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Foreword



Tewodros Tamrat
Ag. Secretary General

African Airlines Braved 2009

Indeed, air transport is today one of the most unpredictable industries to invest in. At any time when things begin to look up for airlines, something else surfaces at the global scene to dim the excitement. If it is not a medical catastrophe, it would be a terrorist threat, a fuel price hike or a global financial meltdown. 2009 was one such year when airlines lost both traffic and revenue on the one hand and picked up huge costs of doing business. The resilience of airlines in constantly swimming against the tide is commendable. Unlike other sectors of the economy that easily attract the sympathy of governments, airlines are left to fight to survive or perish.

African airlines and in particular AFRAA member airlines have braved 2009 and emerged with a cumulative net profit of US\$137 million. In fact, one of Africa's carriers (Kenya Airways) was the fifth most profitable airline in the world in 2009.

Africa seems to be the toast of the world at the moment and is therefore attracting the attention of both the developed and other emerging markets. The result is that, there is growing economic activity in the continent leading to unprecedented GDP growth in many countries. With booming economies, air transport activity is growing. Unfortunately, the greatest beneficiaries of this growth are not African airlines as you would discover in this report. 78% of all intercontinental traffic in 2009 was carried by non-African airlines. Over the last five years, African airlines lost 3% market share to the competition for various reasons outlined in the report.

The African airline industry has failed to evolve with the times and today, it remains saddled with challenges of restricted market access, poor infrastructure, ageing fleet, brain-drain, undue government interference, high operating costs, over-taxation, lack of cooperation and alienation by the mega carriers of the world, among others. There are many airlines still struggling to survive against all odds. We admire their tenacity and efforts. Government and industry need to provide them support.

Fortunately, it is not all gloom. Some African airlines are positioning themselves to take advantage of the growing traffic. The continent is investing heavily in new and modern aircraft with order book for AFRAA member airlines currently at 112

aircraft and growing. These investments in modern aircraft will greatly improve safety and reduce the carbon dioxide footprint in line with global environmental requirements. Four of the continent's airlines are now members of the global alliances and thereby extending their market reach. There are also encouraging signs that AFRAA members are enhancing their cooperation through code share, cross-border investment, joint training and maintenance partnerships.

To complement the growth and expansion of African airlines, new airports are under construction in some countries and many existing ones are being refurbished and expanded to cater for the growing traffic and aircraft movements. Modern technology solutions are also being introduced to improve service delivery, passenger convenience and bring down the cost of business.

All this investment will not yield the desired results unless African governments create the enabling environment for intra-African and domestic air transport to thrive. A liberalized regional market will enable airlines to expand and grow; incentives to foster cooperation assisted by the appropriate legal and regulatory framework will see airlines reconsolidating and working more closely together.

The success achieved collectively by AFRAA member airlines in 2009 is commendable and it is hoped that with further collaboration in training, maintenance, network harmonization and other forms of commercial cooperation as well as cost saving initiatives, 2011 will be even more successful.



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Note of Appreciation

This issue of the Annual Report being published after ten (10) long years of non-production due to some constraints.

The publication was made possible with the cooperation and support of the Executive Committee and entire membership of AFRAA, industry partners such as; IATA, ICAO and ACI Africa, all of whom have contributed in diverse way to the content of the publication of this AFRAA Annual General Report.

It is the hope of AFRAA that airlines, partners and other stakeholders will find the content of this report useful and informative.

AFRAA would like to especially thank all who contributed to the publication of the report and look forward to your continued support in availing data for future reports.

Special appreciation also goes to the following airlines that have positively responded to our request for advertising support for this publication. These are: Air Nigeria, LAM Mozambique Airlines, Air Burkina, and Ethiopian Airlines.



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Section One

African Economic Perspective

The African continent is a wide expanse territory comprising 53 States that cover 30 million square kilometers. The land area is about 22% of the total global land area but characterized by rugged terrain that makes it difficult to traverse by ground transportation. It therefore has insufficient and/or poorly developed ground transport infrastructure and relies on air transport to complement the movement of goods and people and facilitation of economic activities. With a population of over nearly 1 billion and fast growing economies, the continent has huge untapped air transport potential. There are 15 landlocked and 7 island countries in Africa whose dependence on air transport for social economic development is indispensable.

Ground transport limitations are easily overcome by the use of air transport. By virtue of its speed, air transport remains the only means of establishing a physical connection between African capitals and between them and other cities in the world.

Some of the economic benefits of air transport in Africa include: rapid development and easier access to African cities; consolidation of international trade relations; creation of employment and generation of foreign exchange earnings from airline operations, facilitation of tourism, earnings from agricultural and other exports and in some cases rapid conveyance of relief food and medicines in times of disasters.

For some of the aforementioned reasons, virtually all the 53 African states have air transport systems. Though many of these airline operations are limited to the domestic or regional market, a good number of airlines perform intercontinental operations and compete favourably with other global players.

Economic Outlook

Africa's economic outlook is bright and this augurs well for the African aviation industry. According to the International Monetary Fund (IMF), Africa's gross domestic product was USD1600 billion in 2008. This has been growing at 4.9% per annum since 2000. The economic growth is being fueled by increased political stability on the continent as well as Africa's rich natural resources such as oil and minerals.

The world economic crisis brought to sudden halt the high economic growth rate that Africa was experiencing in 2006-2008. During this period the continent achieved average economic growth of 6%. Between 2001 and 2009, 21 African States mostly in sub Saharan Africa achieved average growth rate of 5% and above. The continent as a whole achieved 5.7% Annual Real GDP growth. This was reversed in 2009 and the growth rate tumbled to a 1.8% with GDP growth coming to a near standstill.

However Africa fared much better than most other regions which experienced negative growth during 2009. The direct effect of the crisis of the world's financial centers on African banks was relatively small because of the banks' low degree of integration with international financial markets and relatively strict capital market regulations.

The major channel of crisis transmission was through:

- The collapse of commodity prices and the fall of export volumes (declined by 2.5% and 8% respectively in 2009)
- The decline of workers' remittances.
- The decline of foreign direct investment, particularly in those sectors most affected by the global crisis, such as mining and tourism.

Table 1.1

Country/ Region	2009 (%)	2010 Forecast (%)
Africa	1.8	4.1
Middle East	2.0	3.7
Euro Area	-4.8	-0.3
World	-1.4	2.5
Central & Eastern Europe	-5.0	1.0
China	7.5	8.5



The global crisis of 2009 affected all regions and countries in Africa but to different degrees and was not even across the continent. The Southern Africa region experienced the biggest fall with about 80 Percentage points to a negative growth of 1 percentage point. Eastern and northern Africa fared better. While Eastern African and North African economies proved to be the most resilient regions and – despite some deceleration of growth – continued to expand by 5.75% and 3.75% in 2009. Growth declined to 3% in West Africa and to around 2% in Central Africa. In most African countries, GDP continued to grow in 2009, albeit at a lower rate. However, GDP declined in 10 African countries (Seychelles, Madagascar, Botswana, South Africa, Namibia, Mauritania, Gabon, Niger, Chad and Angola), while in half of all countries, per capita GDP stagnated or fell. In contrast, several countries, notably Ethiopia, Republic of Congo and Malawi, achieved relatively high growth in 2009 despite the global recession.

Gradual Recovery

In the World Economic Outlook October 2009, the International Monetary Fund projected the GDP annual percentage growth for most African countries. In 2010, the fastest growing African economies are projected to be:

- Republic of Congo (12.2%)
- Angola (9.3%)
- Ethiopia (7%)

In 2011, the fastest growing African economies are projected to be:

- Ghana (22.5%)
- Liberia (9.2%)
- Botswana (8.5%)
- Angola (8.4%)

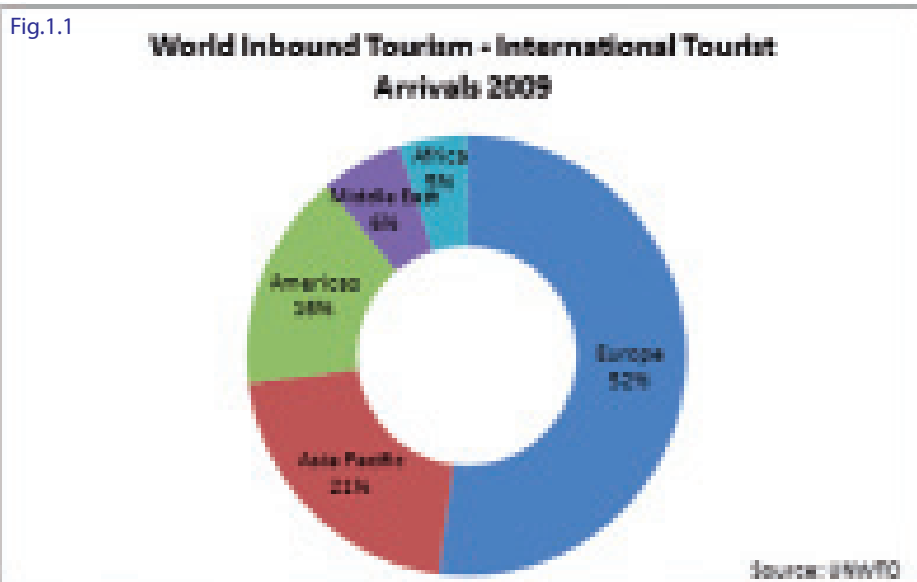
In 2012, there are several double-digit growth projections including:

- Botswana (13.8%)
- Liberia (12.8%)
- Mauritania (13.1%)
- Niger (12.9%)

The implication to the airline industry of the GDP growth and the huge population growth in domestic, intra-Africa and international travel as well as movement of industrial and commercial goods

Tourism Trends

Travel and tourism in Africa has a very small share of the global tourism economy. Despite the continent's wealth of natural and cultural attraction the relative performance of tourism in Africa lags behind. Africa's tourism industry over all contributions to the economy is still low in comparison to most other regions. However it is an important contributor to African airlines international and intercontinental passenger traffic. More importantly its potential for growth as indicated in various forecast





for the coming years offer an opportunity for the continents airlines.

International tourist arrivals fell by an estimated 4% in 2009; while Africa achieved a robust 5% increase despite the global economic slowdown.

Growth returned to global tourism in the last quarter of 2009 contributing to better than expected full-year results, according to the latest edition of the UNWTO World Tourism Barometer. Prospects have also improved with arrivals now forecast to grow between 3% and 4% in 2010.

Economic Growth and Impact on Air Transport

The traffic growth rate on the continent is projected by various studies to be higher than world average for the foreseeable future. IATA forecasts that over the next 3 years, passenger traffic to and from the continent will have an annual growth rate of 6.5%, making it among the fastest in the world. This upbeat forecast is reflected by the growth in forecasted aircraft orders. Boeing forecasts that Africa will need 710 aircraft in the 20 years period to 2029 worth about USD80 billion. Airbus has a more bullish forecast of 1270 new aircraft deliveries between 2009 and 2028.

The growth prospects for the African continent have not gone unnoticed by carriers from outside Africa. Currently, non-African carriers dominate air transport to and from the African continent with around 861 flights a week. In addition to the European carriers, several Middle East and Asian carriers like Emirates, Qatar, Turkish Airlines, Air India and Cathay Pacific fly into the continent. China Southern and China Eastern also have operations into Africa which are expected to expand in the future. Delta Airlines, which began direct US-Africa flights in 2006 has continued to increase its operations on the continent and now operates to 8 destinations. Another US carrier, United Airlines has commenced direct daily flights to Accra, Ghana. It is expected that with the Boeing 787 starting operations in the continent by the end of 2010, will result in an aircraft with the right range and size for connecting Sub-Saharan Africa directly to the US.

The African airline industry has to gear itself for this exciting growth of the continent's air transport business. It is encouraging to see several African carriers renewing their fleets and taking advantage of the lower operational costs and lower environment emissions of the new aircraft types. The various initiatives by several stakeholders such as ICAO, IATA, AFCAC, AFRAA, and States to improve safety on the continent augur well for air transport development. There has been significant infrastructure development such as more modern airports, in countries ranging from South Africa, Egypt, Kenya, Ethiopia, Senegal, Nigeria and Libya which should facilitate this expansion.

The very successful FIFA 2010 Football World Cup hosted by South Africa not only resulted in significantly increased air traffic movements but opened the world to the vast opportunities on the African continent. It is these prospects that AFRAA member airlines need to exploit to improve its market share of international air transport, which currently remains small. There is seemingly a scramble for Africa by carriers from outside the continent and already non-African carriers transport over 70% of international traffic to and from the continent.

To fully exploit the growing aviation opportunities, African States need to fully implement the Yamoussoukro Decision. This will result in much stronger African airlines that can effectively compete against the influx of mega-carriers from outside the continent.

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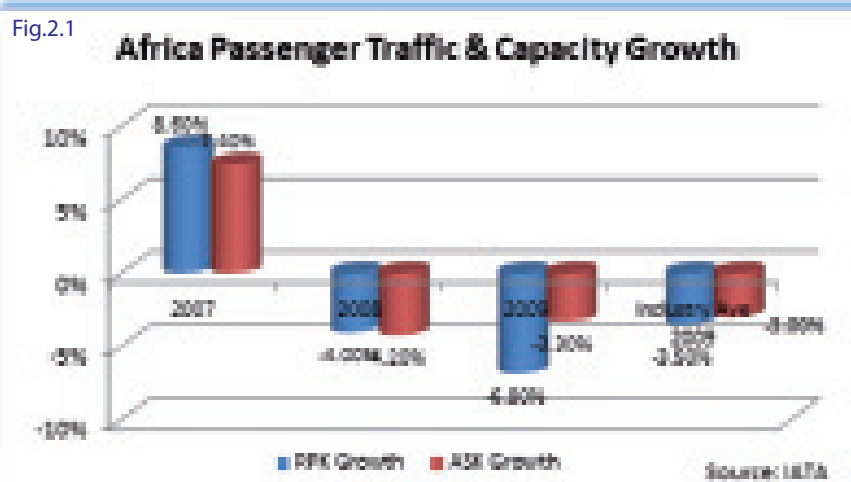
Section Two

Africa Air Transport Overview

Passenger Traffic in Africa

Air Transport market in Africa is one of the fastest growing sectors on the continent. Though the industry is experiencing consistent growth in passenger numbers the beneficiaries of the growth are largely non-African airlines. While non-African airlines experienced growth in traffic in 2009, Africa airlines experienced their worst passenger traffic decline according to IATA data. Compared to 2008, passenger traffic measured in Revenue Passenger Kilometer (RPKs) declined by 6.8%.

