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Foreword



African economies are increasingly being liberalised and are growing at above world average rates. Economic growth for the region in 2014 is forecast at 5.2% up from 4.7% in 2013, with a third of countries achieving 6% growth or more, according to the World Bank. Regional vibrancy has attracted attention. Foreign direct investment continent-wide

is expected to reach US\$56 billion in 2015 from US\$38 billion in 2012.

To facilitate the growth and development of African aviation, the Yamoussoukro Decision (YD) of 1999 is the instrument which relates to the liberalization of access to air transport markets. The objective of YD was to harmonize air transport policies and free exchange of traffic rights in the Intra-African market.

The various African stakeholders including the African Union (AU) recognize that the Yamoussoukro Decision (YD) is the only policy that will contribute to the integration of African air transport markets and that the implementation of the Decision is well overdue. It is also recognized that there is need for adequate aviation infrastructure mainly at airports to cope with the growing airline traffic including the use of the latest information communication technologies.

Among the reasons often cited for lack of full implementation of the YD are lack of legal and strong institutional framework, lack of know-how and protection of national airlines. To overcome these challenges, the regulatory texts and legal institutional framework are scheduled to be finalised this year. The Heads of State are expected to endorse a single African aviation market at their Summit early next year and it is anticipated that the continent will become a single air transport market and void all bilateral air services agreements by early 2016.

There will concurrently be need for capacity building and empowerment of AU Commission and the African Civil Aviation Commission (AFCAC) to oversee and enforce the implementation of an African single market. Some airlines and key States are being mobilized to champion the establishment of the single air transport market. Guidelines will soon be formulated for negotiation of air services agreements with third parties and enable the AU to carry out block to block negotiation in view of the African single market.

Even though the continent is yet to be fully liberalised, African carriers have opportunities to enter into cooperative arrangements to generate greater revenue, to reduce unit costs through economies of scale, and to minimize or share risks by strengthening their market position. Such cooperation can be in the form of either tactical or strategic alliances. Tactical alliances or marketing or commercial alliances entail entering bilateral agreements between airlines, which by joining efforts in a limited number of routes gain access to the other airline's network. Tactical alliances include airlines cooperating at the marketing level through interline/pro-rating agreements and code sharing. Strategic alliances such as the equity participation of Ethiopian Airlines in ASKY

and Malawian Airlines or that between Kenya Airways and PrecisionAir have proved to be win-win arrangements which are highly encouraged.

Air transport connectivity is critical for African growth and development, supporting some 6.9 million jobs and US\$80.5 billion in economic activity, according to studies by ATAG. Of the 6.9 million jobs, 428,000 are within the industry itself and the rest are supported as part of the industry's supply chain and the significant role air transport plays in the tourism sector.

Industry costs in Africa are way above world average mainly due to high taxes, charges and levies on passengers, fuel and other services. These need to be brought down to world average rates. Also the average fleet size of African airlines at around 3 to a dozen aircraft is too small to benefit from economies of scale. It is necessary for African airlines to consolidate and become viable operating entities which can attract financing at competitive rates to modernise their fleets as well as attracting highly competent and skilled people at all levels.

In Africa, fuel prices on average are 21% higher than the world average and the pricing system can be opaque. At some stations in Africa, for example, fuel prices can be twice as high as the world average, which obviously has consequences for competition. Higher costs translate into higher prices, which in turn stifle demand. AFRAA has teamed up with IATA to lobby governments for reduction of these costs.

Infrastructure at many African airports is not coping with the growing traffic although there are some notable exceptions such as in South Africa, Egypt and the Kingdom of Morocco. Some of the major hubs in Africa are barely coping with increasing traffic especially for transit passengers. Airport hubs need to be attractive, comfortable and user friendly such as what we witness in the Middle East (for example, Dubai, Abu Dhabi and Qatar), in Singapore (the Changi Airport) and others in Europe such as in Paris and Istanbul.

African airlines are expected to make a profit of US\$100 million in 2014 compared with a loss of US\$100 million in 2013, according to IATA. Africa faces many unique challenges, but as African economies take off, breaking even or making profits of around US\$100 million will not be enough to generate the investments needed for African aviation to seize the emerging opportunities and play the important role of stimulating development across the continent.

This report provides a comprehensive review of the state of the African air transport industry in 2013 and takes a look at the prospects for the future. It gives a snapshot of what every executive, investor and supplier needs to know about the African airline industry. Also contained in the report are list and contacts of aviation training institutions, maintenance, repair and overhaul (MRO) centres as well as summaries of AFRAA partners. The airlines biography section will help readers get important facts about all member airlines of AFRAA.



DR. ELIJAH CHINGOSHO
Secretary General

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Appreciation

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

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

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Section One

Economic Performance

1.1 Global Economic Performance

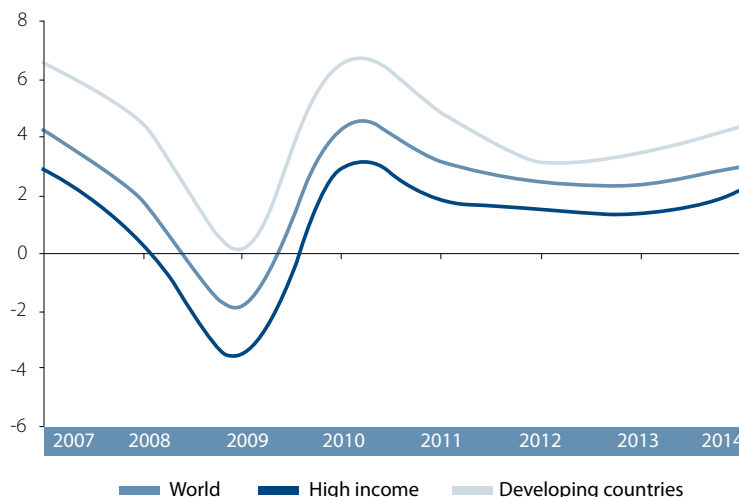
The global economy grew at 3% in 2013 and is projected to strengthen to 3.6% in 2014 and 3.9% in 2015 according to IMF. Global growth picked up in the second half of 2013, averaging 3.5% from the 2.5% recorded during the first half of the year. Much of the pickup is expected to come from advanced economies, especially the United States.

The Economic Commission for Africa reported that although growth in emerging market economies as a whole is projected to pick up slightly in 2014, it is likely to remain relatively weak in some key trading partners of the region, such as Brazil and India, under the combined effect of policy tightening, reduced global liquidity, and structural bottlenecks, with adverse effects on commodity prices and demand for major African exports.

Mixed Growth Trends Across Regions

The World Bank estimated that low and middle-income economies grew by 4.9% in 2013, and projected them to expand to 5.3% in 2014. Growth in high-income economies is projected to grow at 2.2% in 2014 and developing countries are estimated to have grown at an overall pace of 4.8% in 2013, compared to 4.9% in 2012 (World Bank, 2014).

Figure 1.1 Global GDP growth: growth is picking up, with much of the impetus coming from the high-income countries



Source: World Bank

The Economic Commission for Africa estimated that **Africa** grew at 4.0% in 2013, slightly lower than the average for developing countries. Africa was surpassed only by East and South Asia, which grew at 5.6% in 2013. According to the Economic Commission for Africa, Africa's expansion was underpinned by sustained relatively high commodity prices, increased domestic demand (due especially to higher private investment in infrastructure and energy) and improved economic governance and management in African countries.

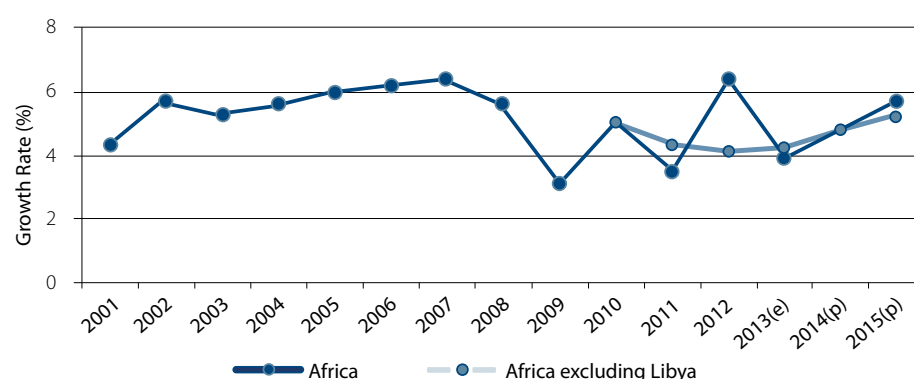
Global growth and world trade are expected to improve gradually with world output growth accelerating in 2014 and 2015 to around 3.5% and around 4% respectively (from around 3% in 2013). World trade volume growth is projected to recover gradually from around 3% in 2013 to close to 5% and 5.5% to 6% in 2014 and 2015 respectively. The assumed recovery of the global economy and of world trade will benefit Africa's exporters. With these projections, growth of world output and world trade continue to remain lower than before the global financial crisis. From 2004 to 2007, annual growth of world output and world trade had been around 5% and around 9% respectively. The main reasons for the recently relatively low growth were the continuing crisis in the euro area, sluggish growth in other advanced economies, notably the United States and Japan, and more subdued growth in emerging countries such as China, India and Brazil. While the ultra-loose monetary policies in the United States, Europe and Japan helped to stabilise financial markets and prevented a backsliding into a new recession, they were unable to lift the economies to a sustained growth path with adequate job creation.

1.2 Africa's Economic Performance

Africa's Growth is Expected to Pick Up

African economies showed a remarkable resilience during the 2009 global recession and also during the past three years of weak global growth. Nonetheless, the impact of the flagging world economy has taken a toll on Africa's growth. In some countries this has been aggravated by political conflicts and social tensions. As a result, Africa's average GDP growth has remained lower than before the global recession. AfDB, OECD and UNDP reported that in 2013 growth amounted to 3.9% and, excluding the effect of the fall in Libya's oil production, it was 4.2% and similar to that in 2012. Africa's growth is projected to accelerate to 4.8% in 2014 and 5.7% in 2015. If the effect of the assumed rebound in Libya's oil production in 2015 is excluded, Africa's growth is estimated at 5.2% in 2015 (Figure 1.2), Africa's underlying growth will then have returned to the earlier path before the 2009 global recession (AfDB et al., 2014). An assumption underlying this overall favourable outlook is that the world economy will strengthen and that political and social stability in those African countries, which have been affected by conflicts, will improve.

Figure 1.2 Africa's Economic Growth



(e) estimates, (p) projections

Source: AfDB

Growth Remains Robust in Sub-Saharan Africa, Mainly Driven by Investment

According to IMF, growth in 2013 remained robust in most of sub-Saharan Africa, attaining 4.9% in 2013, the same level as in 2012 (Table 1.1). This performance was mainly driven by domestic demand, supported by continued strong credit growth to the private sector in some countries. A major contribution to growth derived from buoyant public and private investment in mining activities, infrastructure for transport and communication, and energy production. These investments were accompanied by a general expansion in trade, communications, and other services, and several countries benefited also from improved agricultural production.

Table 1.1 Sub-Saharan Africa: Real GDP Growth (percent change)

	2004–08	2009	2010	2011	2012	2013	2014	2015
Sub-Saharan Africa excluding South Africa	7.2	4.3	6.7	6.3	5.8	5.9	6.5	6.5
Sub-Saharan Africa (Total)	6.4	2.6	5.6	5.5	4.9	4.9	5.4	5.5
of which:								
Oil-exporting countries	8.4	4.8	6.7	6.1	5.2	5.7	6.6	6.5
Middle-income countries ¹	5.1	-0.8	4.1	4.9	3.4	2.7	3.0	3.3
of which: South Africa	4.9	-1.5	3.1	3.6	2.5	1.9	2.3	2.7
Low-income countries ¹	7.3	5.1	7.0	6.5	6.2	6.8	6.9	6.8
Fragile States	2.7	3.3	4.8	3.3	7.5	6.0	7.1	7.1
Memorandum item:								
World economic growth	4.6	-0.4	5.2	3.9	3.2	.0	3.6	3.9
Sub-Saharan Africa resource-intensive countries ²	6.4	2.0	5.4	5.5	4.8	4.1	4.9	5.0
Sub-Saharan Africa frontier and emerging market economies ³	5.8	2.5	5.4	5.5	4.8	4.4	5.0	5.2

Source: IMF, World Economic Outlook 2014

1. Excludes fragile states.

2. Includes Angola, Botswana, Cameroon, Central African Republic, Chad, Democratic Republic of Congo, Republic of Congo, Equatorial Guinea, Gabon, Ghana, Guinea, Mali, Namibia, Niger, Nigeria, Sierra Leone, South Africa, Tanzania, Zambia, and Zimbabwe.

3. Includes Côte d'Ivoire, Ghana, Kenya, Mauritius, Nigeria, Rwanda, Senegal, South Africa, Tanzania, Uganda, and Zimbabwe.

External demand provided a relatively weaker contribution to growth in the region, as growth in the rest of the world and commodity prices remained relatively subdued during most of the year. World Bank estimates indicate that in South Africa, growth was slower at 1.9%, hurt by structural bottlenecks, tense labor relations, low investor confidence, and weak external demand. Excluding South Africa, average output growth for the rest of the region was 6.1%, second only to developing Southeast Asia and Pacific at 7.2% and well above the global GDP growth rate at 2.4%.

1.3 Africa's Performance by Region

Growth Performance Widely Varied, West and East Africa Remain the Fastest Growing Regions

Varied economic growth across the continent reflects the differences in stages of development, availability of natural resources, weather conditions, and political and social stability.

AfDB estimated that **West Africa** grew by 6.7%, a decrease of 0.2% on the previous year and is expected to continue its rapid growth. AfDB and the Economic Commission for Africa further reported that Africa's growth is likely to accelerate to above 7% in 2014 and 2015. Growth in the region is widespread with most countries achieving growth of 6% or more. In Nigeria growth is mainly driven by non-oil sectors, such as agriculture, trade, information and communications technology (ICT) and other services. Ghana's growth will remain robust, boosted by oil and gas production and increased private and public investment. Côte d'Ivoire is also expected to remain on a high growth path. Growth is supported by favourable developments in agriculture, manufacturing and services. Sierra Leone is currently the fastest growing country in the region with growth mainly driven by iron and ore exports although other sectors, in particular agriculture and construction, also contribute. In Mali, the economy rebounded in 2013 after the backlash in 2012 caused by the political and security crisis and growth is expected to improve further in 2014 and 2015.

AfDB and the Economic Commission for Africa report that West Africa will continue to demonstrate Africa's best prospects for growth in the medium term. Average growth is projected at about 7% in 2014 and 2015, respectively. This will mainly be due to the rich natural resource endowment and the reaping of the peace dividend, including higher tourism flows. Structural reforms and the consolidation of peace will help ensure regional stability and high growth.

