



AFRICAN AIRLINES ASSOCIATION  
ASSOCIATION DES COMPAGNIES AÉRIENNES AFRICAINES



2011 **ANNUAL REPORT**

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## > Foreword



In 2010, African airlines mirrored the global industry performance; recording net positive results of over US\$100 million. This commendable result was a breather after substantial losses in 2008 and 2009. Passenger and cargo traffic in Africa went up by

12.9% and 23.8% respectively on the back of positive GDP growth, increase in foreign direct investments and remittances and import/export rebound. Indications at the close of 2010 were that the global economy was recovering from the recession and financial crisis of the previous two years. The industry started 2011 with high hopes of improving upon the 2010 performance, but as unpredictable as this industry could be, a combination of natural disasters (Japanese volcano and subsequent tsunami) and political instability in the Middle East and North Africa, dealt a telling blow to the industry. Traffic slumped and fuel prices are sky-rocketing. IATA estimates that in 2011, African airlines will merely break even.

There were however some disruptions to air transport operations during the year, chief among them being the volcanic ash eruption in Iceland in April, 2010, which led to the closure of the EU airspace and the consequent disruption in operations into the EU. During the year, the price of oil see-sawed but eventually stabilized, averaging about US\$88 per barrel for 2010.

Some of the challenges bedeviling African aviation remained during the year. Among them is the slow pace of liberalization through the implementation of the Yamoussoukro Decision (YD). This is constraining the growth and development of African airlines and curtailing their competitiveness. The result is that the intercontinental markets to and from Africa continues to be dominated by non-African operators, with over 80% of total intercontinental passengers carried in 2010 by them.

AFRAA continued to urge States to take their safety oversight responsibilities seriously to bring safety levels on the continent at par with other regions. The number of African airlines attaining IOSA certification continues to grow. By the end of 2010, a total of 36 airlines were

IOSA registered. AFRAA continues to call upon States to make IOSA certification a pre-condition for issuing air operator's certificates.

Passenger and fuel charges as well as taxes in Africa tend to be above world average rates with some airports having passenger charges as high as US\$80. These put African aviation beyond the reach of the average consumer, thus limiting the number of citizens that can travel by air as well as the frequency of travel by those who do. Efforts to stimulate intra-Africa air travel or the establishment of low cost carriers are being adversely affected by the high level of taxes, charges and fees. In addition, a number of airports have monopoly ground handling service providers thus denying carriers choice and passing on the cost of their inefficiencies to customers.

The frequent changes in top management of African airlines continue to haunt the industry. Since the last annual report was issued in November 2010, 16 (50%) of AFRAA member airlines changed their Chief Executive Officers (CEOs), some after less than one year in office. Such frequent changes are detrimental to the success of airlines. These changes are particularly prevalent in Government owned airlines, where often times are politically motivated and nothing to do with the capabilities of the incumbent.

African aviation is committed to meeting its environmental responsibilities and in this regard, the Association has consistently urged airlines to modernize their fleet so as to reduce the environmental footprint. AFRAA supports the efforts by ICAO to proactively address environmental issues on a global basis while adding its voice to other regions in condemning the unilateral imposition of the Emission Trading Scheme (ETS) by the EU which is set to begin in 2012. AFRAA would like to once again to call upon the EU to desist from unilateral imposition of its internal regulations on non-EU States since this would invoke retaliation and destabilize the global operating environment.



**Dr. Elijah Chingosho**  
Secretary General

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## > Appreciation

AFRAA would like to express its appreciation to all members who contributed to the publication of this report by responding to our requests and availing data. We look forward to your continued support.

Our heartfelt thanks go to Avions de Transport Régional (ATR) for sponsoring the publication of this report.

We believe that airlines, partners and other stakeholders will find the content of this report useful and informative.

Your feedback and comments will be highly appreciated.

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## > Section One: Economic Overview

### World Overview

World real GDP grew at 5% in 2010 and this is forecast by the IMF to decline modestly to about 4.5% in 2011 and 2012. Real GDP in advanced economies and emerging and developing economies is expected to expand by about 2.5% and 6.5%, respectively. In advanced economies, weak sovereign balance sheets and still-moribund real estate markets continue to present major concerns, especially in certain Euro area economies. Despite significant progress, markets in the Euro area remain apprehensive about the prospects of countries under market pressure. For them what is needed is sufficient, low-cost, and flexible funding to support strong fiscal adjustment, bank restructuring, and reforms to promote competitiveness and growth. Strengthening the recovery will require keeping monetary policy accommodative as long as wage pressures are subdued, inflation expectations are well anchored, and bank credit is sluggish.

According to the IMF, implementing fiscal consolidation plans and establishing stronger fiscal rules and institutions particularly in the United States are urgently needed to stem the risk of global markets destabilization. Efforts should be made to reduce the projected deficit for fiscal year 2011. Measures to trim discretionary spending are a move in this direction.

In Japan, the immediate fiscal priority is to support reconstruction and once this is underway, attention should turn to linking reconstruction spending to a clear fiscal strategy for bringing down the public debt ratio over the medium term.

The challenge for many emerging and some developing economies is to ensure that present boom-like conditions do not develop into overheating over the coming year. Inflation pressure is likely to build further as growing production comes up against capacity constraints, with large food and energy price increases, which weigh heavily in consumption baskets, motivating demands for higher wages. Real interest rates are still low and fiscal policies appreciably more accommodative than before the crisis.

Capital flows to emerging market economies resumed remarkably quickly after the crisis of 2008/2009. However, as interest rates in advanced economies rise from their unusually low levels, volatile flows may again exit the emerging market economies.

### Africa Overview

Africa's recovery from the global financial crisis-induced slowdown is gathering steam with growth in most countries now back to the high levels of the mid-2000s. The World Bank forecasts that the economies of sub-Saharan Africa will grow 5.5% in 2011 and 5.9% in 2012. North African and the Middle East economies will however grow at a slower pace of 4.3% this year and 4.4% in 2012.

Commodity markets account for much of this growth, as manufacturing countries, particularly China, seek to hedge against volatility by negotiating long-term contracts with African producers of raw materials. Indeed, countries and companies are increasingly shifting their attention from Africa's problems to its vast potential and abundant opportunities. Direct foreign investment, growing urbanization, and rising incomes will spur higher domestic demand for consumer goods and transportation. The International Monetary Fund predicts that over the next 5 years, seven of the world's 10 fastest growing economies will be in Africa.

**Table 1: Sub-Saharan Africa: Micro-Economic Aggregates, 2004-2012**

	2002-2008	2009	2010	2011	2012
	<i>(percent change)</i>				
<b>Real GDP growth</b>	6.6	2.8	4.9	5.5	5.9
<b>Inflation, end of period</b>	8.7	8.3	7	8.1	6.7
	<i>(percent of GDP)</i>				
<b>Fiscal Balance, excl. grants</b>	0.1	-7.2	-5.6	-3.2	-2.3
<b>Current account balance</b>	0.8	-2.3	-2.2	0.5	0.5
	<i>(months of imports)</i>				
<b>Reserve coverage</b>	4.6	5	4.5	5	5.5

Sources: IMF, *World Economic Outlook*; and IMF, African Department database

While foreign direct investment (FDI) inflows are recovering slowly from the global credit crunch, both total exports and imports picked up in 2010, with growth rates of 15.3% and 11.3% respectively. Remittances, the continent's second largest source of net foreign inflows after FDI, are also beginning to recover from the slump in 2009, reaching nearly \$40 billion in 2010.

## Foreign Dependence

Intra-African trade is a mere 10% of total exports – compared to trade within the Association of South East Asian Nations' (ASEAN) 60%, or North American Free Trade Agreement (NAFTA), which accounts for 56% of total exports. This lack of economic diversification explains the high volatility of African trade and consequently the poor intra-Africa air transport development.

With the sharp increase in food and fuel prices in 2011, the resilience exhibited by Africa during the last few years is about to be tested again. The volatile fuel costs, political upheaval in the Middle East and North Africa, and unresolved government debt in many industrialized economies create risk of a renewed downturn. These price shocks are resulting in high inflation in most countries and deteriorating current account deficits in a number of fuel importers.

Perhaps the limited integration of many African countries into the global economy proved worthwhile with the resilience of the continent to the global economic meltdown. The main factor distinguishing this slowdown from previous cycles has been the stronger macroeconomic position of most countries in the region.

The boom-bust cycle in private financial inflows was less marked in Africa than in other regions, largely due to the high share in sub-Saharan Africa of foreign direct investment over other more volatile forms of private capital. Remittances also fell only slightly and official financing flows have increased in response to efforts by the IMF and other agencies to scale up.

## Growing Population and Middle Class

The population of Africa was estimated in June 2011, to be about 1.05 billion and it is estimated that by 2050, one human being in four will be African or of African origin (Gilles Pison, Research Director of France's National Institute of Demographic Studies). By 2050, Sub-Sahara Africa population is estimated to be about 3.4 billion of the global population of 10 billion. Nigeria will become the world's third most populous country with 433 million people.

Not only is the total population of Africa growing faster than other parts of the world, its middle class is also on the rise. In the last 10 years, six of the world's fastest growing economies have been in sub-Saharan Africa according to the Economist. Over the next five years, the Democratic Republic of Congo, Ethiopia, Ghana, Mozambique, Nigeria, Tanzania and Zambia may grow at an average of 7.2% annually.

Over this period, the average Africa economy will outpace its counterparts in Asia. The continent has become an important emerging market and compared with other regions, it has a relatively high rate of return on investment. In many countries, political reforms have accompanied economic growth, allowing local entrepreneurs to thrive. By 2030, Africa's new middle class will be over 300 million and will spend around USD2.2 trillion in a year, which amounts to about 3% of worldwide consumption according to the African Development Bank.

## Doing Business in Africa

Africa has 90% of the world's platinum, 50% of the world's gold, 70% of the world's cotton and 30% of the world's diamond reserves, according to the October 2011 issue of the African Business magazine. This has elicited business and investment interest in the continent.

Chinese companies are doing business in every one of Africa's 54 countries. Trade between China and Africa will almost triple to USD 300 billion by 2015, according to Standard Bank of South Africa. Companies from India and Brazil are similarly pursuing commercial opportunities across the continent. The EU is aggressively negotiating agreements that will give its businesses access to Africa markets. North American companies have been slow to recognize the potential; however, US Secretary of State, Hillary Clinton in June 2011, led a large delegation to Zambia in an effort to deepen US commercial relations. Currently, Nigeria provides 8% of American oil imports, which is almost half the country's production.

## Implications for Air Transport

The positive economic growth indicators, growing foreign direct investment and the rising African middle class bodes well for air transport development in Africa. With a large and growing population and poorly developed other modes of transport, the role expected to be played by air transport in the socio-economic development and regional integration is enormous. Africans are turning more and more to air travel as disposal incomes improve and speed becomes of essence among the business community and the continent's growing entrepreneurs. Consequently, air transport is expected to sustain a 6.1% growth in 2011 and keep the growth rate at or above the historical trend through to 2030.

Direct foreign investment, growing urbanization and rising incomes will continue to spur higher domestic demand for consumer goods and air transport. Intra-Africa air travel which is currently 20% of total air travel is set to grow significantly to support the fast expanding regional trade which is only 10% at the moment. The various regional economic communities across the continent (ECOWAS, EAC, COMESA etc.) are working assiduously to eliminate trade barriers and increase cross border trade, investment and movement of goods and people.

As China and India continue to be major trading partners in almost all African countries, traffic between Africa and Asia will continue to grow. Projections are that air travel between Africa and Asia will grow at 8.1% annually over the next 20 years to 2030. The Africa-Asia market will be the fastest intercontinental air travel growth region and therefore African carriers would need to focus resources in developing their Asian networks before the Asian carriers intensify their operations westwards into Africa.

## Competition

The huge untapped air transport market in Africa has not escaped the radar of non-African carriers who are looking for growth markets to deploy their excess capacity. Many foreign airlines are strategically positioning themselves in various markets in Africa to take advantage of the anticipated traffic boom and exploit the weaknesses of African operators. During the financial crisis of 2008/9, non-African carriers deployed their excess capacity on African routes. In 2010 as in earlier years, non-African airlines commanded the biggest market share of 82% of all intercontinental traffic to/from Africa compared to 18% by African airlines. The market share of African airlines in the last three years has dropped from 20% to the current 18%.

On intra-African routes, the competitive landscape is radically different with EgyptAir, Ethiopian Airlines, Kenya Airways, Royal Air Maroc and South Africa Airways being the dominant operators. Well-timed connecting flights between East and West Africa are improving passenger travel time and convenience. Though flights availability is improving, West and Central Africa remains the region with the least number of direct flights between cities. The absence of an effective hub airport in the region accounts for this.

## Commercial Partnerships and Alliances

One way African carriers can be more competitive on intercontinental routes is for them to establish stronger intra-Africa networks that feed passengers to gateway (hub) cities and facilitate better connections. Already some patterns are beginning to form in this regard. Ethiopian Airlines is a major strategic partner of ASKY. It also provides technical support to Air Nigeria and other airlines. Over 90 commercial partnership arrangements currently exist among AFRAA member airlines (see chart attached).

On the global scale, South African Airways, EgyptAir (and soon Ethiopia Airlines) are members of the Star Alliance, Kenya Airways belong to the SkyTeam while Comair (a franchise of British Airways) represents the Oneworld alliance.

## World and Regional Tourism Trends

World tourism rebounded strongly in 2010 from the shock it suffered in 2008 and 2009 due to the global financial crisis and the economic recession. According to UNWTO World Tourism Barometer (February 2011 Issue), international tourist arrivals increased by 6.7% over 2009 to 935 million. The increase more than offsets the decline caused by the economic downturn, with additional 22 million arrivals over the previous peak year 2008. Probably as a reflection of the economic conditions, recovery was at different speeds and was particularly strong in emerging economies, where arrivals grew faster (+8%) than in developed ones (+5%).

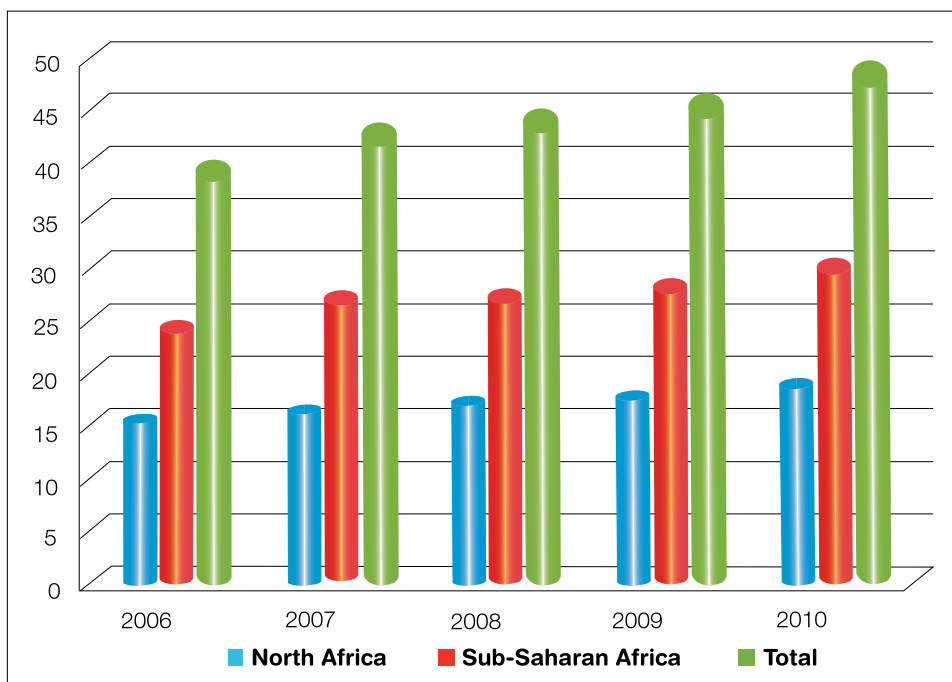
**Table 2: Africa International Tourist Arrivals (millions)**

	2006	2007	2008	2009	2010
North Africa	15.1	16.3	17.1	17.6	18.7
Sub-Saharan Africa	24.4	26.9	27.3	28.3	30.2
<b>Total Africa</b>	<b>39.5</b>	<b>43.2</b>	<b>44.4</b>	<b>45.9</b>	<b>48.8</b>
Annual % Growth		9.4	2.8	3.4	6.5

Source: UNWTO

Africa achieved 6.5% increase on the positive results in 2010; almost double the growth attained in 2009. The worldwide exposure created by the hosting of the FIFA World Football Cup in South Africa supported the continent maintain momentum in 2010. Total tourist arrivals peaked at 48.8 million.

