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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.
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’s (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)

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

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

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

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

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 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 9: Regional Passenger Market Share – to/from Africa

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

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

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

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.
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.

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.
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

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

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.
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.

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.
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

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

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

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.
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

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

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

Figure 23: World Commercial Passenger Airline Fleet Composition
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

![Figure 24: Boeing 20 Year Forecast for Africa](source: Boeing Current Market Outlook)

Figure 25: Embraer 20 Year Aircraft Forecast for Africa

![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

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
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.

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.
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

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

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RTK/employee</td>
<td>144,300</td>
</tr>
<tr>
<td>Number of passengers/employee</td>
<td>555</td>
</tr>
<tr>
<td>Employee/aircraft</td>
<td>179</td>
</tr>
<tr>
<td>Revenue/employee</td>
<td>US$117,300</td>
</tr>
<tr>
<td>Operating profit/employee</td>
<td>US$731</td>
</tr>
</tbody>
</table>

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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Pilots</td>
<td>4,258</td>
</tr>
<tr>
<td>No. of Engineers</td>
<td>23,240</td>
</tr>
<tr>
<td>Pilots needed by 2030</td>
<td>55,932</td>
</tr>
<tr>
<td>Engineers needed by 2030</td>
<td>58,635</td>
</tr>
<tr>
<td>Annual training capacity - Pilots</td>
<td>1,010</td>
</tr>
<tr>
<td>Annual training capacity - Engineers</td>
<td>600</td>
</tr>
<tr>
<td>Annual Pilots shortfall</td>
<td>2,804</td>
</tr>
<tr>
<td>Annual Maintenance personnel shortfall</td>
<td>3,169</td>
</tr>
</tbody>
</table>

Source: ICAO Global & Regional 20 Year Forecasts

Figure 32: Africa Pilots and Maintenance Personnel Requirements

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.

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

<table>
<thead>
<tr>
<th>Airline</th>
<th>Country of Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Afriqiyah Airways</td>
</tr>
<tr>
<td>2</td>
<td>Air Algerie</td>
</tr>
<tr>
<td>3</td>
<td>Air Madagascar</td>
</tr>
<tr>
<td>4</td>
<td>Air Malawi</td>
</tr>
<tr>
<td>5</td>
<td>Air Mauritius</td>
</tr>
<tr>
<td>6</td>
<td>Air Namibia</td>
</tr>
<tr>
<td>7</td>
<td>Air Nigeria</td>
</tr>
<tr>
<td>8</td>
<td>Air Seychelles</td>
</tr>
<tr>
<td>9</td>
<td>Air Zimbabwe</td>
</tr>
<tr>
<td>10</td>
<td>EgyptAir</td>
</tr>
<tr>
<td>11</td>
<td>Ethiopian Airlines</td>
</tr>
<tr>
<td>12</td>
<td>Interair South Africa</td>
</tr>
<tr>
<td>13</td>
<td>Kenya Airways</td>
</tr>
<tr>
<td>14</td>
<td>LAM Mozambique Airlines</td>
</tr>
<tr>
<td>15</td>
<td>Libyan Airlines</td>
</tr>
<tr>
<td>16</td>
<td>Precision Air Services</td>
</tr>
<tr>
<td>17</td>
<td>Royal Air Maroc</td>
</tr>
<tr>
<td>18</td>
<td>Tunisair</td>
</tr>
<tr>
<td>19</td>
<td>South African Airways</td>
</tr>
<tr>
<td>20</td>
<td>South African Express Airways</td>
</tr>
<tr>
<td>21</td>
<td>Sudan Airways</td>
</tr>
<tr>
<td>22</td>
<td>TAAG Angola Airlines</td>
</tr>
</tbody>
</table>
Table 11: Non AFRAA Member Airlines on IOSA Registry

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

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

<table>
<thead>
<tr>
<th>Course</th>
<th>Venue and host</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Airside Safety Awareness</td>
<td>Kigali, Rwanda, hosted by RwandAir</td>
<td>4 – 6 July 2010</td>
</tr>
<tr>
<td>3. Airside Safety Awareness</td>
<td>Kigali, Rwanda, hosted by RwandAir</td>
<td>7 – 9 July 2010</td>
</tr>
<tr>
<td>4. Airline Maintenance Cost Management</td>
<td>Port Louis, Mauritius, hosted by Air Mauritius</td>
<td>20 – 24 September 2010</td>
</tr>
<tr>
<td>5. Senior Management of Civil Aviation</td>
<td>Nairobi, Kenya</td>
<td>22 – 26 November, 2010</td>
</tr>
</tbody>
</table>

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Boeing Current Market Outlook, 2011-2030
Embraer Commercial Aircraft Market Outlook, 2011-2030
IATA World Air Transport Statistics (WATS) 55th Edition
IMF Global Report
IMF, World Economic Outlook
UNWTO World Tourism Barometer, February 2011
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> Section Seven: AFRAA Member Airlines

