Officer

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

IATA CODE: VR ICAO CODE: TCV

AFRAA MEMBERSHIP Became member in 2014 Established in 1958

OWNERSHIP STRUCTURE Government: 100%

DESTINATIONS SERVED Domestic 10 Intra-Africa 3 Intercontinental 5 FLEET ATR 72-500 3 Boeing 757-200 1





**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 governmentowned company)

DESTINATIONS SERVED	
Domestic	15
International	5

EMPLOYEES 1,165

FLEETBoeing 737-8004Bombardier Dash 8-Q2004Bombardier Dash 8-Q4004





**Mrs. Sarra Rejeb** Chairperson & 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 SERVI	ED
Intra-Africa	9
Intercontinental	34
EMPLOYEES 3,712	
FLEET A319-100	4

A319 100	4
A320-200	17
B737-600	7
A330-200	2

## **SECTION FOURTEEN** >> AFRAA Partners – Profiles and Contacts



ACS Group is a leading global professional services firm delivering professional aviation solutions with a focus on safety, compliance and operational excellence. Our services range from safety & compliance audits and operational reviews, through to specialist aviation consulting including documentation services, auditor and safety training, Fatigue & Risk Management specialists and outsourcing recruitment services.

Our Auditing and Compliance division is one of only eight (8) IATA accredited Audit Organisations (AO) globally; with ACS being one of the original three (3) AOs that conducts the IATA Operational Safety Audit (IOSA) and IATA Safety Audit Ground Operations (ISAGO) of Ground Service Providers (GSP's). ACS is also an IATA Strategic Partner which through our participation in various IATA work groups and task forces helps us gain unique insights into airlines priorities and we are recognized for working together with IATA in serving

#### Key contacts:

Abiola Omosini Aviation Commercial Manager Email: abiola.omosini@acornpetroleum.com www.acornpetroleum.com the air transport industry. ACS is approved by the Flight Safety Foundation (FSF) to conduct Basic Aviation Risk Standard (BARS) Audits predominately for the resource industry.

For over a decade, ACS has successfully completed over 500 audits and hundreds of projects globally. Our clients range from aircraft operators, maintenance providers, airports, training schools, government departments and industry associations working with both large international and domestic/regional carriers, smaller general aviation or charter operators. ACS' Quality Management System holds ISO 9001 Accreditation providing our clients with added assurance.

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

#### Funke Alli Aviation Senior Commercial Executive Email: funke.alli@acornpetroleum.com

Oladiji Vera-Cruz Aviation Commercial Executive Email: oladiji.veracruz@acornpetroleum.com



Tunisian French Academy for Civil Aviation Safety and Security Training, AFSAC – ICAO TRAINAIR PLUS Member and AFRAA Approved Training Center is considered the first training institution specialized in Civil Aviation training covering all the fields of ICAO TRAINAIR PLUS training program: Aerodromes, Air Navigation Services, Air Transport, Environment, Flight Safety and Safety Management, Security and Facilitation and Capacity Building. AFSAC provides training programs that are requested from ICAO, by investing all of its resources from material and human resources, organizational infrastructure to conduct these training programs to support the objectives of ICAO.

During the past years, AFSAC have joined international forces to form a renewable worldwide group by its long experiences in Aviation safety, security and all other civil aviation fields. Our company have spent the last few years in developing and investing to become a reliable and competitive partner on the aviation safety and security system.

#### Key contacts:

Mr. Hassan SEDDIK Chairman Mobile: 00216 98 333 330 / 00216 27 333 330 Email: h.seddik@afsactunisie.com admin@afsactunisie.com AFSAC provides Aerodromes, Air Navigation Services, Air Transport, Environment, Flight Safety and Safety Management, Security and Facilitation and Capacity Building courses aimed to improve the knowledge of the skills of those who works on the aviation industry, whilst keeping in mind that safety in aviation is permanent requirement which is not negotiable.

Safety and Security are at the core of aviation. Achieving the adequate levels of safety and Security is not only a precondition for aviation but also an enabler towards growth and competitive advantages. The management of safety and Security is therefore a key for all the companies in aviation industry to function in an efficient and pro-active way.

AFSAC's mission is to provide quality training and a return on investment to its customers through the positive impact realized on their business from training their employees. AFSAC is constantly striving to better serve the Aviation industry and to meet the needs of the decision – makers as well as to prospect the customers' needs.

07 Avenue Taha Houssein Montfleury 1008-Tunis - Tunisia www.afsactunisie.com





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

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

Across all its fly-by-wire aircraft families Airbus' unique approach ensures that aircraft share the highest possible

#### Key contacts:

Mr. Hadi Akoum Vice President Sales Africa and Indian Sub-Ocean Customer Affairs AIRBUS degree of commonality in airframes, on-board systems, cockpits and handling characteristics, which reduces significantly operating costs for airlines.

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

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 JOB'RG for an aileron because of a food truck damage, our location gives us global reach unmatched by many.

#### Key contacts:

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 colourful 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.

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

## amadeus

Amadeus is at the heart of the global travel industry. Our people, our technology and our innovation are dedicated to working with our customers and partners to shape the future of travel.

Amadeus ambition is to facilitate the entire travel journey from door-to-door, in the process improving the travel experience for over a billion people every year: from initial search to making a booking, from pricing to ticketing, from managing reservations to managing check-in and departure processes. Amadeus has a worldwide team of more than 14,200 people and keeps the travel sector moving by connecting key players: travel agencies, corporations, airlines, airports, ground handlers, hotels, railways and more.

In 2015, 566 million travel bookings were made via the Amadeus Selling Platform. Meanwhile over 700 million passengers boarded airplanes using the Amadeus Altéa solution during 2015; we estimate that this will increase by more

#### Key contact:

Mr. Maher Koubaa Vice President Head of Airline Group Middle East Africa Region Amadeus IT Group SA Dubai BR Dubai Festival City Festival Tower - 16th floor PO Box 126712, Dubai, UAE Tel: +971 4 2935278 Mobile: +971 50 450 9446 Email: maher.koubaa@amadeus.com than one billion by 2018, based upon contracts signed for airlines to migrate to our system. The foundation of our approach is our innovative technology. We invested around  $\notin$ 4.2 billion in R&D between 2004 and 2015.