**Figure 1: Africa International Tourist Arrivals – 2006-2010**



Source: IATA

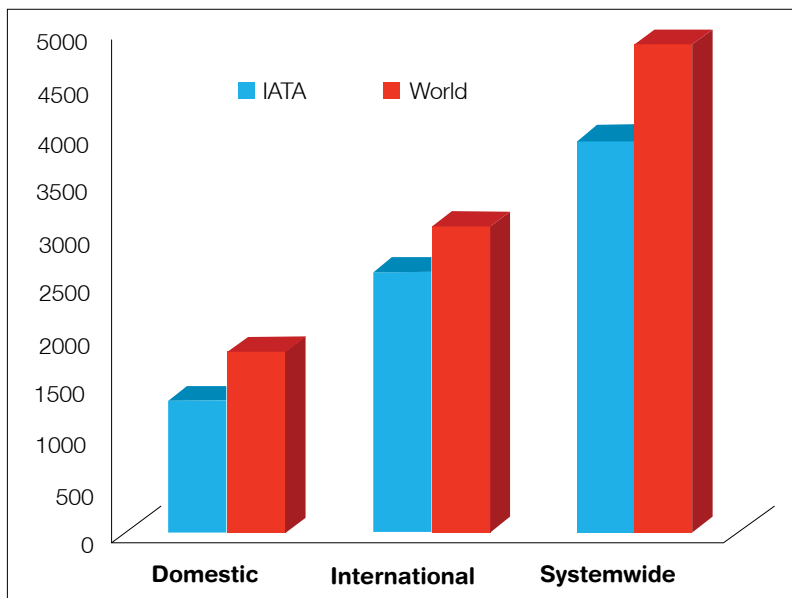
## > Section Two: Airline Performance

### Global Performance

According to IATA, global passenger air traffic rose 7.5% in 2010, following the 1.6% decline in 2009. The total number of passengers carried on all scheduled services increased by 7.4% to 1.80 billion. Passenger Seat-Kilometres (RPK) rose 7.5% to 3,895 billion and Available Seat-Kilometres (ASK) expanded by 4.4% to 4,972 billion, resulting in a historic high passenger load factor (PLF) of 78.2%, an increase of 2.3 percentage points on 2009.

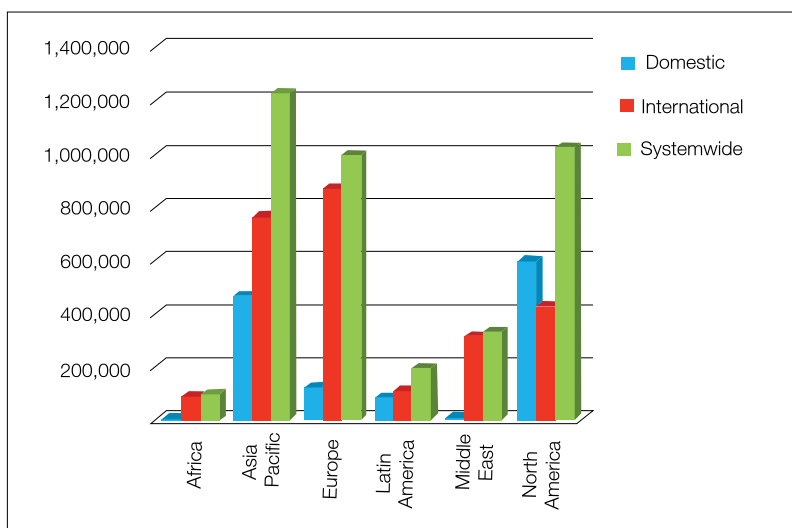
Freight tonnes carried by all scheduled services grew by 13.4% in 2010 compared to the drop of 8.5% in 2009. Revenue Tonne-Kilometres (RTK) on all scheduled services grew by 10.8%, while Freight Tonne-Kilometres (FTK) went up 18% in the year under review.

**Figure 2: IATA Share of World's Schedule Passenger-Kilometres (RPKs) 2010 – in Billions**



Source: IATA

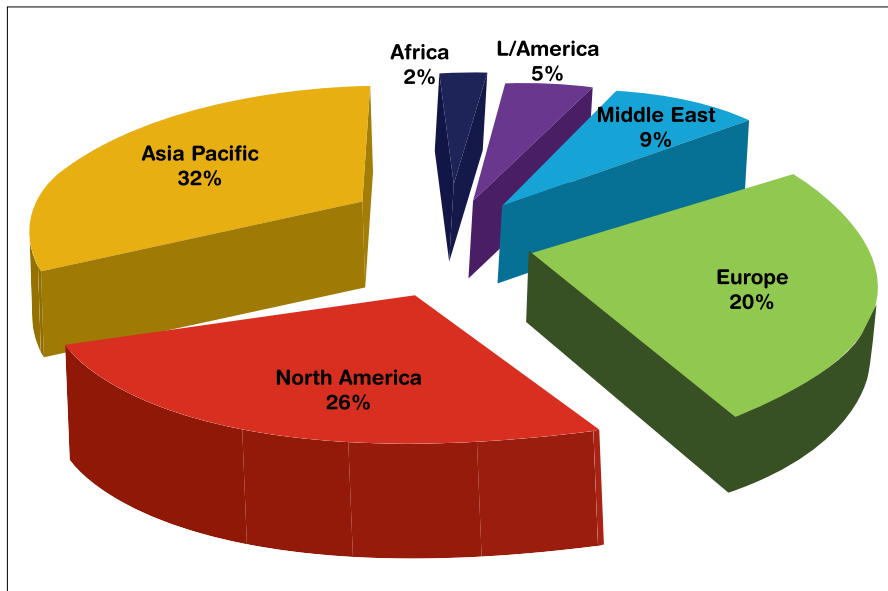
**Figure 3: Revenue Tonne-Kilometres per Region – IATA Schedule Services – 2010**



Source: IATA

System-wide, the Asia region was the world's biggest air transport market by RPKs performed (32%) in 2010, followed by Europe and North America at 26% each. Africa remains the smallest market, accounting for only 2% of global RPKs.

**Figure 4: Global Revenue Tonne-Kilometres Performed per Region – IATA Schedule Services – 2010**



Source: IATA

## > African Airlines Performance

### Passengers Carried

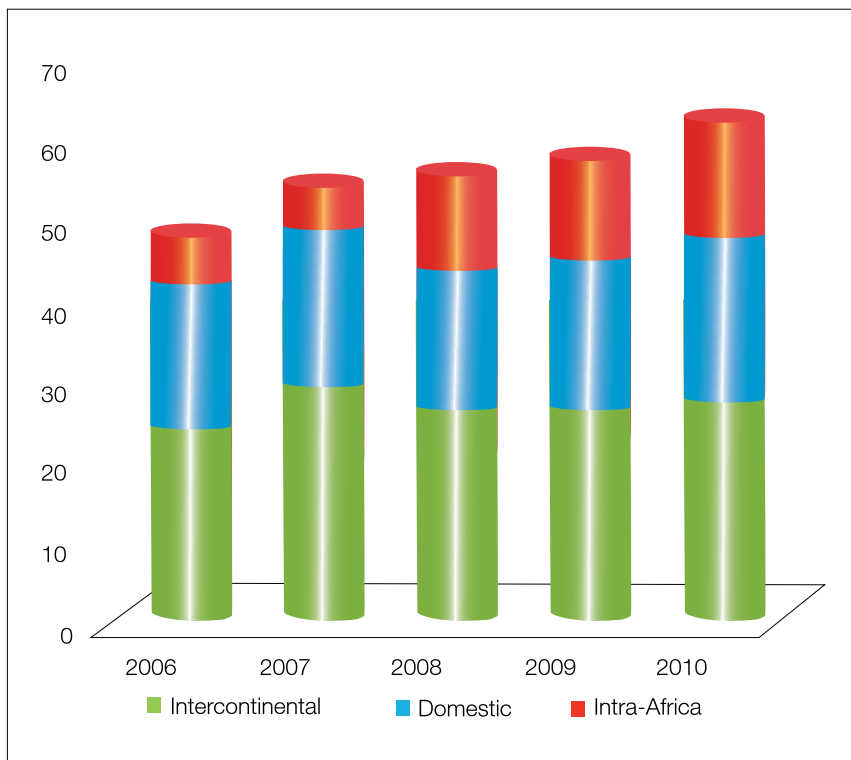
Passenger traffic has shown consistent growth since 2004. Number of passengers carried in 2010 went up to over 61 million. This growth was achieved through network expansion, new markets development and an increase in domestic and intra-Africa travel. The quick recovery by many African countries from the global economic downturn and high demand for natural resources from Africa also supported the traffic growth. The 20 AFRAA airlines that reported their passenger numbers for 2010 together carried over 44.3 million passengers.

### Domestic/Regional Passengers

Domestic passenger numbers increased by 10.1% to 20.4 million due to an increase in the number of low cost carriers in South Africa and parts of North Africa and competition induced lower cost of travel in some markets such as Kenya. AFRAA airlines carried 12.2 million or 60%.

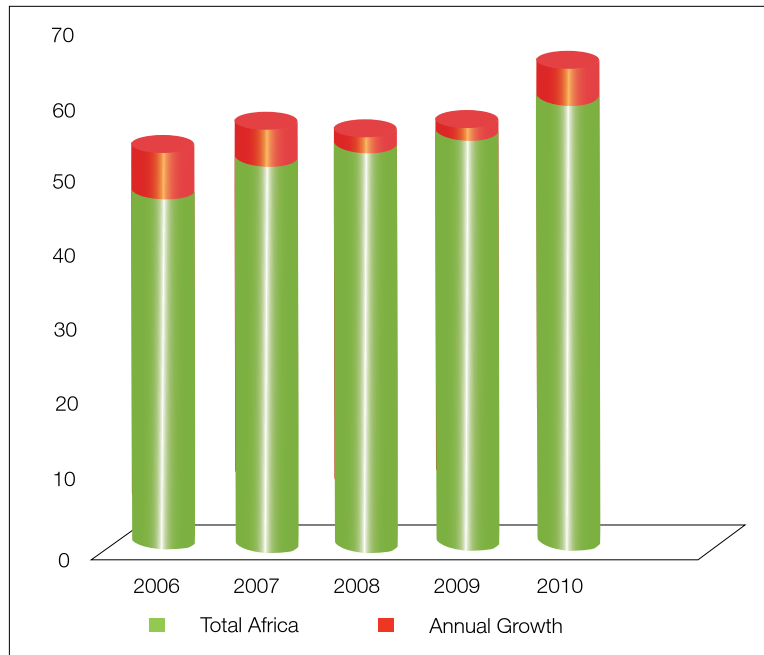
Intra-Africa passenger numbers went up by 15.3% to 13.5 million while intercontinental passengers grew by 5.6% to 27.0 million in 2010.

**Figure 5: Passengers Carried by African Airlines**



Source: AFRAA/ICAO

**Figure 6: Passengers Carried by African Airlines Showing Annual Growth**



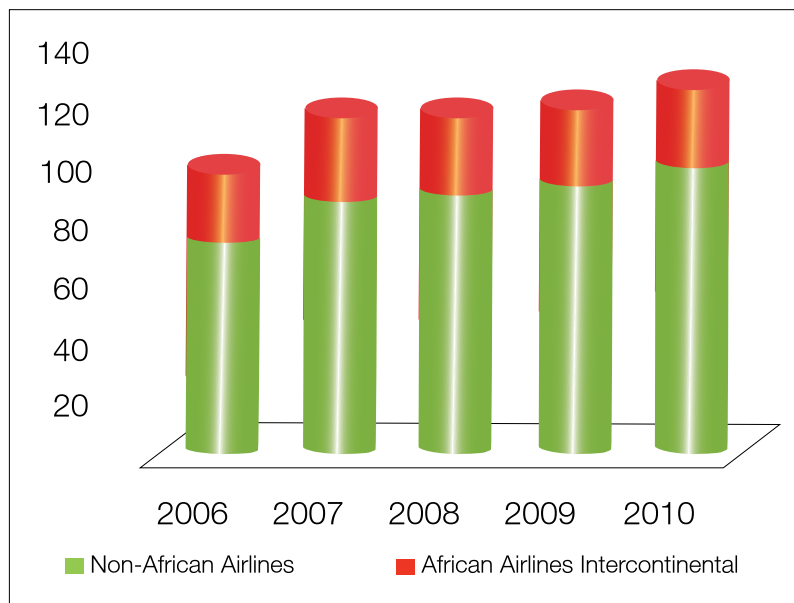
Source: AFRAA/ICAO

## Intercontinental Passengers

On the intercontinental segment, passengers carried by African airlines were up 5.6% compared to 2009. Non-African Airlines carried 7.4% more in 2010.

In spite of stiff competition, Africa's share of intercontinental passengers increased marginally to 18.46% of the total passengers carried between Africa and other regions due to a number of new intercontinental destinations launched and increased frequencies in 2010. The 2009 figure stood at 18.12%. Non-African airlines carried 81.54% in 2010.

**Figure 7: Passengers Carried by African and Non-African Airlines on Intercontinental Routes**



Source: AFRAA/ICAO

## Market Share

Intra-Africa passenger traffic is still very small (20%) compared to other regions.

**Table 3: Airline Traffic Distribution by Region (RPKs) in 2010**

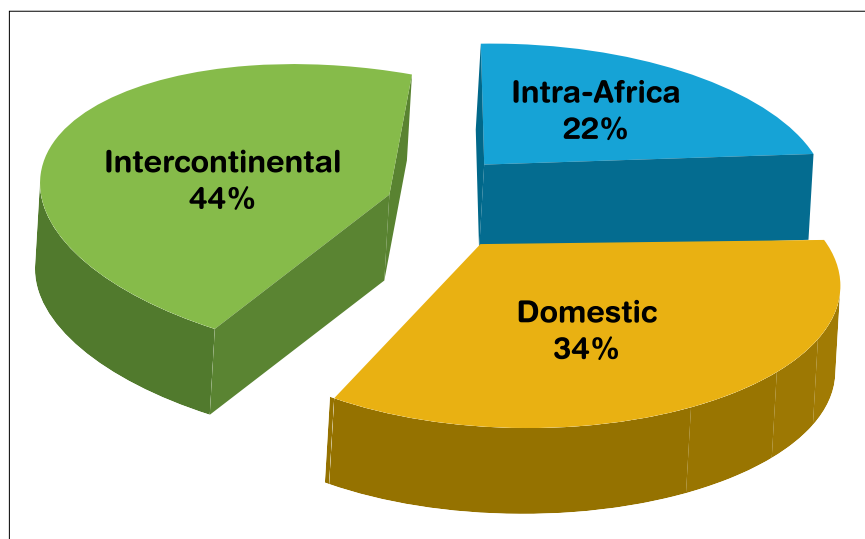
	Asia Pacific	North America	Europe	Middle East	Latin America	Africa
Asia Pacific	57%	14%	16%	37%	1%	7%
North America	15%	50%	23%	10%	33%	4%
Europe	17%	23%	36%	30%	31%	54%
Middle East	10%	3%	8%	16%	–	14%
Latin America	–	9%	9%	–	35%	1%
Africa	1%	1%	8%	7%	1%	20%
All traffic to/from region	100%	100%	100%	100%	100%	100%

At 20% intra-Africa traffic is only better than that of the Middle East. But with Africa's over 1.0 billion population spread across the vast expanse of the continent's 54 countries, there is huge potential for growth of this market segment. The major limitation to the development of intra-Africa traffic is the continued over-reliance on the restrictive Bilateral Air Services Agreements (BASAs) and failure to implement the Yamoussoukro Decision.