In response to the declining traffic volumes, African airlines contracted capacity by 3.3% in 2009. The declining performance of African airlines which started in 2008 and continued in 2009 is as a result of the impact of the global financial crisis and the inability of many airlines to respond adequately to stiff competition by foreign airlines that have increased their presence and capacity to Africa. The period also saw Delta airlines introducing direct flight to more African cities. Delta airlines now operate to eight (8) African destinations and this is expected to increase. United Airlines in 2010 also started daily operations to Accra, Ghana.

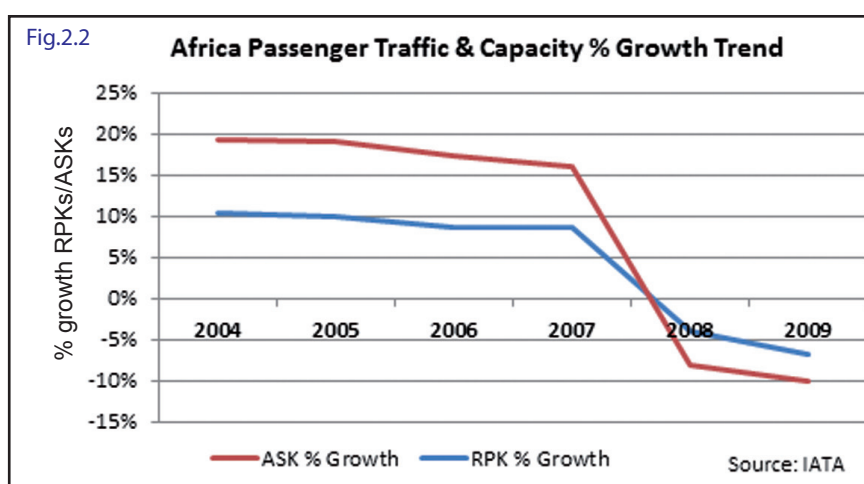


While the major African airlines maintained their intercontinental capacity to a greater extent, many of the continent small and medium size airlines had to contract capacity or pull out of some routes – especially intercontinental routes in order to survive. This capacity pull-back notwithstanding, some airlines could not survive the challenges following the financial downturn.

Globally the entire airline industry in 2009 suffered a decline in passenger traffic of 3.5%. In response to the declining demand the global airlines industry reduced capacity by 3% in 2009.

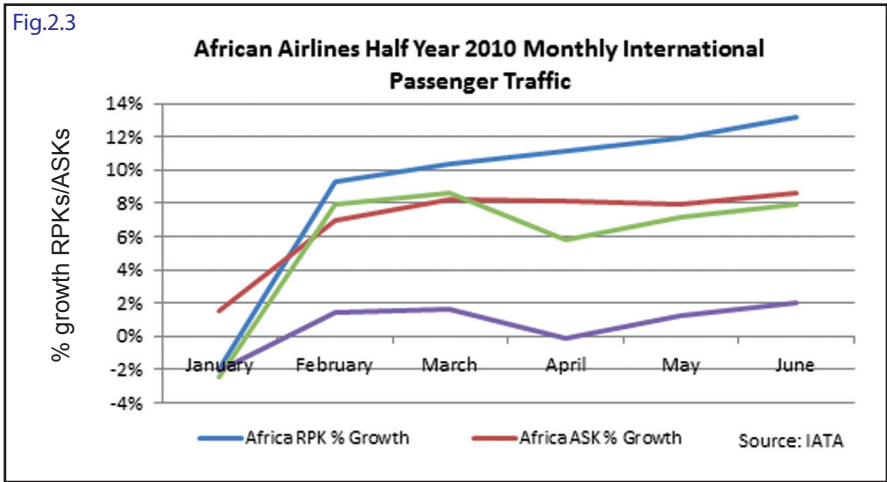
International passenger traffic percentage growth for African carriers over the last 6 (six) years have witnessed a consistent decline. The worse decline was in 2008 when Revenue Passenger Kilometer (RPK's) declined by 12.6% to -4%, according to available IATA data. Over the same period, capacity also declined by 11.6% to -4.2%.

This downward trend is partly due to the collapse of some of the continents major airlines and the subsequent takeover of the international traffic in those markets by foreign carriers.



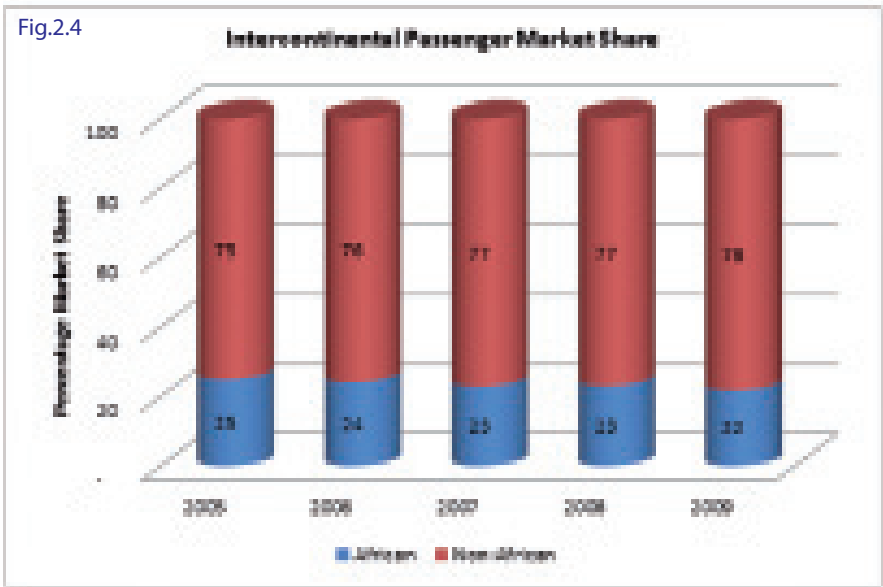


So far in 2010, African airlines international traffic performance has been impressive compared to same period in 2009. Average monthly growth for the first six months of the year show an average growth of 9.3%. This positive rebound of traffic is the result of a stronger growth by many economic sectors in Africa, increased regional/international business activities and a determined move by many African airlines to gain additional market share through improved operation, and network expansion. A number of new routes have been started within and outside the continent by African operators and more routes are expected to commence before year end. African airlines performance for the first half of 2010 shows a 3.4% better passenger traffic than the global average for the same period.



International Market Share

African airlines market share of intercontinental traffic to/from the continent has over the last 5 years declined by 3% from 25% in 2005 to 22% at the end of 2009.



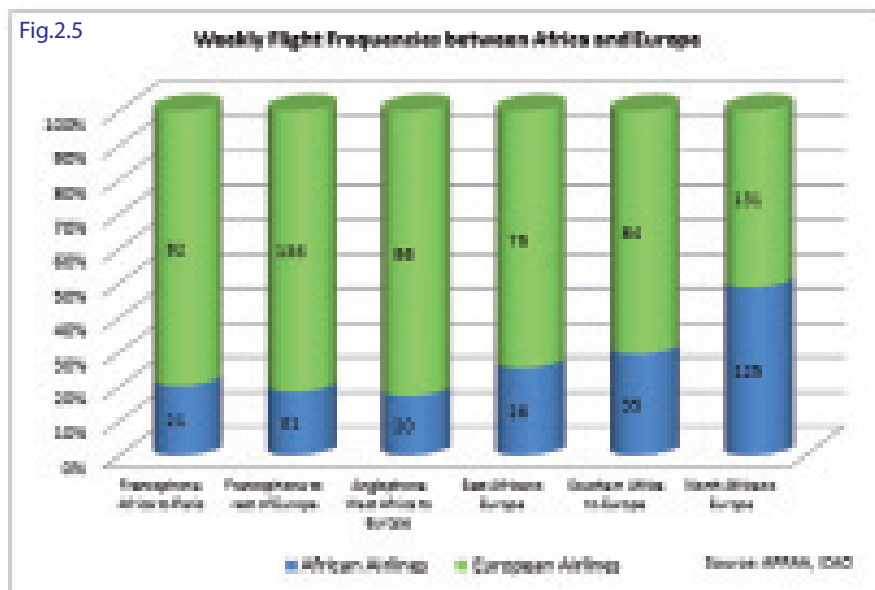
The loss of intercontinental market share has partly been the result of the collapse of some major airlines in the past and the takeover of the traffic by foreign carriers. Restrictive bilateral services agreements have often made it difficult for African carriers to exercise fifth freedom rights from sister countries.

International Passenger Capacity

In many markets, there is a disproportionately high direct intercontinental market access granted to foreign carriers at the expense of African operators. At the end of 2009, an analysis of average weekly flight frequencies between Africa and various European destinations indicate that Africa accounts for 28% of all intercontinental flights between the two regions. The 72% capacity controlled by foreign airlines makes them dominant operators in all the sub-regions of Africa with better market access.



Fig.2.5



The failure by African States to implement the Yamoussoukro Decision (internal liberalization programme) and allow market access by local airlines is constraining the growth of the airline industry in Africa.

With the return of North American (Delta and United) and Asian carriers to Africa, Africa's share of intercontinental traffic may further be eroded unless operators initiate measures to recapture market share.

Fig.2.6

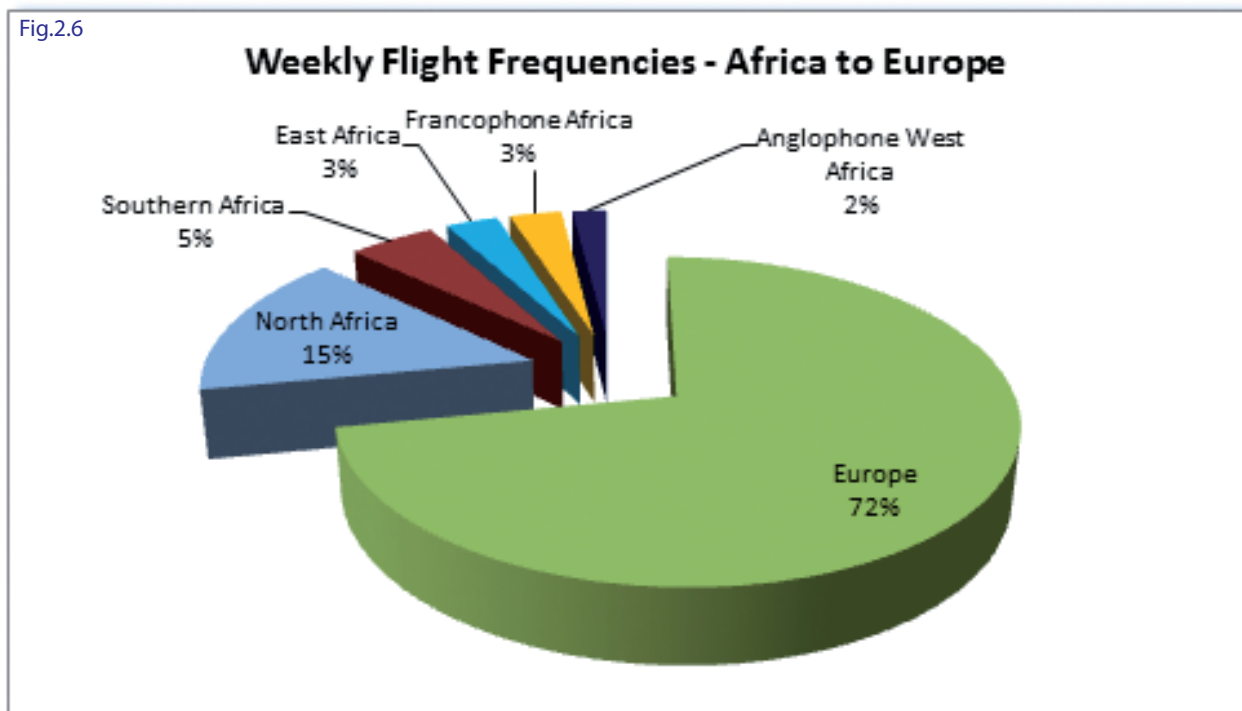
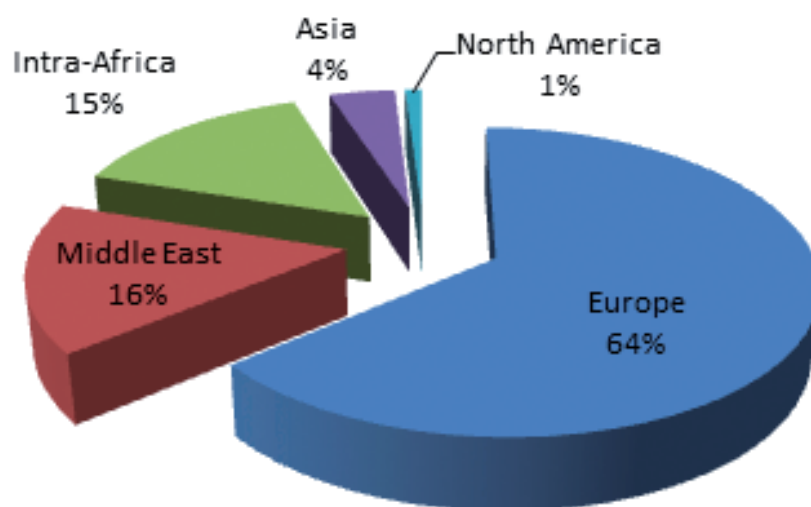


Fig.2.7

Passenger Traffic Distribution - Africa to Other Regions



Of the 28% of all frequencies between Europe and Africa operated by African airlines in 2009, Anglophone West Africa contributed a paltry 2% of that capacity to Europe. The region capacity to operate on intercontinental routes has been greatly diminished by the absence of strong operators, lack of appropriate equipment, uncompetitive product offering among others. International Destinations of African Passengers

64% of African air passenger traffic travel through Europe with only 1% going to North America. Middle East accounts 15%, while Asia Pacific destinations received 4% of African travellers in 2009.

The total number of passengers carried by African and non-African airlines to/from and within the continent increased by 2.36% in 2009 to over 145 million passengers. 21.77% of the intercontinental traffic was carried by African airlines with 78.23% carried by foreign airlines.