Table 1.2 Growth by regions (real GDP growth in percentage)

	2012	2013 (e)	2014 (p)	2015 (p)
Africa	6.4	3.9	4.8	5.7
Central Africa	5.8	3.7	6.2	5.7
East Africa	3.9	6.2	6.0	6.2
North Africa	9.4	1.9	3.1	5.5
Southern Africa	3.3	3.0	4.0	4.4
West Africa	6.9	6.7	7.2	7.1
Memorandum items:				
<i>Africa excl. Libya</i>	4.1	4.2	4.8	5.2
<i>Sub-Saharan Africa (SSA)</i>	4.9	5.0	5.8	5.9
<i>SSA excl. South Africa</i>	5.8	6.1	6.8	6.9

Note: (e) estimates; (p) projections.

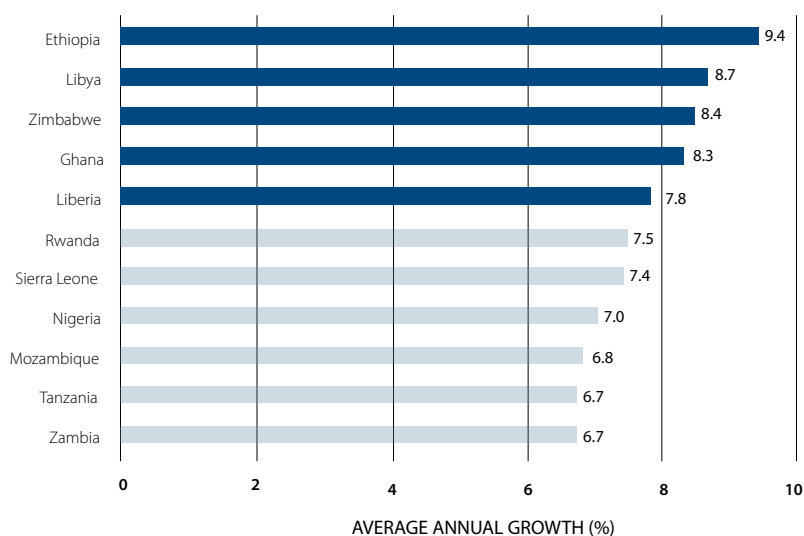
Source: Statistics Department, African Development Bank

AfDB estimated that **East Africa** grew by 6.2% on average, about 2% higher than 2012. The African Economic Outlook report indicated that Ethiopia, Rwanda, Tanzania and Uganda are likely to achieve growth of between 6.5% and 7.5% in 2014/15. The main sources of growth are agriculture, industry and services. In Kenya growth is expected to accelerate from around 5% in 2013 to a little under 6% in 2014 and 2015, driven by exports and private investment and, on the supply side, by service sectors including finance and ICT and by the construction sector. Growth in Sudan continues to remain subdued. In South Sudan growth remains volatile due to the disruptions and resumptions of oil production, and prospects are highly uncertain due to ongoing conflicts. In Somalia, large support from donors has helped secure progress in peace and state building and in spite of the long conflict the country has a dynamic private sector in the more stable regions.

AfDB, OECD and UNDP reported that **Central Africa** grew by 3.7% compared to about 6% in 2012. By the end of 2013, prospects had worsened significantly as armed conflict ensued in the Central African Republic. Growth prospects are favourable for Chad where new oilfields come on stream, in the DRC, driven mainly by mining, agriculture and infrastructure investment, and in the Republic of Congo and in Gabon where the non-oil sectors continue to grow faster than the oil sector. In Cameroon growth is broad-based, with oil and gas production, construction and services as the main drivers together with agriculture, which has recovered from the flood damage of 2012. But the economy of the Central African Republic is heavily affected by the political and security conflict, and prospects remain uncertain. In Equatorial Guinea, GDP growth was negative in 2013.

In **North Africa**, the African Economic Outlook report estimated 2013 growth at 1.9%, a decline of more than 8% points compared with 2012, owing to social unrest in some countries. North Africa's economic development continues to be heavily affected by the aftermath of the political upheavals in Tunisia, Libya and Egypt. As the region has also close trade links with Europe it has also been adversely affected by the crisis in the Euro area. In Egypt, political uncertainty increased again in 2013 and growth continued to remain weak, at around 2% and is expected to remain weak in 2014. AfDB estimates that North Africa will grow by 3.1% in 2014 and by 5.5% in 2015. However, political developments in the region will be a key determining factor.

Figure 1.3 African Countries among top 11 performers from 2009-2013



Source: Economic Report on Africa (2014)

Southern Africa's growth was reported by AfDB to have averaged 3.0% in 2013, indicating little change from 2012. However, the growth performance was uneven. Angola, Mozambique and Zambia recorded the highest growth of between 5% and 7% in 2013 and are projected further to accelerate to between 7% and 9% in 2014/15. Growth in these countries is boosted by investment in infrastructure and investment in extractive industries. In South Africa, labour unrest and the weak global environment have depressed growth. The exchange rate depreciated during 2013 and again at the beginning of 2014. In Southern Africa, the African Economic Outlook projected South Africa to grow at 2.7% and 3% in 2014 and 2015, respectively. The relatively modest growth in South Africa is also depressing growth in sub-Saharan Africa.

The impact of South Africa's growth on the region will be marked during the next cycle of global recovery. Other countries in the region, notably Zambia, are expected to post higher growth rates, above 7%. In particular, Zimbabwe is expected to return to more normal capacities, growing at around 4%, following serious reform attempts in the past few years. Growth in Mozambique is expected to rise substantially in the medium term, to above 8%. Botswana, Lesotho and Swaziland are expected to post growth rates of between 2 and 6%.

Inflation

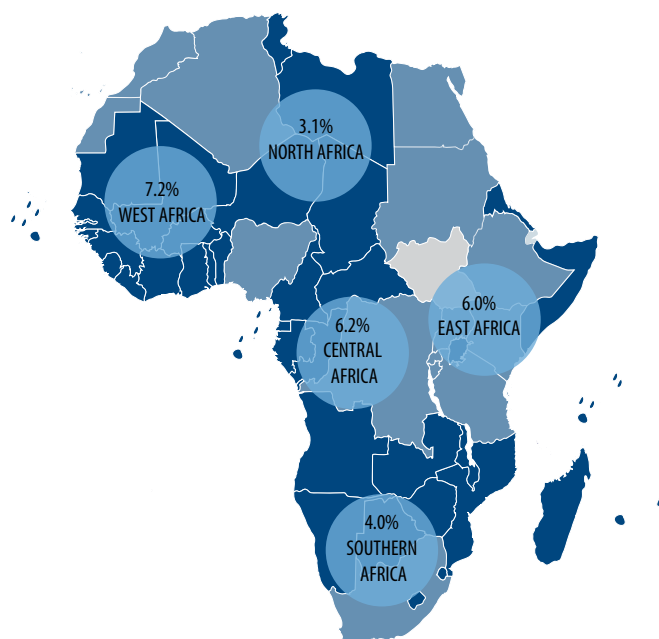
On the whole, African governments continued to pursue cautious monetary and fiscal policies in 2013. Coupled with sluggish global demand, average inflation rates improved by 2 percentage points to 6.7% in 2013; compared to global rates of 6%, and rates of less than 2% in the US and the EU according to AfDB. Inflation in WAEMU and CAEMC member countries was at about 2%, close to the eurozone average, resulting from the pegging of the local currency, the CFA, to the euro. Elsewhere in Africa, inflation rates were more varied, but remained generally within single digits as in 2012. Exceptions were countries such as Sudan and Malawi that experienced economic shocks during 2013, and saw inflation rates rising to approximately 30%. AfDB expects African inflation to remain moderate in the medium term at about 7% in both 2014 and 2015. Fiscal deficits are expected to increase in 2014 and 2015, respectively, as countries adjust to demanding fiscal environments, with expenditures exceeding revenue.

1.4 Africa's Near-term Outlook

Africa's medium-term growth prospects look good. (AfDB et al., 2014) project Africa's average growth to accelerate to close to 5% in 2014 and 5%-6% in 2015, thus to levels last seen before the onset of the 2009 global recession. This forecast is based on the premise of a gradual strengthening of the world economy and also on improvements in political and social stability in those African countries currently affected by conflicts. But if the global economy should remain weak, or if political and social tensions within Africa were to improve less than assumed, growth would be lower than projected.

Data from IMF and World Bank indicates that growth in sub-Saharan Africa is projected to accelerate to about 5.5% in 2014 and 2015, although concerns remain regarding how this growth could be made more inclusive. Excluding South Africa, the African Economic Outlook reported that the growth figures are 6.1% and 6.8% for 2014 and 2015 respectively. East and West Africa recorded the fastest growth in 2013, 6% or above. Growth in low-income countries, at 6% or above, exceeded that of upper-middle-income countries in North and Southern Africa at below 3%.

Figure 1.4 African Development Bank's growth projections, by sub-regions



Source: AfDB (2014)

Overall, Sub-Saharan Africa's growth rate should remain in the top 30% in the world. Despite emerging challenges, medium-term growth prospects for Sub-Saharan Africa remain favorable. Robust domestic demand, underpinned by investment in natural resources and infrastructure and household consumption, will continue to drive growth in most countries in the region. External demand will also be supportive of growth in the region in view of the strengthening recovery in high income countries, which bodes well for export demand and investment flows. According to World Bank, growth is expected to accelerate in all country groups, especially fragile states and oil exporters.

1.4.1 Implications for Travel and Tourism Industry

Tourism Performance in 2013

Tourism is an important driver of growth for several countries. Over the past six decades, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged in addition to the traditional favourites of Europe and North America. The World Tourism Organization (UNWTO) reported that despite a fragile economic recovery, particularly in the Eurozone, and important geopolitical shifts, international tourist arrivals grew by 5% in 2013 to reach 1.087 million. Emerging (+4.8%) and advanced economies (+5.2%) grew at the same pace. By region, demand for international tourism was strongest for destinations in Asia and the Pacific (+6%) and Europe (+5%). The leading sub-regions were South East Asia (+10%, Central and Eastern Europe (+7%), Southern and Mediterranean Europe (+6%) and North Africa (+6%).

Data from UNWTO on international tourism receipts for 2013 indicates that the growth in receipts has followed closely that of arrivals. with a projected growth rate of between 4.5% and 5% in real terms (local currencies, constant prices), international tourism receipts are estimated to have reached US\$1.150 billion in 2013 up from 1.077 billion in 2012.

Table 1.3 International tourist arrivals

	International Tourist Arrivals (million)								Market share (%)	Change (%)	Average annual growth (%) '05-'13*
	1990	1995	2000	2005	2010	2012	2013*	2013*			
World	434	528	677	807	948	1035	1087	100	4.1	5.0	3.8
Advanced economies¹	296	334	421	459	506	551	581	53.4	3.8	5.4	3.0
Emerging Economies¹	139	193	256	348	442	484	506	46.6	4.4	4.5	4.8
By UNWTO regions:											
Europe	261.1	304.0	388.2	448.9	484.8	534.4	563.4	51.8	3.6	5.4	2.9
Northern Europe	28.2	35.8	46.6	60.4	62.7	65.1	68.9	6.3	0.9	5.8	1.6
Western Europe	108.6	112.2	139.7	141.7	154.4	167.2	174.3	16.0	3.5	4.2	2.6
Central/Eastern Europe	33.9	58.1	69.3	90.4	94.5	111.7	118.9	10.9	8.3	6.5	3.5
Southern/Medit. Eu.	90.3	98.0	132.6	156.4	173.3	190.4	201.4	18.5	1.9	5.7	3.2
- of which EU-28	229.7	267.3	332.3	363.8	380.0	412.2	432.7	39.8	2.7	5.0	2.2
Asia and the Pacific	55.8	82.0	110.1	153.5	204.9	233.5	248.1	22.8	6.9	6.2	6.2
North-East Asia	26.4	41.3	58.3	85.9	111.5	122.8	127.0	11.7	6.0	3.5	5.0
South-East Asia	21.2	28.4	36.1	48.5	70.0	84.2	93.1	8.6	8.7	10.5	8.5
Oceania	5.2	8.1	9.6	10.9	11.4	11.9	12.5	1.1	4.0	4.7	1.7
South Asia	3.1	4.2	6.1	8.1	12.0	14.6	15.5	1.4	6.2	6.1	8.4
Americas	92.8	109.1	128.2	133.3	150.6	162.7	167.9	15.5	4.3	3.2	2.9
North America	71.8	80.7	91.5	89.9	99.5	106.4	110.1	10.1	4.2	3.5	2.6
Caribbean	11.4	14.0	17.1	18.8	19.5	20.7	21.2	2.0	3.0	2.4	1.5
Central America	1.9	2.6	4.3	6.3	7.9	8.9	9.2	0.8	7.3	3.7	4.9
South America	7.7	11.7	15.3	18.3	23.6	26.7	27.4	2.5	5.0	2.6	5.2
Africa	14.7	18.7	26.2	34.8	49.9	52.9	55.8	5.1	6.6	5.4	6.1
North Africa	8.4	7.3	10.2	13.9	18.8	18.5	19.6	1.8	8.2	6.1	4.4
Sub-Saharan Africa	6.3	11.5	16.0	20.9	31.2	34.5	36.2	3.3	5.8	5.0	7.1
Middle East	9.6	13.7	24.1	36.3	58.2	51.7	51.6	4.7	-5.4	-0.2	4.5

Source: World Tourism Organization (UNWTO, 2014)

_ Classification based on the International Monetary Fund (IMF)

Among the top ten tourism destinations, receipts were up by double digit growth rates in Thailand +(23%), in Hong Kong (China) and Macao (China) (+18% each), the United Kingdom (+15%) and the USA (+10%). Receipts in Spain France, Italy and Germany grew between 2% and 5%. China on the other hand, saw its tourism receipt decline by 3%.

1.4.2 Tourism in Africa in 2013

Africa's international tourist arrivals and receipts have sharply increased over the last decade. UNWTO reported that Africa continued to enjoy sustained growth, attracting 5% more international tourist arrivals in 2013, corresponding to an increase of 3 million. The region welcomed a total of 56 million tourists (5% of the world) in 2013 surpassing the 50 million mark in 2012. International tourism receipts remained at US\$34 billion. The region maintained a 5% share in worldwide arrivals and a 3% share in receipts. North Africa (+6%) had another year of robust growth. Morocco (+7%) is the first African destination to have surpassed the mark of 10 million international arrivals, while Tunisia (+5%) recovered further.

Ethiopia, Kenya, Mauritius, Seychelles and Tanzania are some of the African countries where UNWTO reported an increase in tourism in 2013. These countries benefited from diversification towards tourists from Asia. In Tunisia tourism receipts picked up slightly after an earlier fall caused by political uncertainty, also helped by the weaker exchange rate. But in Egypt political instability and security concerns caused a further sharp fall in tourism receipts. In some other countries, such as Cabo Verde and Namibia, tourism was also adversely affected as tourist arrivals from Europe declined. In Cabo Verde tourism receipts slowed even though occupancy rates increased, pointing to competitive pricing pressures in this most important sector, which, together with related industries, represents 30% of GDP.