Apart from the Middle East where regional traffic accounts for 16% of total traffic, Europe, North America and Asia Pacific regional passenger traffic ranges from 35% to 57% of total traffic.

Africa's intercontinental passenger market segment remains the biggest with 44% of all passengers travelling between Africa and other regions of the world. Domestic travel has witnessed rapid growth in recent years due to a growing middle class and the increasing role of low cost airlines in a few markets. In 2010, the domestic market segment accounted for 34% of market share.

**Figure 8: African Airlines Passenger Distribution**

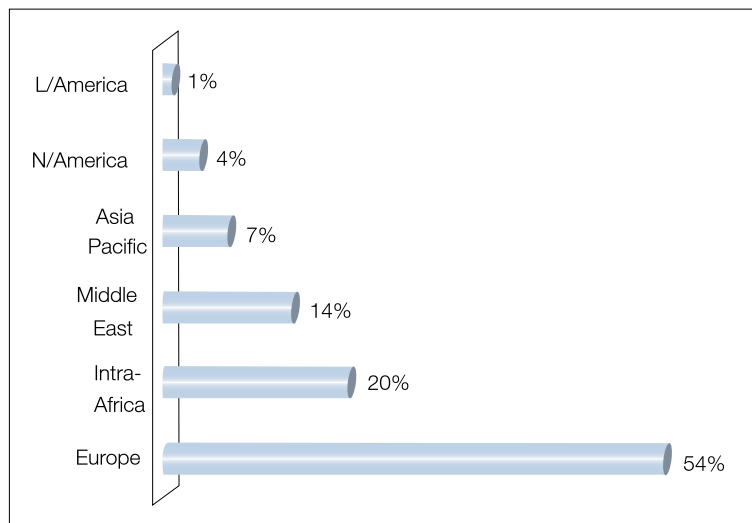


Source: AFRAA

## Europe is Africa's Biggest Market

Europe accounts for 54% of total traffic originating or terminating in Africa. The high volume of traffic to/from Europe has attracted many carriers from Europe and increased competition. Next to Europe is the Middle East at 14%. Though Asia Pacific current occupies the 3rd place at 7%, the forecast growth of 8.1% per year over the next 20 years could see this market overtake the Middle East and probably Europe in the future. Africa's air transport demand has on average grown by around 5.6% annually in the last five years. In 2010, Africa presented the second-highest traffic growth region in the world

**Figure 9: Regional Passenger Market Share – to/from Africa**

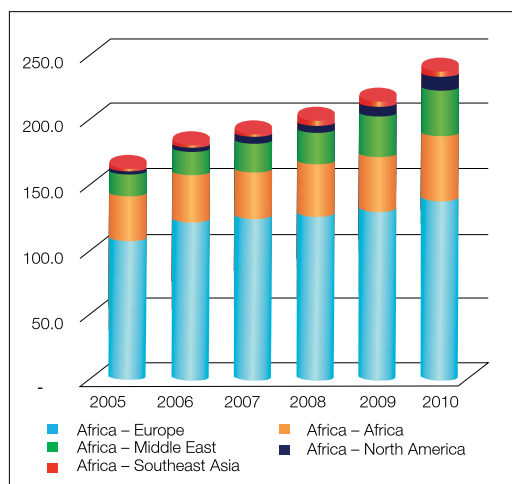


Source: AFRAA/Innovata

at 12.9%. Domestic and international traffic (RPKs) expanded by 7.6% and 12.2% respectively. Africa's strong economic ties with Asia and increasing investments from developed regions are contributing to the positive trend in air travel demand.

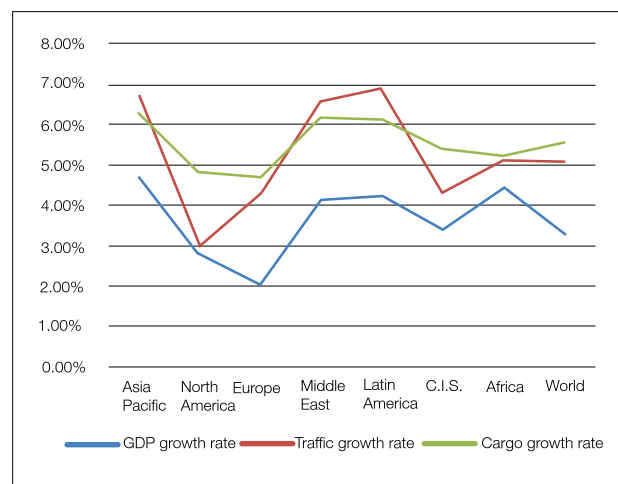
Unfortunately, the political unrest in North Africa will have overall depressing effect on the 2011 performance of that sub-region and the continent as a whole.

**Figure 10: African Traffic Growth by Regional Flow – RPKs (in Billions)**



Source: Boeing Current Market Outlook

**Figure 11: GDP, Passenger and Cargo Growth for Various Regions – 2010**



Source: Boeing Current Market Outlook

## North America Operations

Delta Airlines, which began direct US-Africa flights in 2006 has now increased its operations on the continent to 29 flights per week and operates to 8 destinations. Another US carrier, United Airlines has commenced direct daily flights to Accra, Ghana. In just 5 years of resumption of operations into Africa, North American carriers in 2010 accounted for 47.5% capacity on the US-African route.

**Table 4: Average Weekly Capacity on the Africa-North America Route – 2010**

Airline	Flights per Week	Seats per Week	% Market Share
<b>African Carriers</b>			
Air Algerie	2	484	2.9%
Royal Air Maroc	10	2,300	13.9%
Egyptair	7	2,422	14.6%
South African Airways	12	3,036	18.4%
Arik Air	2	454	2.7%
<b>North American Carriers</b>			
Delta Air Lines	29	6,928	41.8%
United Airlines	5	915	5.7%
<b>TOTAL</b>	<b>67</b>	<b>16,593</b>	<b>100%</b>

Source: AFRAA/Innovata

## New Routes

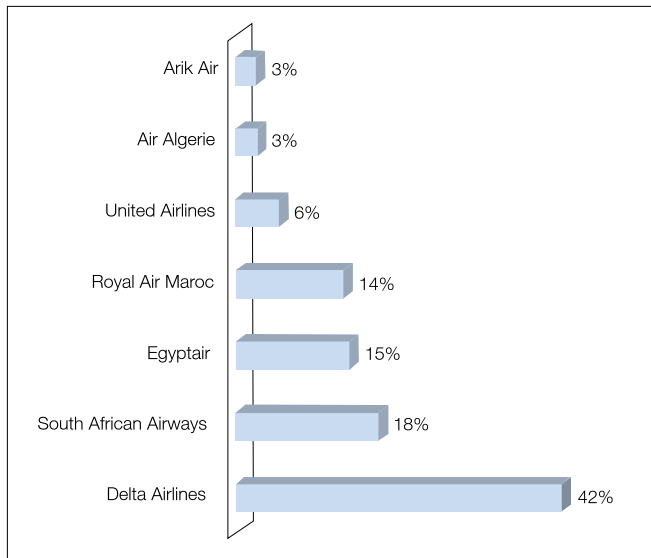
During the financial crisis (2008/2009), foreign airlines turned to Africa for opportunities to schedule more intercontinental flights, but this did not stop the continent's airlines from increasing their performance especially on the regional and international routes. In 2010, more than 80 new markets were launched by both African and non-African airlines, and an additional 130 daily flights added. Foreign carriers see Africa as an underserved market and are increasingly focusing on the region for further network development.

The growth prospects for the African continent have not gone unnoticed by carriers from outside Africa. In 2010, non-African carriers dominated the African sky with over 80% intercontinental weekly frequencies compared to less than 20% by African airlines.

In addition to the European carriers, several Middle East and Asian carriers like Emirates, Qatar, Turkish Airlines, Air India and Cathay Pacific now fly into the continent. China Southern, China Eastern and Hainan Airlines also have operations into Africa which are expected to expand in the future.

The very successful FIFA 2010 Football World Cup hosted by South Africa not only resulted in increased air traffic but opened the world to the vast opportunities on the African continent. International tourist arrivals in Africa reached an all-time peak of 48.8 million in 2010.

**Figure 12: Market Share on the Africa-US Route**



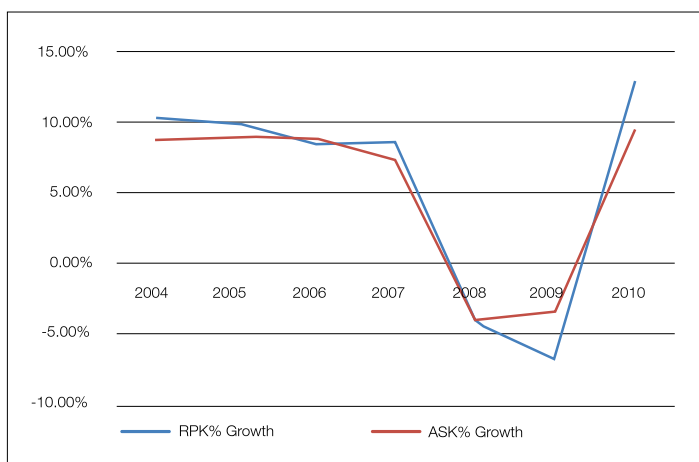
Source: AFRAA/Innovata

## Intercontinental Passenger Traffic Performance

After 6 years of consistent year-on-year decline (except 2007) of international passenger traffic, 2010 saw a significant rebound of 12.9% RPK growth. Passenger capacity, measured by ASKs also grew by 9.6% in 2010. The passenger traffic growth in 2010 was only second to the year-on-year growth attained by the Middle East Region.

This growth is attributable to the strong performance of African airlines, the increased tourist arrivals (partly attributable to the 2010 FIFA Football World Cup), substantial intra-Africa and domestic traffic growth and the increase in foreign direct investment, infrastructure investments and growth being experienced in many African countries.

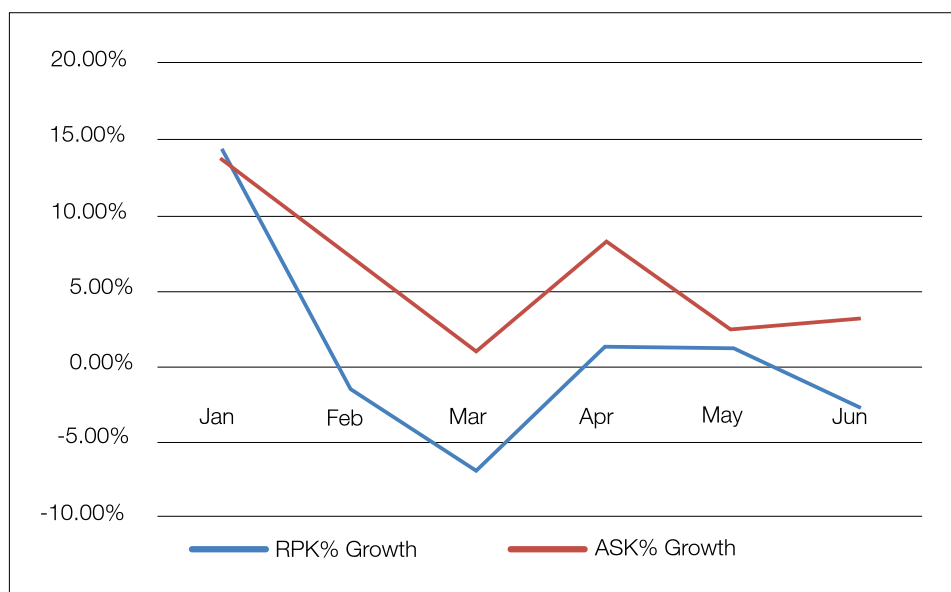
**Figure 13: African Air Transport Year-on-Year International Passenger Traffic Growth – 2004-2010**



Source: AFRAA/IATA

For the first half of 2011, passenger traffic has been declining month on month, after growing 14.3% in January. The declining trend is partly due to the ongoing political instability in parts of North Africa which started in February. Both business and tourism in Africa have been affected by the disturbances in the North. Capacity is not being reduced fast enough to match the declining demand.

**Figure 14: African Air Transport International Month-on-Month Passenger Traffic Growth Trend – 2011**



Source: AFRAA/IATA

## Passenger Traffic Forecast

The forecast traffic growth on the African continent is projected at over 6% per annum for the next 20 years. This is above the global industry average of around 5.1%. Airbus 2009-2029 forecast indicates that Africa, Asia, Latin America, CIS and Eastern Europe will grow at 6.1% while Western Europe, North America, Japan and Australia will grow at 3.7%.

Passenger traffic growth forecast between Africa and other regions show variations, with some regions set to grow faster than others. Over the next 20 years, the fastest growth region will be Asia Pacific at 8.1% per year followed by North America and the Middle East at 6.4% each. Latin America and Intra-Africa are projected to grow at about 6.0% and 5.1% respectively. Europe will grow the least at 4.6% per year.

**Table 5: Africa to other Regions Passenger Forecast 2011-2030**

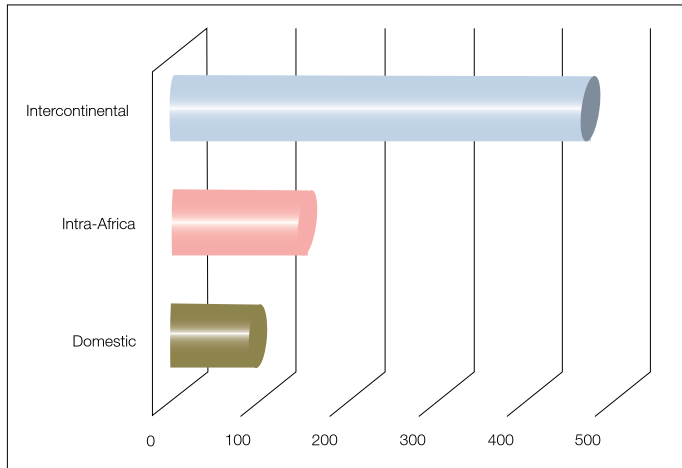
Regions	RPKs in 2010 (billions)	Av. Forecast Growth (2011-2030)
Africa-Africa	50.0	5.1%
Africa-Europe	138.1	4.6%
Africa-Middle East	35.7	6.4%
Africa-North America	11.4	6.4%
Africa-Asia Pacific	5.6	8.1%
Africa-Latin America	N/A	6.0%

Source: Boeing Current Market Outlook

## Freight Performance

Air freight shipment in Africa is still very low. In 2010 the continent accounted for about 689,000 tonnes of total global freight carried. In FTKs, this represents a growth of 23.8% over 2009 and a 3.2 percentage points above the global average for 2010. Freight carried within Africa amounted to 142,000 tonnes while domestic freight movement was 84,000 tonnes.

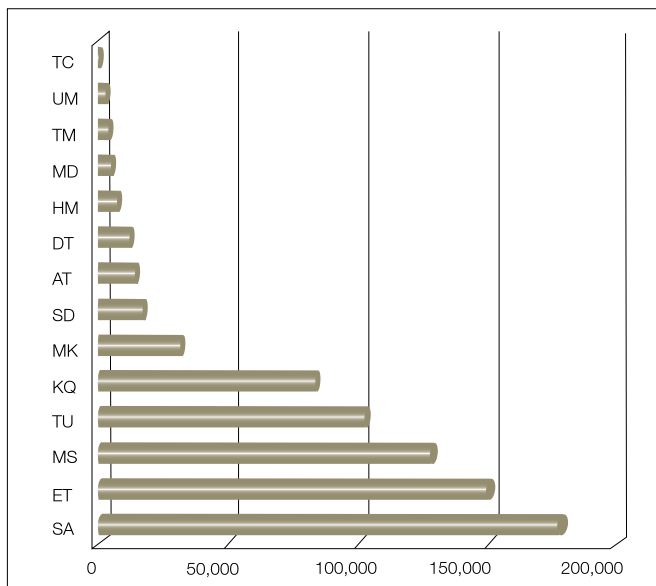
**Figure 15: African Airlines Freight Tonnes Carried (000)**



Source: AFRAA

About 70% of all freight carried is between Africa and other regions. The outbound freight is composed mainly of perishables such fresh fruits, vegetables, flowers and other agricultural produce while the inbound is manufactured goods, electronics and components. AFRAA airlines in 2010 carried a total of over 590,000 tonnes or 86%.