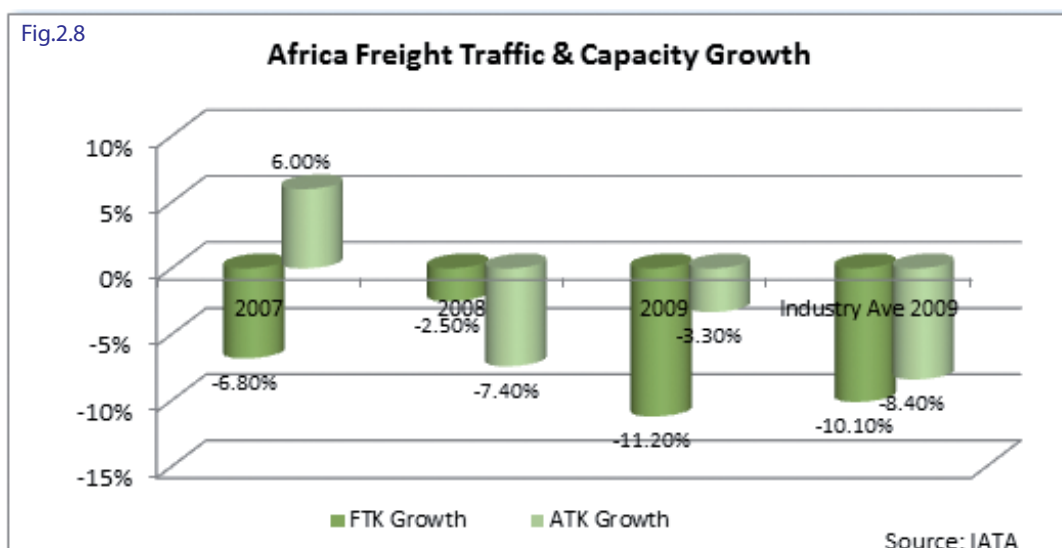
With Delta and United Airlines now offering direct flights between North America and some African destinations, the percentage of passengers travelling direct instead of via Europe to the USA is bound to increase in 2010 and beyond. Asia too has become a major business destination for many African travellers and this couple with the launch of services by some Asia carriers to Africa will also impact of the number of passenger in the future transiting through Europe.



Freight Traffic in Africa

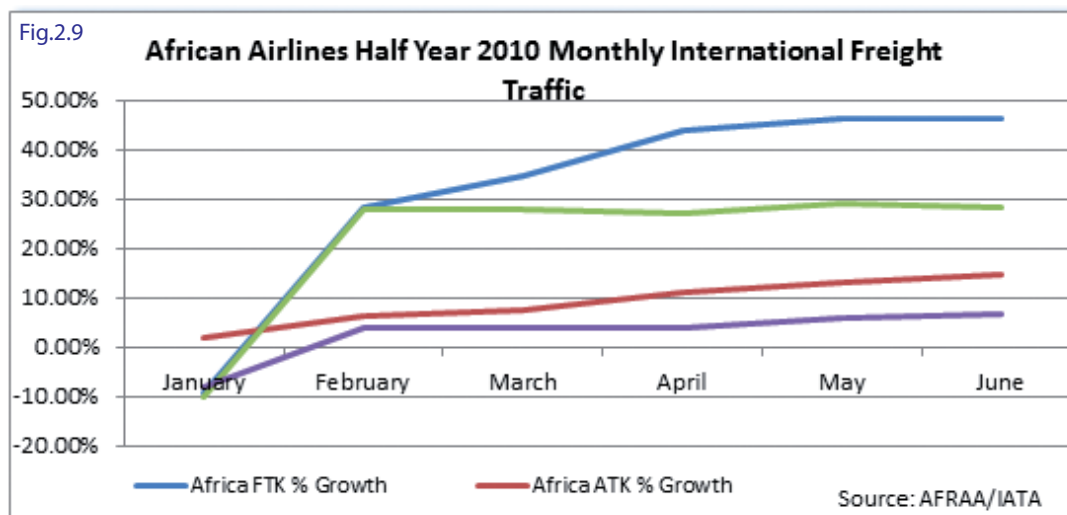
Air freight shipment in Africa is still very low. The continent accounts for less than 2% of global freight traffic.

There was significant injection of freight capacity by African operators 2007 in anticipation of growth in subsequent years. Since then, African airlines have been unable to right-size capacity and demand as subsequent years demand fell below forecast. According to IATA 2009 figures, African Freight Tonnage Kilometers (FTK) declined by 11.2% compared to the 2.5% decline in 2008. Though substantial capacity (7.4%) was taken off the market in 2008, the remaining capacity was still far in excess available demand. Capacity in Africa was reduced by 3.3% compared to global capacity cut of 8.4%. Africa freight traffic performance was worse than the global industry average of 10.1% by 1.1% in 2009 due in part to the global economic downturn that constricted trade and reduced the volume of cargo shipment between Africa and other regions. The use of wide body passenger aircraft with excess belly capacity also enabled non-Africa operators to uplift freight to/from other regions. African airlines lack of dedicated cargo operations is causing the industry to loose market share.



Freight traffic performance in the last six years has been a decline except for the period between 2007 and 2008 when freight traffic improved slightly from -6.8% to -2.5%. But this improvement was not sustained in 2009 as freight traffic dipped by 13.7% to -11.2%.

Freight traffic of Africa in 2010 is witnessing significant growth at an average rate 31.6% month-on-month growth. This compares favorably with the global average month-on-month performance of 21.6% for the six (6) months period to June, 2010.

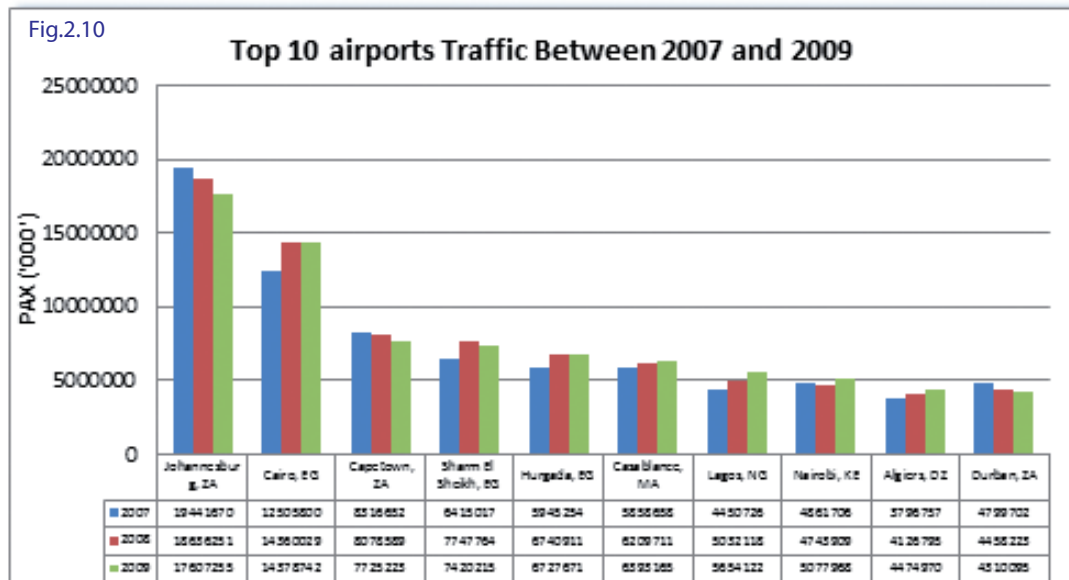




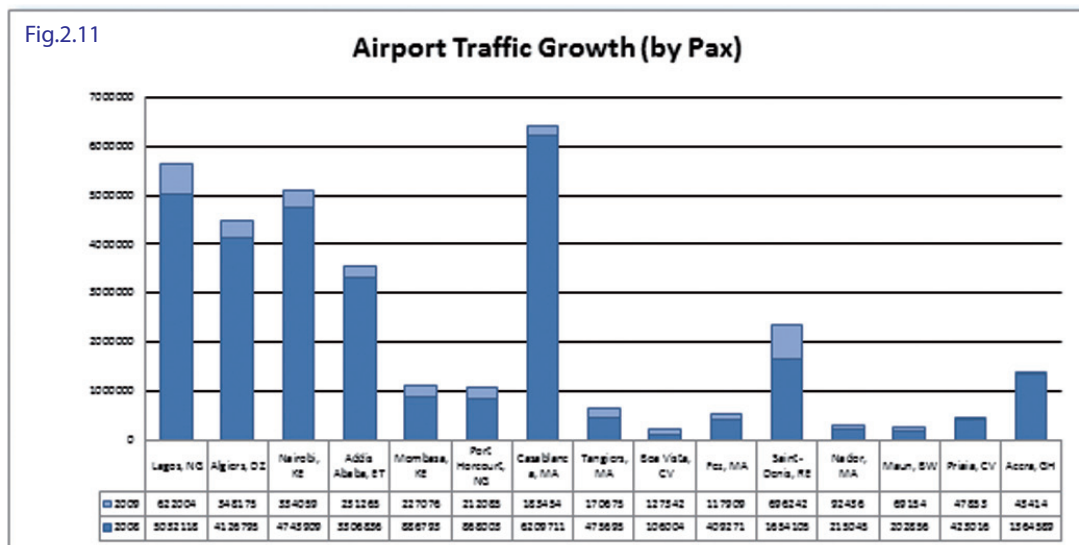
African Airport Statistics

In 2009 African airports passenger traffic declined by 1.85% to 273 million. There was significant capacity increase with the construction of a number of new airports in South Africa and Egypt. Many airports also refurbished and expanded existing terminal buildings and installed modern IT and passenger handling facilities.

The top 10 busiest airports in Africa in 2009 and the of number of passengers handled show Johannesburg was the busiest airport followed by Cairo International Airport.



The total number of passengers handled by African airports in 2009 was nearly 150 million plus 2.1 million tons of freight. Aircraft movement over the period was 2.75 million.



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Distance running is synonymous with the Ethiopian culture, starting from Abebe Bikila, the winner of the Olympic Marathon gold medal in Rome and Tokyo in 1960 and 1964 respectively, to the living legend Haile Gebrselassie, one of the greatest distance runners in history. with 22 world records so far and many more to come, Ethiopians dominate all major long distance competitions in the world. In line with this tradition, Ethiopian Airlines is about to establish itself in the ultra-long distance arena as well.



Ethiopian Airlines will be the first airline in Africa to operate the 777-200LR — the longest range airplane in the world. This aircraft will enable Ethiopian Airlines to connect Addis Ababa to the U.S and to more destinations in Asia — nonstop.

with a range of up to 17,396 km, the 777-200LR will carry more than 300 passengers in the most passenger preferred cabin of any aircraft in service. Its efficient design means low fuel consumption, less noise and cleaner emissions, which is in sync with the Airline's green initiatives.

This technologically advanced aircraft will further establish Ethiopian Airlines as a leader on the continent, and as an airline that takes its mission of connecting Africa to the World, Seriously.



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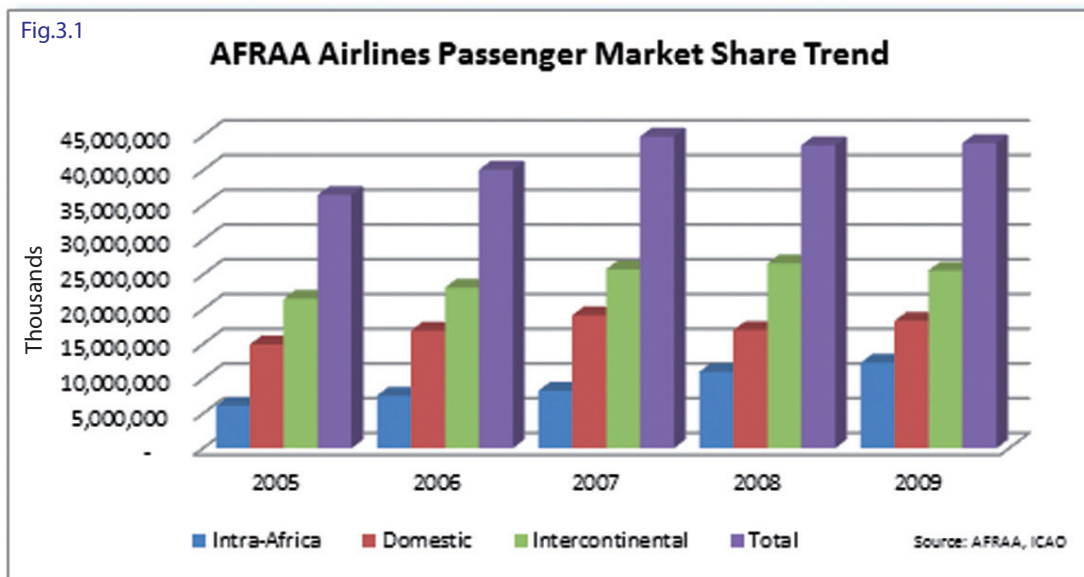
THE NEW SPIRIT OF AFRICA

Section Three

AFRAA Member Airlines Operations

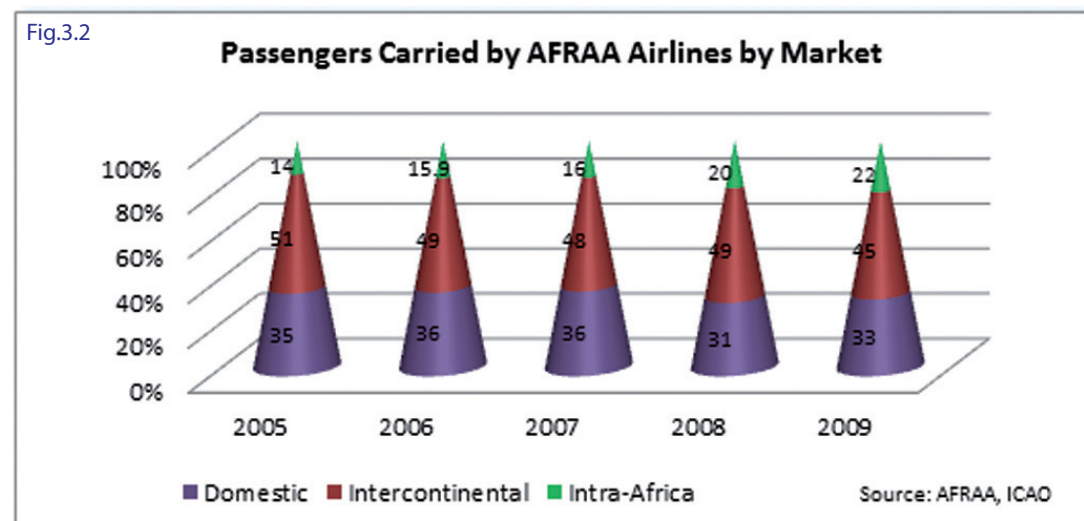
Passenger Operations

Total number of passengers carried in 2009 by AFRAA member airlines was 43.9 million, an increase of 4.7% over 2008. Many of the continent carriers recorded growth in passenger numbers. The trend is expected to continue in 2010 as the African as well as world economies are registering growth. Year to June, 2010 average monthly growth of passenger traffic is about 9.5%. The traffic growth was the result of increase in frequency, new destinations and good load factors recorded by some airlines.



In terms of market share, International traffic constitutes 45% of the market, domestic with 33% and intra- Africa with 22% in 2009. The trend in previous years is similar, with international traffic always constituting between 45-50% of all passengers carried by AFRAA airlines.

Though the intercontinental passengers carried by AFRAA airlines declined by 3% in 2009, intra-Africa and domestic passenger numbers increased by 1% and 2% respectively.