Arrivals growth in Sub-Saharan Africa is estimated at 5%, though individual destinations with data available show a mixed picture. South Africa, the largest destination in the sub-region, reported 4% growth. Seychelles (+11%) and Gambia (+9%) reported strong growth, while Mauritius (+3%), Zimbabwe (+2%) and Uganda (+1%) posted more modest increases. Madagascar and Kenya, two leading destinations in Sub-Saharan Africa, saw significant declines in international tourist arrivals due to domestic events.

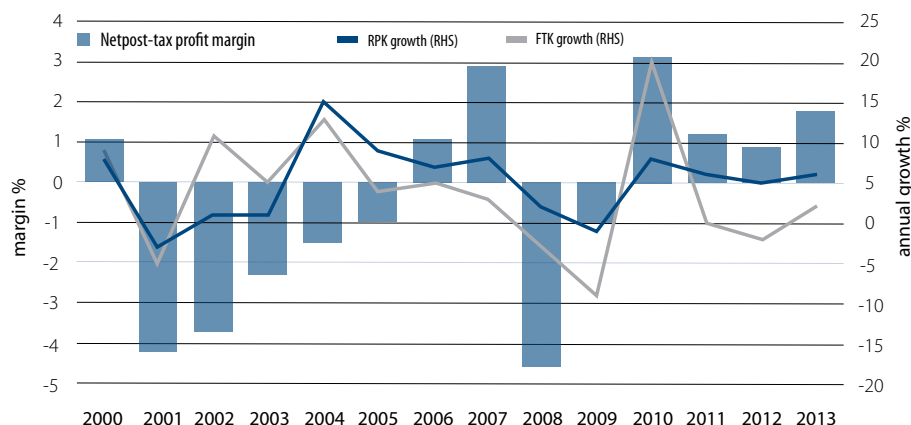
1.4.3 International Tourism in 2014 Projections

UNWTO forecasts international tourist arrivals to increase by 4% in 2014, again above its long term forecast of +3.8% per year between 2010 and 2020. The UNWTO Confidence Index, based on the feedback from over 300 experts worldwide, confirms this outlook with prospects for 2014 higher than in previous years. 2014 regional prospects are strongest for Asia and the Pacific (+5% to +6%) and Africa (+4% to +6%) followed by Europe and the Americas (both +3% to +4%). In the Middle East (0% to 6%) prospects are positive yet volatile. UNWTO projects Africa's international tourist arrivals to increase from around 53 million in 2012 to around 85 million in 2030 and 134 million in 2050, corresponding to an average annual increase of between 2% and 3%.

1.5 Airline Industry

Airlines saw improved profitability in 2013 as global economies continued to strengthen from the 2008-2009 economic recession. IATA reported that airlines made a net post-tax profit of US\$10.6 billion in 2013 (a 1.5% margin on revenues) up from the US\$6.1 billion profit (0.9% margin on revenues) made in 2012. Profitability in 2013 was achieved largely on increased demand, the positive impact on cash flow of industry restructuring, and slightly lower than expected fuel costs. Jet fuel averaged just under US\$125 a barrel, about US\$5 less than in 2012. In 2014, African airlines are expected to make a profit of about US\$100 million.

Figure 1.5 Annual traffic growth and profit margin



Source: IATA

Demand for passenger and cargo services showed signs of accelerated growth; this reflected the rebounding global economy and an increase in world trade. Business confidence strengthened to its highest level since 2011, but the trend is flattening. Consumers in mature economies gained confidence from a 2% increase in global GDP. In emerging economies, GDP growth had an even greater impact, as each unit of GDP generates more air travel in emerging economies than in mature markets. This trend was bolstered by significant price drops in airline fares in some African and Asian markets because of increasing competition.

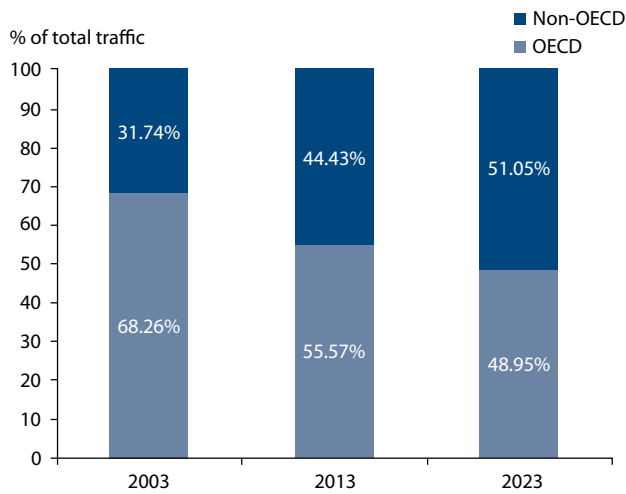
IATA reported that more than 31.6 million scheduled flight services were provided in 2013, a 2% increase on the previous year. There was also an increase in the number of seats in 2013 as a result of increased aircraft deliveries and aircraft replacements of older aircraft by generally larger-sized aircraft, adding 5% capacity to the global market. Passenger ancillary revenues are playing an increasing role in the industry. Revenues from added-value services improved from US\$36 billion to US\$42 billion in 2013 from a year earlier, or more than US\$13 a passenger, and form an increasing share of passenger yield. Airlines, though, managed to keep as net profit an average of just US\$3.39 from each passenger served. Overall, the return on invested capital in the industry rose from 4% to 4.5% in 2013. This is still well short of the 7% to 8% expected by investors based on the returns available through investments in other industry sectors. It is, nevertheless, a marked improvement over 2012's return of 3.6%.

IATA's forecasts show a number of large emerging markets, driven by rising wealth and changing consumer habits, expanding their international air traffic flows and outbound travel expenditure over the next decade. The standout performers are Russia, Brazil, India, Indonesia and Turkey.

Emerging Markets Have Already Emerged in Air Travel

A study by Oxford Economics reveals that non-OECD countries accounted for 44% of global air traffic in 2013 and this is forecast to rise to 51% in the next ten years, driven primarily by the expansion of large emerging markets, especially China.

Local travel providers in emerging markets are successfully tailoring multi-modal content to travellers' requirements and making innovative use of mobile technology for bookings, payment and connectivity etc. Local providers are utilising local market expertise, incorporating local bus and ferry content to air travel and accommodation booking. These local champions will continue to secure market share in isolated markets that fall outside the scope of established global travel providers. Many agents in emerging markets have leapfrogged to accepting payment by mobile. Payment via mobile becomes increasingly compelling in light of the very rapid expansion of mobiles in emerging markets.

Figure 1.6 OECD declining share of global air traffic

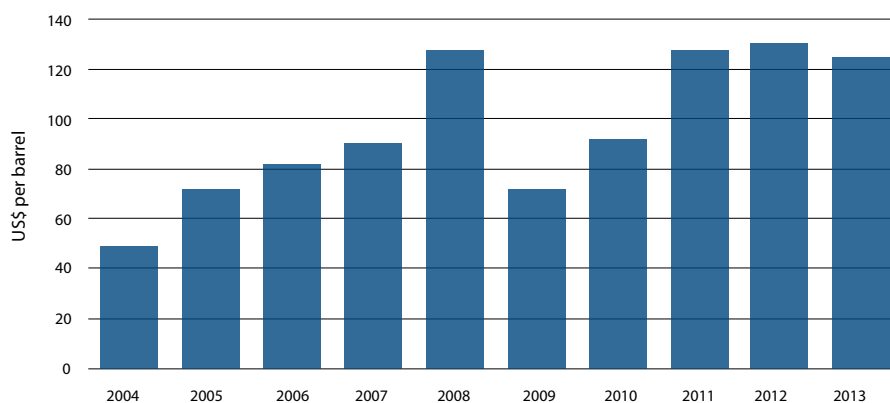
Source: Oxford Economics (2014)

1.6 Fuel

Facing High Jet Fuel Prices

According to IATA, jet fuel averaged US\$124.5 a barrel during the year under review, to remain within the high range of the past three years, during which it averaged US\$127 a barrel. In 2012, jet fuel averaged just under US\$130 a barrel.

The growth in the US energy supply forced a moderate decrease on jet fuel, but fuel continues to be the largest number in the airline debit column, accounting for 31% of airline costs. The economic outlook for growth in the United States and in Chinese exports and an improved economic situation in Europe suggests fuel prices will remain high in 2014.

Figure 1.7 Jet fuel price per barrel

Source: IATA

1.7 Industry Challenges

Air transport has grown strongly in Africa in recent years and this trend is projected to continue. However, air transport in Africa is still expensive, connections are irregular, infrastructure is inadequate and poor safety challenges persist in some countries. Taxes, fees, landing and navigation charges are high, market access is restrictive and non-physical barriers including visa requirements limit movement of people and goods. These constraints add to competition and high operating costs resulting from surging oil prices, high finance/insurance costs and limited resources. Policy changes to strengthen regulatory oversight and achieve full liberalization of the air transport sector are needed. Addressing these challenges could significantly unlock the industry's potential for future growth.

Infrastructure

Inadequate, dilapidated and poor airport infrastructure as well as the lack of equipment and human resources constrains the development of aviation in Africa. Although substantial progress has been made in the past decade, Africa still lags behind other regions in terms of infrastructure. African countries need to invest in infrastructure to support the industry's growing traffic and airlines. Much of the infrastructure in Africa is below international standards, yet attracts higher user cost than in other regions. Several airports have monopoly suppliers in one or more areas of operations while many have high charges. Significantly though, some African airports have seen major infrastructural developments since 2010.

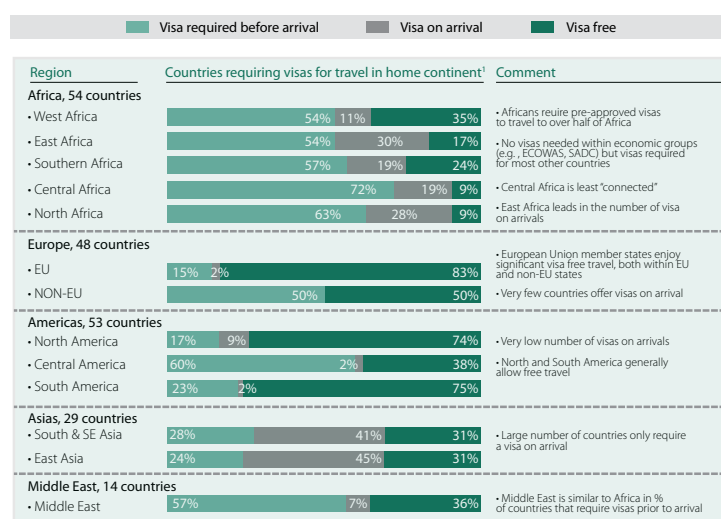
African heads of States adopted a Programme for Infrastructure Development for Africa in 2012 which identifies priority regional infrastructure projects to be built by 2040. Regional economic communities also have their own infrastructure master plans. For example, SADC developed its Regional Infrastructure Development Master Plan Vision 2027, targeting financing from member governments, multilateral lenders and the private sector. While there has been progress in developing regional transport corridors, there are still missing links – which are investment opportunities for African and foreign investors.

Regional Integration

Integration and connectivity in other regions of the world have spurred growth in the free flow of goods, services, capital, and people. These regional economic activities and investment inter-linkages remain low in Africa. Given the relatively low level of intraregional trade, countries in the region should renew their efforts to promote greater regional integration through lower tariff and nontariff barriers and by facilitating the movement of people, goods, and capital. Without all of these, connectivity will be stunted and the rapidly expanding cities across the continent will take longer to realize their full potential to trade and experience meaningful socio-economic growth. This transition will be facilitated by more open markets, improving infrastructure, access to technology and improved political stability.

Free movement by people is supposed to be the hallmark of African integration, facilitating trade growth across the continent. Research by McKinsey (2013) found that Africa's laws on free movement remain generally restrictive despite political commitments to bring down borders. Central Africa is the most restrictive region and West Africa the most liberal in terms of visa free travel, according to the research. Some African countries fail to provide even for strategic regional preferences when deciding visas. North Americans, followed by Europeans, enjoy the most liberal entry into Africa. They get visa-free travel or can obtain a visa on arrival in at least half the countries on the continent. Africans need visas to get into at least two thirds of other African countries.

Figure 1.8 Ease of travel within Africa compared to other regions



1. No distinction made between tourist and business visa. Results are for tourist visas. Business visas may be required before arrival.
Note: Based on data available end 2012. This work was done as a collaborative effort between McKinsey, the AfDB and WEF Global Agenda Council on Africa.
Source: McKinsey (2013)

Safety

Safety is the most pressing challenge facing the aviation industry in Africa. The frequent accidents in few accident prone countries stem from inconsistency in the implementation and enforcement of internationally accepted safety standards and practices. AFRAA, AFCAC, IATA, ICAO and other organizations have committed to support the African Union backed Africa Strategic Improvement Action Plan – a plan that will address safety deficiencies and strengthen regulatory oversight in the region by end of 2015. The chapter on Safety in this report will discuss the topic in more detail.

Harmonised Regulations

Despite the growing awareness of the role that the aviation industry could play in the development of the continent, the industry is still not the top priority of African governments. And despite increased liberalization of the aviation industry in other regions, some African governments are still reluctant to open their skies fearing competition could undercut national airlines. These challenges require governments to enhance regulation on airspace management, consumer protection and safety. Such policy and regulatory changes will strengthen oversight, create a level playing field and full liberalization of air transport.

High Costs and Taxes

The cost of operations is high in Africa. Fuel prices almost twice higher than the world average in many airports and there is lack of transparency in the pricing system. Higher costs translate into higher prices, which in turn stifle demand. AFRAA is working with IATA and African airlines to better understand the issue and provide lobbying assistance with governments. Currencies in many African countries are weak compared with the US dollar or the euro. And while the bulk of revenue is generated in local currencies, the majority of the overheads – capital, financing, lease rentals, fuel uplift at foreign airports, and infrastructure are often incurred in the stronger currencies.