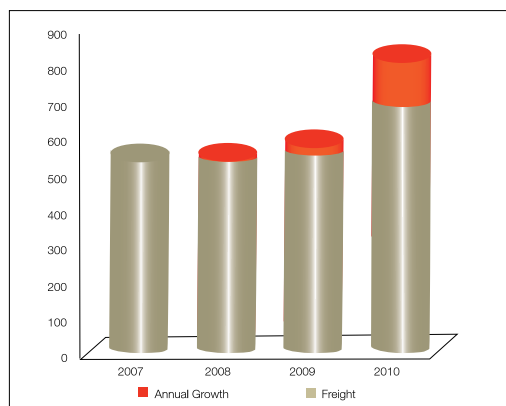
**Figure 16: Freight Carried by Some AFRAA Airlines (tonnes)**



Source: AFRAA

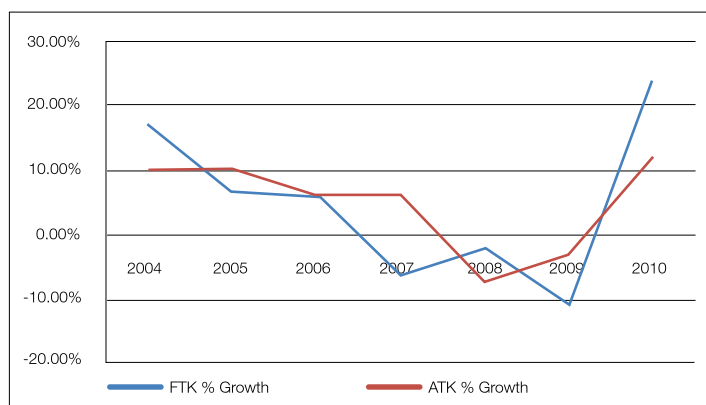
## International Freight Traffic

In the last 4 years freight carried has seen a gradual growth year-on-year. Growth in 2009 was a modest 2.9% but this substantially increased to 23.8% in 2010 as the global economic recovery gathers momentum.

**Figure 17: Annual Freight Carried – 2007-2010 (000)**

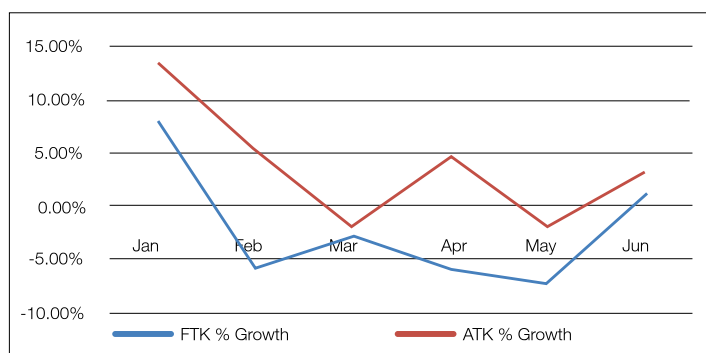
Source: AFRAA

The failure by many airlines to develop the cargo component of their operations has led to dominance of this sector by non-African airlines. On the domestic and regional level, airlines have lost freight business to rail and road transporters due to lack of capacity and bureaucratic customs clearance processes at airports.

**Figure 18: African Air Transport Year-on-Year International Freight Traffic Growth Trends – 2004-2010**

Source: AFRAA/IATA

After fluctuations in both FTKs and ATKs since February 2011, freight traffic began picking up in May. It is estimated that by year end 2011, traffic would be just about the 2010 level or better. The decline in freight traffic is attributable to the political disturbances in North Africa that has disrupted both inbound and outbound shipments.

**Figure 19: African Air Transport Month-on-Month International Freight Traffic Growth – 2011**

Source: AFRAA/IATA

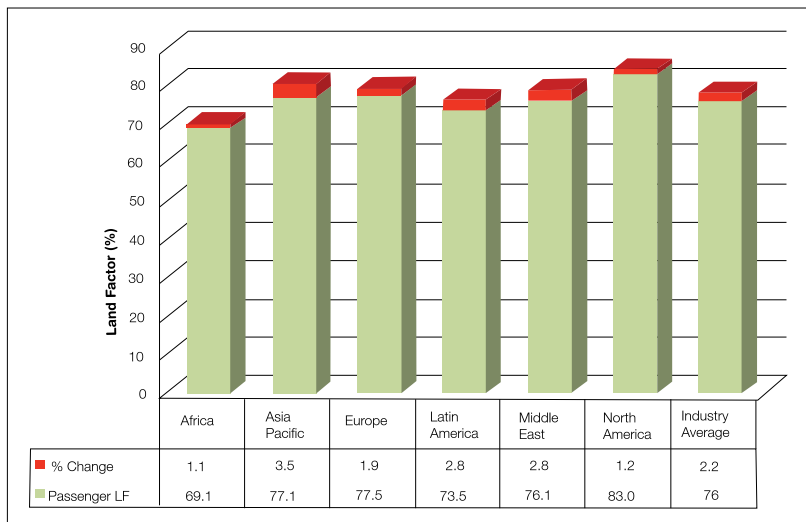
## Load Factor

The imbalance of capacity and demand continues to create inefficiencies in many African airlines. The result is that average passenger load factor for 2010 was 69.1%. All other regions of the world had passenger load factors exceeding 73%. Global industry average load factor was 76%; a 6.9 percentage points above the load factor achieved by Africa.

Passenger load factor achieved by AFRAA airlines was even less than the continental average at 65.3%, while weighted load factor was 54.8%.

An Embraer study pointed out that about 45% of flights within Africa use aircraft with more than 120 seats, yet 87% of those departures carry, on average, fewer than 110 passengers. This imbalance of capacity and demand creates inefficiency. Accordingly, the average passenger load factor for 2010 was 69.1%, the lowest compared to other regions and far below the industry average of 76%. The deployment of high-capacity jets on low and mid-density markets not only drives down load factors, but also stifles incentive to add frequency.

**Figure 20: Passenger Load Factor by Region – 2010**



Source: AFRAA/IATA

In terms of year-on-year growth, Africa experienced the least growth of 1.1% in 2010. Weight load factor for the continent was however better at 68.1%. With many airlines investing in appropriate regional aircraft to replace oversized and ageing fleet, load factor may improve in coming years if capacity and demand are matched and capacity dumping avoided.

**Table 6: Passenger and Weight Load Factor for all Regions – 2010**

	Passenger LF	% Change	Weight LF	% change
Africa	69.1%	1.1	68.1%	2.2
Asia Pacific	77.1%	3.5	72.4%	4.6
Europe	77.5%	1.9	70.4%	3.1
Latin America	73.6%	2.8	62.4%	1.0
Middle East	76.1%	2.8	63.1%	3.3
North America	83.0%	1.2	63.2%	1.9
Industry Average	76.0%	2.2	66.6%	2.7

Source: AFRAA/IATA

## > Section Three

### Fleet Composition and Development

Global commercial airline fleet in 2010 was composed of 19,410 passenger aircraft and 1,760 freighters according to Boeing. Of this, Africa's passenger aircraft make up of 680 (3.6%) and freighters are less than 10 aircraft. AFRAA airlines in 2010 operated a total of 501 aircraft (see details in appendix).

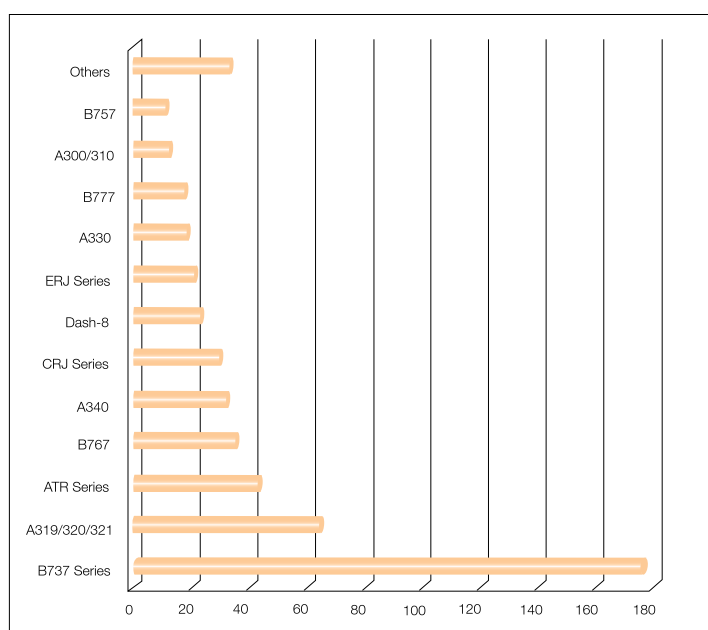
**Table 7: World Aircraft Fleet – 2010**

Region	No. of Aircraft	% of Total Fleet
Asia Pacific	4,410	22.7%
North America	6,610	34.0%
Europe	4,380	22.5%
Middle East	1,040	5.3%
Latin America	1,150	6.0%
C.I.S.	1,140	5.9%
Africa	680	3.6%
World	19,410	100%
Freighters (All Regions)	1,760	

Source: Boeing Current Market Outlook

AFRAA member airlines operate a fleet of 518 aircraft from various manufacturers. Of this, 34.2% is composed of B737 series aircraft and 12.4% a mix of A319, A320 and A321 equipment. The total number of Boeing airplanes in the African fleet is 222 (including 9 MD aircraft) or 42.8% of the total. Airbus equipment constitute 24.3% of total fleet. Between Airbus and Boeing, they provide 67.1% of the AFRAA airlines fleet, with the rest provided by ATR, Bombardier Embraer and others.

**Figure 21: AFRAA Airlines Current Fleet Composition**

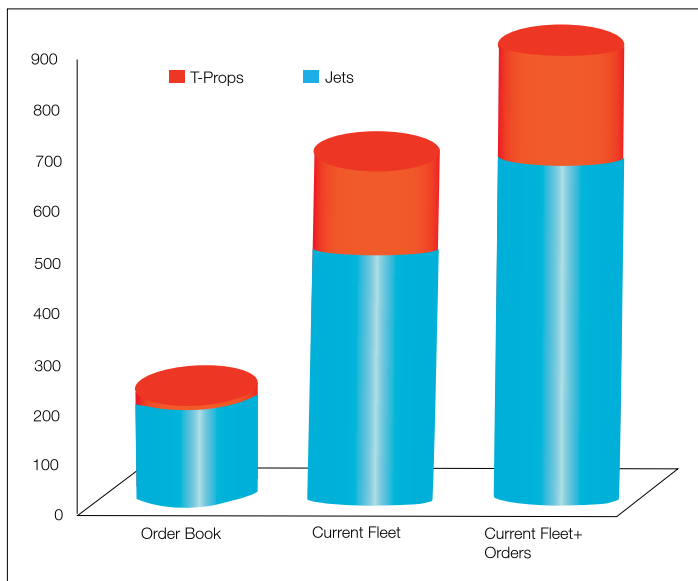


Source: AFRAA

## Africa Fleet and Order Book

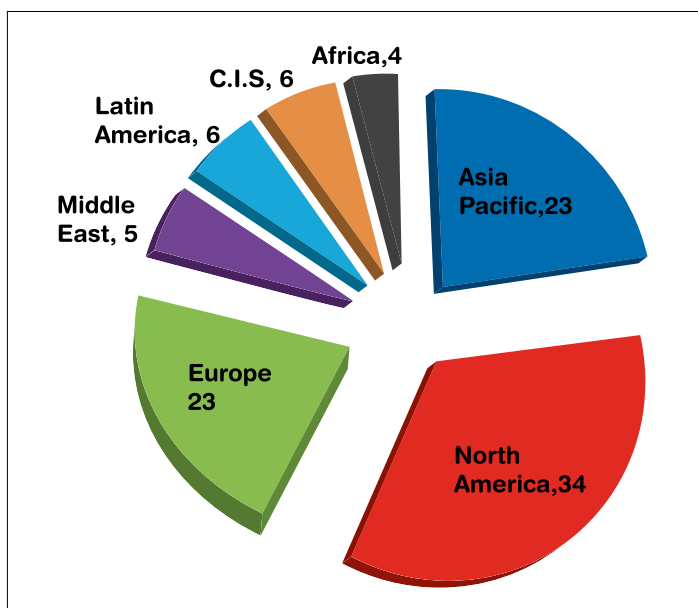
680 aircraft with an average age of 14 years were operating scheduled flights in Africa in 2010. The fleet was composed of 500 jets (74%) and 180 turboprops. There was an order book of 215 aircraft: 190 jets (88%) and 25 turboprops (12%). The improved average age of the fleet from 19 to 14 years was as a result of the acquisition of new aircraft and the retirement of some over-aged fleet.

Figure 22: Africa Fleet and Orders



Source: AFRAA

Figure 23: World Commercial Passenger Airline Fleet Composition



Source: Boeing Commercial Aircraft Market Outlook

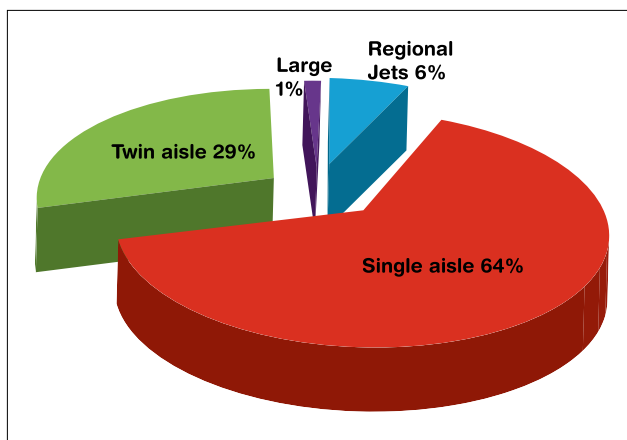
## Fleet Forecast

The average age of the African fleet has declined as airlines modernize for fuel efficiency and to increase capacity. Some countries including Nigeria and South Africa have undertaken ambitious airport infrastructure projects to alleviate congestion and address safety concerns. The Yamoussoukro Decision on the Liberalization of Air Transport Markets in Africa, which set out in 1999 to create a single African market is receiving renewed attention. The full implementation will significantly boost intra-Africa air transport development and investments in regional aircraft.

Africa's fleet requirement is estimated at between 780 and 1050 over the next 20 years. Over 80% of those new aircraft will be single aisle and mid-range aircraft, a clear indication of the anticipated growth in intra-Africa travel. Boeing forecasts that Africa will need 800 new aircraft worth about USD100 billion over the next 20 years to 2030. This forecast shows an additional 90 aircraft to the 710 projected by the manufacturer in 2009. Airbus forecast was more bullish at 1050 new aircraft deliveries in the next 20 years while Embraer conservatively forecast 780 new deliveries between now and 2030.

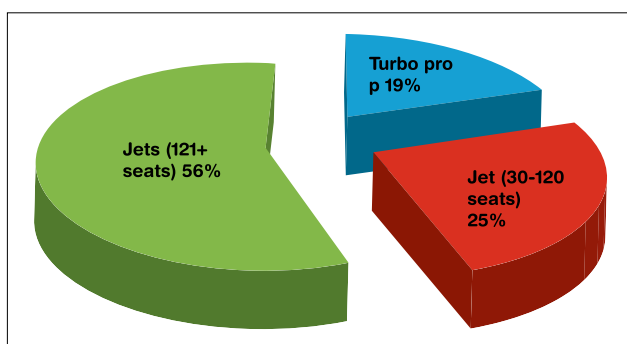
While about 60% of the new fleet will be addition to the existing aircraft in operation, the other 40% will replace current old generation aircraft. The various forecasts also indicate that single aisle and middle range aircraft would constitute over 60% of all new aircraft deliveries in Africa in the next 20 year. The large orders of middle range and single aisle aircraft will support the intra-Africa traffic development.