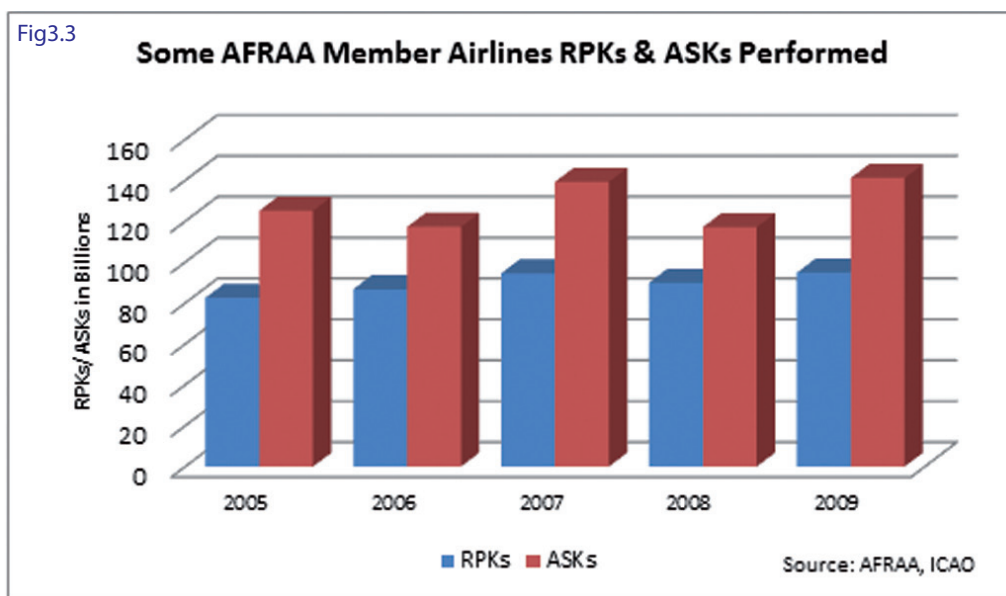


Of the AFRAA airlines that reported their data, 5 of them account for 78% of all international operations. Over 71% of all domestic traffic is transported by just 4 carriers. On regional operations, 4 carriers account for over 64% of the market share.

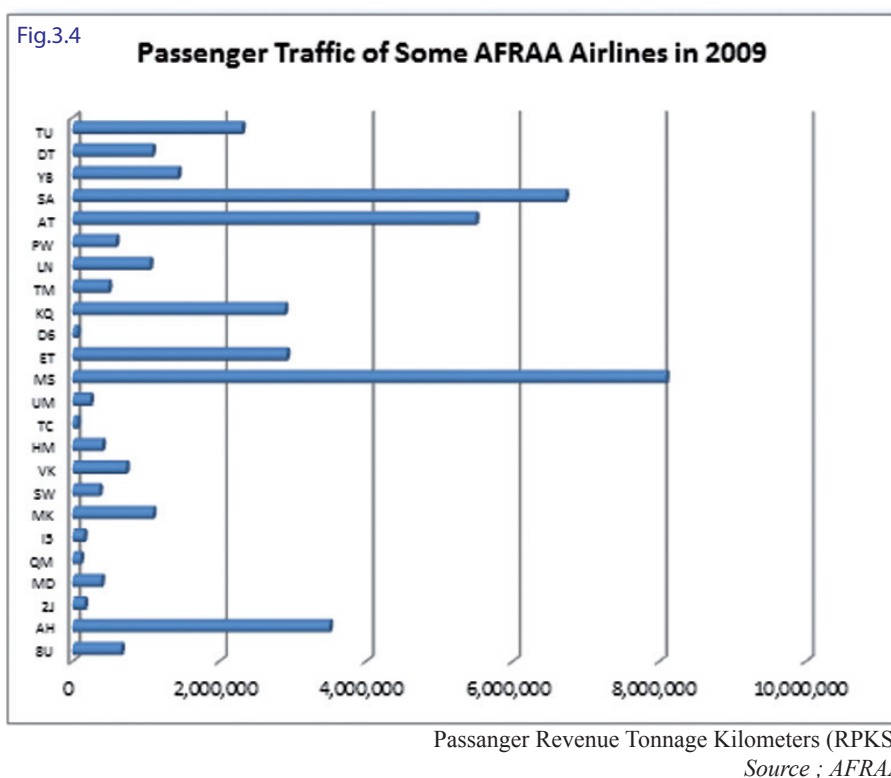
There is significant growth of traffic in the Nigerian, South African, Egyptian and Moroccan markets especially on the domestic and regional segments but most of it is not reported and therefore not captured in this report.

RPKs and ASKs Performed by Some AFRAA Airlines

AFRAA airlines performed 94.8 billion Revenue Passenger Kilometers (RPKs) in 2009 or 5.2% more than 2008. Available Seat Kilometers (ASKs) were 141.1 billion resulting in an overall load factor of 69.9%



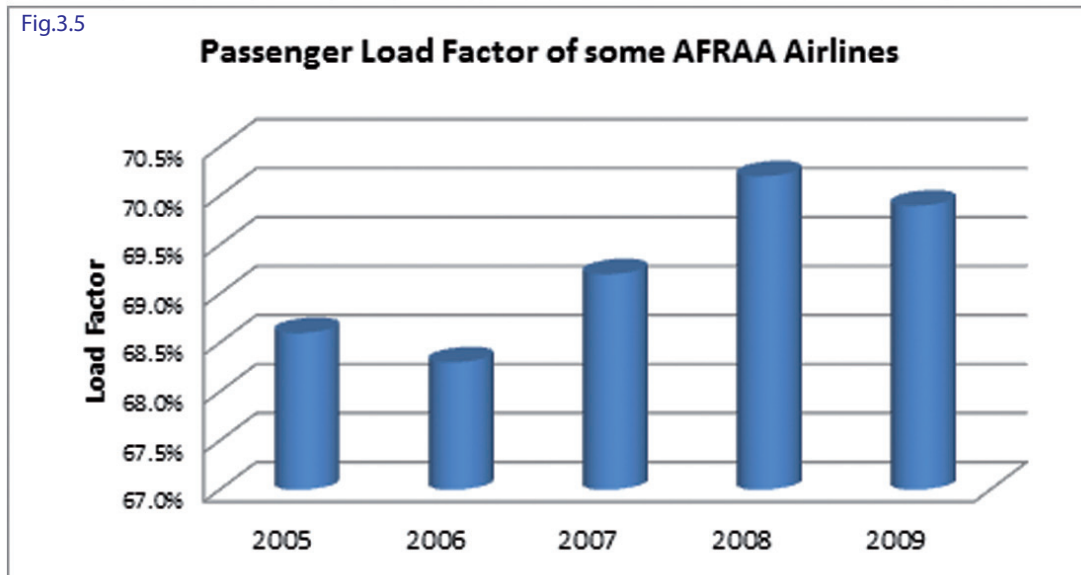
The largest five airlines account for 70% of Revenue Passenger Kilometers (RPKs) performed whilst the remaining 30% is shared by the rest. The dominance of the continent's major airlines is set to increase as they are among those that are expanding and investing in new equipment, people and facilities. Four of the major airlines are members of worldwide alliance groups which further extends their market reach and attractiveness to customers.



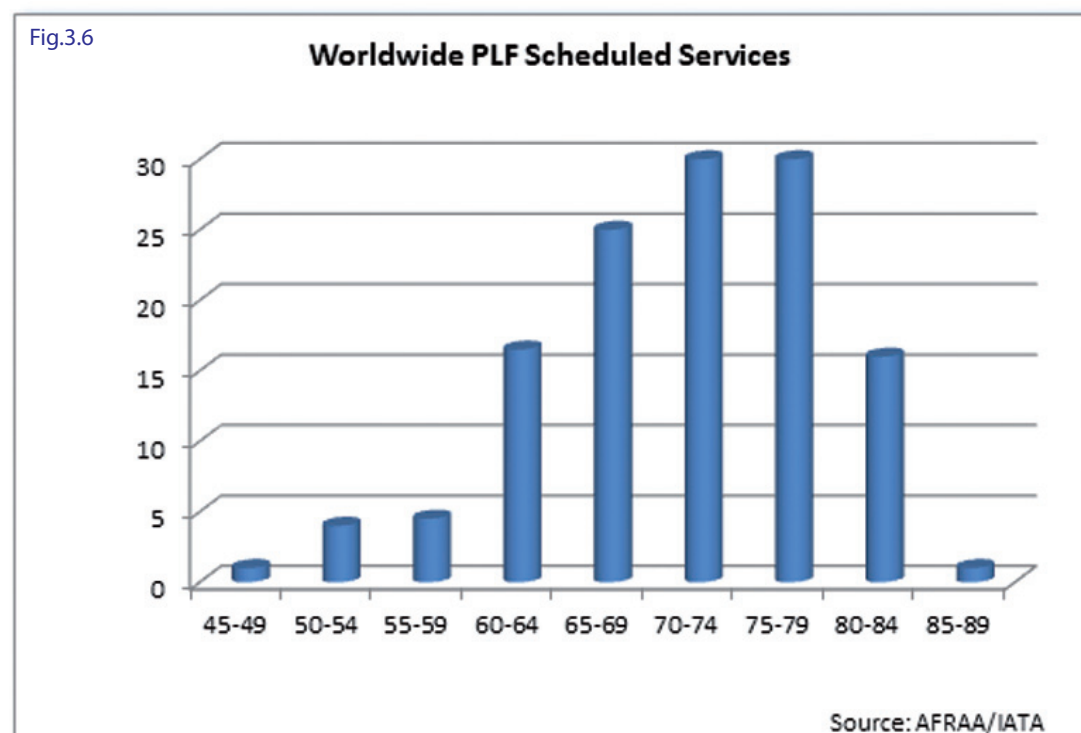


Passenger Load Factor (PLF - %)

The PLFs reported for African airlines was 69.9% in 2009, down from 70.2% in 2008. African airlines load Factor is the lowest compared to other regions of the world. The global average load factor for 2009 was 75.6% down to 6.3% from 2008.



Poor Load Factors of African airlines are compensated for by the high yields in most markets on the continent.





Freight Operations

The 22 AFRAA airlines that provided data reported over 560,000 tonnes of freight in 2009, a slight increase of 2.9% from 2008. Over 74% of the total amount is carried by 4 airlines with well-developed cargo business units dedicated to optimizing revenue from this often neglected area of airline operations. It is also significant to note that these airlines with marked cargo business reported positive annual net results partly due to cargo's contribution to the bottom-line.

Fig.3.7

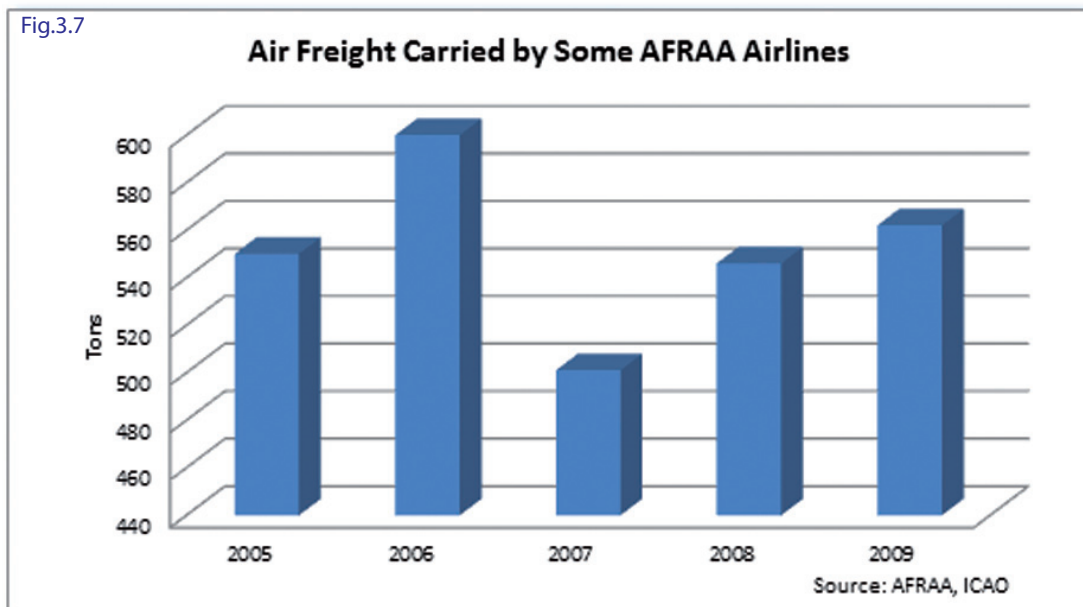
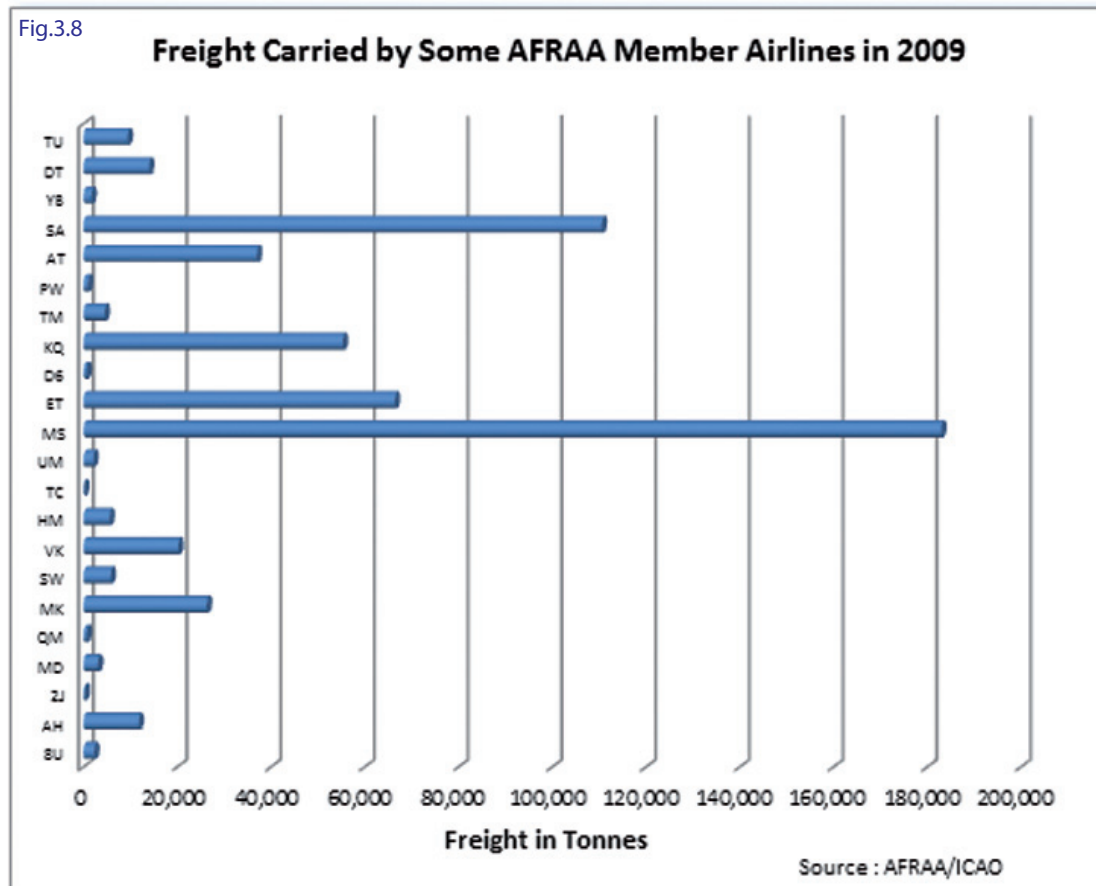


Fig.3.8





Charter Operations

Charter operations transported 1,877,042 passengers in 2009. This constitutes 4.7% of the total passenger carried by AFRAA member airlines in 2009.