Section Two

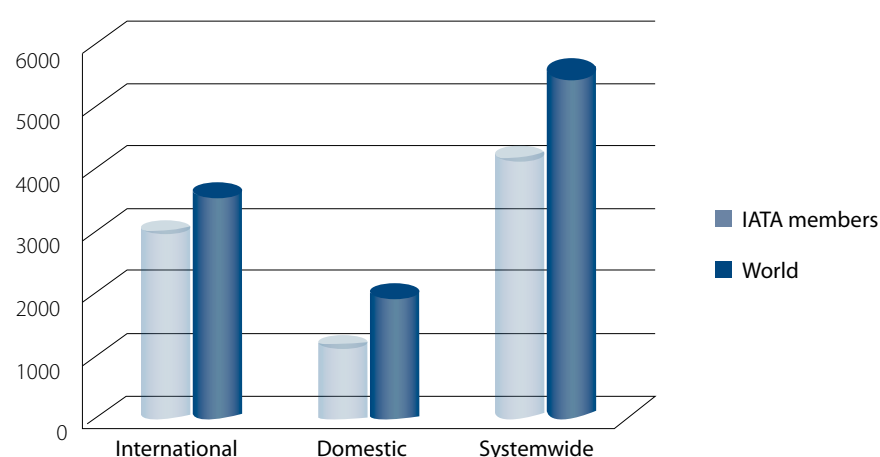
Airline Performance

2.1 Global Performance

Global passenger air traffic measured in RPKs improved by 5.7% in 2013 compared to 2012. International markets had an increment of 6.1% while domestic markets grew by 5.2%. In line with the traffic upward trend, seat capacity (ASKs) increased by 5.5% and 4.8% on international and domestic routes respectively. With this, the average load factor increased to 79.7%.

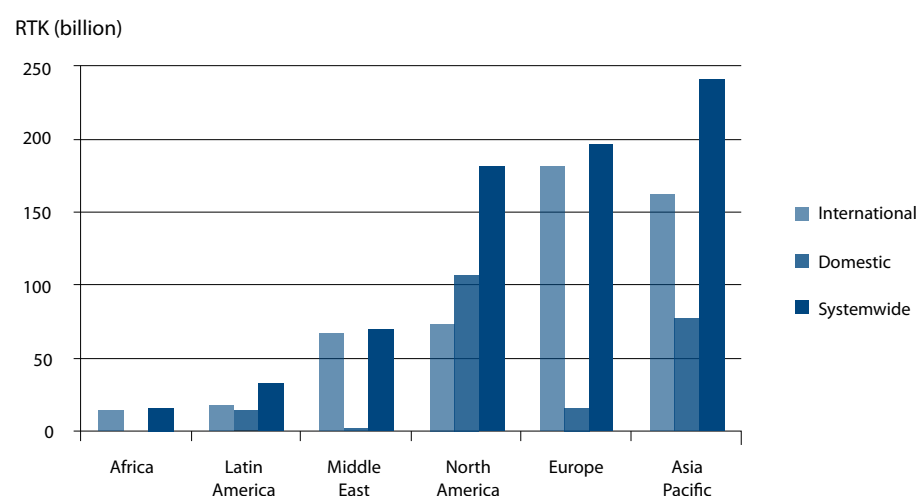
Estimates of scheduled world cargo traffic (FTK) increased by 1.8% in 2013 compared to 2012. International freight traffic, which accounts for more than 86% of total FTKs, decreased by 1.6%, while domestic freight traffic increased by 2.9%. Overall, scheduled revenue tonne-kilometres increased by 4.7% and available tonne kilometres by 4.5%.

Figure 2.1 IATA Share of World's Scheduled Passenger Kilometres (RPKs) 2013 (billions)



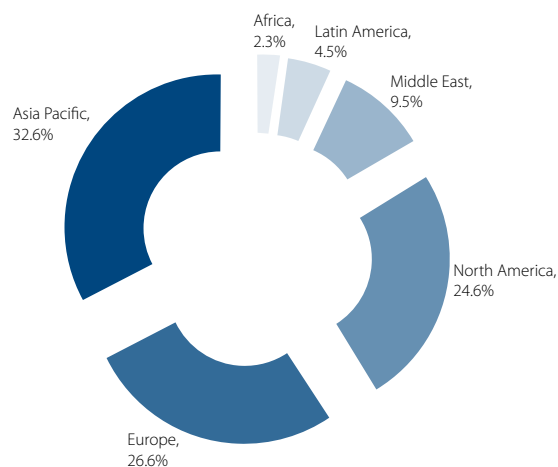
Source: IATA WATS/AFRAA

Figure 2.2 Revenue Tonne-Kilometres per Region – IATA Schedule Services 2013



Source: IATA WATS/AFRAA

System-wide, the Asia Pacific region was the world's biggest air transport market by RPKs performed (32.55% in 2013), followed by Europe and North America at 26.60% and 24.56% respectively. Africa remains the smallest market, accounting for about 2.3% of global RPKs.

Figure 2.3 Revenue Tonne-Kilometres Performed per Region – IATA Schedule Services 2013

Source: IATA WATS/AFRAA

2.2 African Airlines Performance

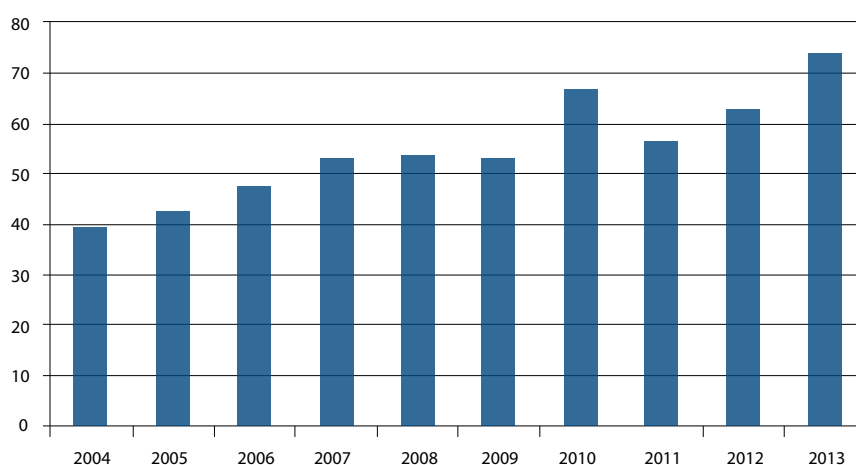
Passengers Carried

Demand for passenger services showed signs of accelerated growth in 2013, reflecting the rebounding global economy and an increase in world trade. Business confidence strengthened to its highest level since 2011, but the trend is levelling out.

Passenger numbers has grown consistently year on year since 2004 except in 2011 where the numbers dipped as a result of the Arab Spring and political instability in parts of North Africa. From less than 40 million passengers carried in 2004 by African airlines, passenger numbers increased to 73.8 million in 2013 from 63 million in 2012.

Figure 2.4 Total Passengers Carried by Market: 2004 – 2013

No of passengers (millions)



Source: AFRAA

The 20 AFRAA airlines that reported their passenger numbers carried 47.3 million passengers in 2013 or 64% of total passengers carried by all African airlines. This represents an increase of 2.32% over the 46.2 million reported by the same airlines in 2012. The top passenger country by region in 2013 was South Africa with 109.2 million passengers.

Table 2.1 Top 5 passenger countries in Africa in 2013

	2013 Passenger numbers	% change
South Africa	20,430,771	-0.1
Egypt	16,898,602	-3.5
Morocco	13,534,630	15.7
Nigeria	7,633,422	-9.2
Algeria	7,346,887	17.7

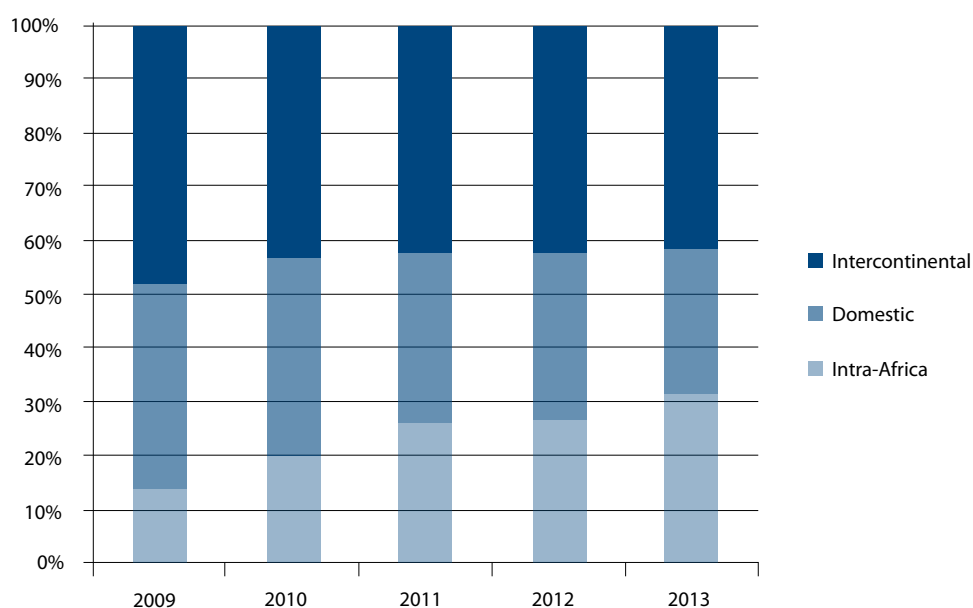
Source: IATA WATS

A robust GDP growth was experienced in 2013 in Africa as a result of buoyant public and private investment in mining activities, infrastructure for transport and communication, and energy production. Additionally, Africa received 5% more international tourist arrivals in 2013, corresponding to an increase of 3 million tourists. African airlines therefore continued their aggressive network expansion, new markets development and further penetration of their domestic and Intra-Africa markets. As a result, passenger numbers increased on domestic, Intra-Africa and intercontinental routes.

Domestic and Intra-Africa Passengers

Domestic passenger numbers increased to 28 million due to an increase in access to air travel, lower fares and new routes launched in 2013. The growing competition in many domestic markets and the resultant improvement in service quality and lower fares continue to stimulate demand. Low Costs Airlines, particularly in South Africa, Kenya, Egypt, Morocco and Tanzania continue to aggressively promote and attract more passengers, some of whom have never flown by air.

Figure 2.5 Percentage Share of Passengers Carried by Market: 2009 – 2013



Source: AFRAA

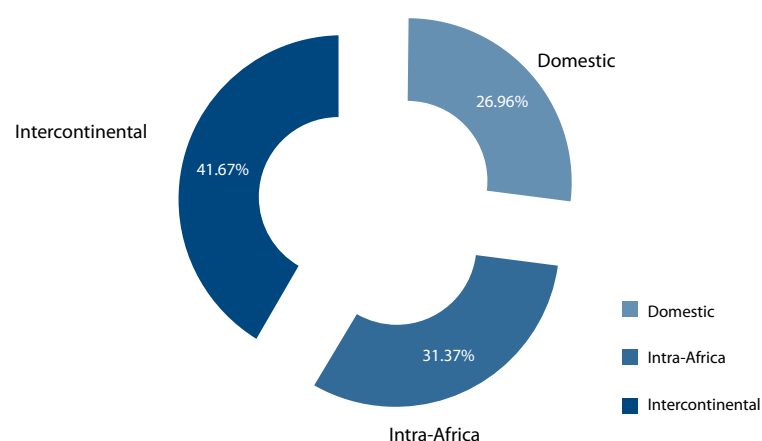
On the intercontinental routes, passenger numbers also went up by to 45.5 million in 2013. Significantly, Intra-Africa passenger numbers stood at 31.4% of the total number of passengers carried in 2013.

With a population of over 1.07 billion, spread across the vast continent of 54 countries, there is huge potential for growth in Intra-Africa air travel. The major constraint to this growth is the slow pace of liberalisation and the over-dependence on Bilateral Air Services Agreements (BASAs) by many States.

Passenger Distribution

Intercontinental passenger market segment remains the biggest with 42% of all passengers travelling between Africa and other regions of the world. The domestic market segment represents 27% while the Intra-Africa market is 31.3%.

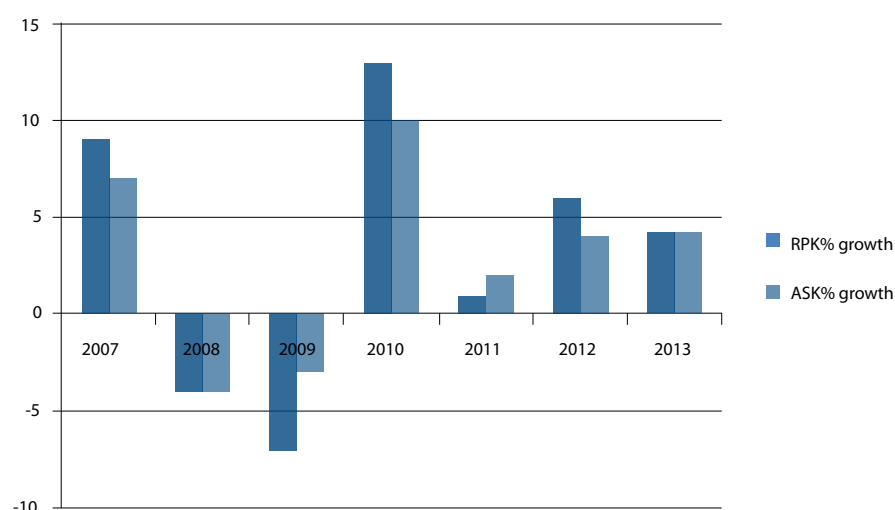
Figure 2.6 African Airlines Passenger Distribution 2013



Source: AFRAA

Based on RTKs globally, Asia Pacific was the region that grew the most in 2013 with 11.8% compared with 2012 followed by Asia Pacific and Latin America with 8.6% and 6.6% growth respectively. Africa is still the smallest market in terms of RPKs at less than 3%.

Figure 2.7 Africa Passenger Traffic and Capacity Annual Percentage Growth: 2007 – 2013



Source: AFRAA/IATA

Figure 2.8 Africa Passenger Traffic and Capacity % Growth Trend: 2007 – 2013



Source: AFRAA/IATA

Passenger Load Factor

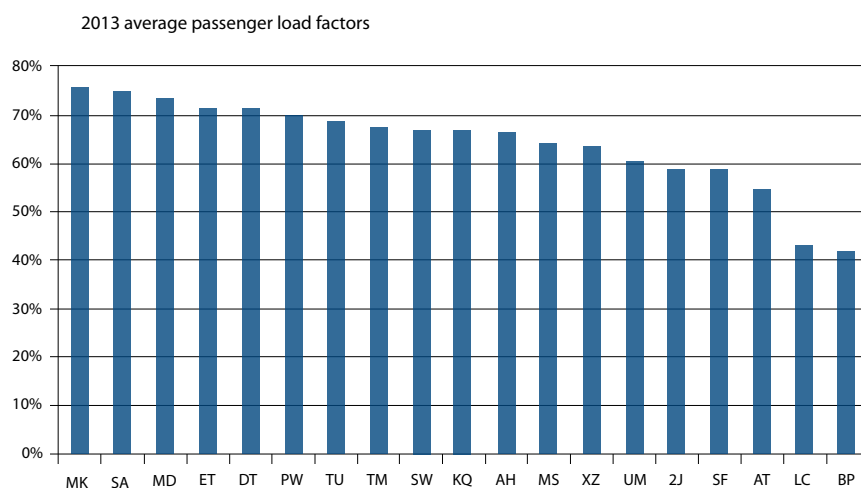
The demanding environment in Africa is strong, with robust economic growth of local economies and continued development of internationally trading industries. But some parts of the continent have shown weakness including South Africa, which experienced a slowdown in its economy, with a corresponding impact on the demand base for international air travel.