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 to serve the continent. Our technology is present in areas that are relevant for their growth – from meeting their distribution needs, to embracing digital commerce, building their passenger services systems, and developing the new airport infrastructure to enable the full potential of the region.

## 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 30+ years, diversified and constantly grown to become a well-known, respected and reliable full service commercial aviation supplier.

AGS is a proud partner of AFRAA. AGS represents Honeywell Aerospace, Trepel Airport Equipment Company GmBH, TUG Technologies, Malabar International, SWITLIK, the Stinar Corporation and Clyde Machines in sub-Saharan Africa. The diverse activities of AGS include, but are not limited to the following:

- Commercial aircraft spare parts supply including all related materials and equipment such as shop and ground support equipment, aircraft tyres, etc.
- Aircraft, engines, and other component maintenance through marketing alliances and maintenance agreements

#### 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 with organizations that have the capability, such as Summit Aerospace of Miami, Florida, Ethiopian Airlines, etc.

- Technical assistance to customer airlines through personnel secondment on site and /or providing training in the USA;
- Facility audits and capability development for customer airlines;
- Technical writing assistance such as maintenance 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!





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 APG'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-Elysées | 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 wwww.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, APG'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. Djibril B. Taboure President, VP Middle East and Africa APG CENTRAL & WEST AFRICA ACI 2000-Immeuble " A.T.S" Hamdallaye BP E 1955 Bamako - MALI Email: djibril.b.taboure@apg-ga.com

## Atlantic FuelEx

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

Atlantic FuelEx works closely with the clients by alerting them round-the-clock on the internationally fluctuating fuel prices; besides providing a comprehensive list of related services such as Fuel Management, unique VAT-Exempt and VAT-Compliant aviation fuel policies, Tax Consultation Services (Federal Excise Tax, State, Local and etc.) and Zero Cost Consultation. Furthermore, it provides

#### Key contact:

Mr. Rani Awad President & Chief Executive Officer Atlantic FuelEx | Atlantic Group AIS LLC Al Sapphire Tower office No. 702, Dubai, UAE Tel: +97142556626 Fax: +97142556405 Email: rani.awad@atlanticfuelex.com customized advice and suggestions which will surely help clients to choose ideal locations to refuel their aircrafts and enjoy maximum saving on each and every purchase.

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



The world leader in the collection and distribution of fare and fare-related data, ATPCO has been providing solutions for the travel industry for 50 years. Today, we work with more than 450 airlines worldwide, supplying more than 99 percent of the industry's intermediated fare data to all the major airfare pricing engines.

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

#### Key contact:

Mr. Frank Socha Regional Director Central House, Lampton Road ATPCO Hounslow, Middx TW3 1HY United Kingdom Tel: +44 208 538 0811 Email: fsocha@atpco.net www.atpco.net their ancillary services, recoup fees and surcharges, and efficiently settle with their interline partners.

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

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



Founded in 1981, ATR is the world leader on the market for below-90-seat regional aircraft. Since its creation, ATR has sold over 1,500 aircraft. ATR models equip the fleets of over 200 airlines in nearly 100 countries. ATR is an equal partnership between two major European aeronautics players, the Airbus Group and Leonardo. Based in Toulouse, France, ATR is well established worldwide with a large customer support network. It includes four Customer Service

#### Key contact:

Patrice Y Bouëdo Vice-President Sales Africa Email: patrice.bouedo@atr-aircraft.com Tel: +33 (0)5 62 21 91 85 Mobile: +33 (0)6 35 55 40 95 www.atr-aircraft.com Centres in Toulouse, Miami, Bangalore, and Singapore, six Spare Parts Warehouses in Paris, Sao Paulo, Miami, Kuala Lumpur, Singapore, Auckland and four Regional Customer Support Offices in Johannesburg, Sao Paulo, Rangoon and Brisbane. In Africa, ATR currently has some 100 aircraft flying under the liveries of over 20 operators.

For more information, please visit http://www.atr-aircraft.com, follow @ATRaircraft on Twitter and ATRbroadcast on YouTube.





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 products and tailored services include commercial and military aircraft, satellites, weapons, electronic and defense systems, launch systems, advanced information and communication systems, and performancebased logistics and training.

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

Boeing has been the premier manufacturer of commercial jetliners for more than 40 years. Today, the company

manufactures the 737, 747, 767, 777 and 787 families of airplanes and the Boeing Business Jet. New product development efforts include the Boeing 787-10 Dreamliner, the 737 MAX, and the recently launched 777X. More than 10,000 Boeingbuilt commercial jetliners are in service worldwide, which is roughly 48 percent of the world fleet. The company also offers the most complete family of freighters, and about 90 percent of the world's cargo is carried onboard Boeing planes.

Through Boeing Commercial Aviation Services, the company provides unsurpassed, around-the-clock technical support to help operators maintain their airplanes in peak operating condition. Commercial Aviation Services offers a full range of world-class engineering, modification, logistics and information services to its global customer base, which includes the world's passenger and cargo airlines, as well as maintenance, repair and overhaul facilities. Boeing also trains maintenance and flight crews in the 100-seatand-above airliner market through Boeing Training & Flight Services, the world's largest and most comprehensive provider of airline training.

#### Key contacts:

Mr. Van Rex Gallard VP, Africa, Latin America & Caribbean Sales Boeing 1901 Oakesdale Ave SW, Renton, WA 98057 - USA Email: vanrex.gallard@boeing.com Mr. Lawrence Tolliver Sales Director, Africa, Commercial Planes PO Box 3707 MC 21-30 Seattle, WA 98124-2207 1901 Oakesdale Ave SW, MC 21-31Renton WA 98055 Tel: +1 206 766 2088/+1 206 853 5828 Fax: +1 206 766 2461 Email: Lawrence.j.tolliver@boeing.com Mr. Reginald Abel Director of Sales, North Africa Address: 1901 Oakesdale Avenue S Renton, WA 98057 Tel: +1206 234 4479 Email: reginald.w.abel@boeing.com Mr. Jim Deboo Sales Director, Africa Tel: +206 766 2224 Email: jim.s.deboo@boeing.com

## **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

#### Key contacts:

Mr. Jean-Paul Boutibou Vice President Sales, Middle East and Africa Jean-Paul.Boutibou@aero.bombardier.com www.bombardier.com | www.cseries.com www.crjnextgen.com | www.q400nextgen.com Mr. Sameer Adam Sales Director Bombardier Aerospace, Commercial Aircraft Email: Sameer.Adam@aero.bombardier.com

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 CR] NextGen aircraft are optimized.