In terms of tonnage of charter freight carried, only 5 AFRAA member airlines reported freight charters. 44,225 tonnes of freight with Ethiopian Airlines transporting 38,384 tonnes accounting for 87% of charter freight carried. Ethiopian Airlines, Egypt Air, Kenya Airways and South African Airways are the major AFRAA member airlines with dedicated cargo operations. The majority of African airlines rely on passenger aircraft belly space to transport cargo.



Section Four

Financial Performance and Jet Fuel Costs

The global airline industry suffered huge losses in 2008 and 2009, estimated by IATA at USD16.8billion and USD11.35billion respectively. The global financial crisis and world recession in these two years as well as the high fuel costs in 2008, which averaged USD121.00 per barrel, contributed to the huge losses in the industry. The sharp fall in fuel prices in 2009 was more than offset by the fall in traffic as the world recession took its toll.

Some AFRAA Member Airlines Final Results

The 19 airlines that provided financial results reported operating revenue of USD8,971 billion against operating expenses of USD8,611 billion. This resulted in operating profit of USD393 million and net profits of USD137 million. These are commendable results at a time that IATA estimated losses worldwide for 2009 at USD11.35 billion.

IATA Corporate Financial Results:

Table 4.1

YEAR	Operating Result (USD millions)	Net Result (USD millions)
2009	-3,731	2,173
2008	-3,019	9,983
2007	23,369	17,656
2006	17,206	-16,524
2005	10,240	-11,350

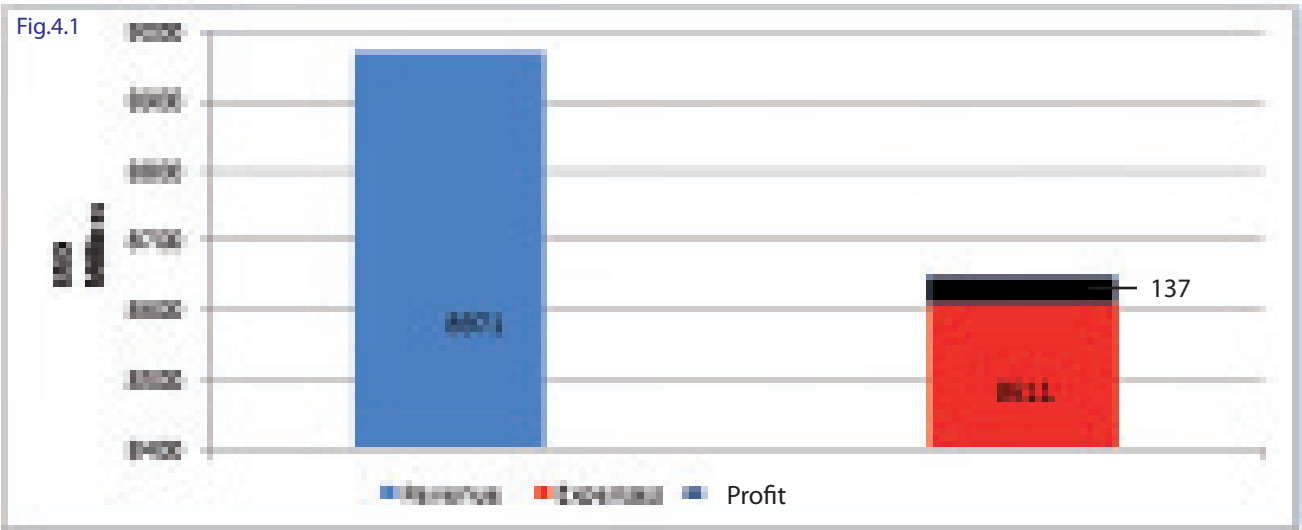
Source: IATA

The positive financial results by AFRAA carriers are as a result of stringent cost control coupled with the reduction in fuel costs in 2009.

FINANCE

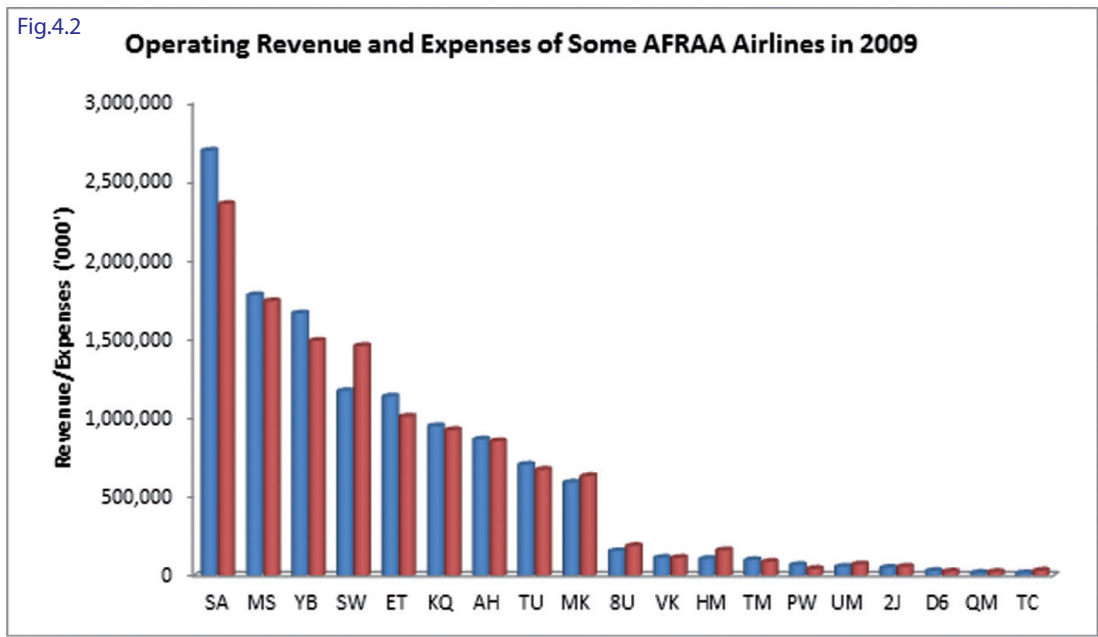
Systemwide Operating Performance (USD millions)

Fig.4.1





Operating expenses in 2009 was 96% of total operating revenue. Of the 25 AFRAA airlines that reported operating revenue results for 2009, 24% of them made a net profit.

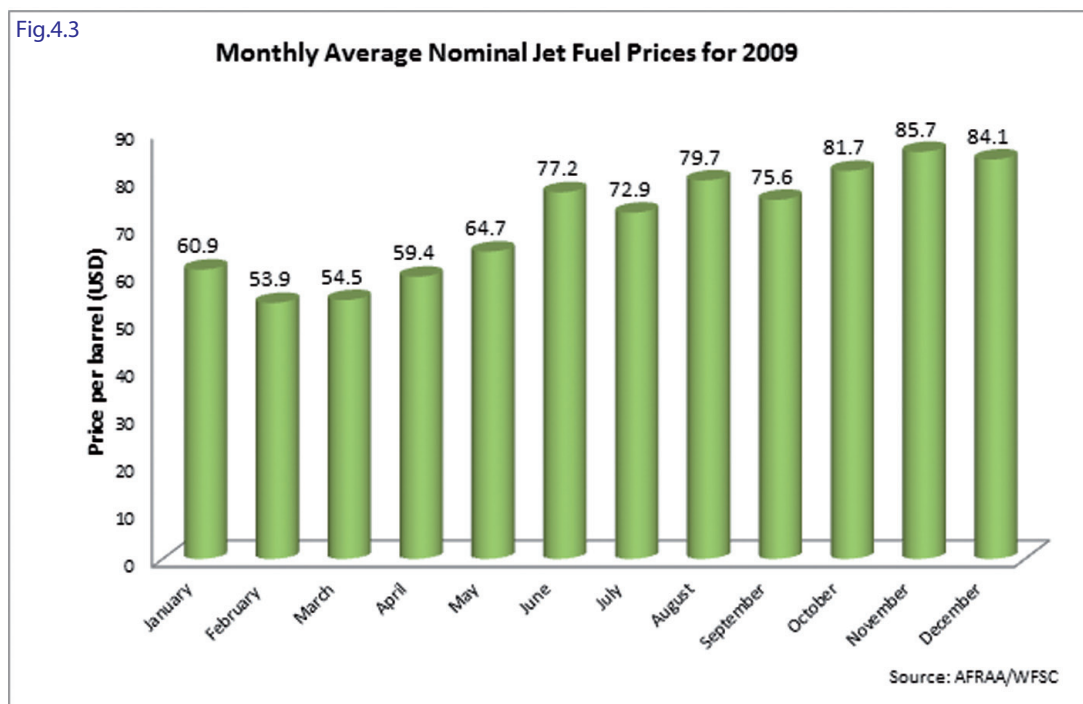




Jet Fuel Cost

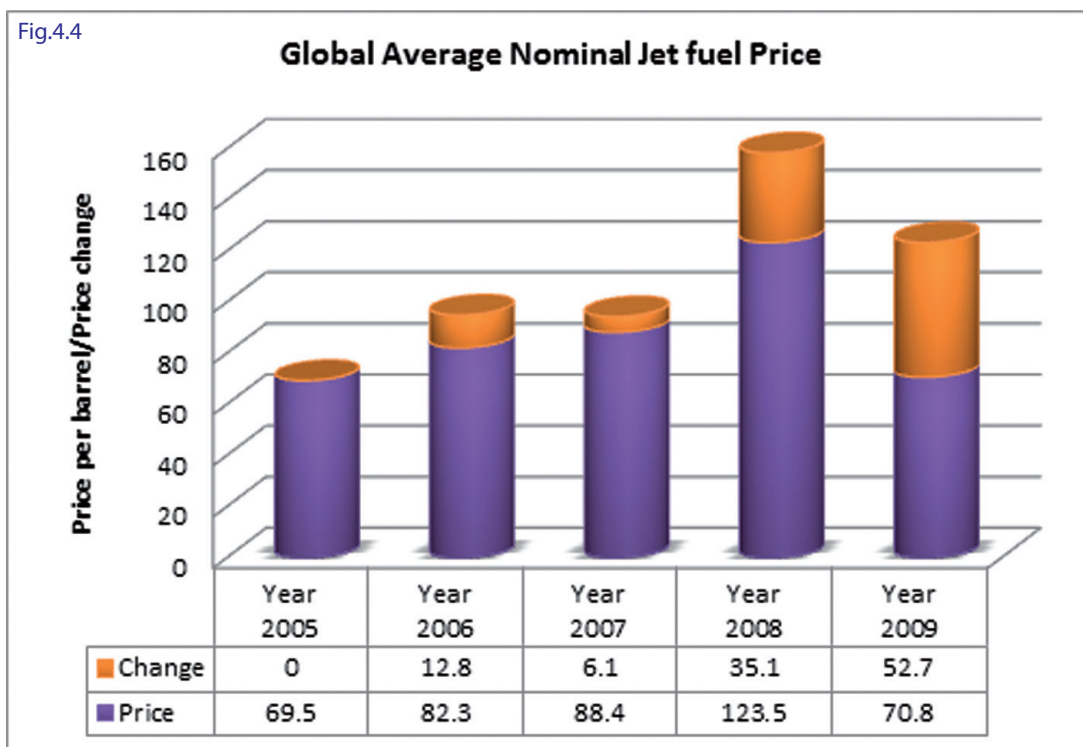
Jet fuel remains one of the major cost components of airlines. Compared to 2008, average jet fuel price dropped in 2009 by 42.7% per barrel to US\$70.8.

Fig.4.3



On a month-by-month basis jet fuel prices fluctuated from a low of US\$53.9 (the lowest in 2009) in February to a high of US\$85.7 in November 2009.

Fig.4.4



Source: AFRAA/WFSC



Section Five

Employment

In 2009, the total number of people employed by AFRAA members was about 82,000. A number of airlines are expanding their fleet and operations which is resulting in them having to increase their staff numbers. Some of the smaller airlines are right-sizing through restructuring programmes brought about by the need to survive in a challenging operating environment. The downturn in the global airline industry in 2008 and 2009 brought about some respite in the loss of skilled manpower which was particularly adversely affecting the smaller and less resource endowed airlines. However, the current positive global economic outlook and the consequent increase in demand for air transport services is already seeing some airlines losing pilots, experienced maintenance personnel and other key staff to larger industry players from outside Africa. African airlines therefore need to design better employment packages to retain their staff as well as to invest in training and human resource development to ensure that there are adequately qualified and competent people to ensure viable, safe and profitable airlines.

Employee Productivity

The table below shows IATA Employee productivity in the period 2005 – 2009. Member airlines can use this to benchmark their employee productivity.