Many African airlines continue to see inefficiencies and poor load factors due the imbalance of capacity and demand, limited commercial cooperation and uncoordinated Intra-African networks with other African operators. In addition, the deployment of high-capacity aircraft on low and mid-density markets drives down load factor and also acts as a disincentive to more frequency where it may be needed.

Average passenger load factors (PLF) for African carriers improved marginally to 69.6%. This compared unfavourably to the global average load factor which reached a record high of 79.7% in 2013. Higher passenger load factors were achieved in domestic routes (74.5%) than on international routes (68.8%).

The top 5 AFRAA member airlines with the highest average passenger load factors in 2013 were: Air Mauritius (75.70%), South African Airways (75.10%), Air Madagascar (73.73%), Ethiopian Airlines (71.49%) and TAAG Angola (71.00%).

Figure 2.9 Passenger Load Factor of some AFRAA Airlines in 2013 (%)



Source: AFRAA

As seen in the past 2 years, North America remains the world region with the highest passenger load factor of 83.2% followed by Europe at 81.0% and Asia Pacific at 77.8%. Except for the Middle East region that saw a decrease by 0.3 percentage points, other regions saw a marginal increase in load factors in 2013. Africa and Asia Pacific regions saw the least increase of 0.1 percentage points each. Africa attained the lowest load factor of 69.6% in 2013.

Table 2.2 Passenger and Weight Load Factor for all Regions – 2013

	Passenger LF	% Change	Weight LF	% change
Africa	69.6%	0.1	57.9%	-0.1
Asia Pacific	77.8%	0.1	69.9%	-0.1
Europe	81.0%	1.0	70.6%	0.5
Latin America	77.2%	1.7	63.8%	1.5
Middle East	77.5%	-0.3	63.3%	-0.4
North America	83.2%	0.3	63.9%	0.1
Industry Average	79.7%	0.4	67.3%	0.1

Source: AFRAA/IATA WATS

2.3 AFRAA Airlines Passenger Traffic

AFRAA airlines that reported performance in 2013 carried a total of 47,239,411 passengers of which intercontinental passengers made up 41.67%. The biggest airline by number of passengers carried in 2013 was EgyptAir, with over 8.5 million passengers transported.

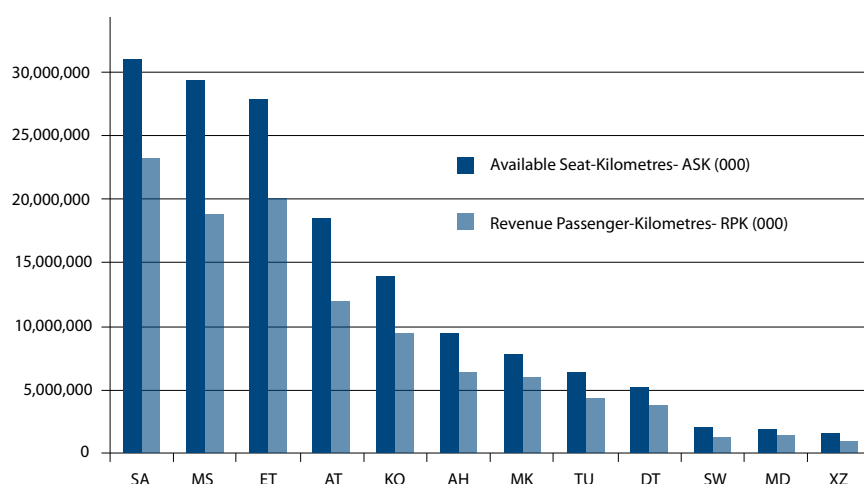
Table 2.3 Total Passengers Carried by some AFRAA Airlines in 2013 (000)

	Domestic Passengers (000)	Regional Passengers – within Africa (000)	Intercontinental Passengers (000)	Total Passengers Carried (000)
Air Algerie	1,521	326	2,856	4,703
Air Botswana	92	173	-	265
Air Burkina	7	122	-	129
Air Madagascar	303	103	133	539
Air Mauritius	122		1,196	1,318
Air Namibia	78	268	113	458
Air Zimbabwe	70	81	-	151
ECAir	175	22	11	207
EgyptAir	1,493	1,242	5,778	8,513
Ethiopian Airlines	678	2,432	2,484	5,594
Kenya Airways	885	1,869	939	3,693
Lam Mozambique	462	220	2	684
Precision Air	430	314		743
Royal Air Maroc	686	1148	4022	5,856
RwandAir	26	309	74	408
South African Airways	3,494		3,670	7,163
South African Express	1,121	233		1,354
TAAG Angola	669	211	442	1,322
Tunisair		881	2,831	3,712
Tassili Airlines	425		2	427
TOTAL	12,736	9,952	24,551	47,239

Source: AFRAA

The AFRAA airlines that reported their performance in 2013 put on the market total ASKs of 157,624 million up from 126,475 million reported in 2012. Total reported RPKs for 2013 was 108,740 million (87,410 million in 2012) while the overall average passenger load factor reported for the 20 airlines in 2013 was 64.2%. In terms of ASKs and RPKs, the top 5 biggest African carriers are South African Airways (31,071 million ASKs, 23,345 million RPKs), EgyptAir (29,461 million ASKs, 18,914 million RPKs), Ethiopian Airlines (27,886 million ASKs, 19,936 million RPKs), Royal Air Maroc (18,524 million ASKs, 12,003 million RPKs) and Kenya Airways (13,916 million ASKs, 9,322 million RPKs).

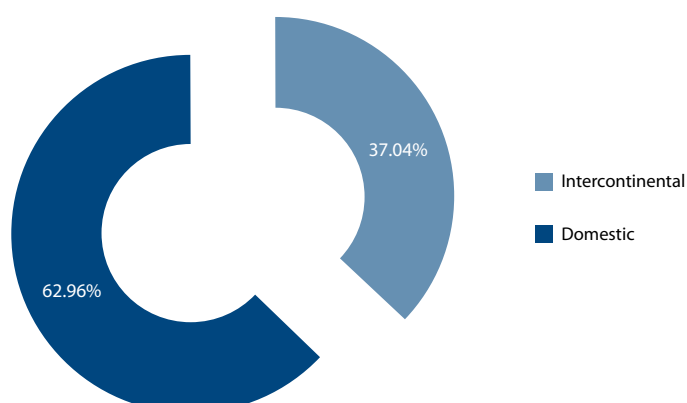
Figure 2.10 ASKs and RPKs of Some AFRAA Airlines in 2013 (000)



Source: AFRAA

AFRAA airlines in 2013 continued with their aggressive route expansion, not just within the continent, but also on intercontinental routes. In 2013, 54 new routes were launched by 11 AFRAA member airlines to domestic, Intra-Africa and intercontinental destinations. Of these, 20 destinations were intercontinental with the remaining 34 new routes within the continent.

Figure 2.11 New Destinations by AFRAA Airlines in 2013



Source: AFRAA

Table 2.4 New Destinations by 11 AFRAA Airlines in 2013

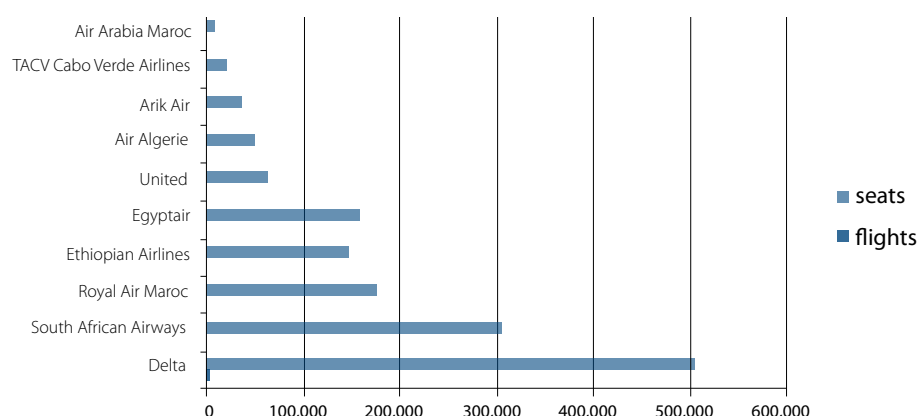
	Origin	Destination		Origin	Destination
1	Algiers	Abidjan	28	Casablanca	Turin Airport
2	Dar es Salaam	Tabora	29	Casablanca	Guelmim Airport
3	Dar es Salaam	Kigoma	30	Casablanca	Sao Paulo
4	Entebbe	Mogadishu	31	Casablanca	Zurich
5	Entebbe	Kilimanjaro-Mombasa	32	Casablanca	Stockholm Arlanda
6	Nairobi	Pemba	33	Casablanca	Tan-Tan Plage Blanche Airport
7	Cairo	Prince Nayef bin Abdulaziz Regional Airport	34	Casablanca	Copenhagen
8	Cairo	Abidjan	35	Casablanca	London Gatwick
9	Cairo	Toronto Pearson International Airport	36	Kigali	Juba
10	Cairo	Manchester	37	Kigali	Accra
11	Cairo	Dar es Salaam-Harare	38	Algiers	Djanet
12	Addis Ababa	Bangkok-Singapore	39	Oran	Setif
13	Addis Ababa	Singapore	40	Alger	Tamenrasset
14	Addis Ababa	Seoul	41	Tamenrasset	Alger
15	Addis Ababa	Lome-Rio de Janeiro	42	Alger	el Oued
16	Addis Ababa	Lilongwe-Blantyre	43	El oued	Annaba
17	Addis Ababa	Ndola	44	Alger	Adrar
18	Addis Ababa	Sao Paulo	45	Oran	Setif
19	Addis Ababa	Enugu	46	Alger	Ghardia
20	Addis Ababa	Niamey	47	Alger	Illizi
21	Nairobi	Blantyre	48	Illizi	Djanet
22	Nairobi	Abu Dhabi	49	Alger	Bechar
23	Nairobi	Livingstone	50	Tunis	Tobruk
24	Nairobi	Jeddah	51	Tunis	Ouagadougou
25	Marrakech	Santa Maria Airport	52	Sfax	Sebha
26	Casablanca	Munich Airport	53	Sfax	Misrata
27	Casablanca	Swami Vivekananda Airport	54	Tunis	Beida

Source: CAPA /AFRAA

2.4 North America Operations

Delta Airlines continued its dominance on the Africa-North American route with over 39% of the passenger capacity. Its total number of flights from Africa to North America in 2013 was 2258. Another US carrier, United Airlines had a capacity of 259 flights out of Africa in the same period. The 2 North American carriers together operate 43.75% of all scheduled flights across the Atlantic.

8 African airlines together operated 3,236 flights across the Atlantic in 2013. This represents 56.25% capacity by African carriers.

Figure 2.12 Operators Market Share on the Africa-USA

Source: AFRAA/OAG

Table 2.5 Africa to North America Capacity Share 2013

Operating Carrier	Flights in 2013	Seats in 2013	% share (seats)
Delta	2258	503783	39.25%
South African Airways	1118	304774	19.43%
Royal Air Maroc	678	174890	11.79%
Ethiopian Airlines	494	146259	8.59%
EgyptAir	454	157084	7.89%
United	259	62818	4.50%
Air Algérie	199	50705	3.46%
Arik Air	152	36024	2.64%
TACV Cabo Verde Airlines	109	19575	1.89%
TOTAL	5753	1461096	

Source: AFRAA/OAG Schedules iNet

2.5 Passenger Traffic Forecast

IATA annual survey of airline forecasts for traffic growth carried out in 2013 has adjusted upwards the expected passenger travel growth to 5.4% on average over the five year periods to 2017. IATA's long term forecast however expects an average growth of 6.2% over the same period which represents an upgrade of almost 1.0% from last year's medium term expectations. IATA's long term forecast shows an expected growth on demand (RPKs) of 5.1% over the 2013 – 2030 period. ICAO's outlook on the other hand, shows an estimated growth to 2013 of 4.6% points. Passenger demand forecasts by Airbus, Boeing and Embraer show an expected growth of between 4.7% and 5.0% over the next 20 years.

Table 2.6 Passenger Traffic Forecast

Regions	RPKs in 2013 (billions)	RPKs in 2033 (billions)	Av. Forecast Growth (2013-2033)
Africa– Africa	53.7	197.6	6.7%
Africa–Europe	140.4	368.6	4.9%
Africa–Middle East	50.8	206	7.3%
Africa–North America	12.2	40.1	6.1%
Africa–Southeast Asia	4.2	15	6.65

Source: Boeing Market Outlook

Passenger traffic growth forecast between Africa and other regions show variations, with some regions set to grow faster than others.

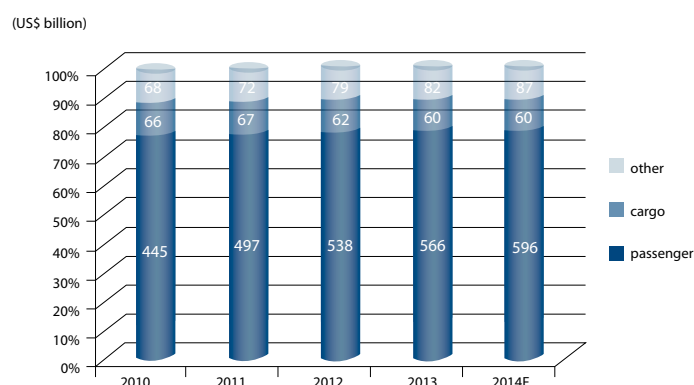
Section Three

3.1 Financial Performance

Global Financial Performance

According to IATA and ICAO, global airline revenues are estimated to have reached a new high of US\$708 billion in 2013. IATA estimates that the global commercial airline industry generated an operating profit of US\$21.5 billion and a net profit of US\$10.6 billion in 2013. However, cargo performance continued to experience overcapacity and cargo revenue declined for the second consecutive year even as freight tonnage increased.