**Figure 24: Boeing 20 Year Forecast for Africa**



Source: Boeing Current Market Outlook

**Figure 25: Embraer 20 Year Aircraft Forecast for Africa**



Source: Embraer Commercial Aircraft Market Outlook

## > Section Four

### Financial Performance

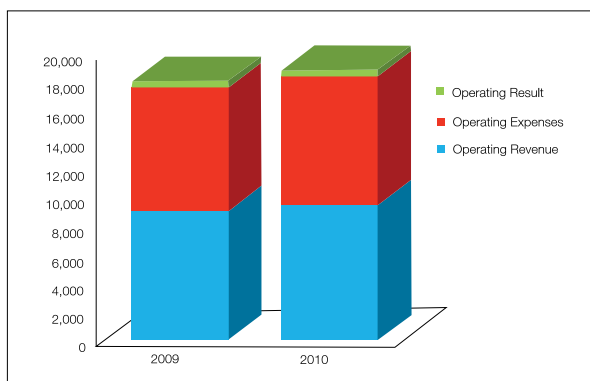
Global airline revenues grew an estimated 15% over 2009 levels to \$554 billion in 2010. Growth in cargo revenues was even stronger with a rise of almost one-third to \$66 billion. The industry went from net pre-tax losses of \$9.9 billion in 2009 to profits of \$18 billion in 2010 – the largest financial performance improvement in over 60 years according to IATA. African airlines share of profit in 2010 was \$100 million.

### Operating Revenue and Expenses

Only 15 of AFRAA airlines reported their financial results for 2010. The analysis is therefore limited to these airlines.

The 15 reporting AFRAA carriers total operating revenues was \$9.4 billion in 2010 compared to \$8.9 billion in 2009. This represents a revenue growth of 6% year-on-year.

**Figure 26: AFRAA Airlines Operating Performance**



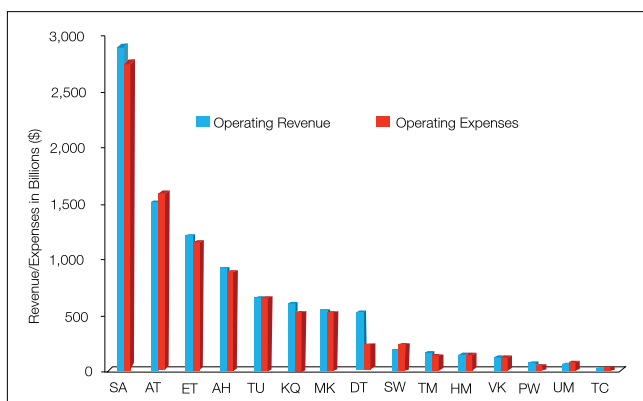
Source: AFRAA

Over the same period, total operating expenses for the reporting airlines was \$8.9 billion compared to \$8.6 billion, an increase of 3.5% over 2009. Operating expense in 2010 was 95.7% of total operating revenues – a 0.03% improvement over 2009. Fuel cost accounted for 39% of the total operating cost.

Of the 15 reporting airlines, 7 reported net profit while 8 posted losses. Net results by individual airlines range from profit of over \$121 million to loss of over \$110 million.

The average operating results for the reporting airlines in 2010 was \$388 million. Average net result was \$58 million.

**Figure 27: AFRAA Airlines Operating Performance**



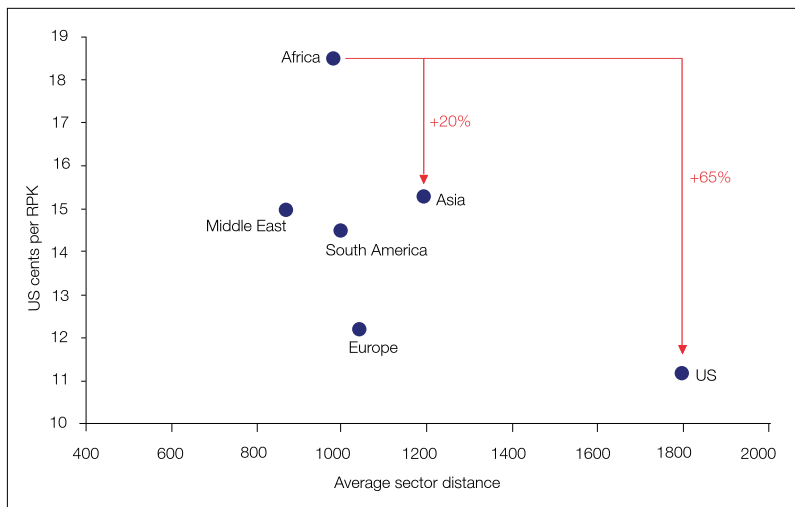
Source: AFRAA

## High Cost of Travel

Cost of air travel per RPK in Africa remains the highest in the world. Travel cost in Africa average 18.5 US cents per RPK compared to 15.3 cents in Asia and 11 cents in the USA. In other words, cost of travel in the Africa is 65% more expensive than it is in the USA and 20% than in Asia.

The high cost is partly due to the excessive taxes, charges and fees imposed on air travellers in Africa. Fuel cost is also significantly higher than in other regions.

**Figure 28: Cost of Air Travel per RPK**

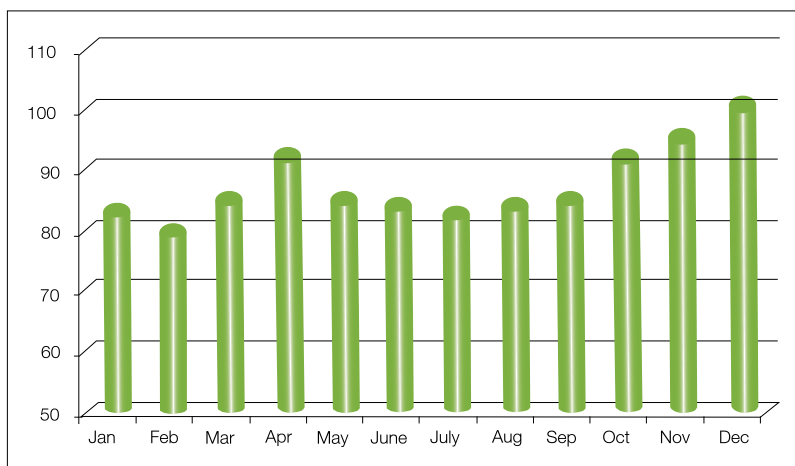


Source: IATA

## Jet Fuel Cost

Fuel cost in 2010 fluctuated between a low of US\$80.13 per barrel in February to a high of US\$101.48 in December. The average for the year was US\$88.0, an increase of over 24% compared to 2009. The year-on-year average increase was US\$17.2 per barrel in 2010 compared to the US\$52.6 average increase experienced in 2009.

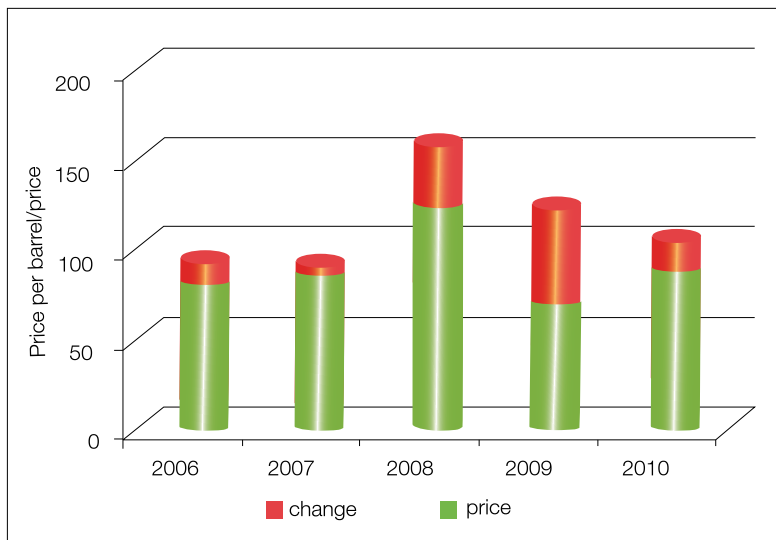
**Figure 29: Monthly Average Fuel Prices/Barrel – 2010**



Source: Platts

Average jet fuel price in 2010 was 40.3% cheaper than in 2008 but 24.3% more expensive compared to 2009. In spite of the high cost of fuel, the global industry went down in history as having made over US\$18.0 billion in profits in 2010. Africa's share of this profit was about \$100 million. Fuel cost accounted for about 39% of total operating cost of African airlines in 2010.

**Figure 30: Global Average Jet Fuel Price**



Source: Platts

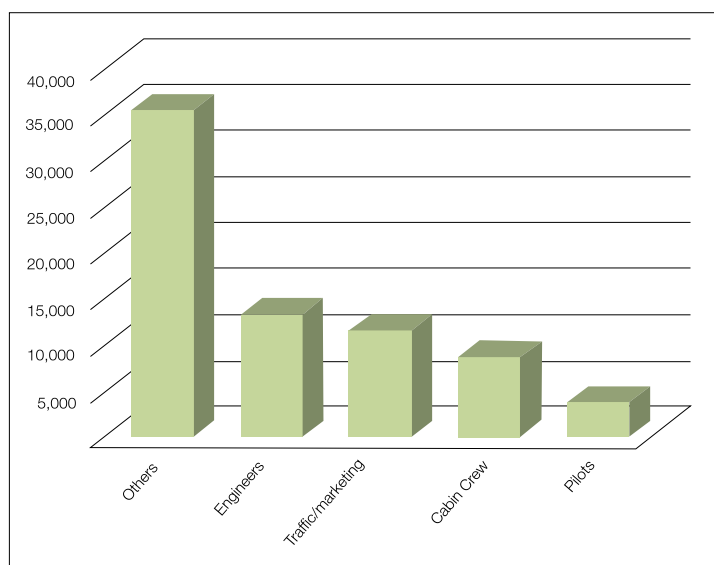
## > Section Five

### Employee Productivity

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

The total number of people employed directly by AFRAA member airlines in 2010 declined by 2.6% to 79,947 from 82,000 in 2009. A number of airlines in an effort to improve efficiency restructured and shed off excess staff. The reduced head count could partly also be due to the brain-drain which has seen highly qualified and experience employees attracted by competitors in other parts of the world.

**Figure 31: AFRAA Airlines Employees by Job Type**



Source: AFRAA

Despite the reduced number of employees, productivity increased as evidenced by the 6.0% increase in total revenue generated in 2010. Revenue and operating profit per employee were US\$117,300 and US\$731 respectively.

**Table 8: Employee Performance Indicators**

RTK/employee	144,300
Number of passengers/employee	555
Employee/aircraft	179
Revenue/employee	US\$117,300
Operating profit/employee	US\$731

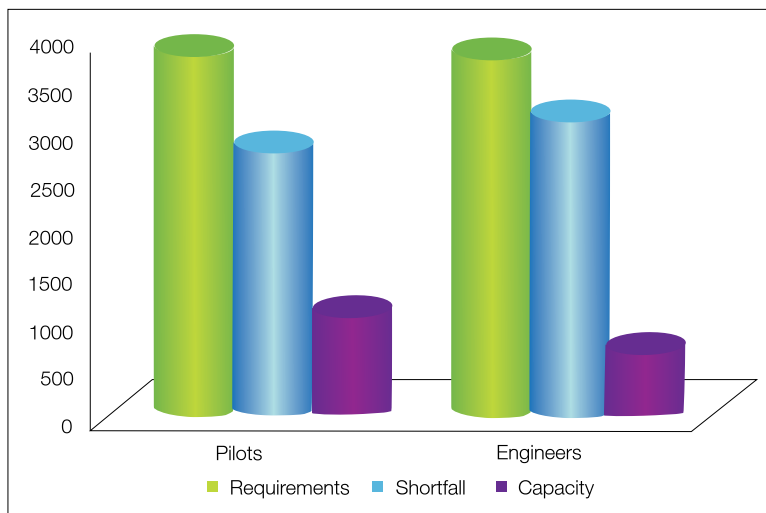
Source: AFRAA

AFRAA airlines employ a total of 3,700 of the 4,258 pilots in Africa and around 13,200 maintenance personnel in 2010. According to ICAO, Africa will require 55,932 and 58,635 pilots and maintenance personnel respectively by 2030. Existing training capacity can only deliver 1,010 pilots and 600 maintenance personnel annually. The inadequate training capacity in Africa will create an annual shortfall of pilots and maintenance personnel requirements of 2,804 and 3,169 respectively over the next 20 years.

**Table 9: Africa Pilots and Maintenance Personnel Requirements**

No. of Pilots	4,258
No. of Engineers	23,240
Pilots needed by 2030	55,932
Engineers needed by 2030	58,635
Annual training capacity - Pilots	1,010
Annual training capacity - Engineers	600
Annual Pilots shortfall	2,804
Annual Maintenance personnel shortfall	3,169

Source: ICAO Global & Regional 20 Year Forecasts

**Figure 32: Africa Pilots and Maintenance Personnel Requirements**


Source: ICAO Global & Regional 20 Year Forecasts

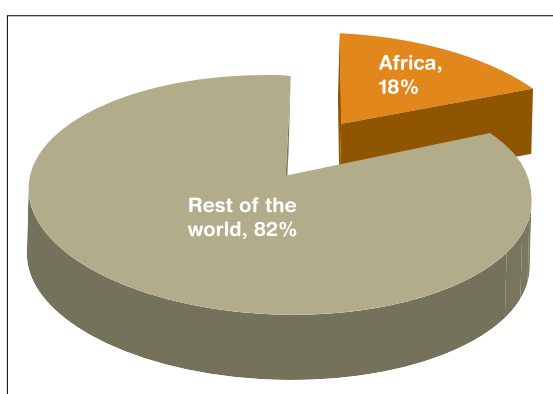
With a projected shortage of pilots, maintenance personnel and air traffic controllers, against an expected growth in traffic, African airlines risk losing more of their experienced and qualified technical personnel to other regions. The brain-drain which is threatening the growth of some African airlines may get worse unless efforts are made to intensify training in addition to paying competitive salaries and wages.

## > Section Six

### Safety

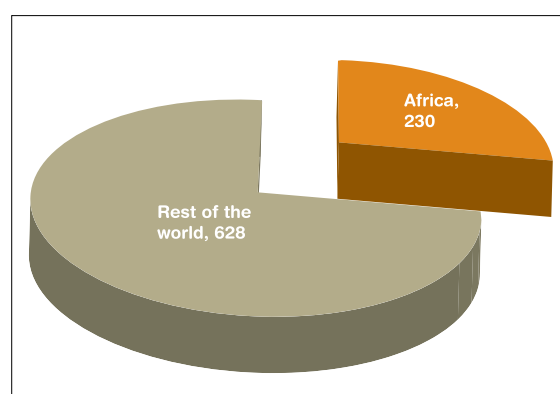
Statistics from Flight Safety Foundation show that there were 34 fatal accidents worldwide in 2010. The number of fatalities involved was 858. Six of the fatal accidents took place in Africa or 18% of the total global accidents with 230 fatalities. Two of the aircraft involved were jets while the other 4 were turbo propellers including one Antonov 24B. Two of the accidents took place in the DRC.

Figure 33: Africa Share of Total Accidents



Source: Flight Safety Foundation

Figure 34: Accident Fatalities



Source: Flight Safety Foundation

Over the past decade, the DRC has consistently had accidents every year and contributes to most of the accidents on the continent. Efforts to reduce accidents on the continent have to include finding a lasting solution to the perennial problem of high accident rates in the DRC. The DRC has to realize that these accidents have the effect of tarnishing the continent's safety image and adversely affecting all operators including those with impeccable safety credentials. Poor safety perception has the effect of discouraging some potential clients from patronizing African airlines. It also attracts higher insurance premiums contributing to higher operating costs.

Lack of safety oversight capacity in some African States and poor infrastructure has been identified as among the major challenges to aviation safety. The AFI Plan launched under the auspices of AFCAC and ICAO has pooled together a team of qualified and experienced inspectors who will provide assistance in areas of aircraft certification, capacity building and oversight to resource-deprived states. This should help improve safety on the continent.