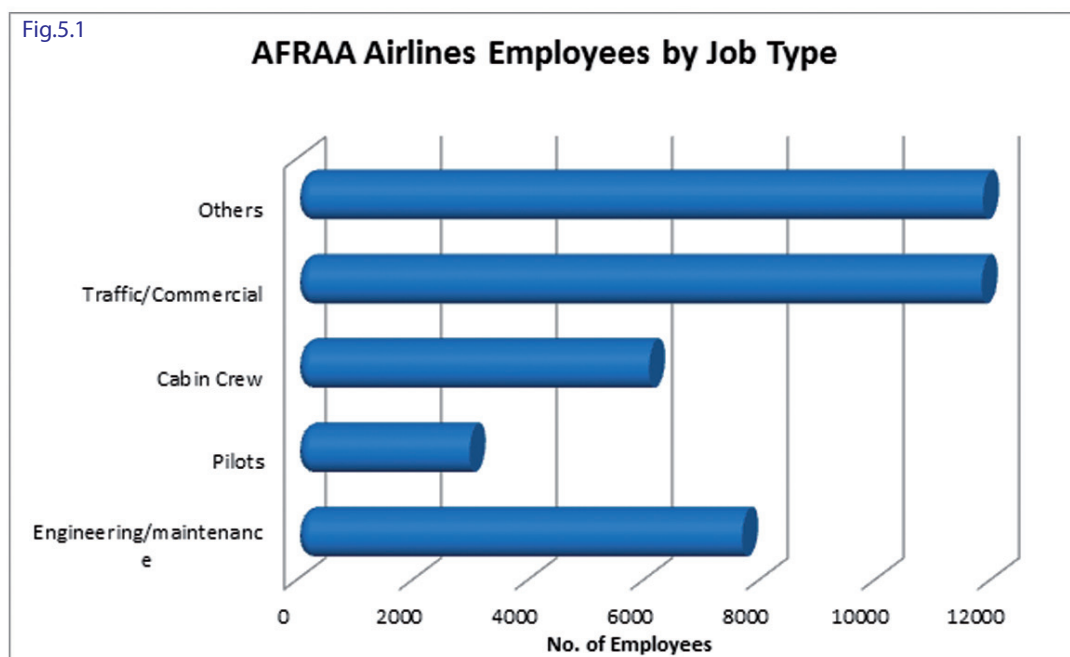
Table 5.1

All Services	RTK/Employee (thousands)
2009	344
2008	347
2007	357
2006	346
2005	317

Source: IATA

Directly AFRAA airlines employed over 81,000 people in 2009. The composition of the works force by job type is indicated on the graph below.

Fig.5.1



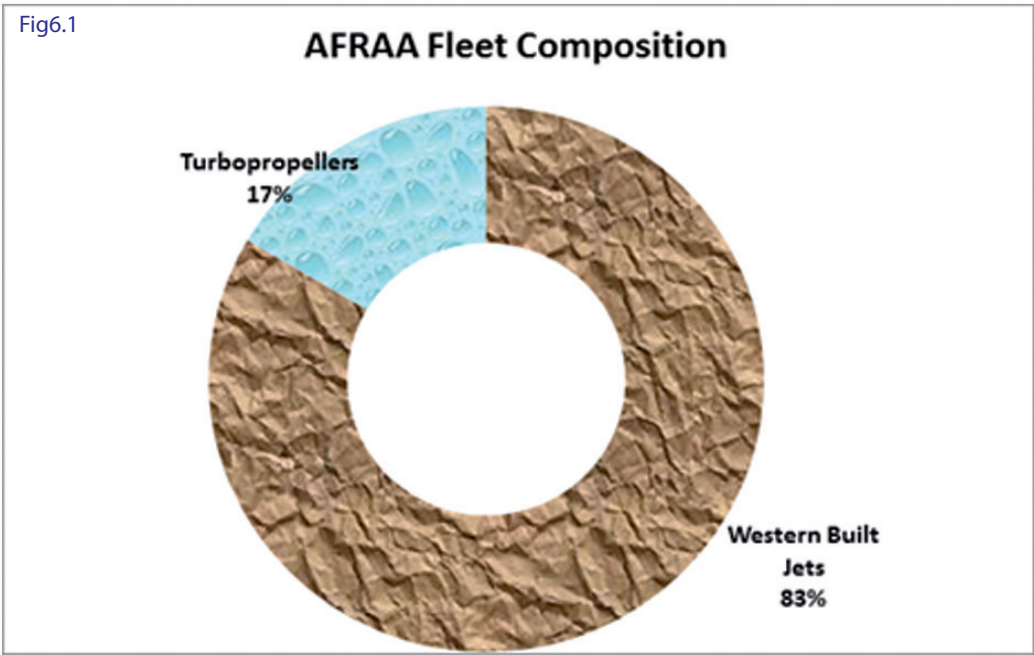
Average revenue per employee was USD.110, 000.00. The employee per air craft ratio is 162.



Section Six

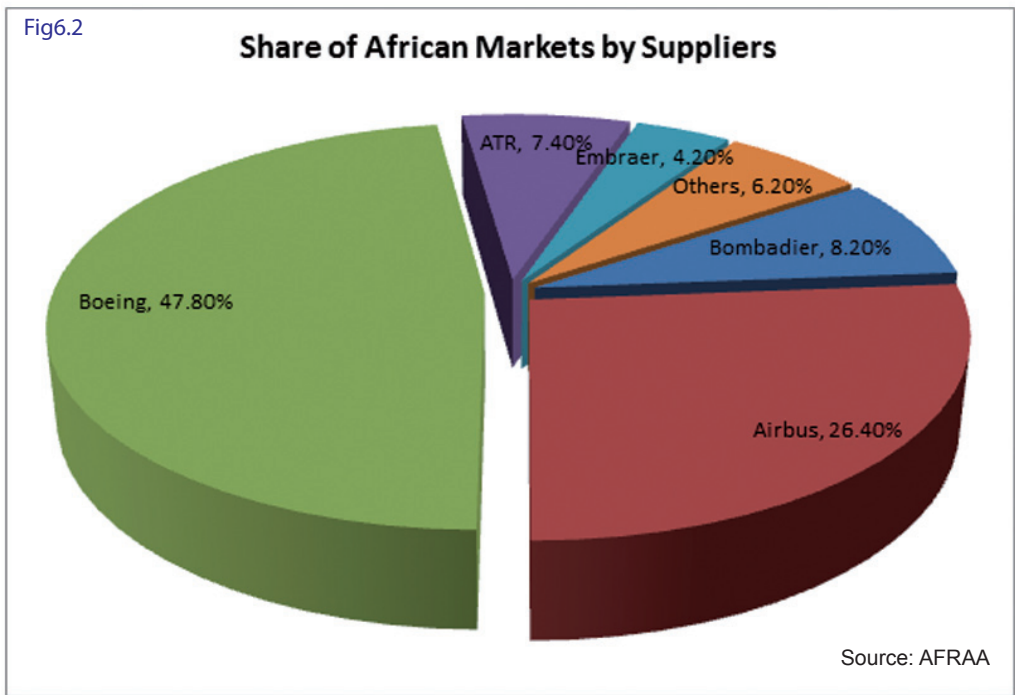
Fleet Composition and Development

The effect of the global economic downturn in 2008 and 2009, volatile fuel prices and the need to drastically cut costs to remain viable compelled some airlines to retire or put into storage the older generation aircraft such as the Boeing B737-200 and the Airbus A310. At the end of October, 2010, AFRAA members operated a fleet of 503 aircraft. The fleet is made up of 420 jets and 83 turbo propellers. With planned replacement programme in many airlines, the average age of fleet is set to improve in near the future.



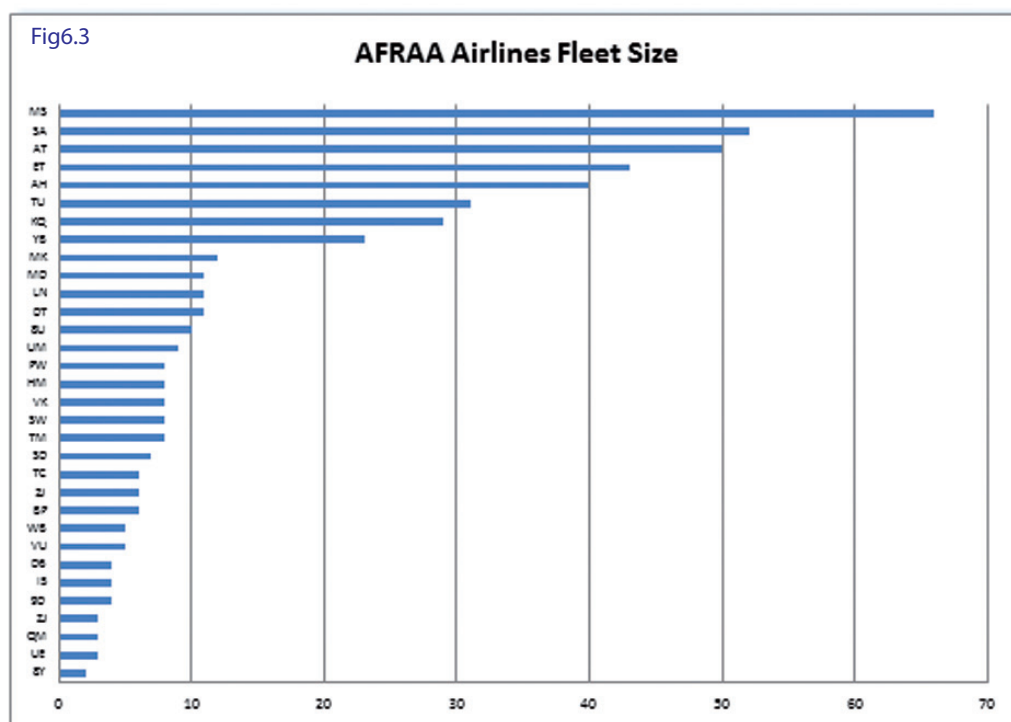
Fleet breakdown by Suppliers

Boeing is the dominant supplier of aircraft with 240 jets including the McDonnell Douglas types, followed by Airbus with 133 jets. The other major suppliers on the continent are Bombardier with its CRJ regional jets and the Dash 8 and Q Series turbo-props, the ATR regional turbopropeller aircraft (ATR-42 and ATR-72) as well as the Embraer family of regional jets.





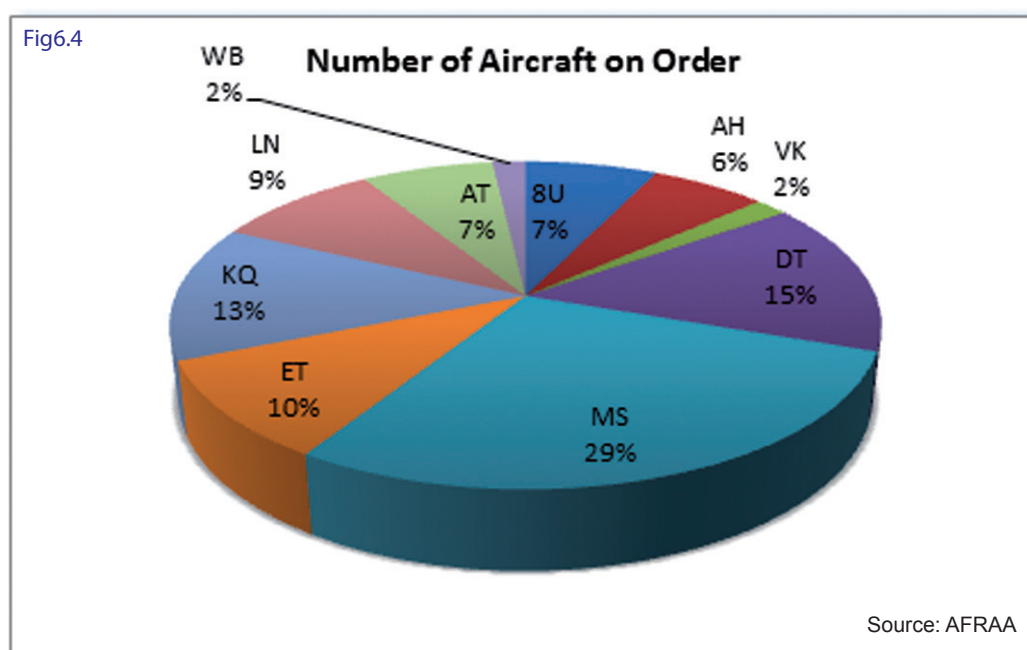
Fleet size per AFRAA member airline



Aircraft on Order

As of October 2010, AFRAA member airlines had 112 aircraft on order. This is continuing the modernizing trend of member airline fleets to reduce operational costs as well as reducing the carbon dioxide footprint in line with IATA's goal of 25% reduction in fuel consumption per Revenue Tonne Kilometre from 2005 to 2020.

Among the airlines with significant modernization programmes include Afriqiyah Airways, Air Algerie, TAAG Angola Airlines, EgyptAir, Ethiopian Airlines, Kenya Airways, Libyan Airlines, Royal Air Maroc, Air Nigeria and Rwandair.



AFRAA Airlines Individual Summary Facts

AFRIQIYAH AIRWAYS



الخطوط الجوية الأفريقية
AFRIQIYAH AIRWAYS



Eng. Rammah B. Ettir
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2002

Established in 2001

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP -

DESTINATION SERVED

Domestic	02
Regional	17
International	11

EMPLOYEES

1023

FLEET

A320-200	03
A319-111	03
A330-200	03

FLEET ON ORDER

A320-200	06
A350-800	06

AIR ALGERIE



Mr. Abdelwahid Bouabdallah
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1968

Established in 1947

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

Air France	Lufthansa
British Airways	Turkish Airlines
Qatar Airways	Syrianair
Spanair	Aigle Azur
Air Canada	Air China
Alitalia	Iberia Airlines
Korean Air	Middle East Airlines
Tunisair	Royal Air Maroc

DESTINATION SERVED

Domestic	27
Regional	9
International	34

EMPLOYEES

8898

FLEET

B737-800	12
B737-600	5
B767-300	3
ATR72 -500	12
A330-200	5
Cargo	
Lockheed C-130	1
B737-200	1

FLEET ON ORDER

B737-800	6
A330-200	5

AIR BOTSWANA



Mr. Mike Higgins
General Manager



AIR BOTSWANA
Going Your Way

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1991

Established in 1947

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

Code share with Kenya Airways
on Gaborone-Nairobi route

DESTINATION SERVED

Domestic	3
Regional	3

EMPLOYEES

355

FLEET

ATR42-500	3
ATR72-500	2

AIR BURKINA SA



Mr. Mohamed Ghelala
Chief Executive Officer



air burkina

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2002
Established in 1967

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Air Ivoire
Air Mali
Ethiopian Airlines Enterprise
Hahn Air
Heli Air Monaco
Kenya Airways
Tunis Air

DESTINATION SERVED

Domestic	2
Regional	9
International	2

EMPLOYEES

262

FLEET

MD-87	2
MD-83	1
CRJ200	1

AIR IVOIRE



Mr. Francois Emmanuel
Chief Executive Officer

ADDRESS

SN Air Ivoire, Place de la Republique,
01 BP 7782 Abidjan 01, Cote d'Ivoire
Tel: +225 20 25 15 74
Fax: +225 20 320490
www.airivoire.com

AFRAA MEMBERSHIP

Became member in 2002
Established in 1960

OWNERSHIP STRUCTURE

IFC Private Air : 50.5%
Government : 49.5%.