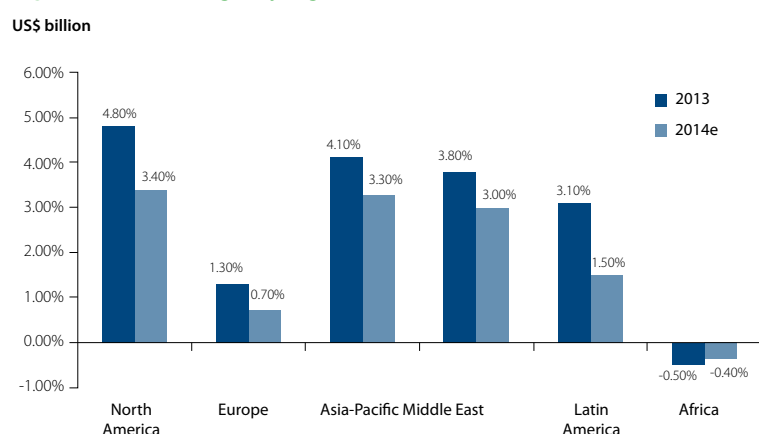
Figure 3.1 Global commercial airline revenue (US\$ billion)



Source: IATA, ICAO

Airlines saw some operating expense relief in 2013 as a result of lower fuel prices. Fuel expense was flat from 2012-2013 even as capacity and consumption grew. A reduction in jet fuel crack spread in 2013 also contributed to lower jet fuel costs. The replacement of older aircraft with newer, more fuel-efficient models should help airlines to continue to control fuel expense. However, the failure by many African airlines to develop the cargo component of their operations has led to dominance of the intercontinental sector by non-African airlines. On the domestic and Intra-Africa segments, the bulk of freight is transported by rail or road due to lack of capacity and challenges in customs clearance at airports.

Figure 3.2 EBIT margin by region



Source: IATA

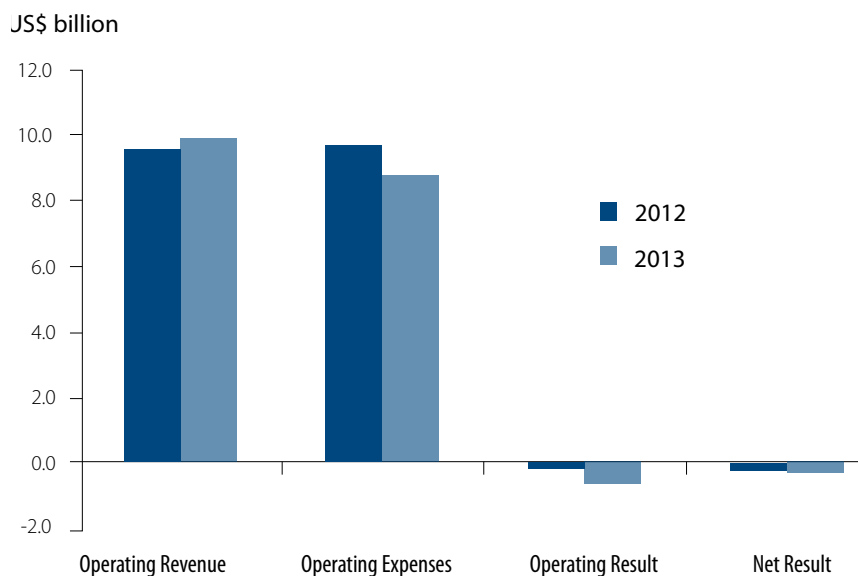
3.2 AFRAA Airlines Operating Revenue and Expenses

This analysis is limited to 14 AFRAA airlines that reported their financial results for 2013.

The 14 AFRAA carriers' total operating revenue was US\$9.9 billion in 2013 compared to US\$9.7 billion in 2012. Operating expenses for 2013 was US\$8.8 billion resulting to an operating loss of US\$722 million and a net loss of US\$231 million. Of the 14 airlines that reported their results, 5 made profit. Ethiopian airlines was the largest African carrier in 2013 with revenue topping US\$2.3 billion.

African airlines are expected to post a US\$100 million profit in 2014, reversing the US\$100 million loss in 2013. Economic growth and network development by some African airlines is leading growth, however, profitability is not evenly spread across the continent. African airlines face stiff competition on intercontinental routes, market access restrictions, high operating costs, heavy taxation and infrastructure deficiencies which hamper the region's airlines profitability.

Figure 3.3 Financial results of some AFRAA airlines (US\$ billions)



Source: AFRAA

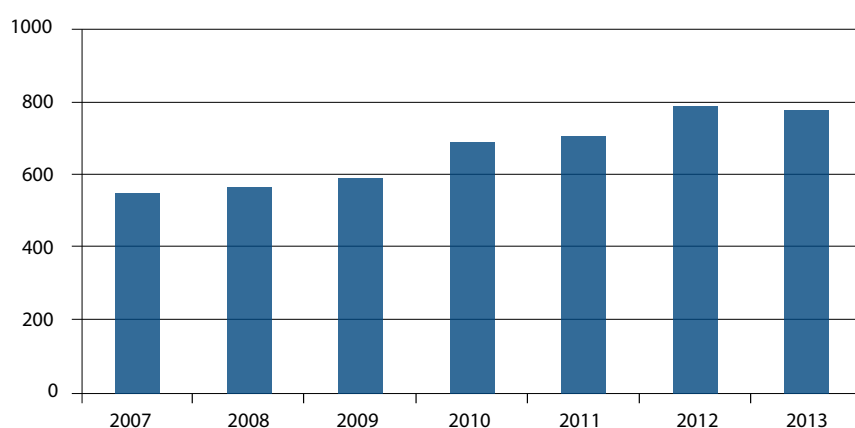
Section Four

Freight Carried and Traffic

Air freight shipment in Africa is still very low. In 2013 the continent airlines carried about 781,000 tonnes of total global freight carried, representing 1.57% of total air freight shipment. 20 AFRAA member airlines that reported their results carried a total of over 760,000 tonnes. In FTKs, this represents a growth of 14.9% compared to the growth of 11.7% in 2012. The Middle East and Latin America recorded the highest year-on-year air freight growth of 8.6% and 7.5% respectively.

Figure 4.1 African Airlines Year-on-Year Freight Carried (tonnes)

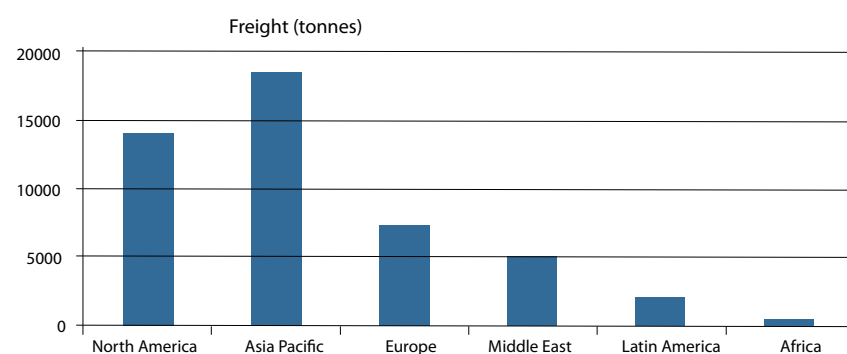
Freight carried (tonnes)



Source: AFRAA/IATA WATS

Over 70% of all freight carried is between Africa and other regions. The outbound freight is composed mainly of perishables such as fresh fruits, vegetables, flowers and other agricultural produce while the inbound is manufactured goods, electronics, mining equipment and components. Though small, intra-Africa air freight is growing very fast because of recent increase in regional trade and cross investments among African countries. With harmonisation of customs regulations and procedures and availability of regular scheduled freighter services, intra-Africa air freight could gain more importance.

Figure 4.2 Freight Carried by Region (tonnes) – 2013



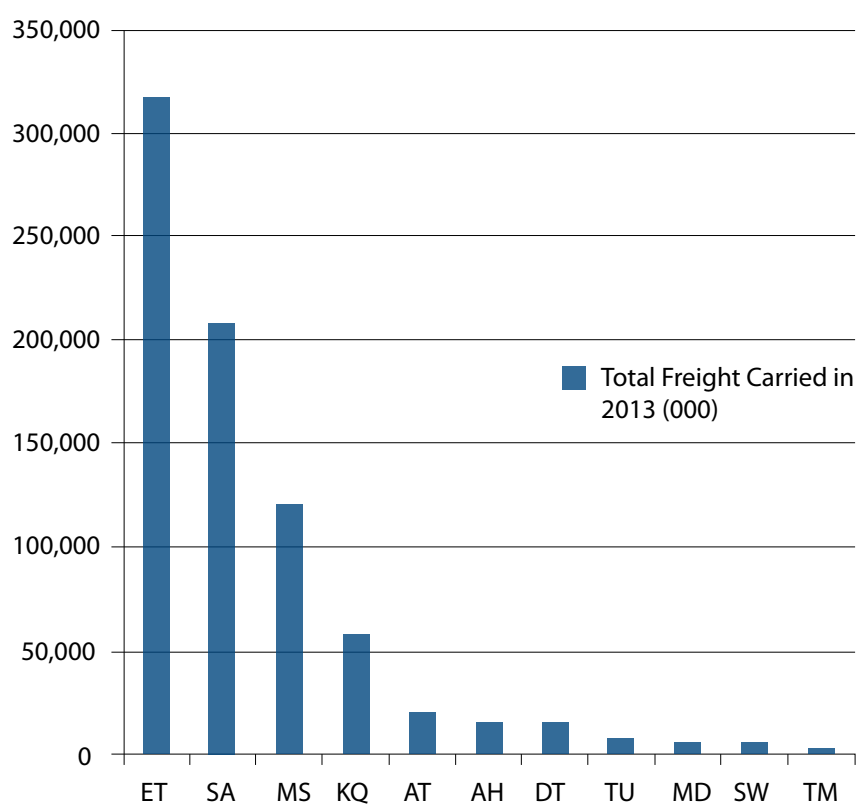
Source: AFRAA/IATA WATS

However, the failure by many African airlines to develop the cargo component of their operations has led to dominance of the intercontinental sector by non-African airlines. On the domestic and intra-Africa segments, the bulk of freight is transported by rail or road due to lack of capacity and challenges in customs clearance at airports.

Reporting AFRAA airlines together moved 780,154 tons. 61.55% of the freight was carried on intercontinental routes, with 30.19% and 8.26% carried on domestic and regional routes respectively. Ethiopian Airlines carried the largest portion of freight at 317,659 tons followed by South African Airways at 208,040 tonnes.

Figure 4.3 Total Freight Carried by Some AFRAA Airlines in 2013 (000)

Total Freight Carried (000)



Source: AFRAA

Freight Traffic Forecast

Air freight markets have been more affected by economic conditions than passengers and as a result, most of the forecasts have been downgraded and show a more cautious outlook compared to the expectations in 2013.

IATA survey showed that airlines on average now expect air freight tonnes to grow by 3.2% annually over the next 5 years to 2017 on international markets. The manufacturers have also downgraded their long term forecasts and now expect air freight demand (FTKs) growth to average 4.8-5.0% over the next 20 years. IATA's medium term estimated freight tonnes growth remains at 4.5% for the next 5 years.

Section Five

African Airports Statistics

In 2013, African airports carried 165 million passengers. This represented an increment of 1 million passengers over the number of passengers carried in 2012. International passengers constituted 64% of the passengers carried in 2013.

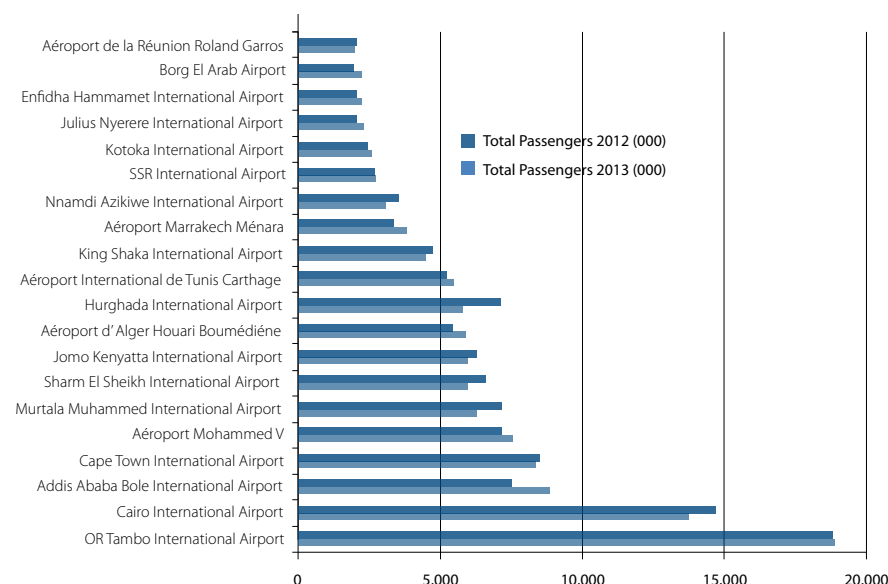
Of the top 20 African airports in passenger numbers, 3 are located in South Africa and 4 in Egypt, making the two countries the biggest air transport markets in Africa. O.R. Tambo International Airport is the busiest airport in Africa in terms of passenger numbers, cargo handled and aircraft movement.

Figure 5.1 Top African Airports by Passengers Carried in 2013 and 2012 (000)

	Country	Airport	Total Domestic Passengers 2013	Total Domestic Passengers 2012	Total International Passengers 2013	Total International Passengers 2012
1	South Africa	OR Tambo International Airport	9,347,668	9,670,140	9,445,801	9,011,526
2	Egypt	Cairo International Airport	1,795,546	1,845,749	10,957,330	12,737,485
3	Ethiopia	Addis Ababa Bole International Airport	602,413	561,716	6,260,086	5,341,391
4	South Africa	Cape Town International Airport	6,872,554	7,013,155	1,476,300	1,492,408
5	Morocco	Aéroport Mohammed V	663,785	6,114,80	6,870,946	6,551,781
6	Nigeria	Murtala Muhammed International Airport	3,136,916	4,272,994	3,075,993	2,850,431
7	Egypt	Sharm El Sheikh International Airport	643,061	676,627	5,308,255	5,945,108
8	Kenya	Jomo Kenyatta International Airport	1,010,725	1,132,319	3,783,987	3,913,143
9	Algeria	Aéroport d'Alger Houari Boumédiène	1,688,727	1,574,261	4,229,405	3,824,009
10	Egypt	Hurghada International Airport	449,641	426,224	5,331,859	6,707,808
11	Tunisia	Aéroport International Tunis Carthage	213,351	246,755	5,171,588	4,883,529
12	South Africa	King Shaka International Airport	4,234,694	4,528,848	270,235	218,213
13	Morocco	Aéroport Marrakech Ménara	166,932	149,491	3,612,679	3,172,338
14	Nigeria	Nnamdi Azikiwe International Airport	2,366,376	2,803,838	725,024	719,555
15	Mauritius	SSR International Airport	126,118	123,170	2,600,173	2,567,699
16	Ghana	Kotoka International Airport	772,298	544,583	1,669,542	1,726,051
17	Tanzania	Julius Nyerere International Airport	1,077,354	868,821	1,136,560	1,100,666
18	Tunisia	Enfidha Hammamet International Airport	2,184	4,605	2,226,796	2,048,095
19	Egypt	Borg El Arab Airport	133,239	126,939	2,117,558	1,833,109
20	La Reunion	Aéroport de la Réunion Roland Garros	10,982	14,390	1,968,459	1,984,743