AFRAA has called upon States to consider IOSA registration as one of the criteria for issuing an air operator's certificate to airlines. This should help create a safety culture among airlines and ensure adherence to industry best practices by all operators.

## Progress on IOSA Registration

It is critical that safety on the African continent be improved for the industry to take advantage of the opportunities available. It is targeted that by 2012 at least 3 more African airlines will obtain IOSA certification. Currently, a total of 37 airlines on the continent have IOSA certification of which 22 of these are AFRAA member airlines. Air Botswana and Air Mali will undergo IOSA audits this year and the expectation is that they will be successful.

**Table 10: AFRAA Member Airlines on IOSA Registry**

	Airline	Country of Registration
1	Afriqiyah Airways	Libya
2	Air Algerie	Algeria
3	Air Madagascar	Madagascar
4	Air Malawi	Malawi
5	Air Mauritius	Mauritius
6	Air Namibia	Namibia
7	Air Nigeria	Nigeria
8	Air Seychelles	Seychelles
9	Air Zimbabwe	Zimbabwe
10	EgyptAir	Egypt
11	Ethiopian Airlines	Ethiopia
12	Interair South Africa	South Africa
13	Kenya Airways	Kenya
14	LAM Mozambique Airlines	Mozambique
15	Libyan Airlines	Libya
16	Precision Air Services	Tanzania
17	Royal Air Maroc	Morocco
18	Tunisair	Tunisia
19	South African Airways	South Africa
20	South African Express Airways	South Africa
21	Sudan Airways	Sudan
22	TAAG Angola Airlines	Angola

**Table 11: Non AFRAA Member Airlines on IOSA Registry**

	Airline	Country of Registration
1	Air Austral	Reunion Islands
2	Air Cairo	Egypt
3	Air Memphis	Egypt
4	ALS Limited	Kenya
5	AMC Airlines	Egypt
6	Arik Air	Nigeria
7	Atlas Blue	Morocco
8	Comair	South Africa
9	Lotus Air	Egypt
10	Nouvel Air	Tunisia
11	Koral Blue Airlines	Egypt
12	SAFAIR (Proprietary) Ltd	South Africa
13	South African Airlink	South Africa
14	TACV Cabo Verde Airlines	Cape Verde
15	Tristar Air	Egypt

In partnership with the IATA Airline Training Fund (IATF), AFRAA has over the year delivered many safety courses to hundreds of airline personnel free of charge. In 2010, AFRAA delivered the following courses:

**Table 12: Joint IATF/AFRAA Courses Held in 2010**

	Course	Venue and host	Dates
1	Airside Safety Awareness	Kigali, Rwanda, hosted by RwandAir	4 – 6 July 2010
2	Management of Training	Nairobi, Kenya hosted by Kenya Airways	5 – 9 July, 2010
3	Airside Safety Awareness	Kigali, Rwanda, hosted by RwandAir	7 – 9 July 2010
4	Airline Maintenance Cost Management	Port Louis, Mauritius hosted by Air Mauritius	20 – 24 September 2010
5	Senior Management of Civil Aviation	Nairobi, Kenya	22 – 26 November, 2010
6	Airline Emergency Planning and Response Management	Kigali, Rwanda	23 – 26 November, 2010

## References

AFRAA Statistical Data

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CAN TURBOPROP TECHNOLOGY, PROFITABILITY  
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## > Section Seven: AFRAA Member Airlines



**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  
SITA: TIPABXH  
www.afriqiyah.aero

### AFRAA MEMBERSHIP

Became member in 2002  
Established in 2001

### OWNERSHIP STRUCTURE

Government: 100%

### COMMERCIAL PARTNERSHIP

Austrian  
Lufthansa  
Libyan Airlines

### EMPLOYEES

1023

### FLEET

Airbus 319	3
Airbus 320-200	6
Airbus 330-200	2
Airbus 340-200	1

### FLEET ON ORDER

Airbus 320-200	4
----------------	---



**Mr. Mohamed Salah Boultif**  
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

Aigle Azur	Air Canada
Air China	Alitalia
Iberia	Korean Air
Middle East Airlines	Qatar Airways
Tunisair	Turkish Airlines

### DESTINATIONS SERVED

Regional	31
Intra-Africa	11
International	31

### EMPLOYEES

8898

### FLEET

Airbus 330-200	5
ATR72-500	12
Boeing 737-800	17
Boeing 737-600	5
Boeing 767-300	3
Boeing 737-200	1

### Cargo

Lockheed L100-130	1
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**AIR BOTSWANA**  
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**Mrs. Sakhile Reiling**  
General Manager

### 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

### DESTINATIONS SERVED

Regional	4
Intra-Africa	3

### EMPLOYEES

355

### FLEET

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



**Mr. Sergio Rosa**  
Chief Executive Officer

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 2002  
Established in 1967

#### OWNERSHIP STRUCTURE

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

#### COMMERCIAL PARTNERSHIP

Air Ivoire  
Air Mali  
Aigle Azur  
Brussels Airlines  
Hahn Air  
Heli Air Monaco  
Kenya Airways  
Tunis Air

#### DESTINATIONS SERVED

Domestic	2
Regional	9
International	1

#### EMPLOYEES

262

#### FLEET

Bombardier CRJ200	1
McDonnell Douglas 83	1
McDonnell Douglas 87	2



**Mr. Francois Emmanuel**  
Chief Executive Officer

#### ADDRESS

SN Air Ivoire, Place de la République,  
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

N/A

#### DESTINATIONS SERVED

N/A

#### EMPLOYEES

N/A

#### FLEET

Boeing 737-500	3
Boeing 737-200	1



**Mr. Hughes Ratsiferana**  
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

Malagasy state:	89.56%
ARO:	5.53%
SONAPAR:	2.53%
Air France:	1.65%
NY HAVANA:	0.32%
Staff:	0.39%

#### COMMERCIAL PARTNERSHIP

Air Austral  
Air France  
Thai Airways International

#### DESTINATIONS SERVED

Regional	5
International	3

#### EMPLOYEES

1358

#### FLEET

ATR42-320	1
ATR42-500	1
ATR72-500	2
Boeing 737-300	3
Boeing 767-300ER	1
DHC-6 Twin Otter Series 300	4



**Mr. Patrick Chilambe**  
Chief Executive Officer

#### ADDRESS

P.O. Box 84, Blantyre, Malawi  
Tel: +265 1820811  
Fax: +265 1821396  
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 Airways

#### DESTINATIONS SERVED

Regional	2
Intra-Africa	6
Intercontinental	1

#### EMPLOYEES

240

#### FLEET

ATR42-320	1
Boeing 737-200 (leased)	1
Boeing 737-300	1
Boeing 737-500	1



**Mr. Abderahmane Berthe**  
Chief Executive Officer

#### ADDRESS

Immeuble TOMOTA –  
Avenue Cheick Zayed BPE  
2286 Hamdallaye, Bamako  
MALI  
Tel: +223 20 700110  
Fax: +223 20 295600

#### 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 Uganda  
Tunisair

#### DESTINATIONS SERVED

Domestic	3
Regional	12
International	2

#### EMPLOYEES

213

#### FLEET

Boeing 737-800	1
McDonnell Douglas 83	1
McDonnell Douglas 87	2
Saab 340A	1



**Mr. André Viljoen**  
Chief Executive Officer

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 1985  
Established in 1967

#### OWNERSHIP STRUCTURE

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

#### COMMERCIAL PARTNERSHIP

Malaysia Airlines  
Air India  
Emirates  
Air France  
Air Madagascar  
Kenya Airways

#### DESTINATIONS SERVED

Regional	4
Intercontinental	10

#### EMPLOYEES

2402

#### FLEET

Airbus 340-300E	2
Airbus 340-300	4
Airbus 319-100	2
Airbus 330-200	2
ATR 72-500	2
Bell 206 -Jet Ranger	3



**Mrs. 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

TAAG Angola

#### DESTINATIONS SERVED

Domestic	6
Regional	6
Intercontinental	2

#### EMPLOYEES

571

#### FLEET

Airbus 319-100	3
Airbus 340-300	2
Beechcraft 1900	4
Boeing 737-200	1
Boeing 737-500	2



**Mr. Kinfe Kahssaye**  
Chief Executive Officer

#### ADDRESS

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

Afriqiyah Airways  
British Airways  
Ethiopian Airlines  
Heli Air Monaco  
Kenya Airways

#### DESTINATIONS SERVED

Domestic	7
Intra-Africa	9

#### EMPLOYEES

835

#### FLEET

Boeing 737 – 300	8
Boeing 737-400	4
Embraer E-190	2

#### FLEET ON ORDER

Embraer E-190	7
---------------	---



**Mr. Bram Stellar**  
Chief Executive Officer

#### ADDRESS

Air Seychelles,  
Seychelles International Airport  
P.O. Box 386  
Victoria, Mahé, 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

#### DESTINATIONS SERVED

Domestic	8
Intra-Africa	3
Intercontinental	4

#### EMPLOYEES

890

#### FLEET

Boeing 767-200 ER	2
Boeing 767-300 ER	3
DHC-6 Twin Otter	3
Shorts 360-300	1

#### FLEET ON ORDER

Boeing 787 Dreamliners	2
------------------------	---



**Mr. Busera Awel**  
Chief Executive Officer

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 2010  
Established in 2009

#### OWNERSHIP STRUCTURE

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

#### COMMERCIAL PARTNERSHIP

Ethiopian Airlines

#### DESTINATIONS SERVED

Intra-Africa 19

#### EMPLOYEES

203

#### FLEET

Boeing 737 (NG)-700 3  
Bombardier Dash 8-400 NG 1



**Mr. Paul Chizi**  
Chief Executive Officer

#### 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

N/A

#### DESTINATIONS SERVED

Domestic 6

#### EMPLOYEES

175

#### FLEET

Bombardier Dash 8- Q300 1



**Mr. Innocent Mavhunga**  
Ag. 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

N/A

#### DESTINATIONS SERVED

Domestic 2  
Intra-Africa 3  
Intercontinental 3

#### EMPLOYEES

1,354

#### FLEET

Boeing 737-200 3  
Boeing 767-200 2  
Xian MA60 2



**Mr. Santiago Nsobeya Efuman Nchama**  
Chief Executive Officer

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 2011

#### OWNERSHIP STRUCTURE

N/A

#### COMMERCIAL PARTNERSHIP

Air France

#### DESTINATIONS SERVED

Domestic	2
ltra-Africa	9

#### EMPLOYEES

146

#### FLEET

ATR 42-500	1
ATR 72-500	2



**Eng. Hussein Massoud**  
Chairman & CEO EgyptAir Holding Co.

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 1968  
Established in 1932

#### OWNERSHIP STRUCTURE

Government: 100%

#### COMMERCIAL PARTNERSHIP

Gulf Air  
Malaysia  
Yemenia Airways  
TAP Portugal  
Syrianair  
Tunisair  
Star Alliance

#### DESTINATIONS SERVED

Domestic	8
Intra-Africa	17
Intercontinental	43

#### EMPLOYEES

29285

#### FLEET

Airbus 300-600RF	2
Airbus 300B4-200F	1
Airbus 330-200	7
Airbus 330-300	1
Airbus 320-200	13
Airbus 321-200	4
Airbus 340-200	3
Boeing 737-800	17
Boeing 737-500	4
Boeing 777-200ER	5
Boeing 777ER-300	6
Embraer ERJ-170	12

#### FLEET ON ORDER

Airbus 330-300	4
Boeing 737-800	3



**Ato Tewolde GebreMariam**  
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

ASKY Airlines  
Star Alliance

#### DESTINATIONS SERVED

Domestic	17
Intra-Africa	39
Intercontinental	25

#### EMPLOYEES

5,635

#### FLEET

Boeing 737-700	5
Boeing 737-800	5
Boeing 747-200	1
Boeing 757-200	7
Boeing 757-260F	2
Boeing 767-300ER	11
Boeing 777-200LR	5
Bombardier Q400DHC-8	8
McDonnell Douglas 11F	2

#### FLEET ON ORDER

Airbus 350-900	12
Boeing 737-800	10
Boeing 777F	4
Boeing 787-8	10



**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  
Established in 1993

#### OWNERSHIP STRUCTURE

Private Shareholding

#### COMMERCIAL PARTNERSHIP

N/A

#### DESTINATIONS SERVED

Intra-Africa 16

#### EMPLOYEES

230

#### FLEET

Boeing 737-200	3
Boeing 727-200	2
Boeing 767-200ER	1



**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

Air Mauritius  
LAM Mozambique  
Air Nigeria  
Air Botswana  
Precision Air  
TAAG-Angola Airlines  
Jet Airways  
Qantas  
SkyTeam

#### DESTINATIONS SERVED

Domestic	3
Intra-Africa	40
Intercontinental	10

#### EMPLOYEES

2408

#### FLEET

Boeing 737-300	6
Boeing 737-700	4
Boeing 737-800	5
Boeing 767-300ER	6
Boeing 777-200ER	4
Embraer 170-LR	5
Embraer 190-AR	4

#### FLEET ON ORDER

Boeing 777-300ER	2
Boeing 787-8	9
Embraer 190	10
Boeing 747-400F	1



**Mrs. Marlene Mendes Manave**  
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 Airlines  
Kenya Airways  
South African Airways  
South African Express

#### DESTINATIONS SERVED

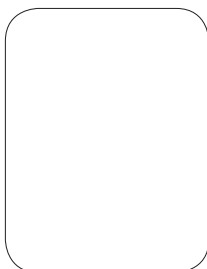
Domestic	10
Intra-Africa	4

#### EMPLOYEES

710

#### FLEET

Boeing 737-200	2
Embraer 190	2
Bombardier Q400	3

**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

**DESTINATIONS SERVED**

Domestic	10
Regional	4
International	9

**EMPLOYEES**

2030

**FLEET**

Airbus 300-600	2
Airbus 320-200	4
Bombardier CRJ900	8
Airbus TR42-500	2

**FLEET ON ORDER**

Airbus 320-200	5
Airbus 330-200	4
Airbus350-800	4

**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**

Kenya Airways  
Rwandair Express

**DESTINATIONS SERVED**

Domestic	10
Intra-Africa	3

**EMPLOYEES**

665

**FLEET**

ATR 72-202/212/500	5
ATR 42-300	4
Boeing 733-300	1

**Mr. Driss Benhima**

Chief Executive Officer

**ADDRESS**

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

**AFRAA MEMBERSHIP**

Became member in 1977  
Established in 1957

**OWNERSHIP STRUCTURE**

Moroccan Government: 96.80%  
Private Investors: 3.20%

**COMMERCIAL PARTNERSHIP**

SN Brussels Airlines  
Delta Airlines  
EgyptAir  
TAP Portugal  
Etihad Airways  
Iberia Airlines  
Turkish Airlines  
LOT  
Aeroflot

**DESTINATIONS SERVED**

N/A

**EMPLOYEES**

RAM staff	4181
-----------	------

**FLEET**

Airbus 321	4
Beechcraft AT7	4
ATR 42-600	2
ATR76-600	2
Boeing 737-700	6
Boeing 737-800	21
Boeing 737-400	5
Boeing 737-500	6
Boeing 747-400	1
Boeing 767-300	5
Douglas 73F (cargo)	1

**FLEET ON ORDER**

Boeing 787 Dreamliner	6
-----------------------	---



**Mr. John Mirenge**  
Chief Executive Officer

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 2009  
Established in 2002

#### OWNERSHIP STRUCTURE

Government: 99%  
Bayigamba Robert: 1%

#### COMMERCIAL PARTNERSHIP

SN Brussels  
Ethiopian Airlines  
Air Uganda  
Kenya Airways  
Qatar Airways  
Air Burundi  
South African Airways  
Delta Airlines  
KLM