COMMERCIAL PARTNERSHIP -

DESTINATION SERVED

Regional 9
International 2

EMPLOYEES -

FLEET

B737-500 3
B737-200 1

AIR MADAGASCAR



Mr. Fidy Rakotonirina
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1975
Established in 1962

OWNERSHIP STRUCTURE

Government : 89,56%
ARO : 5,53%
SONAPAR : 2,53%
Air France : 1,65%
NY HAVANA : 0,32%
Staff : 0,39%

COMMERCIAL PARTNERSHIP

TG - UU

DESTINATION SERVED

Domestic 24
Regional 5
International 3

EMPLOYEES

1388

FLEET

ATR42-320 1
ATR42-500 1
ATR72-500 2
B737-300 2
B767-300ER 2
DHC-6 300 3

AIR MALAWI



Mr. Maxwell Serenje
A.g. Chief Executive Officer



ADDRESS

P.O. Box 84, Blantyre, Malawi
Tel: +265 1820 811
Fax: +265 1821 396
www.airmalawi.com

AFRAA MEMBERSHIP

Became member in 1968
Established in 1964

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

Kenya Airways
British Airways; Hahn Air
Air Tanzania
Qatar Airways
South African Airways
British A

DESTINATION SERVED

Regional - 5

EMPLOYEES

240

FLEET

ATR42-320	1
B737-200 (leased)	1
B737-300 (owned)	1
B737-500 (owned)	1

AIR MALI



Mr. Abderahmane Berthe
Chief Executive Officer



ADDRESS

Immeuble TOMOTA –
Avenue Cheick Zayed BPE 2286
Hamdallaye, Bamako, MALI
Fax: +(223) 20 29 56 00
www.airmali.net

AFRAA MEMBERSHIP

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

OWNERSHIP STRUCTURE

Aga Khan For Economic Development/AKFED - 51 %,
Malian State - 20 %
Agora Mali company - 21,66 %
Malian shareholders - 7,34 %

COMMERCIAL PARTNERSHIP

Air Burkina
Air Ouganda
HeliAir Monaco
Eurofly S.p.a.
Hahn Air
IberiaBrussels Airlines
Kenya Airways
Turkish Air lines

DESTINATION SERVED

Domestic	3
Regional	13
International	1

EMPLOYEES

213

FLEET

MD-83	1
MD-87	3
Beech	1

AIR MAURITIUS



Soobhiraj Bungraz
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1985
Established in 1967

OWNERSHIP STRUCTURE

Government - 43.83%
State Investment Corporation Ltd - 18.02%
Rogers & Co. Ltd - 18.12%
Air France - 11.21%
Air India - 8.82%

COMMERCIAL PARTNERSHIP

Malaysia Airlines
Air India
Emirates
Air France
Air Madagascar

DESTINATION SERVED

Europe	6
Asia	7
Australia	2
Africa	4
Indian Ocean	4

EMPLOYEES

2431

FLEET

A340-300E	2
A340-300	4
A319-100	2
A330-200	2
ATR 72-500	2
Bell 206 -Jet Ranger	3

AIR NAMIBIA



Ms. Theo Namases
Ag. Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2000
Established in 1946

OWNERSHIP STRUCTURE

Government - 100%

COMMERCIAL PARTNERSHIP

Code share - TAAG, SPA's
(Special Prorate Agreements)&
Interline E-ticket agreements

DESTINATION SERVED

Domestic	4
Regional	7
International	

EMPLOYEES

571

FLEET

A340-300	2
B737-500	2
B1900 D	4





AIR NIGERIA



Mr. Kinfe Kahssaye
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2007
Established in 2004

OWNERSHIP STRUCTURE

Nicon Group – 48%
Virgin Atlantic Airways – 49%
IGI - 2%
MAGAMI HOLDINGS - 1%

COMMERCIAL PARTNERSHIP

Air France	Cathay Pacific
Singapore Airlines	Kenya Airways
South African Airways	Hahn Air
Qatar Airways	Inter Air South Africa
China Southern	Ethiopia Airlines
Delta Airlines	China Airways
Air Mauritius	Kingfisher Airlines
Saudi Arabian Airlines	Indian Airlines
Air Botswana	Lam-Linhas Aereas De Mocambique
Air Namibia	EL Al Israel Airlines Ltd
PIA Pakistan International Airlines	Jet Airways
Air India	NorthWest Airlines
KLM Royal Dutch Airlines	Ghana International Airways
Egypt Air	Continental Airlines
Gabon Airlines	FlyBe
US Airways	Royal Air Maroc
Etihad Airways	Air Burkina
Afriqiyah Airways	Compagnie Aerienne Du Mali
Alitalia Compagnia Aerea	Emirates
British Airways	Middle East Airlines

DESTINATION SERVED

Domestic	5
Regional	9

EMPLOYEES

904

FLEET

B737-300	6
E-190	2

FLEET ON ORDER E190 8

AIR SEYCHELLES



Capt. David Savy
Executive Chairman

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1993
Established in 1978

OWNERSHIP STRUCTURE

Government -100%

COMMERCIAL PARTNERSHIP

Air France/NEOS

DESTINATION SERVED

Domestic	3
International	8

EMPLOYEES

840

FLEET

B767-200EM	2
B767-300ER	3
Shorts 360-300	1
DHC-6	3

FLEET ON ORDER

B787	2
DHC6-400	1



AIR TANZANIA



Mr. William R. Haji
Ag. Managing Director & CEO

ADDRESS

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

AFRAA MEMBERSHIP

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

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

None

DESTINATION SERVED

Domestic	7
Regional	3

EMPLOYEES

358

FLEET

A320	1
Dash 8 300	2

AIR ZIMBABWE



Dr. Peter Chikumba
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1981
Established in 1946

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

NONE

DESTINATION SERVED

Domestic	2
Regional	3
International	4

EMPLOYEES

1234

FLEET

B737-200	3
B767-200	2
MA60	3



ASKY AIRLINES



Bussera Awel
Chief Executive Officer



ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2010
Established in 2009

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Ethiopian Airlines

DESTINATION SERVED

Regional 17

EMPLOYEES

160

FLEET

B737.700	2
Q400	1

FLEET ON ORDER

B737.800	2
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EGYPTAIR



Eng. Hussein Massoud
Group Chairman & CEO



ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1968
Established in 1932

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

Asiana Airlines	Austrian
Bmi	Gulf Air
Korean Air	Lufthansa
Malaysia	Olympic airlines
Yemenia Airways	South African Airways
Singapore Airlines	Saudi Arabian Airlines
Tap portugal	Swiss International Airlines
Syrianair	Thai Airlines
Tunisair	Turkish Air
Spanair	Brussels Airlines
Air China	United Airlines

DESTINATION SERVED

Domestic	10
Regional	17
International	49

EMPLOYEES

27000

FLEET

A320-200F	4	A320-200	13
A321-200	4	A330-200	7
A340-200	3	B737-500	4
B737-800	12	B777-200ER	5
B777-300ER	2	Embraer E-170	12
A300B4 -200F	2	A300B4 -600RF	2

FLEET ON ORDER

B777-300ER	4
B737-800	8
A330-200	5

ETHIOPIAN AIRLINES



Ato Girma Wake
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

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

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

BMI	Brussels Airlines
Gulf Air	Kuwait Airways
Lufthansa	RwandaAir
SAS	Saudi Arabian Airlines
South African Airways	Turkish Airlines

Agreement in progress with several others

DESTINATION SERVED

Domestic	16
Regional	38
International	21

EMPLOYEES

5358

FLEET

B767-300ER	11
B757-200ER	8
B737-700	5
B737-800	2
Fokker 50	5
Q400	6
B757-260 F	2
MD-11F	2
B747-200 leased	2

FLEET ON ORDER

B787-8	10
B737-800	10
B777-200LR	5
Q-400	2
A350-900	5

INTERAIR SA



Mr. David Tokoph
Chairman & Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2001
IATA MEMBER SINCE 1994
ESTABLISHED 1993

OWNERSHIP STRUCTURE

PRIVATE SHAREHOLDING

COMMERCIAL PARTNERSHIP

N/A

DESTINATION SERVED

Regional	15
----------	----

EMPLOYEES

230

FLEET

B737 - 200	3
B727-200	2
B767-200ER	1



KENYA AIRWAYS



Dr. Titus Naikuni
Group Managing Director & CEO

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1977
Established in 1997

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

KLM - Royal Dutch Airlines
Air France
Precision Air
Northeast Airlines
Rwanda Express
Korean Air
Skyteam Member

DESTINATION SERVED

Domestic	4
Regional	38
International	10

EMPLOYEES

2408

FLEET

B777-200ER	4
B767-300ER	7
B737-800	5
B737-700	4
B737-300	5
E170LR	5

FLEET ON ORDER

E170LR	2
B787-8	9

LAM – LINHAS AÉREAS DE MOÇAMBIQUE SA



Mr. Ricardo Viegas
Chairman & Chief Executive Officer

ADDRESS

P.O. Box 2060, Maputo, Mozambique
Tel: + 258 21 46 87 10
Fax: + 258 21 46 51 34
www.lam.co.mz/en

AFRAA MEMBERSHIP

Became member in 1976
Established in 1936

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

TAP Portugal
Kenya Airways
TAAG - Linhas Aéreas de Angola
SAA - South African Airways

DESTINATION SERVED

Domestic	9
Regional	5
International	1

EMPLOYEES

798

FLEET

B737-200	2
Q400	2
E-190	2

FLEET ON ORDER

B737-200	2
Q400	2
E-190	2

LIBYAN AIRLINES



Mr. Emhemed M. Abrebish
Chief Executive Officer

ADDRESS

P.O. Box 2555, Omar Mukhtar Street/Tripoli. G.S.P.
Libyan Arab Jamahiriya, Tripoli, Libya
Tel: + 218 21 3614102
Fax: + 218 21 361 4815
(www.libyanairlines.aero)
or (www.ln.aero)

AFRAA MEMBERSHIP

Became member in 1968
Established in 1965

OWNERSHIP STRUCTURE

Government -100%

COMMERCIAL PARTNERSHIP

Austrian Airlines
Lufthansa
Afriqiyah Airways

DESTINATION SERVED

Domestic	11
Regional	7
International	17

EMPLOYEES

2030

FLEET

A320	2
CRJ900	5
ATR42-500	2

FLEET ON ORDER

A320	7 / 5 option
A330	4
A350	4

PRECISION AIR LIMITED



Mr. Alphonse Kioko
Chief Executive Officer

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 2006
Established in 1991

OWNERSHIP STRUCTURE

Kenya Airways - 49%
Michael Ngaleku Shirima - 51%

COMMERCIAL PARTNERSHIP

Joint Venture with Kenya Airways

DESTINATION SERVED

Domestic	10
Regional	3

EMPLOYEES

607

FLEET

B737-300	1
ATR42-320	2
ATR42-500	2
ATR72 - 500	5





ROYAL AIR MAROC GROUP



The wings of Morocco

Mr. Driss Benhima
Chief Executive Officer

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Tel: +212 522 912000
Fax: + 212 522 912021
www.royalairmaroc.com

AFRAA MEMBERSHIP

Became member in 1977
Established in 1957

OWNERSHIP STRUCTURE

Etat Marocain : 96.80%
Divers prives : 3.20%

COMMERCIAL PARTNERSHIP

SN Brussels airlines
Delta Airlines
EgyptAir
Emirates
Etihad Airways
Iberia Airlines
Turkish Airlines

DESTINATION SERVED

Domestic	14
Regional	20
International	44

EMPLOYEES

5364

FLEET

B737-400/500	11
B737-700/800	27
B757-200	1
B767-300ER	5
B747-400	1
A321	4
B737-300 Freight	1
ATR 72 -200	4

FLEET ON ORDER

B787 Dreamliner	4
ATR 42-600	2
B737-800	11
ATR 72 -600	4

RWANDAIR EXPRESS S.A.R.L



Mr. Rene Janata
Chief Executive Officer

ADDRESS

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www.rwandair.com

AFRAA MEMBERSHIP

Became member in 2009
Established in 2002

OWNERSHIP STRUCTURE

Government : 99%
Bayigamba Robert:1%

COMMERCIAL PARTNERSHIP

SN Brussels
Ethiopian Airlines
Air Uganda
Kenya Airways
Qatar Airways
Air Burundi

DESTINATION SERVED

Domestic	1
Regional	6

EMPLOYEES

409

FLEET

B737-500	2
CRJ200LR	2
Dash 8-102	1

FLEET ON ORDER

B737-800	2
----------	---



SOUTH AFRICAN AIRWAYS



Mrs. Siza Mzimela
Chief Executive Officer

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Fax: + 27 11 978 6055
www.flysaa.com

AFRAA MEMBERSHIP

Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

Star Alliance

DESTINATION SERVED

Domestic	5
Regional	20
International	32

EMPLOYEES

8292

FLEET

A340-600	9
A340-200	6
A340-300E	6
A319-100	11
B737-800	17

FLEET ON ORDER

A320-200	1
A330-200	6

SOUTH AFRICAN EXPRESS



Mr. Inati Ntshanga
Chief Executive Officer

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AFRAA MEMBERSHIP

Became member in 2003
Established in 1994

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

South African Airways

DESTINATION SERVED

Domestic	10
Regional	5

EMPLOYEES

970

FLEET

CRJ 200ER	13
CRJ 700	2
Dash 8-Q300	7
Dash 8-Q400	2



SUDAN AIRWAYS



Mr. Ali Obaid Fadl Almoula
Managing Director

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AFRAA MEMBERSHIP

Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE

Government : 51% Private 49%

COMMERCIAL PARTNERSHIP

Nasair

DESTINATION SERVED

Domestic	20
Regional	4
International	9

EMPLOYEES

1840

FLEET

A300B4-622R	2 Owned
A310-322	1 Owned
A320-214	1 Owned
Fokker 50	4 Owned
B707-300C	1 Owned
B737 - 500	2 Leased
A 320 - 200	1 Leased

FLEET ON ORDER

A320 - 200	3
A330-200	2
A300-600 Freighter	2

TAAG ANGOLA AIRLINES



Mr. Joaquim Teixeira Cunha
Ag. Chief Executive Officer

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AFRAA MEMBERSHIP

Became member in 1978
Established in 1938

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

Air France
Brussels Airlines
Lufthansa
British Airways
LAM
Kenya Airways
Air Namibia

DESTINATION SERVED

Domestic	14
Regional	14
International	10

EMPLOYEES

4124

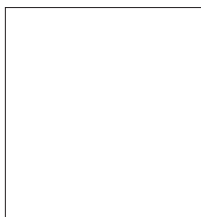
FLEET

B737-200	3
B737-700	4
B747-300M	1
B777-200ER	3

FLEET ON ORDER

B777-300ER	2
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TOUMAI AIR TCHAD



Mr. Deby Zakaria
Chief Executive Officer

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www.tumaiair.com

AFRAA MEMBERSHIP

Became member in 2007
Established in 2004

OWNERSHIP STRUCTURE

Government : 100%

COMMERCIAL PARTNERSHIP

DESTINATION SERVED

Domestic	2
Regional	5

EMPLOYEES

FLEET

B737-200	1
Fokker F28	1

TUNISAIR



Mr. Nabil Chettaoui
Chief Executive Officer

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AFRAA MEMBERSHIP

Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE

Government : 74 %

COMMERCIAL PARTNERSHIP

TU has code share 's with MS, ME, RB, SV and YD

DESTINATION SERVED

Domestic	10
Regional	7
International	36

EMPLOYEES

3037

FLEET

A300-600	3
A319-100	4
A320-200	13
B737-500	4
B737-600	7

FLEET ON ORDER

A320-200	9
A330-200	3
A350-800	3

ZAMBEZI AIRLINES LTD



Mr. Wilfred L. Amstelveen
Chief Executive Officer

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AFRAA MEMBERSHIP

Became member in 2009
Established in 2008

OWNERSHIP STRUCTURE

Private

COMMERCIAL PARTNERSHIP

Kulula, Proflight

Commercial Partnerships in progress

Qatar, Afriqiyah

DESTINATION SERVED

Regional 8

EMPLOYEES

128

FLEET

B737-500 3



AFRAA Partners Profile & Contacts

Amadeus is a global leader in technology solutions for the travel and tourism industry. Amadeus provides e-commerce solutions and services across the travel industry, enabling new ways to connect with customers, build loyalty and grow online revenues. Today, our system is the engine behind 260 corporate sites in 30 countries and more than 60 airlines and hotel sites. Amadeus has central sites in Madrid (corporate headquarters & marketing), Nice (development) and Erding (Operations: data processing centre) and regional offices in Miami, Buenos Aires and Bangkok

Amadeus is a truly global company. It has established a global presence for the world-class service it delivers:

- 75 national marketing companies
- present in over 215* markets worldwide
- 5 regional centres
- 3 Research & Development centres
- over 6,500 employees
- over 100 nationalities in our central sites alone

Products & Services

- Consulting
- CRS
- IT Solutions, Hardware & Software
- IT Services, Travel Distribution, e-Commerce
- StB Product and Services

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URL: www.amadeus.com



American General Supplies, Inc.