> Mr. Pardeep Sandhu Director, Sales - Africa Bombardier Commercial Aircraft Mobile: +1 416 277 1497 (Canada) Mobile: +254 712 306 581 (Kenya) Tel: +1 416 375 4479 Email: pardeep.sandhu@aero.bombardier.com





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 visit: www.champ.aero

CHAMP Cargosystems – Connected thinking for the air cargo community.



The Power of Flight

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

#### Pioneers and visionaries

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

#### The CFM spirit

By capitalizing on the powerful expertise and the

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

#### The work split

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



## **EMBRAER** 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 includes four state-of-the-art aircraft offering a balanced proposition of capacity between 70 and 130 seats. The E170, E175, E190 and E195 set the standard in their category with their advanced engineering, high degree of efficiency, spacious and ergonomic cabins with two-by-two seating, combined with attractive operating economics.

There are 109 Embraer aircraft operating in Africa between jets (ER) 145 and E-Jets) and turboprops (EMB 110 Bandeirante and EMB 120 Brasilia). In terms of operators, there are two Bandeirante, 19 Brasilia, 15 ERJs and six E-Jets operators. With entry-into service in 2018, Embraer is launching the E-Jets E2, which will feature 3 family members seating between 70 to 130 seats, setting a new benchmark in terms of performance, economics and innovative cabin designs.

#### Headquarters Address:

EMBRAER Europe Zuiderhof II Jachthavenweg 109 1081 KM Amsterdam, The Netherlands URL: www.embraercommercialjets.com Supporting the fleet of 2,000 aircraft, Embraer Commercial Aviation currently has 37 service centers worldwide servicing E-Jets, ERJ 145 family and Brasilia and Bandeirante turboprops. The Embraer global Services & Support structure 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. It is designed to maximize aircraft productivity and avoid unnecessary operating costs and delays through both corrective and preventive maintenance.

Mr. Francisco Moraes Regional Sales Director Jachthavenweg 109 1081KM Amsterdam, The Netherlands Tel: +31 (0) 6 20 69 14 28 Email: francisco.moraes@embraer.fr Mr. Raul Villaron Manager, Market Analysis Commercial Aviation – Middle East and Africa Email: raul.villaron@embraer.fr



FLYHT is a leading provider of real-time aircraft intelligence and cockpit communications for the aerospace industry. More than 50 customers, including airlines, leasing companies and original equipment manufacturers, have installed our systems in order to increase safety, improve operational efficiencies and enhance profitability. FLYHT's innovative technology, the Automated Flight Information Reporting System (AFIRSTM), operates on multiple aircraft types and provides functions such as safety services voice and text messaging, data collection and transmission, and on-demand streaming of flight data recorder (black box), engine and airframe data. AFIRS sends this information through the Iridium Satellite Network to FLYHT's UpTimeTM ground-based server, which routes the data to customer-specified end points and provides an interface for real-time aircraft interaction. AFIRS has flown over 2.2 million aggregate flight hours and 1.5 million

#### Key contact:

Derek Taylor Sales Director FLYHT Aerospace Solutions Ltd | TSX.V: FLY, OTCQX: FLYLF 300E, 1144 - 29 Avenue NE, Calgary, AB, T2E 7P1, Canada Direct: +1.403.291.7429 | Fax: +1.403.291.9717 Email: dtaylor@flyht.com | www.flyht.com flights on customers' aircraft. FLYHT holds supplemental type certificates (STC) which allow for the installation of AFIRS on 95% of transport category aircraft.

FLYHT is an AFRAA member and has supported airlines in Africa for the past 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 unique ability to capture, process, and transmit data, coupled with real-time alerts provides airlines with direct insight into the operational status and health of their aircraft and enables them to take corrective action in order to maintain the highest standard of operational control.



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.

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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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## 🌏 Hahn Air

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

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

#### Key contacts:

Mr. Mike Cranfield Group CEO Linkham Angels Den, High St., Maresfield East Sussex TN22 2EH 7525776959 Email: mike.cranfield@linkham.com www.linkham.com We don't stop there. We believe in providing on-going support to ensure the long term success of the programme – so we provide regular feedback, recommendations and implementable solutions to ensure that you are sending the right messages to your customers!

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

Shailendre Woodhoo Regional Direct - Africa Linkham Services Mauritius 5th Floor Nexteracom Tower 1 Ebene, Mauritius Email: shailendre.woodhoo@linkhamservices.com



## Lufthansa Consulting

Lufthansa Consulting is an aviation and management consulting company dedicated to globally assist aviation industry clients to successfully meet the challenges that lie ahead. With more than 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.

#### Key contacts:

Mrs. Catrin Drawer, Associate Partner Tel: +49 151 589 40 540 Mr. Bruno Boucher, Associate Partner Tel: +49 151 58921 956 Lufthansa Consulting GmbH Frankfurt Airport Center 1 Hugo-Eckener-Ring 60546 Frankfurt, Germany Fax: +49 69 696 20830 Email: Mail@LHConsulting.com 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.

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

## Lufthansa Systems

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

Lufthansa Systems Am Weiher 24 65451 Kelsterbach Germany Tel: +69 696 90000 Fax: +69 696 95959 Email: info@LHsystems.com www.lhsystems.com 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.

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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 \$12.3 billion, Marsh & McLennan Companies is also the parent

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Mr. Gordon Middleton | Senior Vice President Marsh | Aviation & Aerospace Tower Place East, London, EC3R 5BU, United Kingdom Office: +44 (0)20 7357 5406 Mobile: +44 (0)77 6990 7087 Gordon.middleton@marsh.com 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.