#### DESTINATIONS SERVED

Domestic	1
Intra-Africa	7
International	1

#### EMPLOYEES

449

#### FLEET

Boeing 737-500	2
Boeing 737-800	2
Bombardier CRJ200LR	2
Bombardier Dash 8-102	1



**Mr. Inati Ntshanga**  
Chief Executive Officer

#### ADDRESS

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

#### AFRAA MEMBERSHIP

Became member in 2003  
Established in 1994

#### OWNERSHIP STRUCTURE

Government: 100%

#### COMMERCIAL PARTNERSHIP

South African Airways  
Mozambican Airlines – LAM  
SA Airlink  
Congo Express

#### DESTINATIONS SERVED

Domestic	5
Intra-Africa	11

#### EMPLOYEES

1015

#### FLEET

Bombardier CRJ 200ER	12
Bombardier CRJ 700	2
Bombardier Dash 8-Q300	7
Bombardier Dash 8-Q400	2

#### FLEET ON ORDER

Bombardier Dash 8-Q400	4
------------------------	---



**Mrs. Siza Mzimela**  
Chief Executive Officer

#### ADDRESS

Floor 5, Block G, Airways Park, OR Tambo  
International-Johannesburg, South Africa  
Tel: +27 11 978 1908  
Fax: +27 11 978 6055  
www.flysaa.com

#### AFRAA MEMBERSHIP

Became member in 1994  
Established in 1934

#### OWNERSHIP STRUCTURE

Government: 100%

#### COMMERCIAL PARTNERSHIP

South African Express  
Star Alliance

#### DESTINATIONS SERVED

Domestic	5
Intra-Africa	20
International	32

#### EMPLOYEES

8883

#### FLEET

Airbus 319-130	11
Airbus 330-200	5
Airbus 340-200	5
Airbus 340-300	8
Airbus 340-600	9
Boeing 737-300F	2
Boeing 737-200F	1
Boeing 737-800	15

#### FLEET ON ORDER

Airbus 320-200	10
Airbus 321-200	10
Airbus 330-200	1



**Mr. Ali Elobaid Fad Almoula**  
Managing Director

#### ADDRESS

P.O. Box 253, 161, Block 10, Obeid-Khatim  
Street, Riaydh, Khartoum, Sudan  
Tel: +249 9123 05604  
Fax: +249 183 243717  
www.sudanair.com

#### AFRAA MEMBERSHIP

Became member in 1968  
Established in 1947

#### OWNERSHIP STRUCTURE

Government: 51%  
Private: 49%

#### COMMERCIAL PARTNERSHIP

Nasair

#### DESTINATIONS SERVED

N/A

#### EMPLOYEES

1840

#### FLEET

Airbus 300-620R	2
Airbus 310-320	1
Airbus 320-210	1
Fokker 50	4
Hawker Beechcraft King Air 200-200	1
Hawker Beechcraft King Air 90-C90	1



**Mr. António Luis Pimentel Araujo**  
President and CEO

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Fax: +244 222 390739  
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#### AFRAA MEMBERSHIP

Became member in 1978  
Established in 1938

#### OWNERSHIP STRUCTURE

Government: 100%

#### COMMERCIAL PARTNERSHIP

Aeroflot  
Air France  
British Airways  
Brussels Airlines  
Iberia  
Kenya Airways  
LAM  
Lufthansa

#### DESTINATIONS SERVED

Domestic	11
Intra-Africa	12
Intercontinental	6

#### EMPLOYEES

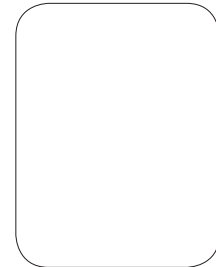
3253

#### FLEET

Boeing 737-200	2
Boeing 737-700	4
Boeing 777-200ER	3
Boeing 777-300ER	2

#### FLEET ON ORDER

Boeing 777-300	2
----------------	---



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#### AFRAA MEMBERSHIP

Became member in 2007  
Established in 2004

#### OWNERSHIP STRUCTURE

Government: 100%

#### COMMERCIAL PARTNERSHIP

N/A

#### DESTINATIONS SERVED

Domestic	2
Intra-Africa	5

#### EMPLOYEES

N/A

#### FLEET

Boeing 737-200	1
Fokker F28	1



**Mr. Mohamed Thamri**  
Chairman & President

#### ADDRESS

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#### AFRAA MEMBERSHIP

Became member in 1968

Established in 1948

#### OWNERSHIP STRUCTURE

Government: 74%

Others: 26%

#### COMMERCIAL PARTNERSHIP

Saudi Arabian Airlines	EgyptAir
Middle East Airlines	Syrian Arab Airlines
Mauritania Airways	Corsairfly
Hahn Air Lines	Air Burkina
Air Mali	Korean Airlines
Emirates	TAP Portugal
Meridiana fly	Gulf Air
Turkish Airlines	Atlasjet
Olympic Air	Asiana Airlines
Libyan Airlines	TAM Linhas Aéreas
Etihad Airways	Oman Air
Jat Airways	
Compagnie Aérienne Corse Méditerranée	
Heli Air Monaco	
TAM Airlines	
Finnair	

#### DESTINATIONS SERVED

Domestic	7
Intra-Africa	9
Intercontinental	36

#### EMPLOYEES

3911

#### FLEET

Airbus 300-600	3
Airbus 320-200	13
Airbus 319-100	4
Boeing 737/500	4
Boeing 737/600	7

#### FLEET ON ORDER

Airbus 320-200	8
Airbus 330-200	3
Airbus 350-800	3



**Mrs. Maureen Dlamini**  
Chief Executive Officer

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#### AFRAA MEMBERSHIP

Became member in 2009

Established in 2008

#### OWNERSHIP STRUCTURE

Private

#### COMMERCIAL PARTNERSHIP

Kulula

Proflight

#### DESTINATIONS SERVED

Intra-Africa	7
--------------	---

#### EMPLOYEES

170

#### FLEET

Boeing 737-500	3
----------------	---

Everything you always wanted to know

# About ATR

but were afraid to ask

An Alenia Aeronautica and EADS joint venture

# ATR

PROPELLING TOMORROW'S WORLD



# 1



COMMERCIAL  
SUCCESS

■ ATR is the leader in the 50-70 seats turboprop category with more than 1200 orders, and all-time high backlog of about 270 aircraft.

■ ATR has received more than 570 new orders since January 2005.

■ ATR is dramatically increasing yearly production rate from 54 aircraft in 2011 to 72 aircraft in 2012, 80 in 2013 and up to 85 in 2014.

# 2



CABIN

■ ATR -600 Series has the widest cross section in its category. Due to its bilobed cross section, ATR cabin offers the widest floor (+9in), aisle (+2.2in) and elbow room of the category.

■ ATR is the quietest cabin, with advanced acoustic treatment system that is simple, maintenance free and efficient (average level in cabin 79 dBA).

# 3



ECONOMICS

■ ATR 72-600 benefits from an in-service experience of more than 950 aircraft flying worldwide, with a proven dispatch reliability of 99.7% and schedule completion rate of 99.9%.

■ Assuming a sector of 250 Nm (460 Km), ATR 72-600 has 20% lower Cash DOC per seat compared to its TP direct competitor and 30% lower Cash DOC/seat than RJ of similar capacity.

# 4



FUEL

■ On 1 hour stage (about 200Nm) an ATR 72-600 burns only as much fuel as a B747 uses in 10 minutes of taxiing!

■ A fleet of 10 ATR 72-600 generates about 9M\$ of yearly fuel cost savings compared to its direct turboprop competitor and 13M\$ compared to a similar sized RJ.

# 5



ENVIRONMENT

■ A fleet of 10 ATR 72-600 generates about 22,000 Tons less pollutant CO2 emissions per year compared to its direct turboprop competitor, and 32,000 Tons less than a similar sized RJ.

■ ATR are fully compliant with ICAO Annex 16 Ch. 4 outside noise requirements, with up to 26 EPNdB cumulated margins.

## > Section Eight: Airline Maintenance, Repair and Overhaul (MROs)



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## > Section Nine: Airline Training Centres



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### Aldawlya for Training and Science

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### Kenya Airways Pride Centre

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### Royal Air Maroc Academy

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### Tunisair Training Centre

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## > Section Ten: Providers of Aircraft Simulators



### **Aviation Training Centre of Tunisia (ATCT)**

2 A320 aircraft simulators

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General Director

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Email: atct@atct.com.tn



### **EgyptAir Training Centre**

A320, A330, A340, B737NG and B777

full flight simulators

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Email: trainingcenter@egyptair.com



### **Ethiopian Aviation Academy**

B737NG and B757/B767

full flight simulator trainings

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A/Director, MRO Sales and Marketing

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Fax: +251 116 651200

Email: Amareg@ethiopianairlines.com



### **Kenya Airways Pride Centre**

B737 NG full flight simulator

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Head of Learning and Development – Pride Centre

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# Africa Wings



## AfRAA's Panaffrican Journal on Air Transport

**The Voice of the African Airlines Association**

**Africa Wings** is a full-colour, professional journal covering the people, management and equipment of African airlines and partners, raising awareness of the successes of African commercial aviation, addressing its challenges and educating the aviation community both within and outside Africa for the benefit of strong African airlines and African aviation in general.

Published quarterly in English and French, **Africa Wings** is a comprehensive aviation communication resource for all African airlines and other players in the industry. Its distribution list reads like a "Who's Who" of African aviation personnel and the magazine is thus a perfect vehicle for advertisers wishing to promote their products or services.

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AFRICAN AIRLINES ASSOCIATION  
Association Des Compagnies Aériennes Africaines

## > Section Eleven: AFRAA Partners



### Technology, Brighter, Bolder, Better innovation

The leading provider of IT solutions to your tourism and travel industry.

Amadeus is a leading transaction processor for the global travel and tourism industry, providing transaction processing power and technology solutions to both travel providers (including full service carriers and low-cost airlines, hotels, rail operators, cruise and ferry operators, car rental companies and tour operators) and travel agencies (both online and offline).

The company acts both as a worldwide network connecting travel providers and travel agencies through a highly effective processing platform for the distribution of travel products and services (through our Distribution business), and as a provider of a comprehensive portfolio of IT solutions which automate certain mission-critical business processes, such as reservations, inventory management and operations for travel providers (through our IT solutions business).

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#### *American General Supplies, Inc.*

American General Supplies, Inc. (AGS) is an after-market 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, Avborne, 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.

#### Contacts

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#### SITA: GAIGSCR

Atlantic Air Industries Maroc (AAI Maroc) is a subsidiary of Atlantic Air Industries that was started in October 2008, in a country in which the local market is in full swing and showing a great international attractiveness.

Atlantic Air Industries Maroc is located in Benslimane, near Casablanca. Under EASA Part 145 approval, It is a secondary base of Atlantic Air Industries France, with facilities approved by the manufacturers ATR and Embraer. In addition to the EASA approval, AAI Maroc also has Moroccan, and other West/Central Africa CAA approvals. AAI Maroc was opened to provide very high quality and cost competitive maintenance services to operators based in North/West/Central Africa and Southern Europe.

AAI Maroc is renowned for its integrated solutions and high technical expertise across Africa and Southern Europe. Beyond its know-how ensuring higher technical reliability, it offers operators & aircraft owners competitive prices which warranty them lower maintenance and ownership costs. Under its EASA approvals and partnerships, AAI Maroc provides its customers with the best services to satisfy them with the quality and reliability of its work.

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ATPCO is the world leader in the collection and distribution of fare and fare-related data for the airline and travel industry. Its products and services organize fares into established formats that seamlessly integrate with global distribution systems, pricing systems, computer reservation systems, governments and related travel organizations. By providing these solutions for the travel industry, ATPCO creates efficiencies in the overall fare management process.

ATPCO currently works with more than 460 airlines worldwide, and it supplies more than 99 per cent of the industry's intermediated fare data to all the major airfare pricing engines. Headquarters are located in Washington, DC, and regional offices are located in London, Miami and Singapore.

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AWAS is a global leader in commercial aircraft leasing, with the scale, expertise, and dedication to deliver innovation solutions for our customers around the world.

AWAS serves markets in The Americas, Europe, Middle East, and Asia-Pacific, from its Dublin headquarters and offices in New York, Miami, and Singapore.

For over 25 years AWAS has been providing flexible, customized and competitive aviation finance solutions to airlines worldwide. The company's staff is known throughout the industry for providing an unmatched level of knowledge and consultative expertise to its customers, helping them to meet their business goals.

AWAS' current portfolio is over 200 modern aircraft strong, and it has another 100+ of the latest, most desirable commercial aircraft on order from Airbus and Boeing. AWAS' aircraft portfolio is on lease to over 90 airline customers in 44 countries. Their fleet features a full range of the most popular aircraft types including both narrow-bodied and wide-body aircraft to serve customers ranging from international flag carriers, low cost airlines, regionals, air freight, charter, and domestic operators.

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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.

With corporate offices in Chicago, Boeing employs more than 159,000 people across the United States and in 70 countries. This represents one of the most diverse, talented and innovative workforces anywhere. More than 123,000 employees hold college degrees – including nearly 32,000 advanced degrees – in virtually every business and technical field from approximately 2,700 colleges and universities worldwide. Boeing also leverages the talents of hundreds of thousands more skilled people working for Boeing suppliers worldwide.

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CFM International is a leading manufacturer of aircraft engines in the medium thrust range of applications, powering 25 models of aircraft for both commercial as well as military customers around the world. CFM combines the resources, engineering expertise and product support of two major aircraft engine manufacturers: Snecma (SAFRAN Group) of France, and GE of the U.S.

Truly a product of international cooperation, the CFM56 line of six engine models offers unparalleled reliability and cost of ownership. With a thrust range of 18,500 to 34,000 pounds, they're well-suited for many commercial and military aircraft.

Underlying CFM's rapid and hard-earned success is the ingenuity of its designers, engineers and product support personnel throughout the world. At CFM, our goal is to maintain the trust of airlines and airframers and contribute to the operational success of our customers. We do this by building remarkable engines and offering dedicated services.

CFM keeps the CFM56 family of engines the best in their class by infusing newly matured technology into the existing fleet. We're also anticipating tomorrow's industry needs with the advanced LEAP-X technology development program.

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CHAMP Cargosystems is the market leader in providing integrated software solutions to air cargo carriers and their distribution partners around the world. With a comprehensive and proven portfolio, CHAMP provides solutions to over 80 airlines and 200 customers worldwide, including GSAs, GHAs and Forwarders.

The new generation applications are scalable and offered as licensed, hosted or SaaS options to suit companies of all sizes with a wide range of business needs. The modules enable fast interoperability with business partners (customers, agents, and service providers) throughout the air cargo supply chain. In addition to the core airline business, the CHAMP portfolio includes extensive ground handling modules addressing the needs of GHA and GSA specialists.

CHAMP also leverages its domain knowledge of cargo airlines and experience of ERP (enterprise resource planning) applications to deliver a new, leading-edge SAP platform for financial and accounting operations and services for airlines managing freight.

Headquartered in Luxembourg and with offices in London, Zurich and Atlanta, CHAMP is jointly owned by SITA and Cargolux S.A. In January 2008, CHAMP acquired 100% shares in Softair A.G. and the acclaimed Cargospot portfolio. With a workforce in excess of 200 staff, CHAMP has expertise in all areas of cargo automation.

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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 (1,806 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 Transportation Aircraft Engines is the world's leading manufacturer of large jet aircraft engines. GE offers products and services for commercial, corporate, military and marine applications that offer the performance and reliability that customers expect.

Since its inception, GE Transportation Aircraft Engines has been at the forefront of many of aviation's most storied accomplishments. From the first U.S. jet engine to an engine for use on the next space shuttle, GE continues to build upon its rich heritage.

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Hahn Air – the ticketing expert, specialised in passenger airline ticketing.

Hahn Air is the ticketing expert for optimised revenues. It takes out the complexity of global sales and gives access to higher, optimised and secure revenues. Hahn Air is a reliable contracting partner for 85,000 IATA and IATAN travel agents and more than 240 airlines.

#### Hahn Air

- takes over costs and risks in all markets
- cooperates with all major travel management companies and online travel agencies
- offers the most economic solution to sell in more than 190 BSP/ARC and non-BSP markets

Outsourcing of passenger airline ticketing to Hahn Air has become an industry standard. Every 7 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.

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Providing innovative data and timetable solutions to the aviation community.