American General Supplies, Inc. (AGS) is an aftermarket parts business established in July 1982 as a commercial aircraft spare parts supplier in Chicago. In the past 25 years AGS has diversified and constantly grown to become a reliable full service supplier.

The diverse activities of AGS include, but are not limited to the following:

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

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

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Contact person:

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

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

Boeing Commercial Airplanes has been the premier manufacturer of commercial jetliners for several years. Today, the main commercial products are the 737, 747, 767 and 777 families of airplanes and the Boeing Business Jet. New product development efforts are focused on the Boeing 787 Dreamliner, and the 747-8. The company has nearly 12,000 commercial jetliners in service worldwide, which is roughly 75 percent of the world fleet. 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.

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CFM International (CFM) is a 50/50 joint company between Snecma (SAFRAN Group) of France and General Electric Company of the United States. Established in 1974, CFM calls for the two parent companies to share everything equally, from design and development to production and support. The CFM56 product line includes six engine models spanning the thrust range from 18,500 to 34,000 pounds for 30 commercial and military aircraft applications. Today, CFM is the world's leading supplier of commercial transport jet engines from 500 customers worldwide. More than 20,000 engines are in service powering more than 8,300 commercial and military aircraft worldwide as the most reliable engines in the air.

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OR

Stephane GARSON
General Manager Product
Marketing



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

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

In Africa, Embraer has over 40 jets in operation with 11 operators, flying under colors of some of the region's most prominent airlines including Kenya Airways, Egyptair, LAM Mozambique, South African Airlink or Air Nigeria. Operators have discovered the tremendous mission versatility and compatibility that E-Jets offer with their larger mainline fleets and are flying the Embraer aircraft on long sectors (up to 5 hours) and increasing frequency on trunk routes.

As of September 30th, 2010, there were 2,553 aircraft (1806 firm orders and 747 options) on the E-Jets and ERJ order book. Embraer had 17,009 employees and a firm order company backlog of US\$15.3 billion.

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GE Aviation, an operating unit of GE (NYSE: GE), is a world-leading provider of jet and turboprop engines, components and integrated systems for commercial, military, business and general aviation aircraft. GE Aviation has a global service network to support these offerings. GE's OnPoint SM solutions are customized service agreements tailored to the operational and financial needs of each customer for any size fleet. These agreements are designed to help lower the customers' cost of ownership and maximize the use of their assets. Backed by GE's global support network, OnPoint services may include overhaul, on wing support, new and used-serviceable parts, component repair, technology upgrades, engine leasing, integrated systems support and diagnostics and integrated systems.

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Connecting to Hahn Air's e-ticketing platform is an industry standard for every airline

Hahn Air operates the industry's leading universal e-ticketing platform. More than 220 airlines across all alliances and business models, among them 35 African Airlines and 27 AFRAA member carriers benefit from Hahn Air's unique global distribution proposition.

No other airline covers more markets than Hahn Air's Interlining Hub, which provides access to:

- 80.000 IATA travel agencies ticketing your airline in any GDS
- 160 BSP/ARC markets plus a dozen of non BSP markets reached by local ticketing offices
- numerous interlining possibilities with all other partner airlines without any additional effort

Interlining with Hahn Air is based on the concept of a neutral validating carrier, avoiding revenue dilution and generating higher yields.

Every 8 seconds – 24 hours a day and 365 days a year – a passenger checks in with a Hahn Air e-ticket at one of almost 4,000 boarding points worldwide.

Connecting with Hahn Air's e-ticketing platform has become a must for every airline.

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Director Airline Business Group
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Kenyon International Emergency Services is a full-service disaster management company with its headquarters in Houston, USA and principal offices in London, Sydney and Hong Kong. Kenyon has since 1906 provided specialist mass fatality expertise at scores of incidents around the world. Notably in the last few years, Kenyon has employed our considerable personnel and equipment resources to Thailand for tsunami relief on behalf of the Australian Government, provided body recovery expertise to the Governor of Louisiana following Hurricane Katrina and assisted with care for victims and families at air crashes in Greece, Kentucky and Indonesia. Kenyon's services are fully flexible and can be scaled to meet the exact and changing requirements of a crisis scenario. Kenyon International Emergency Services (Kenyon) has unparalleled experience in the management of the consequences of airline incidents and accidents in respect of the needs of the victims, their families, the affected community and the airline. Preparation through planning, training, exercises and appropriate service-level agreements can significantly assist an airline to properly manage an accident, provide care for those affected and to meet the expectations of its stakeholders that it will recover suitably with its reputation protected.

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

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

Lufthansa Consulting is well-known as both strategic and a pragmatic business partner, especially in the African market. Airline restructuring, privatization support or cost management, on time-performance measures, safety issues and network management projects - Lufthansa Consulting's service portfolio addresses a wide range of business activities and boosts the success of African airlines and airports.

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

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

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

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

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

We also provide the technology that sets you free with "Software as a Service" capabilities for a number of solution areas ranging from: multi-channel distribution and merchandising; reservations and departure control; airline operations; marketing and planning to more than 300 leading airlines. With this flexible technology, you're able to easily adapt as your business grows.

Our solutions are backed by industry-leading customer service and an unmatched track record of delivery. Additionally, through our consulting services, we help train your staff and align your business with industry best practices. We are also an environmentally and socially responsible company.

Product and Services

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

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

Headquarters Address:

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Seabury is the leading independent transportation-focused investment banking and advisory firm serving aviation, aerospace, cargo and maritime on a global basis, in three different areas: investment banking, corporate recovery/restructuring and a broad range of management consulting services. The company's professionals have advised over 225 clients worldwide in the airline, aerospace, cargo/logistics and maritime sectors, as well as private equity investors interested in those sectors. Seabury has led or been a significant participant in seven of the 10 largest airline financial or operational turnarounds around the globe in the last 15 years. Seabury professionals have an in-depth understanding of the aerospace, aviation, cargo/logistics and maritime industries, and consistently challenge convention to deliver more creative solutions that yield tangible financial and operational benefits.

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

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SITA is the world's leading provider of global information and telecommunications solutions to the air transport industry. With over 50 years experience, SITA offers a total service to around 740 air transport industry members and more than 1,800 customers, supporting them globally in over 220 countries and territories. The company offers a total service to the air transport industry, providing value-added solutions which include: application services - meeting the requirements for airline, airport, aerospace, aircraft applications and systems; end-to-end desktop and infrastructure services; and network services focusing on systems integration, outsourcing and consulting, in support of complex solutions.

Products and Services

- 2D Bar codes
- Baggage &/or Cargo Systems; Automatic ID
- CNS/ATM
- Consulting
- CRS
- CUSS Kiosks
- Electronic Ticketing
- IT Solutions, Hardware & Software
- RFID

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



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

Travelport GDS and Airline IT Solutions

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

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GLOSSARY

Airline alliance - An airline alliance is an agreement between two or more airlines to cooperate for the foreseeable future on a substantial basis. The alliances go beyond code sharing as they seek to harmonize the route systems of several international airlines into a single worldwide network. In the USA, the Departments of Transport and Justice have to authorise anti-trust immunity before two or more airlines may discuss harmonised pricing and service standards. In the USA, the creation of an Open Skies bilateral is a precondition to the grant of any anti-trust immunity to a foreign and USA carrier alliance, as well as a thorough competition analysis.

Available seat kilometres - A seat-kilometre is available when a seat is flown one kilometre. Seat-kilometres available are equal to the sum of the products obtained by multiplying the number of passenger seats available for sale on each flight stage by the stage distance. It excludes seats not available for the carriage of passengers because of the weight of fuel or other loads.

Available tonne-kilometres - A tonne-kilometre is available when one tonne of payload capacity is flown one kilometre. Tonne-kilometres available equals the sum of the products obtained by multiplying the number of tonnes available for the carriage of revenue load (passengers, freight and mail) on each flight stage by the stage distance.

Charter - A non-scheduled flight operated according to the national laws and regulations of the country being served as provided in Article 5 of the Chicago Convention. A flight in which all, or almost all the passenger or cargo capacity is sold to one or more charterers for resale.

Domestic flights - All flights of national or foreign aircraft in which all the airports are located in the territory of the same State.

Globalisation - This is the process of integration of the world community into a common system either economically, politically or socially.

International flight - All flights of national or foreign aircraft whose origin or destination is located in the territory of a State other than that in which the airport being reported on is located. The flight is considered as consisting of the total of its flight stages (i.e. from take-off to its next landing); technical stops are not taken into account.

Non-scheduled revenue flights - Charter flights and special flights performed for remuneration other than scheduled flights. **Passengers carried** - The number of passengers carried is obtained by counting each passenger on a particular flight (with one flight number) once only and not repeatedly on each individual stage of that flight, with a single exception that a passenger flying on both the international and domestic stages of the same flight should be counted as both a domestic and an international passenger.

Revenue passenger-kilometres (RPK) - A revenue passenger-kilometre is performed when a revenue passenger is carried one kilometre. Calculation of revenue passenger-kilometres equals the sum of the products obtained by multiplying the number of revenue passengers carried on each flight stage by the stage distance. The resultant figure is equal to the number of revenue kilometres travelled by all passengers.



Passenger load factor - Passenger-kilometres performed expressed as a percentage of seat-kilometres available.

Passenger Yield (Passenger revenue per traffic-unit) - This is a type of financial measurement which relates the passenger traffic applicable to the passenger revenues. It is computed by dividing passenger revenues by the passenger-kilometres performed.

Passenger tonne-kilometres - Passenger tonne-kilometres are obtained by applying a standard weight per passenger to the passenger-kilometres flown.

Payload capacity - Total payload capacity available (in metric tonnes), above and below deck, for the carriage of revenue load (passengers, baggage, freight and mail) taking into account payload restrictions, where applicable, and operational restrictions on the supply of capacity.

Revenue kilometres - The sum of the product obtained by multiplying the number of revenue flight stages flown by the corresponding stage distance.

Revenue passenger - A passenger for whose transportation an air carrier receives commercial remuneration. This definition includes passengers travelling under publicly available promotional offers or loyalty programmes (for example, frequent-flyer programme); or as compensation for denied boarding or on corporate discounts or on preferential fares (government or student). The definition excludes persons travelling free or on a fare or discount available only to employees of air carriers or their agents or only for travel on business for the carriers or infants who do not occupy a seat.

Scheduled revenue flights - Flights scheduled and performed for remuneration according to a published timetable, or so regular or frequent as to constitute a recognizably systematic series, which are open to direct booking by members of the public. This includes extra flights occasioned by overflow traffic from scheduled flights.

Stage distance flown per aircraft - The average stage distance flown per aircraft is obtained by dividing the aircraft kilometres flown by the related number of aircraft departures.

Revenue tonne-kilometres (RTK) - A RTK is a metric tonne of revenue load carried one kilometre. Revenue tonne-kilometres equals the sum of the product obtained by multiplying the number of total tonnes of revenue load (passengers, freight and mail) carried on each flight stage by the stage distance.

Traffic - The carriage of passengers, freight and mail.

Unit Cost (Operating expenses per traffic-unit) - This is a type of financial measurement which relates the traffic or capacity applicable to the operating expenses. It is computed by dividing the operating expenses by the revenue tonne-kilometres or by the available tonne-kilometres available.

Utilisation - Number of block hours flown in a given period, such as a day, week, month or a year.

Weight load factor - Revenue tonne-kilometres expressed as a percentage of tonne-kilometres available.

Yield (Operating revenue per traffic-unit) - This is a type of financial measurement which relates the traffic or capacity applicable to the operating revenues. It is computed by dividing the operating revenues by the revenue tonne-kilometres or by the available tonne-kilometres.

AFRAA Airline Two Letter Designator Codes

Afriqiyah Airways	8U
Air Algérie	AH
Air Botswana	BP
Air Burkina	2J
Air Burundi	8Y
Air Ivoire	VU
Air Madagascar	MD
Air Malawi	QM
Air Mali	I5
Air Mauritius	MK
Air Namibia	SW
Air Nigeria	VK
Air Seychelles	HM
Air Tanzania	TC
Air Zambezi	ZT
Air Zimbabwe	UM
Antrak Air Ghana	04
Asky Airlines	KP
EgyptAir	MS
Ethiopian Airlines	ET
Ghana International Airlines	G0
Inter Air	D6
Kenya Airways	KQ
LAM Mozambique Airlines	TM
Libyan Arab Airlines	LN
Mauritania Airways	YD
Nasair Group Ltd	UE
Precision Air	PW
Royal Air Maroc	AT
Rwandair Express	WB
South African Airways	SA
South African Express	XZ
Sudan Airways	SD
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