Mr. Dan Moeti Marsh Africa | Head of Sales, Africa Corner 5th Street and Fredman Drive, Entrance 1, Building 1,Alice Lane, Sandton, 2196 Private Bag X14, Benmore, 2010 Tel: +27 (0) 11 060 7721 | Fax: +27 86 772 1855 Mobile: +27 (0) 71 600 8935 dan.moeti@marsh.com www.africa.marsh.com



mercator, headquartered in Dubai, is a leading provider of software and tech-enabled outsourcing solutions and services to the global travel, transportation, and logistics industry. The company enables clients to simplify the movement of people and goods around the world.

With its aviation heritage, and unrivalled insight built from years of experience in developing IT solutions specifically for the industry, Mercator's specialized team of experts have developed a specific portfolio of solutions, rigorously testing them in the real world.

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Mr. François-Xavier Hussenet Marketing Director Tel: +33 1 60 59 50 92 Email: francois-xavier.hussenet@snecma.fr Key solutions and services include Cargo & Logistics Management, Revenue Accounting, Customer Experience, and Passenger Services. Mercator technologies manage critical processes for all segments of the TTL industry.

Born from an airline, Mercator's domain expertise is second to none, giving the company a vital competitive edge. Mercator's solutions power the passenger and cargo operations of leading airlines and transportation companies across the world.

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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.

#### Key contacts:

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MTU Maintenance, a division of MTU Aero Engines, is one of the world's leading providers of maintenance services for aircraft engines and industrial gas turbines. The company boasts one of the largest portfolios worldwide, including the bestsellers V2500 and CFM56, and the GE90. MTU is continuously adding new engines and has secured its position in the aftermarket for next generation engines, such as the PW1000G, the GEnx and the GE9X. 4,000 employees at various locations around the globe and over 15,000 shop visits in 35 years ensure excellent customer service, the highest quality standards and innovative MRO solutions.

A compelling choice tailored services span the entire life cycle of an engine and allow customers to benefit from minimized operational and maintenance costs. Among these are on-site and on-wing services, spare engine support, engine condition monitoring as well as accessory and LRU management. This broad range of comprehensive services can be combined under MTU's all-encompassing modular service package Total Engine Care (TEC<sup>®</sup>). MTUPlus Mature Engine Solutions

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help maximize asset values though optimized end-oflife material and asset management. In addition, MTU is well-respected for its globally unique high-tech repairs. Developed in-house and certified by EASA and FAA, they are marketed as MTUPlus repairs and guarantee aboveaverage performance and extended on-wing time.

#### MRO portfolio at a glance:

- 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: CFM56-3/-5B/-7, PW1100G2, PW20003, PW6000, V2500
- Widebodies: CF6-503/-80C2, GEnx4, GEnx4, GE90-110/-115B, GP72005
- IGTs: LM2500, LM2500+, LM5000, LM6000
- 1. P&WC Customer Service Center Europe
- 2. Planned
- 3. Including military applications
- 4. Turbine Center Frame (TCF)
- 5. Low Pressure Turbine (LPT)

MTU Maintenance Hannover GmbH Muenchner Strasse 31 30855 Langenhagen/ Germany Tel: +49 511 7806 0 Fax: +49 511 7806 2111 AOG: +49 171 431 4333 Email: mtu.maintenance@mtu.de





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.

Key contacts:

Mr. Jaap Butter Sr. Vice President Mitsubishi Aircraft Corporation Europe BV Tel: +31 20 333 8602 Fax: +31 20 676 2081 Email: jaap\_butter@mitsubishiaircraft.com www.mrj-japan.com The MRJ is a family of 70-90 seat next-generation aircraft featuring the Pratt & Whitney's revolutionary PurePower<sup>®</sup> 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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Absolute Aviation Advantage

OAG - Connecting the World of Travel.

OAG is an air travel intelligence company that provides accurate, timely and actionable digital information and applications to the world's airlines, airports, government agencies and travel-related service companies who have to comprehend, with clarity and precision, how the world moves in order to advance their businesses with confidence. OAG has the world's largest network of air travel data and an unrivalled ability to aggregate complex data sets from multiple sources and stages of the travel continuum. It delivers real-time insights, compelling visualisations, powerful applications and analytics for

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Through its unmatched global network of tools, high-quality data, experts and relationships, OAG can unlock hidden sources of value, enabling its customers to innovate and advance their businesses. OAG helps its customers to deliver up-to-the-second actionable solutions, shape smart applications that delight travellers and uncover wider opportunities for greater efficiencies and growth.

Discover how OAG connects the world of travel at www.oag.com





Aster Training Tunisia, a subsidiary of Poulina Group Holding, is a qualified International Academic Training Center, which has been established since year 2000. The center is located in Yasmine Hammamet at the Medina Mediterranea, a leader in the field of conference and congress venue in North Africa.

ATT has a long tradition ongoing professional training and insuring assistance and advice on the technical and behavioral methods according to practical approaches.

ATT has started its activity with high level courses in hospitality, management, soft skills, human resources and Information Technology, and then it has expanded and diversified its activities to offer a range of aviation courses, intended for local government authorities such as Tunisian Civil Aviation and Airports Office (OACA) and Airline Companies and private sectors in Africa & the Middle East.

Through a close collaboration with IATA, ATT provides a best solution in the aviation specialized in Cargo and Dangerous Goods Regulations, Fares and Ticketing, Finance and

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Accounting, Safety, Ground Operations, Security, Law and Regulations, as a first step. All training courses are organized with high precision through knowledgeable and IATA certified instructors.

Furthermore, ATT has invested in developing e-learning platform solution. Our e-courses can help companies in the aviation industry to achieve their goals while cutting training costs and increasing their operational efficiencies. Moreover, ATT facilities are designed to make your training experience as pleasant as possible in a very charming and lively Medina Mediterranea venue. The centre provides top level classrooms and hands on training which will allow trainees to obtain the necessary licenses and qualifications needed to advance in their career.

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

> Website: www.astertraining.com.tn Address: Medina Mediterranea, Rue de la Medina, 8050 Yasmine Hammamet, TUNISIA



Pratt & Whitney has approximately 33,500 employees who support more than 11,000 customers around the world.

Frederick Rentschler founded Pratt & Whitney in 1925. Our first aircraft engine transformed the aviation industry. It was the 410-horsepower, aircooled Wasp, which delivered unprecedented performance and reliability for the time. We have been leading change ever since.