Innovata, a global leader in travel and hospitality content management and distribution solutions is now established and recognized as a major industry source for worldwide airline schedule and related data. As a partner of IATA in marketing the Schedule Reference Service (SRS) to the industry, Innovata maintains one of the world's largest flight databases (passenger and cargo) representing more than 99% of the air segment miles flown worldwide, containing over 900 airlines, 95% of which are updated and refreshed every week.

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Kenyon is an international leader in worldwide disaster management, providing pre-incident crisis planning and post emergency response services on behalf of the world's foremost companies. Privately owned, Kenyon remains the only firm in its business with over a hundred year history, comprehensive resources, and experience in every type of mass fatality accident including aviation disasters, natural disasters, war, and terrorist attacks.

Kenyon Operations Services provide experienced, specialized personnel and equipment to respond to incidents. Kenyon teams establish and staff family support areas, telephone inquiry centers, crisis communications centers, practical facilities (morgues) and processes for the recovery, identification and return of the deceased and their property.

Kenyon Consulting Services provide incident-experienced planning and training specialists who work with your organization to develop and implement crisis management plans and systems. For those organizations with developed plans and systems, Kenyon conducts exercises to test those systems for real-world response. Headquartered in Houston, Texas, it has offices and facilities in Sydney, Australia, London, UK, and Beirut, Lebanon.

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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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Pratt & Whitney, a United Technologies company, provides dependable power to hundreds of airlines and operators every day. Our fleet of commercial engines has logged more than 1 billion hours of flight powering the single-aisle and wide-body aircraft that fly both passengers and cargo around the world.

We continue to invest in our current engines, developing new technologies to improve fuel efficiency, performance and environmental impact. Our new PurePower® PW1000G engine delivers double-digit improvement in fuel burn versus today's engines, which translates into average savings of up to \$1.5 million per aircraft per year.

The company also has one of the largest global networks of repair and overhaul facilities and offers services that are focused on lowering the customers' cost of ownership. Pratt & Whitney, the world's only OEMRO®, offers a broad portfolio of service solutions including line maintenance services, engine monitoring and diagnostics, environmentally friendly on-wing EcoPower® water washes, lease engines, custom engine service programs, and new and repaired parts.

Learn more at [www.pw.utc.com/oemro](http://www.pw.utc.com/oemro) and [www.purepowerengines.com](http://www.purepowerengines.com).

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# Rolls-Royce

Rolls-Royce, a world-leading provider of power systems and services for use on land, at sea and in the air, has established a strong position in global markets - civil aerospace, defence aerospace, marine and energy and nuclear. The civil aerospace business powers over 30 types of commercial aircraft and has a strong position in all sectors of the market: wide-body, narrow-body and corporate and regional aircraft. Over 13,000 engines are currently in service with 650 airlines, freight operators and lessors and 4,000 corporate operators. A Rolls-Royce powered aircraft takes off or lands every 2.5 seconds.

Rolls-Royce is the world's second largest provider of defence aero-engine products and services, with 18,000 engines in service for 160 customers in 103 countries. Our engines power aircraft in all sectors: transport, combat, reconnaissance, training, helicopters and unmanned aerial vehicles.

Rolls-Royce has a world-leading range of capabilities in the marine market, encompassing the design, supply and support of power and propulsion systems. We are leaders in the integration of technologically complex, mission critical systems for offshore oil and gas, merchant and naval vessels.

Rolls-Royce has more than 2,500 marine customers and has equipment installed on over 30,000 vessels worldwide, including those of 70 navies. The energy business supplies gas turbines, compressors and diesel power units to customers around the world. The business is a world leader in the supply of power for onshore and offshore oil and gas applications. Our developing civil nuclear capability has further strengthened our position in the power generation market.

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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
- Consulting Services
- Technology
- Airline Reservations
- Enterprise Operations

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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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SERVAIR is the leading French airline catering and cleaning company. SERVAIR offers airlines a range of services that are vital to the air transport sector and for the comfort of passengers. Its requirements, in terms of quality and know-how, have led to SERVAIR becoming a true driving force for its 120 customer companies, helping them to improve their commercial offers to passengers, while scrupulously adhering to the constraints of air transport.

Servair an international reference: Ranked 3rd in the world with its partners and subsidiaries, Servair has consolidated its international presence, operating in more than 60 stopovers and aiming at becoming the brand of reference in 4 continents. In order to help its customers on key stopovers, Servair has developed a strong and long-lasting partnership policy with Flying Food Group in the US, Air Chef in Italy, Sats and China Southern in China.

Servair, leader in Africa: Servair already enjoys a long experience in Africa. The first African unit was opened in 1987 in Dakar, Senegal. Today, Servair is affirming its position as Africa's leading caterer with a total of 16 units\* and 2500 employees. These units are built in a spirit of co-development with local partners and local providers committed themselves to produce the standards of quality associated with the Servair brand. Recently, Servair made the acquisition of NAS catering in Nairobi and Mombasa and opened new airlines catering units with local partners in Accra, Ghana and shortly in Brazzaville and Pointe Noire, Congo and a duty free outlet and snack bar at Conakry's International G'Bessia airport. New openings will be announced in 2012.

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SITA is the world's leading specialist in air transport communications and IT solutions. SITA delivers and manages business solutions for airline, airport, GDS, government and other customers over the world's most extensive network, which forms the communications backbone of the global air transport industry.

SITA's portfolio includes managed global communications, infrastructure and outsourcing services, as well as services for airline commercial management and passenger operations, flight operations, aircraft operations and air-to-ground communications, airport management and operations, baggage operations, transportation security and border management, cargo operations and more. With a customer service team of over 2,000 staff around the world, SITA invests significantly in achieving best-in-class customer service, providing integrated local and global support for both its communications and IT application services.

SITA has two main subsidiaries: OnAir, which is the leading provider of in-flight connectivity, and CHAMP Cargosystems, the world's only IT company dedicated solely to air cargo. SITA also operates two joint ventures providing services to the air transport community: Aviareto for aircraft asset management and CertiPath for secure electronic identity management.

SITA is one of the world's most international companies. Its global reach is based on local presence, with services for over 500 air transport industry members and 3,200 customers in over 200 countries and territories. Set up in 1949 with 11 member airlines, SITA today employs people of more than 140 nationalities, speaking over 70 different languages. SITA had consolidated revenues of US\$1.46 billion in 2010. For further information go to [www.sita.aero](http://www.sita.aero)

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Travelport is a broad-based business services company and a leading provider of critical transaction processing solutions and data 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 missioncritical 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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## > AFRAA Member Airline Two-Letter Codes

Afriqiyah Airways	8U	EgyptAir	MS
Air Algerie	AH	Ethiopian Airlines	ET
Air Botswana	BP	Interair	D6
Air Bukina	2J	Kenya Airways	KQ
Air Ivoire	VU	LAM Mozambique Airlines	TM
Air Madagascar	MD	Libyan Arab Airlines	LN
Air Malawi	QM	Precision Air	PW
Air Mali	I5	Royal Air Maroc	AT
Air Mauritius	MK	RwandAir	WB
Air Namibia	SW	South African Airways	SA
Air Nigeria	VK	South African Express	XZ
Air Seychelles	HM	Sudan Airways	SD
Air Tanzania	TC	TAAG Angola Airlines	DT
Air Zimbabwe	UM	Toumai Air Tchad	9D
ASKY Airlines	KP	Tunisair	TU
Ceiba Intercontinental	C2	Zambezi Airlines	ZJ

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## Appendix I

## &gt; AFRAA Member Airlines 2010 Performance

	AFRICA AIRWAYS	ALGERIE	MADAGASCAR	AIR MAURITIUS	AIR NIGERIA	AIR NAMIBIA	AIR SEYCHELLES	AIR TANZANIA	AIR ZIMBABWE	CEIBA	EGYPTAIR	ETHIOPIAN AIRLINES	KENYA AIRWAYS	LAM MOZAMBIQUE	LIBYAN AIRLINES	PRECISION AIR	ROYAL AIR MAROC	SOUTH AFRICAN AIRWAYS	SOUTH AFRICAN EXPRESS	SUDAN AIRWAYS	TAAG ANGOLA	TUNIS AIR
<b>1. TRAFFIC DATA</b>																						
Domestic Passengers (000)	28	1,296	289	104	576	32	165	74	53		2,731	443	547	373	221	405	724	3,499		108	540	4
Regional Passengers - within Africa (000)		226		465	373	254	76		119		1,070	1,363		182		262					164	226
Intercontinental Passengers (000)	727	2,024	239	699		129	179		44		5,717	1,542	2,525		860		5,369	3,141		382	308	3,469
Total Passengers Carried (000)	755	3,546	528	1,268	949	415	420	74	216	146	9,517	3,348	3,072	555	1,081	667	6,093	6,639		490	1,012	3,699
Domestic Freight Carried (000)		1,366	816	65		10		260			1,926	322		3,570				47,012		920	1,389	3,063
Regional Freight Carried (000)		347		10,226		1,016	2,757				15,963	33,943		661							3,143	1,051,713
Intercontinental Freight Carried (000)		11,192	3,631	20,896		6,004	3,781				111,547	117,278	83,994					132,618		15,745	7,431	8,983,787
Total Freight Carried (000)		13,475	4,447	31,187		7,028	6,538	260	3,170		123,036	151,543	83,994	4,231				179,630		16,665	11,983	10,038,563
Revenue Passenger-Kilometres - RPK (000)	1,968,088	4,635,408	1,243,860	6,335,193	546,136	1,478,697	1,559,192	56,898	1,113,772	21,518	20,395,217	11,651,754	8,071,000	647,704	1,479,526	318,685	11,886,002	21,208,459		883,864	2,707,729	5,401,973
Available Seat-Kilometres - ASK (000)	3,752,654	7,656,206	1,818,883	8,031,372	838,641	2,181,958	1,953,431	104,682	1,650,711	33,543	28,509,954	16,182,208	12,143,000	926,962	2,805,654	496,683	17,832,192	30,480,166		1,670,176	4,377,028	7,607,378
Passenger Load Factor - PLF (%)	52.45%	60.54%	71.70%	78.90%	65.00%	68.00%	80.00%	54.00%	57.10%	64.00%	72.00%	72.01%	66.50%	69.90%	52.70%	64.00%	65.50%	69.60%	61.00%	50.90%	62.00%	71.00%
Passenger-Tonne-Kilometres - PTK (000)	196,609	417,187	111,956	572,140		788,427	163,715	5,121			2,044,772	1,443,869		58,425	109,644		1,051,920	1,884,179		84,560	243,866	416,044
Freight & Mail Tonne-Kilometres - FTK (000)		4,033	24,008	191,335		130,291	36,493	210			419,522	743,438		4,953	136		64,376	1,012,668		32,345	55,937	162,770
Revenue Tonne-Kilometres - RTK (000)	196,609	421,220	135,964	763,475		274,100	200,208	5,364			2,464,295	2,187,307		63,379	109,780	31,032	1,116,296	2,896,847		116,905	289,832	526,343
Available Tonne-Kilometres - ATK (000)	375,265	686,018	252,355	1,206,127		404,461	296,127	16,609			4,277,150	3,544,724		103,812	251,150			4,888,693		429,712	811,806	814,689
Weight Load Factor - WLF (%)	52.40%	60.52%	53.70%	63.30%		68.00%	68.00%	33.00%			58.00%	61.71%		61.10%	43.70%			59.20%		37.63%	37.00%	64.60%
<b>2. EMPLOYEES DATA</b>																						
Pilots		429		155	74	84	78	24	48	22	776	333	338	26		69		790			127	336
Engineers		2,586		-	94	5	126	39	177	16	4,591	1,089	540	64		90		2,914			28	881
Cabin Crew		958		493	121	124	170	35	88	27	2,104	659	776	88		100		1,731			403	750
Traffic/Marketing		3,190		822	119		69	30	372	33	2,717	1,412	421	249		75		581			482	994
Others		2,329		864	427	356	447	47	669	48	19,097	2,212	2,212	283		331		2,867			2,233	950
Total No. of Employees		9,502	1,358	2,334	835	569	890	175	1,354	146	29,285	5,705	4,307	710	2,030	665	4,181	8,883			3,253	3,911
<b>4. DESTINATIONS SERVED</b>																						
Domestic - within the country		31		1	9	6	8	6	2	2	8	17		10	10	10					11	0
Intra-Africa - within Africa		11	5	7	9	6	2	0	3	9	17	39		4	10	3					12	9
Intercontinental - Africa to other Regions		31	3	16		1	5	0	3		43	25			9						6	36
New Destinations (all markets)		-		1	18	1		0	0		3	4									0	2
<b>5. FLEET IN OPERATION</b>																						
	9	39	11	12	10	10	5	2	6	3	73	50	30	6	16	10	54	49	23	12	12	31

Source: AFRAA

## Appendix II

## &gt; AFRAA Member Airlines Fleet – 2010

AIRLINE		FLEET TYPE														Totals															
A300	A310	A319/ 320/321	A330	A340	B777	B767	B757	B747	B737-200	B737- 34/500	B737- 6/7/7/8/90	B727	MD-11	MD-82/ 83	MD-87	CRJ 200	CRJ 700	CRJ 900	ERJ-170 /175/ 190/195	BAe 146-100/ 200	F28	F50	Dash-8	ATR 42	ATR 72	DHC-6	Beech 1900C/D	Saab 340B	Xian MA60		
8U		6	3						1		18																				9
AH			5			3																			12						39
BP																									3	2					5
2J															1	2	1														4
VU		1								3																					4
MD						2				2														2	2	3					11
QM														1	3													1			5
15									1	2														1							4
MK		2	2	6																					2						12
SW				2						2																		4			8
VK										8								2													10
HM						5																									5
TC																								2							2
UM						2			3																						6
KP											3													1							4
C2																									2	2					4
MS	4	17	8	3	9					4	16									12											73
ET					2	11	10	2			10		2																		50
D6						1			2			2																			5
KQ					4	7				5	9								5												30
TM									2										2					2							6
LN	2		4																8					2							16
PW										1																					10
WB										2							2									5					5
AT		4				5	1	1		12	27													1					4		54
SA		11		21							17																				49
XZ																	13	5						9							27
SD	2	1	2							3																					12
DT					3			2	3		4																				12
9D										3																					3
TU	3		17							4	7																				31
ZJ										3																					3
Totals	11	1	64	18	32	18	36	11	5	12	54	111	2	2	2	5	16	5	8	21	0	0	9	23	14	29	3	5	0	1	518

\* Air Algérie also has one Lockheed C-130

Source: AFRAA

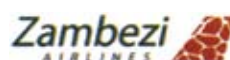
# > AFRAA Member Airlines Commercial Partnership – 2010

Appendix III

	AFRIQIAH AIRWAYS	AIR ALGERIE	AIR BOTSWANA	AIR BURKINA FASO	AIR CÔTE D'IVOIRE	AIR MADAGASCAR	AIR MALAWI	AIR MALI	AIR MAURITIUS	AIR NAMIBIA	AIR NIGERIA	AIR SEYCHELLES	AIR ZIMBABWE	ASKY AIRLINES	EGYPTAIR	ETHIOPIAN AIRLINES	INTERIM	KENYA AIRWAYS	LMV MOZAMBIQUE AIRLINES	LEVIAN AIRLINES	PRECISION AIR	ROYAL AIR MAROC	RWANDAIR	SOUTH AFRICAN AIRWAYS	SOUTH AFRICAN EXPRESS	SUDAN AIRWAYS	TAAZ ANGOLA AIRLINES	TOUAMA AIR TCHAD	TUNISAIR	ZAMBIA AIRLINES	Total
8U																															3
AH																															2
BP																															1
2J																															4
VU																															1
MD																															0
QM																															1
15																															2
MK																															3
SW																															2
VK																															11
HM																															0
UM																															0
KP																															1
MS																															5
ET																															6
D6																															1
KQ																															8
TM																															6
LN																															2
PW																															2
AT																															3
WB																															4
SA																															8
XZ																															3
SD																															0
DT																															5
9D																															0
TU																															6
ZJ																															0
Total	3	2	1	4	1	0	1	2	3	2	11	0	0	1	5	6	1	8	6	2	2	3	3	4	8	3	0	5	0	6	0

Source: AFRAA

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