Source: AFRAA/ACI-AFRICA

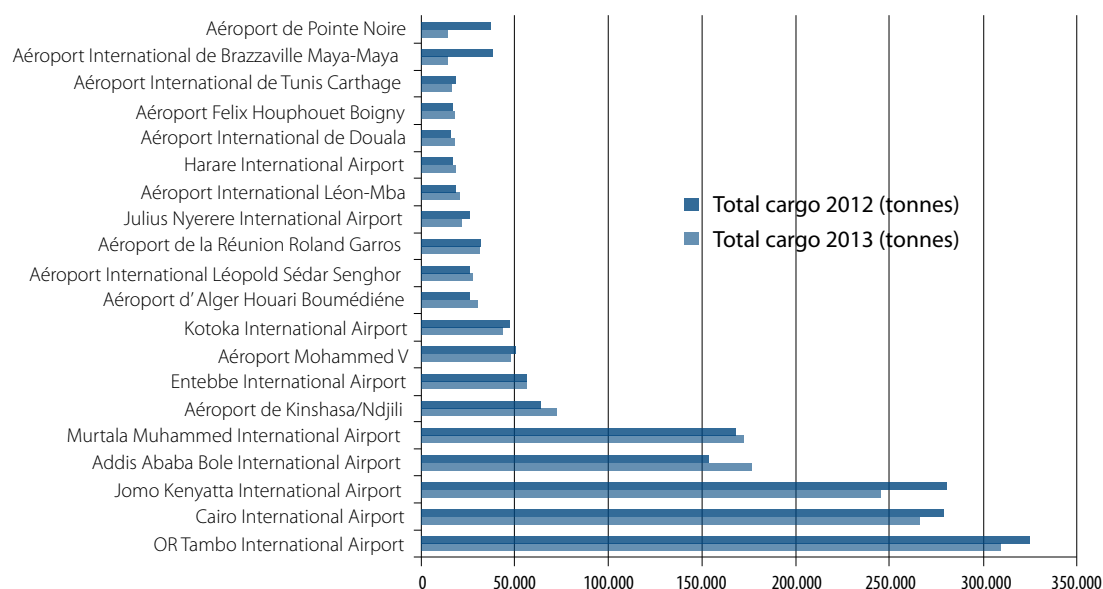
Figure 5.2 Top 20 African Airports by total Passengers Carried in 2013 and 2012 (000)



Source: AFRAA/ACI-AFRICA

Freight traffic in 2013 at African airports was 1,779,661 tonnes, this was a 3.3% from 2012. O. R. Tambo International in Johannesburg was the major cargo airport, accounting for 309,400 tonnes. The other cargo hubs among the top 5 in the continent include: Cairo International Airport (266,500 tonnes), Jomo Kenyatta International Airport (245,000 tonnes), Addis Ababa Bole International Airport (176,500 tonnes) and Murtala Muhammed International Airport (172,600 tonnes).

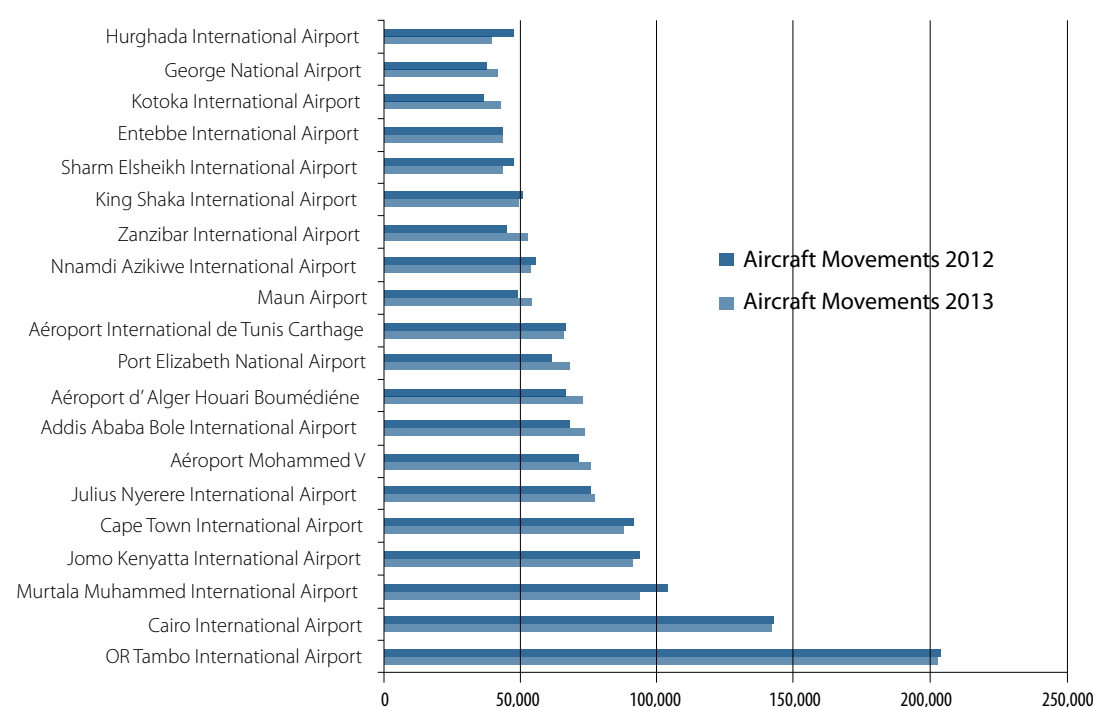
Figure 5.3 Top 20 African Airports by Total Cargo Handled in 2013



Source: AFRAA/ACI-AFRICA

Aircraft movement saw a marginal increase of 1.3% in 2013 compared to 2012. There were 2.7 million aircraft movements in 2013 compared to 2.7 million in 2012. The top 5 African airports ranked by aircraft movements in 2013 are: OR Tambo International Airport(202,750), Cairo International Airport (142,251), Murtala Muhammed International Airport (93,257), Jomo Kenyatta International Airport (91,040) and Cape Town International Airport (87,388).

Figure 5.4 Top 20 African Airports in 2013 by Aircraft Movement



Source: AFRAA/ACI-AFRICA

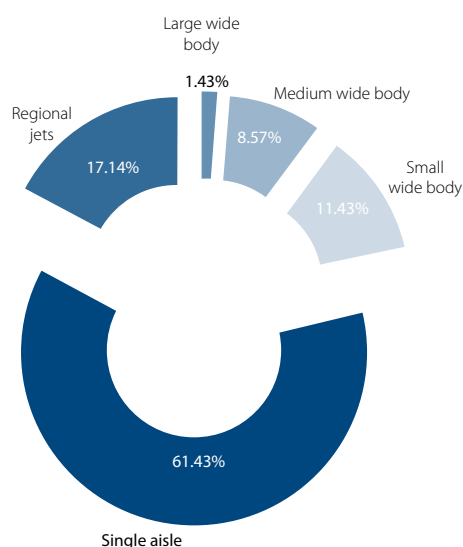
Section Six

Fleet Composition and Development

Global commercial airline fleet in 2013 was composed of 20,910 airplanes and is expected to rise to 42,180 airplanes in 2033 according to Boeing Market Outlook. Between 2013 and 2033, 36,770 new aircraft are expected to be added to or replace some existing fleet in operation. The total cost of the additional fleet is estimated at over US\$5,200 billion.

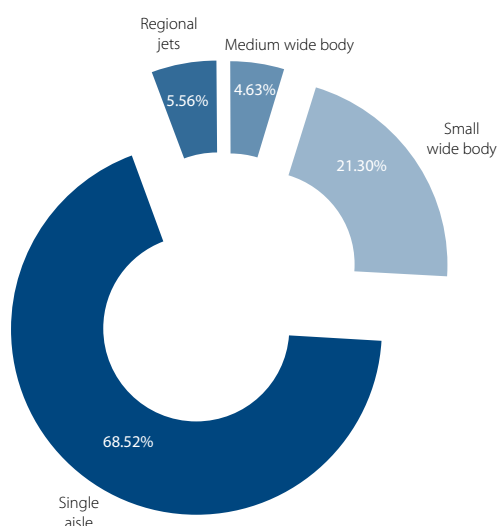
Replacement of aging airplanes, plus the industry's growth requirements, will create a demand for nearly 2,200 freighter deliveries over the next 20 years. Of these, 1,330 will be passenger airplane conversions. The remaining 840 airplanes, valued at US\$240 billion, will be new. The freighter fleet will increase by more than half, from 1,690 airplanes in 2013 to 2,730 in 2033.

Figure 6.1 Africa fleet composition – 2013



Source: Boeing Market Outlook

Figure 6.2 Aircraft demand forecast 2013 – 2033



Source: Boeing Market Outlook

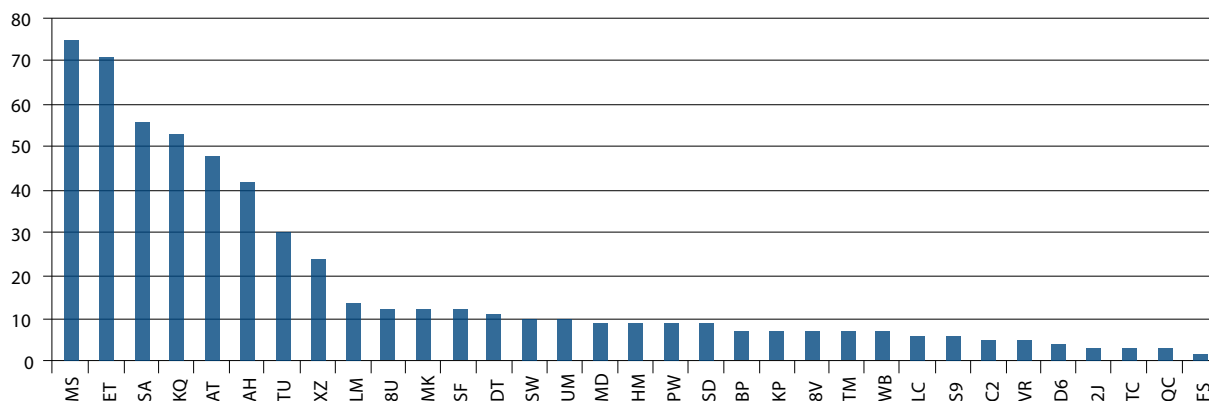
Table 6.1 Global aircraft in service in 2013 and additional demand by 2033

	2013	2033	New Planes	Value (2013 \$B catalog prices)
Large wide body	740	790	620	240
Medium wide body	1,580	3,680	3,460	1,160
Small wide body	2,390	5,570	4,520	1,140
Single aisle	13,580	29,500	25,680	2,560
Regional jets	2,620	2,640	2,490	100
Total	20,910	42,180	36,770	5,200

Source: Boeing Market Outlook

Currently, 430 (61.43%) aircraft in operation in Africa is made up of single aisle type. Wide body (large, medium and small) constitute 21.43% and regional jets constitute 17.14%. The top 5 airlines in terms of number of aircraft in operation in 2013 are Egypt Air, Ethiopian Airlines, South African Airways and Kenya Airways and Royal Air Maroc.

Figure 6.3 Fleet of Some AFRAA Airlines in 2012



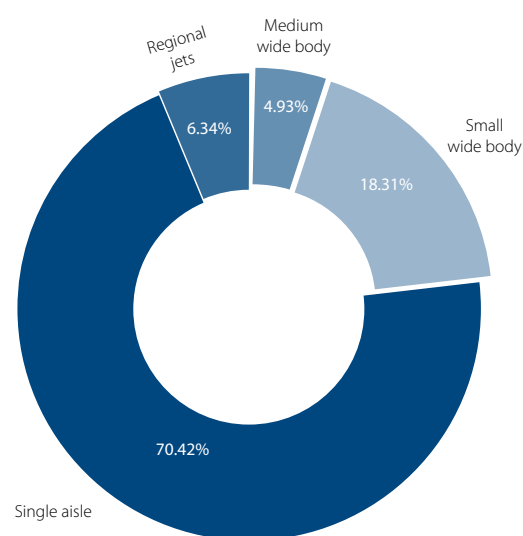
Source: AFRAA

Fleet Forecast

Boeing forecast Africa to require 1,080 new airplanes over the next 20 years, approximately two-thirds of which will expand the region's fleet.

Of this, about 4.9% will be medium wide body aircraft, 18.3% small wide body, 70.4% single aisle and 6.3% will be regional jets. The total number of commercial aircraft to be in operations in Africa by 2033 will double to 1,420.

Figure 6.4 Africa's 2033 fleet composition



Source: Boeing Market Outlook

By 2033, about 77% of the expected new aircraft will be single aisle and regional jets, a clear indication of the anticipated growth in Intra-Africa and domestic travel. Africa fleet composition would remain largely dominated by single aisle and regional jets. About 23% of the fleet will consist of medium and small wide body aircraft.

Section Seven

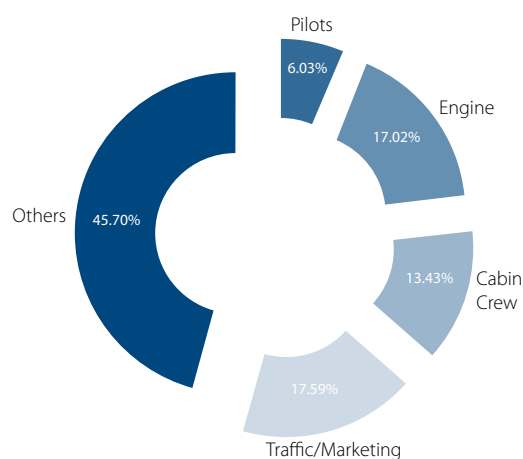
Employee Productivity

This analysis is based on the reported data by 20 AFRAA member airlines.

In 2013, total number of employees of IATA member airlines increased by 2.0% over 2012, with the employee productivity in RTKs per employee increasing by 2.1%.

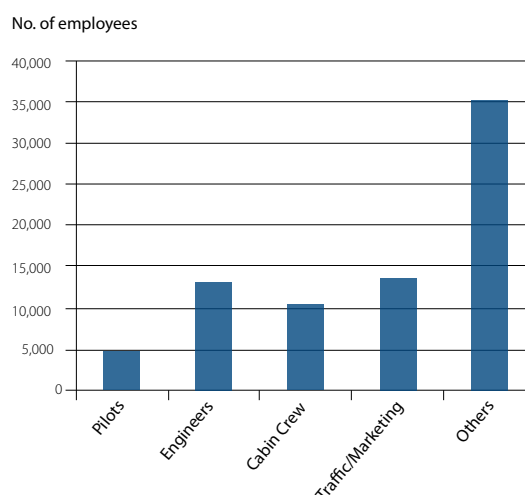
The total number of people employed directly by AFRAA member airlines in 2013 dropped by 3.9% from 80,257 in 2012 to 77,081 employees in 2013.