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

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Aero Engines and the Engine Alliance to meet airline customers' future needs.

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.

Pratt & Whitney AeroPower designs and manufactures auxiliary power units and turbojet engines for commercial and military aircraft. Products include airborne auxiliary power units and ground power units, and small expendable and recoverable turbojet propulsion systems.

24 Hour Customer Help Desk Airline Support United States: 800-565-0140 International: 860-565-0140 Email: help24@pw.utc.com



Rockwell Collins

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

Our aviation electronics systems and products are installed in the flight decks of nearly every air transport aircraft in

#### Key contacts:

Mr. Jean-Pierre Rivet Director, Commercial Systems Marketing – Europe, Middle East & Africa Rockwell Collins Tel: +33 (0) 6 73 99 81 36 Email: jp.rivet@rockwellcollins.com the world. Our airborne and ground-based communication systems transmit nearly 70 percent of all U.S. and allied military communication. Whether developing new technology to enable network-centric operations for the military, delivering integrated electronic solutions for new commercial aircraft, or providing a level of service and support that increases reliability and lowers costs for aircraft operators throughout the world, we deliver on our commitments.

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

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

## Rolls-Royce

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:

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- 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.

Mr. Kevin C Evans Vice President, Customers Rolls-Royce plc PO Box 31, Derby DE24 8B] United Kingdom Tel: +44 7827 900408 Email: kevin.evans@rolls-royce.com





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. 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.

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Mr. Steve Duley Principal: Airline Sales, Europe, Middle East & Africa Office: +27 11 7053360 Mobile: +27 82 8047130 Email: steve.duley@sabre.com www.sabreairlinesolutions.com 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. In 2014 Airline Solutions commercial solutions managed US\$75 billion in airline inventory, greater than Google's revenue for the year. Our operational solutions track over 100,000 flights per day. Our reservation systems handle reservations for 700M+ 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.

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

# SEABURY

To create value, we operate with integrity by aligning our interests with yours. We will understand your needs first and then act – together. We believe expert knowledge and support make a difference.

Our team blends former industry executives, top-tier consultants and seasoned investment bankers. We believe designing projects with change in mind allows your organisation to navigate faster towards improved results that are sustainable.

We prefer to work on-site with your organisation, sharing our expertise to build competence and deliver lasting results.

We believe in proven business intelligence strategy and effective feedback loops allowing your organisation to continually learn, innovate, and compete.

We can help you shape your organisation's strategy. We respect and use the data at hand while utilizing proprietary world-class network planning tools, analysis techniques, best practice models, and databases.

#### Key contacts:

Dr. Jesko-Philipp Neuenburg Senior Vice President Mobile: +44 788 79 444 05 Email: jneuenburg@seaburygroup.com www.seaburygroup.com New York 1350 Avenue of the Americas, 25th Floor New York, NY 10019, USA Tel: +1 212 284 1133 We love to work with clients to help them confront big challenges. Since 1995 we have advised on more than 1,300 client engagements globally, including negotiations for new or existing aircraft orders totalling over \$250 billion (list prices), transactions for over \$80 billion of equity and debt capital financings, and restructuring assignments for 10 of the largest 15 airline turnarounds.

We enjoy bringing our airline and aerospace experience, diverse technical expertise, and our proprietary software to evaluate and provide you unique options. We are confident that through working with us your organisation will experience the satisfaction that comes with big wins. We understand the unique challenges faced by African airlines in harnessing the potential the continent offers. We bring teams with experience in working across Africa, on strategic issues such as fleet campaigns, mergers and alliances, as well as tactical opportunities including commercial and revenue enhancement, maintenance and cost reduction, and workforce efficiency improvements.

London Burdett House 15-16 Buckingham Street London, WC2N 6DU, United Kingdom Tel: +44 208 166 0300 Hong Kong Suite 1701, 17/F, Somptueux Central 52-54 Wellington Street, Central, Hong Kong Tel: +852 5802 5688





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

In February 2011, Servair announced its membership to AFRAA (African Airlines Association), the Association of African airlines, which is an organization mandated to ensure effective cooperation among companies and to accelerate the economic and social integration of African countries. Servair units in Africa offer a wide range of services in all aspects of catering and meals. In addition,

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Mr. Jason Sutcliffe Marketing Director Marketing – Civil Aerospace Rolls-Royce plc, PO Box 31, Derby DE24 8BJ, UK Mobile: +44 782 7986383 Fax: +44 1332 245215 Email: jason.sutcliffe@rolls-royce.com they deploy the expertise of the company, namely: Respect for hygiene and food safety standards, the use of advanced technologies, the culinary expertise, African units master all culinary and logistical skills to meet the increasingly diverse needs and transmission of knowledge.

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

Mr. Kevin C Evans Vice President, Customers Rolls-Royce plc PO Box 31, Derby DE24 8BJ United Kingdom Tel: +44 7827 900408 Email: kevin.evans@rolls-royce.com



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.

#### Key contacts:

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

In 2015, SITA had consolidated revenues of US\$1.7 billion. SITA's subsidiaries and joint ventures include SITAONAIR, CHAMP Cargosystems and Aviareto.

For further information go to www.sita.aero.

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





Travelport is a Travel Commerce Platform providing distribution, technology, payment, mobile and other solutions for the global travel and tourism industry. With a presence in approximately 180 countries, over 3,700 employees, and an additional 1,200 employees at IGT Solutions Private Ltd who provide us with application development services, our 2015 net revenue was over \$2.2 billion.

Travelport is comprised of:

• A Travel Commerce Platform through which it facilitates travel commerce by connecting the world's leading travel providers with online and offline travel buyers in a proprietary business-to-business (B2B) travel marketplace. Travelport has a leadership position in airline merchandising, hotel content and rate distribution, mobile travel commerce and a pioneering B2B payment solution that addresses the needs of travel intermediaries to efficiently and securely settle travel transactions.

#### Key contacts:

M. Darryl Erasmus Regional Marketing & PR Manager, Africa Travelport GDS Tel: +27 (0) 11 620 5000 Email: darryl.erasmus@travelport.com URL: www.travelport.com • Technology Services through which it provides critical IT services to airlines, such as shopping, ticketing, departure control and other solutions, enabling them to focus on their core business competencies and reduce costs.