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www.afriqiyah.aero  
AFRAA MEMBERSHIP  
Became member in 2002  
Established in 2001  
OWNERSHIP STRUCTURE  
Government: 100%  
COMMERCIAL PARTNERSHIP  
Austrian  
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  

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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 China  
Iberia  
Middle East Airlines  
Tunisair  
Turkish Airlines  
DESTINATIONS SERVED  
Regional 31  
Intra-Africa 11  
International 31  
EMPLOYEES  
8898  
FLEET  
Airbus 330-200 5  
ATR72-500 12  
Boeing737-800 17  
Boeing 737-600 5  
Boeing 767-300 3  
Boeing 737-200 1  
Cargo  
Lockheed L100-130 1  

**AIR BOTSWANA**

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 B3 1
- McDonnell Douglas B7 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’Indépendence, 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
<table>
<thead>
<tr>
<th>AIRLINE</th>
<th>Chief Executive Officer</th>
<th>ADDRESS</th>
<th>AFRAA MEMBERSHIP</th>
<th>OWNERSHIP STRUCTURE</th>
<th>COMMERCIAL PARTNERSHIP</th>
<th>DESTINATIONS SERVED</th>
<th>EMPLOYEES</th>
<th>FLEET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>Mr. Patrick Chilambe</td>
<td>P.O. Box 84, Blantyre, Malawi</td>
<td>Became member in 1968</td>
<td>Government: 100%</td>
<td>Kenya Airways, British Airways, Hahn Air, Air Tanzania, Qatar Airways, South African Airways, British Airways</td>
<td>Regional: 2, Intra-Africa: 6, Intercontinental: 1</td>
<td>240</td>
<td>ATR42-320 1, Boeing 737-200 (leased) 1, Boeing 737-300 1, Boeing 737-500 1</td>
</tr>
<tr>
<td>Mali</td>
<td>Mr. Abderahmane Berthe</td>
<td>Immeuble TOMOTA – Avenue Cheick Zayed BPE 2286 Hamdallaye, Bamako, MALI</td>
<td>Became member in 2008</td>
<td>Government: 51%</td>
<td>Air Burkina, Air Uganda, Tunisair</td>
<td>Domestic: 3, Regional: 12, International: 2</td>
<td>213</td>
<td>Boeing 737-800 1, McDonnell Douglas 83 1, McDonnell Douglas 87 2, Saab 340A 1</td>
</tr>
<tr>
<td>Mauritius</td>
<td>Mr. André Viljoen</td>
<td>5, President John Kennedy Avenue, Port Louis, Mauritius</td>
<td>Became member in 1985</td>
<td>Government: 44.42%</td>
<td>Malaysia Airlines, Air India, Emirates, Air France, Air Madagascar, Kenya Airways</td>
<td>Regional: 4, Intercontinental: 10</td>
<td>2402</td>
<td>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</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>AFRAA Membership</td>
<td>Ownership Structure</td>
<td>Commercial Partnership</td>
<td>Destinations Served</td>
<td>Employees</td>
<td>Fleet</td>
<td>Fleet on Order</td>
</tr>
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</tr>
<tr>
<td>Air Namibia</td>
<td>Air Namibia (Pty) Ltd, P.O. Box 731, Windhoek, Namibia</td>
<td>Became member in 2000</td>
<td>Government: 100%</td>
<td>TAAG Angola</td>
<td>Domestic 6, Regional 6, Intercontinental 2</td>
<td>571</td>
<td>Airbus 319-100 3, Airbus 340-300 2, Beechcraft 1900 4, Boeing 737-200 1, Boeing 737-500 2</td>
<td></td>
</tr>
<tr>
<td>Air Seychelles</td>
<td>Air Seychelles, Seychelles International Airport, P.O. Box 386, Victoria, Mahé, Seychelles</td>
<td>Became member in 1993</td>
<td>Government: 100%</td>
<td>Air France</td>
<td>Domestic 8, Intra-Africa 3, Intercontinental 4</td>
<td>890</td>
<td>Boeing 767-200 ER 2, Boeing 767-300 ER 3, DHC-6 Twin Otter 3, Shorts 360-300 1</td>
<td>Boeing 787 Dreamliners 2</td>
</tr>
</tbody>
</table>
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

---

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

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

---

AFRAA MEMBERSHIP
Became member in 2010
Established in 2009

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 6

EMPLOYEES
175

FLEET
Bombardier Dash 8- Q300 1
AFRAA MEMBERSHIP
Became member in 2011

OWNERSHIP STRUCTURE
N/A

COMMERCIAL PARTNERSHIP
Air France

DESTINATIONS SERVED
Domestic 2
Itra-Africa 9

EMPLOYEES
146

FLEET
ATR 42-500 1
ATR 72-500 2
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

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  
Airbus 350-800 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  

FLEET ON ORDER  
Boeing 737-700 2  
Boeing 738-800 6  
Boeing 747-400 1  
Boeing 747-800 2  
Douglas 7F (cargo) 1  