Travelport is headquartered in Langley, U.K and listed on the New York Stock Exchange, trading under the symbol "TVPT".

Given the high growth of travel across the African continent, Africa has been considered a priority region and an area of investment for Travelport over the past couple of years and Travelport now operates in 53 countries and has a regional head office in Johannesburg, South Africa. It has made a number of high profile announcements in 2016 including signing a number of new airline deals and investing in a new travel agency helpdesk in Kenya. For further background, please click on the following links: Travelport and Mango sign new multi-year global agreement, Travelport and Jambojet sign new multi-year agreement, Travelport launches start of the art helpdesk in Kenya.

- Rabih Saab, President & Managing Director, Europe, Middle East, Africa & South Asia, Travelport
- Will Owen Hughes, Senior Director, Air Commerce, Middle East & Africa, Travelport
- Douglas Jewson, Managing Director, Africa, Travelport
- Nita Nagi, Regional Manager, East Africa, Travelport

# wirecard

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 20,000 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

#### Key contacts:

Mr. Jörg Möller Managing Director Wirecard Technologies GmbH Einsteinring 35 85609 Aschheim, Germany Email: joerg.moeller@wirecard.com www.wirecard.com Ms. Marion Bobzin, Sales Manager Airlines Einsteinring 35, D-85609 Aschheim / Germany Tel: +49 (0) 89 4424 1711 +49 (0) 89 4424 1680 Fax: +49 (0) 89 4424 2711 Email: marion.bobzin@wirecard.com airline@wirecard.com

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.

> Mr. Eckart Reiche Head of Sales Airlines Einsteinring 35, 85609 Aschheim / München Tel: +49 89 4424 1680 Email: eckart.reiche@wirecard.com



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	Air Algeria		Air Botswana	Air Air Air Air Burkina Botswana Madagascar	Air Mauritius	Air Namibia	Air Air Air Air Air Namibia Seychelles Zimbabwe		ASKY BA	BADR Egy	EgyptAir Ethic	Ethiopian Kenya Airlines Airways	a Lam ys Mozambique	que NileAir	Air Precision Air	ion RwandAir	Air Royal Air Maroc		South African Sta Airways	Starbow An	TAAG Angola T/	TACV Ta:	Tassili Tunis Air	Air	Total
TRAFFIC DATA																									
Domestic Passengers (000)	1,719	4	76	235	155	92	193	115	482	143	1,813	1,047	682	497		219	13	855	3,153	252	611	339	652		13,347
Regional Passengers – within Africa (000)	368	115		80	550	357	129	79		81	832	3,004 1,	1,946	190	4	155	470 1	1,429	1,980		227	210	37	370	12,613
Intercontinental Passengers (000)	3,451		150	101	765	112	186			14	6,191	2,951 1,	1,008	1	602		59	3,913	1,503		424		2	2,374	23,805
Total Passengers Carried (000)	5,538	119	226	416	1,470	561	508	194	482	238	8,836	7,002 3,	3,636	688	606	374	542 0	6,197	6,636	252	1,262	549	689 2,	2,744	49,765
								ę										-							0
Domestic Freight Carried (000)	697			552		46	22	182		2,823	724		1,533 3,	3,493			23	1,160	32,310	+	1,413	+	+	+	45,255
Regional Freight Carried (000)	1,141			122	12,731	636	322	393			6,335 4	49,805 14,	14,799	645	_	_	728 4	4,578	39,251	_	1,818		_	664	133,968
Intercontinental Freight Carried (000)	13,519			3,610	17,957	3,639	3,941			693 1	115,103 20	207,703 45	45,591	24			107 14	14,408	78,750		6,587		5	5,420	517,052
Total Freight Carried (000)	15,357			4,284	30,755	4,320	4,285	575		3,516 15	122,162 2	257,718 61,	61,923 4,	4,162			858 20	20,146	150,311		9,818		6	6,084 6	696,274
																									0
Revenue Passenger-Kilometres– RPK (000)	7,377,060		117,000	987,972	6,514,667	1,437,777	1,159,586	248,757 50	509,081 155	155,897 17,8	17,857,974 25,0	25,084,931 9,597,380	380	758 747,966		160,669 858	858,357 13,577,280		20,844,568	733,269 3,630,000		729,987 420	420,303 4,118,417		116,869,656
Available Seat-Kilometres-ASK (000)	10,576,017 165,888	165,888	200,000	1,592,729		8,368,545 2,099,539	1,750,044	525,531 7	719,283 309	309,708 27,10	27,102,882 36,58	36,589,206 14,372,960		1,196 995,413		311,213 1,583,222	222 19,717,351		28,672,261 1,47	1,478,471 6,336,000 1,116,821	6,000 1,11		914,808 5,987,	5,987,120 171,486,208	\$6,208
Passenger Load Factor - PLF (%)	69.75%	69.75% 68.00%	58.50%	62.03%	77.80%	68.50%	66.00%	47.00% 70	70.80% 79.0	79.00% 66	66.00% 61	68.56% 66.77%	7% 63.40%	0% 75.10%		52.00% 54.00%	69	%00.	77.00% 50	50.00% 57	57.00% 65.	65.40% 52.1	52.00% 68.80%		1552.41%
																									0
Passenger Tonne-Kilometres – PTK (000)	663,935	113,378		93,857	587,254	1,173,963	147,955	19,901	<u> </u>	5,329 1,7	1,757,077 3,20	3,207,017 940,076		68,000 90,	90,936		1,268,961		1,849,253	32	327,000		412,834		12,726,726
Freight & Mail Tonne-Kilometres – FTK (000)	1,448				173,913	306,503	19,369	895,849		- 36	369,024 1,3	1,333,285 260,918		5,000			51	51,845	874,668	4	46,000		6	9,276 4,3	4,347,098
Revenue Tonne-Kilom etres – RTK (000)	665,383				761,167	761,167 1,480,465	167,324	904,828		- 2,12	2,126,100 4,54	4,540,302 1,200,994		74,000 90,	90,936		1,320,805		2,723,921	37	373,000		422	422,110 16,	16,851,336
Available Tonne-Kilometres –ATK (000)	956,058				1,252,871	1,252,871 2,842,394	280,334			- 4,0	4,030,214 7,24	7,249,622 1,838,099	000 123,000	000	1		3,349,052		4,828,180	1,14	1,143,000		647,005		28,539,825
Weight Load Factor – WLF (%)	69.60				61.00%	52.10%	42.00%			- 23	53.00% 6	62.63% 65.3	65.34% 59.80%	%0	1		39.	%00.	56.00%	8	33.00%		65.20%		658.67%
																									0
EMPLOYEES DATA											_	_								_					0
Pilots	413	11	45	53	183	100	58	43	46	18	741	578	553	32	46	59	56	482	762	15	144	61	109	304	4,912
Engineers	1,399	37	63	206	138	17	72	105	4	10	4,771	2,183	576	105	86	18	28		21	4	321	54	219		10,437
Cabin Crew	1,064	25	40	172	469	136	147	131	84	35	2,089	1,600	603	118	96	62	83	863	1,711	32	514	85	116	763	11,038
Traffic/Marketing	4,026	59	51	264	334	61	288	80	162	85	2,633	1,416	473	125	21	70	12		14	30	911	76	73 1	1,189	12,453
Others	1,708	97	365	489	1,717	344	162	390	122	200	19,950	3,528 1,	1,629	518	256	300	669	1,665	2,758	145	1,663	210	1, 1,	1,456	41,088
Total No. of Employees	8,610	229	564	1,184	2,841	658	727	749	418	348	30,184	9,305 3,	3,834	898	505	509	878 3	3,010	5,266	226	3,553	486 1	1,234 3	3,712	79,928
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DESTINATIONS SERVED														_						-					0
Domestic – within the country	31	1			-	80	œ	4		5	10	20	e	Ħ		10	-	19	4	5	12				153
Intra-Africa - within Africa	6	7			7	7	4	2	19	4	21	54	40	S		۲	15	30	22	1	Ħ			6	267
Intercontinental - Africa to other Regions	31	Ι			13	1	4		1	1	56	39	10	1		1	1	45	6	1	7			34	251
New Destinations started in 2016 (all markets)	2	Ι									5						4	3		5					19
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1 Afriqiyah Airways		5	-																												9
2 Air Algérie			∞					27		m														15					-		54
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4 Air Burkina																	2														2
5 Air Madagascar				2			-	-															-	4							6
6 Air Mauritius		2	2	9																				m							13
7 Air Namibia		4	2														4														10
8 Air Seychelles		2	-																						9						6
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27 Royal Air Maroc							-	36	-	4		4					4							5					_		55
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30 SA Express Airways															10	4						6									24
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33 TAAG Angola Airlines	10							5			∞																		_		13
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**ANNEX 3:** AFRAA Member Airlines Commercial Partnerships