Mr. Driss Benhima  
Chief Executive Officer  

ADDRESS  
Aeroport 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. Driss Benhima  
Chief Executive Officer  

ADDRESS  
Aeroport 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. Driss Benhima  
Chief Executive Officer  

ADDRESS  
Aeroport 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. Driss Benhima  
Chief Executive Officer  

ADDRESS  
Aeroport 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
AFRICA AIRLINES ASSOCIATION
Association des Compagnies Aériennes Africaines

2011 ANNUAL REPORT

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

Mrs. Siza Mzmela
Chief Executive Officer

ADDRESS
Floor 5, Block G, Airways Park, OR Tambo International-Johannesburg, South Africa
Tel: +27 11 978 9008
Fax: +27 11 978 9456
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

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
Mr. Ali ElOobaid Fad Almoula  
Managing Director

ADDRESS
P.O. Box 253, 161, Block 10, Obeid-Khatim Street, Rayadh, 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

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

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

Mr. Deby Zakaria  
Chief Executive Officer

ADDRESS
BP 1112 N’Djamena, Tchad
Tel: +235 252 4108
Fax: +235 252 4106
www.tumaiair.com

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
Boulevard 7 Novembre 1987, 2035 Tunis Carthage, Tunisia
Tel: +216 7083 7000
Fax: +216 7083 6100
www.tunisair.com

AFRAA MEMBERSHIP
Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE
Government: 74%
Others: 26%

COMMERCIAL PARTNERSHIP
Saudi Arabian Airlines
Middle East Airlines
Mauritania Airways
Hahn Air Lines
Air Mali
Emirates
Meridiana fly
Turkish Airlines
Olympic Air
Libyan Airlines
Etihad Airways
Jat Airways
Compagnie Aérienne Corse Mediterranée
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

ADDRESS
Petroda House, 2nd Floor, Great East road, Rhodes Park, Lusaka, Zambia
Fax: +260 211 257 631
www.flyzambezi.com

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

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)

Air Algerie Technics
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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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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:

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- 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.
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- Supporting customer airlines as Purchasing Agents.
- Providing financing services to customer airlines with flexible payment terms.

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

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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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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.

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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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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.

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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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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.

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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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Take a look on the Innovata website www.innovata-llc.com/mapping/mapping.html and view samples of the dynamic and interactive route network maps, showing direct routes, online and interline connections, dynamically plotted and displayed for users searching and querying, along with a comprehensive timetable display, all of which can be configured for any airline or airport. Headquartered in Atlanta, USA, with regional offices in UK and Singapore, Innovata serves over 200 customers, in 52 countries. www.innovata-llc.com

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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.

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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
IT that makes your life easier

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.

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 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 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.

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.

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Product and Services
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- 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

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Contact Person:
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Regional Vice President,
North Europe & Sub-Sahara
Africa Region
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Email: rob.watkins@sita.aero

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

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

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

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Fax: +27 (0) 86 527 2835
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Contact Person:
and
Mr. Samson MUNDA
Sales Director, Africa
Tel: +2711 517-7000
Fax: +2711807-8752
Email: sam.munda@sita.aero
> AFRAA Member Airline Two-Letter Codes

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<thead>
<tr>
<th>African Airlines Association Secretariat Team</th>
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<tr>
<td><strong>Senior Management</strong></td>
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<tr>
<td>Dr. Elijah Chingosho : Secretary General</td>
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<tr>
<td>Mr. Tewodros Tamrat : Director, Government, Industry Affairs</td>
</tr>
<tr>
<td>Mr. Raphael Kuuchi : Commercial Director</td>
</tr>
<tr>
<td>Mrs. Juliet Indetie : Manager, Corporate Finance and Administration</td>
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<td>Ms. Roselyn Mbugua</td>
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<td>Ms. Elin Bukhala</td>
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<td>Mr. Amos Lusava</td>
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<td>Mr. Francis Irungu Kimani</td>
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<td>Mr. David Jesse Njeru</td>
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<td>Mr. Ephrem Kamanzi</td>
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<td>Mr. Akpaca Servais</td>
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**Designed and Produced by:**

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Fax: +254 (20) 4448818
Email: creative@camerapix.co.ke / customercare@camerapix.co.ke
### 1. TRAFFIC DATA

#### Domestic Data

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#### Regional Data

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* Air Algerie also has one Lockheed C-130

Source: AFRAA
## AFRAA Member Airlines Commercial Partnership – 2010

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Source: AFRAA
CAN TECHNOLOGY, PROFITABILITY AND FLEXIBILITY GO TOGETHER?

ATR aircraft offer the lowest greenhouse gas emissions, best technical solutions, and unique commonality while remaining the most cost efficient technology. Now, say Yes to ATR aircraft and choose the best solution for short haul flights.

Latest Generation Glass Cockpit
Compliant with unprepared and very short runways (<3000m)
Designed for economics, 40% less on fuel bills

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