Africa
acilities in
<b>MRO Fai</b>
<b>VEX</b> 4: /
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Can			Training	<b>Maintenance Capability</b>	ility			
MIKO	country	манопагарргоматтуре	School	Airbus	Boeing	Other A C	Engines Overhaul & Testing	Website
AeroContractors	Nigeria	EASA, Nigeria CAA			B737-300,400 & 500			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, Beecracft		www.aerotechs.co.zw.
Aerotechnic Industries (ATI)	Morocco	EASA 145, Moroccan DAC		A320	B737-NC			www.royalairmaroc.com/ corporate/Groupe-RAM/Industrie
Air-Tech	Mauritius & South Africa	South Africa CAA				L410 UVP-E20, L420, Beechcraft 90/200 & PAC 750XL		www.air-tecm.com/
Air Algérie Technics	Algeria	EASA145	Yes	A330	B737NC, B767 and B727	L100-30C, ATR72, Fokker 27		www.airalgerie.dz/
AirQuarius Aviation Maintenance	South Africa	South Africa CAA, Tanzania CAA				Fokker F-28	Rolls Royce Spey	www.airquarius.com
Air Express Algeria	Algeria	EASA, Algerian Directorate of Civil Aviation. South Africa CAA.				LET410, Beechcraft 1900-D, PC-6		airex pressdz.com
Air Mauritius	Mauritius	JAR 145 - France DCAC, Mauritius DCA, EASA 145, EASA 147	Yes	A320 Series, A330 & A340		ATR72-500		www.airmauritius.com/
Air Zimbabwe	Zimbabwe	Zimbabwe CAA, Malawi DCA, Botswana CAA	Yes		B707, 767, 737 Classic	BAe146 and MA60	JT-3D,JT-8D, PW4000, Modular Maintenance	airzimbabwe.aero
Denel Aviation Transport Aircraft Maintenance	South Africa	United States FAA, South Africa SACAA, AS 9100, EASA Europe, ISO 9001:2000	Yes		B707, B727, B737	C130, L100, BAe146		www.denel.co.za/
Egyptian Company for Aircraft Maintenance	Egypt	Egyptian CAA		A320	737-200/300/400/ 500,707			www.ecam-egypt.com
EgyptAir Maintenance ଝ Engineering Company	Egypt	Egypt ECAA, EASA145, FAA, EASA147	Yes	A320, A321, A330, A340	B737 (Classic & NC), B767, B757, B777-200 /-300	Embraer E170/190	V 2500 A1/A5, CFM56 -3C/5C, PW 4060/4158 and Trent 700	http://www.egyptair-me.com/
Ethiopian Airlines	Ethiopia	EASA 145, EASA 147, FAA, Ethiopia CAA, Saudi GACA, UAE CCAA, Kenya CAA, Cambia CAA, Tanzania CAA, Jordan CAA	Yes		Boeing 737 Classic & NG, B757, B767, B777	Fokkerso, DHC-8Q400,MD-11, DA40/42	PW127, PW121, PT6, CFM56-3/7 APUs: CTCP331-200 Modular Maintenance: PW4000 & PW2000	www.ethiopianairlines.com
ExecuJet Maintenance	South Africa and Nigeria	ISO 9002, United Arab Emirates CCAA, Bermuda BDCA, South Africa SACAA, Botswana DCA, Angola DCCA, EASA 145, Namibia CAA				Bombardier, Beechcraft, Dassault, Gulfstream, Embraer Aircraft		www.execujet.net
Fields Airmotive	South Africa	South Africa CAA, FAA					Rolls Royce Dart	www.fieldsairmotive.com
Horoug Aircraft Maintenance & Cround Services	Libya	Journ Annua CAA Libyan CAA, Mali CAA, United Arab Emirates GCAA	169		B707,727	1 MID-02, DC-7-30, DC-10	1100-15, 21/AQC,-219	www.global-avlation.conny www.horoug.com
Interjet (AMETA)	South Africa	South Africa CAA, Angola DCCA, Botswana CAA, Namibia CAA	Yes			Embraer, King Air, Learjets, Beechcraft,Challengers & Gulfstreams		www.interjet.co.za
Kenya Airways	Kenya	EASA 145, Kenya CAA, Tanzania CAA, CAA Uganda, Zambia DCA,	Yes		B737-NG, 757, 767, B777	E170,190		www.kqmro.com
Libyan Aircraft Engineering & Maintenance (LAEM)	Libya	EASA145, Libyan CAA,		A300-600, A310-200				www.laem.ly
Linhas Aereas de Moçambique LAM	Mozambique	Mozambique CAA			B737-200/500			www.lam.co.mz
National Airways Corporation	South Africa	South Africa CAA, ISO 9001:2008 & BARS	Yes		0 - - - -	Bell206/206L/407/222/230/430/412	Rolls Royce	www.nac.co.za
QSA Aeronauical Engineering Services	Morocco	EASA 145, Morocco DAC, Egypt CAA, UAE GCAA, Qatar QCAA	Yes	A318/A319/A320/ A321/A330-200/300, A340-500/600	B737Classic & NG, B747- 400, B767-200/300/400ER, B777-200/300		RR Trent 500/700/800, CFM56, PW4000, CE, Genx	qsamorocco.com/
Sabena Technics	Tunisia	EASA, FRA 145, Tunisia DCCA, South Africa CAA, Canada TCAC	Yes	A300 B2-B4, A300- 600, A310, A320, A330, A340	B737 CC & NC, B747/747- 400, B757, B767, B777	DC 10, MD 11, MD80, MD 90, ATR 42, ATR 72, Bae146, CRJ 100/200, CRJ 700, ERJ 135, ERJ 145, F70, F100		www.sabenatechnics.com/
SAFAIR Technical (JetWorx) Solenta Aviation	South Africa South Africa	FAA, EASA 145 and SACAA South Africa CAA, Cote d'Ivoire CAA, Zamhia DCA			B737, B727	DC-9, MD80, Hercules L382 ATR42, B1900, B200 King, and Cessna		www.jetworx.co.za/ www.solenta.com
SNECMA Morocco Engine Services	Morocco	EASA145, FAR-145, Moroccan DAC			B737 (Classic & NC)		CFM56 -3/5B/7	www.snecma.com
South African Airways Technical	South Africa	FAA, SACAA, Angola DGCA, EASA 145	Yes	A319, A320, A321, A330 and A340	B737 Classic/NG, B747, B767	MD11	JT8, JT9 & GTCP 85 Series engines and APU	www.flysaa.com/saa_technical
Tunisair Technics	Tunisia	EASA 145, Tunisia DGAC	Yes	A300-600, A319/320/321, A330-600,	B737-NC,	ATR 42-200/300, ATR72-100/200	GECF34/6, PW4000,CFM56, RR Trent 700	www.tunisair.com

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Name	Maintenance Training	Crew Training	Simulator Training	EASA/ FAA certification	Other Training Capabilities	Website
Air Algerie	Aircraft/ engine basic and recurrent training on 737NGs, A330 and ATR 72	Basic and recurrent pilot and cabin crew training	Full flight CAE for B737NG and B747-8	EASA 145	Safety/ Security, Manegerial/ leadership, commercial (Marketing, Cargo, Finance etc) and ground handling	www.airalgerie.dz
Air Botswana	Aircraft/ engine basic and recurrent training on ATR 42/72, BAe 146	I	1		1	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	1	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	I	I	EASA 145	IATA authorised training center	www.airmauritius.com
Air Zimbabwe	B737 - 200, B767 - 200, BAe 146 and MA 60	Flight and cabin crew training on B737-200, B767 and MA 60	Ι	1	Safety, Security, Cargo and Ground handling training	www.airzimbabwe.aero
Comair Training* Center, South Africa	Aircraft/ engien 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 & NC and ATR47/72 full flight simulator	EASA 145 EASA 147	Safety, Security and Commercial courses	www.comair.co.za/
EgyptAir	Basic type, overhaul, boroscope and engine module courses on B737NC, 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)	training.egyptair.com
Ethiopian Airlines	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic pilots, basic and reccurent cabin crew training	B737NC & B757/B767 full flight simulator	EASA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	www.ethiopianairlines.com
Kenya Airways	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic and reccurent cabin crew training	B777NC 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	I	I	I	1	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 reccurent cabin crew training	B737Classic & NC full flight simulator	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	www.royalairmaroc.com
South African Express	Q400 refresher training	I	Ι	I	I	www.flyexpress.aero
South African Airways	Aircraft/ engine basic and recurrent training on B737-200 and Embraer 190	Basic pilots, basic and reccurent cabin crew training	I	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	www.flysaa.com
TAAC Angola Airlines	Aircraft/ engine basic system and recurrent training on B737 classic/ NC and B777 aircraft	Basic and recurrent cabin crew training		1	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	B737NC & A320 series full flight simulator	EASA 145	Safety, Security and Commercial courses	www.tunisair.com

**ANNEX 5:** Aviation Training Institutions in Africa

\*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

Afriqiyah	A8	Kenya Airways	KQ
Air Algérie	AH	LAM Mozambique	TM
Air Botswana	BP	Libyan Airlines	LN
Air Burkina	2]	Mauritania	L6
Air Madagascar	MD	Nile Air	NP
Air Mauritius	МК	Precision Air	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	]4	Starbow	S9
Camair-co	QC	Sudan Airways	SD
Ceiba Intercontinental	C2	TAAG Angola Airlines	DT
Cronos	C8	TACV	VR
ECAir	LC	Tassili airlines	SF
EgyptAir	MS	Tunisair	TU
Ethiopian Airlines	ET		

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