Figure 7.1 2013 AFRAA Airlines Employees by Job Type



Source: AFRAA – Reported AFRAA airlines only

Figure 7.2 AFRAA Airlines Employment by Job Type (2013)



Source: AFRAA – Reported AFRAA airlines only

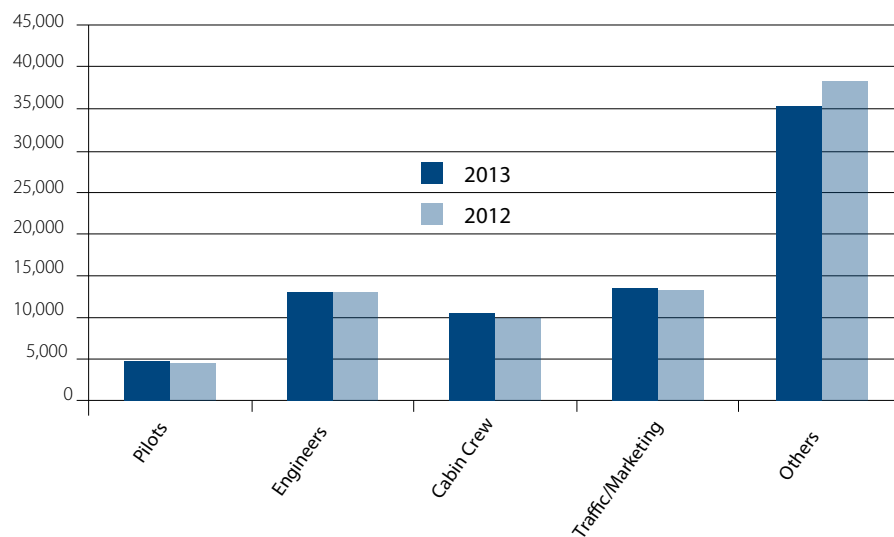
Table 7.1 Employee Performance Indicators

	2013	2012
RTK/employee	168,556	197,000
Number of passengers/employee	612	844
Employee/aircraft	154	130

Source: AFRAA – Reported AFRAA airlines only

Figure 7.3 No. of employees of some AFRAA airlines in 2013 and 2012

No. of employees



Source: AFRAA – Reported AFRAA airlines only

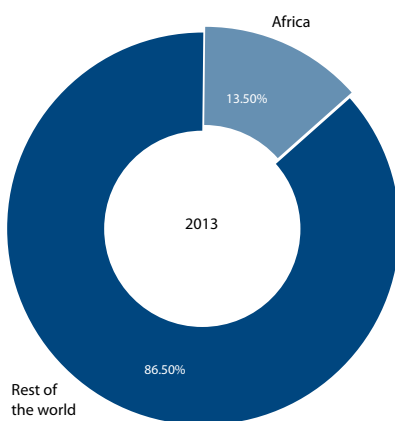
According to Boeing's 2014 Pilot and Technician Outlook, 17,000 pilots and 19,000 technicians will be needed in Africa over next 20 years. The demand will be driven by steadily increasing airplane deliveries.

Section Eight

Safety

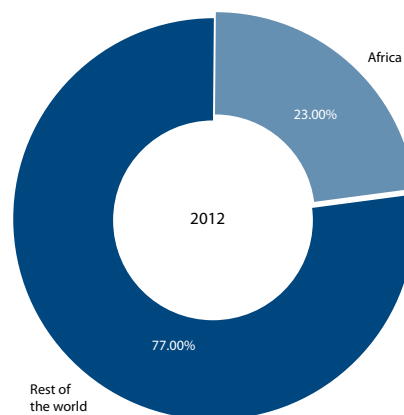
In 2013, there were 31 fatal airline accidents worldwide with 555 fatalities. 7 of the accidents or 23% happened in Africa with 252 fatalities (49 of them on the ground). Three of the accidents were in DRC, a country which consistently registers high accident rates on the continent. The detailed accident statistics are available as Annex 1.

Figure 8.1 Africa-vs-Rest of World Accidents – 2013



Source: Aviation Safety Network

Figure 8.2 Africa and World Share of Fatalities – 2012



Source: Aviation Safety Network

2011 was the best year for Africa in terms of having the lowest accident rates. There were a total of 5 fatal airline accidents on the continent out of 39 worldwide, according to statistics from the Flight Safety Foundation. Of these, again the DRC topped the list with 3 of the 5 fatal airline accidents.

It is also clear that if efforts are made to reduce accidents in the DRC, the rate of accidents on the continent will be significantly reduced. All stakeholders need to work together to ensure that accident rates are brought down to world average rates.

The table shows that there were 37 fatal airline accidents during this period of which 5 (which are highlighted) took place in Africa which constitutes 13.5% of the total. This is a significant improvement over the averages of about 30% over the past decade. Total number of fatalities worldwide was 299 while the number for Africa was 59. The DRC registered one fatal accident, which is an improvement over the past few years when at least 3 fatal accidents were recorded in the country. The average age of aircraft involved in fatal accidents worldwide was 22.4 years.

In 2012, there were 31 fatal airline accidents worldwide with 555 fatalities. 7 of the accidents or 23% were from Africa with 252 fatalities (with 49 of them on the ground). Three of the accidents were in DRC, a country which consistently registers fatal airline accident each year.

From the statistics, only one African IOSA certified airline was involved in a fatal accident in 2013 whilst none was involved in 2012, which further justifies the need for all operating African airlines to be IOSA certified as soon as possible but no later than December 2015. This deadline was set by the African ministers responsible for Aviation in Abuja, in July 2012 and endorsed by African Heads of States in January 2013.

AFRAA and IATA are working diligently in areas of capacity building to help airlines preparing for IOSA audits. AFRAA is very gratified by the positive and enthusiastic response to the training courses that were conducted in conjunction with IATA for the non-AFRAA / non-IATA airlines seeking IOSA registration. We are confident that these efforts plus the efforts by ICAO and AFCAC to strengthen the oversight capacity of African States will continue to help to raise the safety culture in African aviation to global standards as evidenced by reduced accident rates. The table on fatal accident statistics is included in the annexes of this report.

IATA Operational Safety Audit (IOSA)

As of December 2013, Africa had 40 airlines on the IOSA registry. AFRAA requires that all its member airlines be IOSA certified so as to demonstrate that safety is the number one priority for member airlines. The Ministers Responsible for Aviation decided in Abuja in July 2012 to make IOSA mandatory for airlines by 2015 and this endorsed by African Heads of States in January 2013.

The Following African Airlines on IOSA Registry (2013):

- Afriqiyah Airways
- Air Algérie
- Air Austral (Reunion Islands)
- Air Botswana
- Air Burkina
- Air Cairo
- Air Madagascar
- Air Mauritius
- Air Namibia
- Air Seychelles
- Air Uganda
- Air Zimbabwe
- Alexandria Airlines
- Almasria Universal Airlines (Egypt)
- ALS Limited (Kenya)
- Arik Air (Nigeria)
- Comair (South Africa)
- EgyptAir
- Equafight Société SARL (Congo Republic)
- Ethiopian Airlines
- Interair South Africa
- Kenya Airways
- LAM Mozambique Airlines
- Libyan Airlines
- Nesma Airlines (Egypt)
- Nile Air (Egypt)
- Nouvelair (Tunisia)
- Precision Air Services
- Royal Air Maroc
- Tunisair
- SAFAIR (Proprietary) Ltd
- South African Airlink
- South African Airways
- South African Express Airways
- Sudan Airways
- Airlines (Tunisie)
- TAAG Angola Airlines
- TACV Cabo Verde Airlines
- Tassili Airlines (Algeria)
- Trans Air Congo (Congo Republic)



Vision

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

Mission

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

Objectives

- To facilitate the establishment of industry best practices in safety and security.
- To be the repository of data and its analysis focusing on key issues in the aviation sector.
- To provide a platform for consensus building among member carriers.
- To facilitate joint projects between member airlines aimed at reducing their costs and increasing their revenues.
- To actively contribute in human capital development.
- To interact with the regulatory bodies to support and protect the common interests of all African airlines.
- To provide forums for members and industry partners to enhance their knowledge base and enhance mutual cooperation.
- To facilitate the development of environmental policies in keeping with industry best practices.
- To reflect the positive image of the African airlines worldwide.

Section Nine: AFRAA Secretariat Value Added Activities

1. Safety

IOSA Registered Airlines

As of October 2014, Africa had 40 airlines on the IOSA registry. AFRAA requires that all its member airlines be IOSA certified so as to demonstrate that safety is the number one priority for member airlines. The Ministers Responsible for Aviation decided in Abuja in July 2012 to make IOSA mandatory for airlines by 2015 and this was endorsed by African Heads of States in January 2013.

Getting More Airlines IOSA Registered

Following the resolution of the Abuja Declaration to make IOSA mandatory for all African airlines, IATA selected ten (10) airlines in 2013 to provide training and prepare them for IOSA audit. These airlines received in-house workshops to prepare them for the audits. In 2014, IATA has selected 7 additional airlines for assistance with capacity building to prepare them for IOSA audit.

It is anticipated that by 2015, there will be an additional over a dozen airlines that are IOSA certified, which would ensure that most of the major airlines on the continent are IOSA registered and those not on the register would be the exception rather than the norm.

ISAGO (IATA Safety Audit for Ground Operations)

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

The implementation of the IATA Safety Audit for Ground Operations (ISAGO) aims to improve safety and cut airline costs by drastically reducing ground accidents and injuries. It is heartening to note that the number of African ground handling companies with ISAGO registration has increased from 25 in May 2013 to 44 by May 2014.

Partnership with ACS

AFRAA has partnered with an IATA approved auditing firm based in Australia namely Aviation Compliance Solutions (ACS) to train African IOSA auditors. Ensuring that all African airlines are IOSA registered requires that the process of attaining IOSA registration is cost effective. Hence the need for more IOSA auditors based on the continent. ACS in collaboration with AFRAA conducted 2 courses in early 2014 with the third course scheduled for end of the year. This will be followed by on-the-job training of auditors. This process is helping in enhancing a safety culture on the continent.

2. Training and Human Capital Development

In 2014, AFRAA Secretariat conducted 18 training courses and 1 workshops/seminar. Our collaboration with the IATA Airline Training Fund (IATF) for the development of capacity continues to grow. The courses conducted in the training calendar are as follows:

I. AFRAA Courses			
	Course	Course date	Host
1	Train the Trainer	6 - 10 January	Air Tanzania
2	Instructional Design	10 - 14 March	RwandAir
3	Airline Turnaround Coordination	17 - 21 March	Air Botswana
4	Airline Turnaround Coordination	23 - 28 March	Air Botswana
5	Instructional Technics	24 - 28 March	RwandAir
6	Basic Fares & Ticketing	7 - 11 April	Air Burundi
7	Intermediate Fares & Ticketing	14 - 18 April	Air Burundi
8	Airline Document Control	19 - 22 May	Air Namibia
9	Training Needs Assessment	23 - 25 July	RwandAir
10	Managing People Performance	11 - 15 August	RwandAir
11	Instructional Techniques (cabin crew)	25 - 29 August	RwandAir
12	Instructional Design (cabin crew)	1 - 5 September	RwandAir
II. COURSES IN CONJUNCTION WITH OTHER ORGANISATIONS			
1	Lead Auditor - QMS	2 - 7 March	AFRAA & ACS
2	Lead Auditor - QMS	9 - 13 June	AFRAA & ACS
3	TOT - Instructional Technics - IATA	28 July - 1 August	AFRAA & IATA
4	Root Cause Analysis	15 - 19 September	AFRAA & IATA
5	Lead Auditor - QMS	13 - 17 October	AFRAA & ACS
6	Root Cause Analysis	27 - 31 October	AFRAA & IATA
III. WORKSHOPS & SEMINARS			
1	Operations & Maintenance Safety Seminar	19 - 20 August	AFRAA, Boeing, KCAA, Kenya Airways

3. Seeking to Fully Open African Skies

The Secretariat carried out a study on the benefits to various stakeholders of the full implementation of the Yamoussoukro Decision (YD). The study showed the huge benefits that would accrue to airlines, aviation related businesses and organisations, tourism, and the wider economy if the YD is fully implemented. The study was disseminated to all Chairmen and CEOs of member airlines.

A number of CEOs of major African airlines held a meeting with the Chairperson of the AU Commission in October. The airlines expressed their commitment to a single African sky and urged Heads of State at their meeting scheduled for early 2015 to endorse a single air transport market to be operational within a year.

To ensure legal and strong institutional framework, the regulatory texts and legal institutional framework were scheduled to be finalised in October 2014. It is anticipated that the continent will become a single air transport market and void all bilateral air services agreements by early 2016.

4. AFRAA Projects

4.1 AFRAA Fuel Project

The AFRAA Fuel Tender is on its 4th year and the negotiations are currently ongoing. The membership of the members has grown to 14 members with the latest entrant being South African Airways. The tender now covers 169 locations out of which 104 are scheduled locations. The volumes tendered are in excess of 1.2 billion litres.

Lobbying Activities Against High Fuel Taxes and Charges

Africa remains the region with one of the highest taxes and charges. AFRAA has been working closely with IATA in the lobbying efforts against high fuel taxes and charges. In Côte d'Ivoire, the Committee engaged SIR Refinery

who agreed to implement a transparent formula price based on international quotations and published in their invoices. SIR also agreed to post its price on the 1st day of the month to better align with airlines accounting and tankering decision making systems.

In South Africa, AFRAA and IATA have been lobbying for transparency on fuel cost and the introduction of a unique transport tariff independent of the use of the rail or pipeline, although in the short term, this could affect the airlines that are mainly supplied via pipeline, but in the medium and long term will push the differentials down and will equalize the competitiveness from all suppliers. The Committee is also lobbying for the government to review the TRANSNET Pipeline requests.

In Kenya, the Committee has been lobbying for the exclusion of the Rail levy and the scrapping of the VAT fees on the pipeline fees on air tickets. In Zambia, campaigns are ongoing for the removal of the Strategic Reserve Fund as per ICAO convention, the exemption of taxation on jet fuel and the introduction of transparent pricing methodology which will have an impact on the industry's confidence. In Guinea, AFRAA and IATA have urged the Government of Guinea to take necessary actions to avoid any anticompetitive behavior and to implement a transparent charging system on costs of the fuel infrastructure access fee. Other lobbying efforts are being conducted in Ethiopia, Angola, Congo Brazzaville and Rwanda.

The Secretariat will continue its lobbying efforts to reduce the high industry costs on the continent.

4.2 Route Network Coordination Project

AFRAA re-launched the Route Network Coordination Project for its member airlines in 2014. The Route Network coordination project is an initiative of the Association aimed at engaging airlines' Heads of Network Planning together to coordinate and harmonize their flight schedules with other African airlines and develop tactical alliances amongst themselves.

During the launch meeting in August 2014, the Committee reviewed the background of the project and discussed at length the major challenges in the development of tactical alliances through code-share, Special Pro-rate Agreements (SPAs), commercial and marketing agreements. Members agreed to initially work to exhaust the missing codeshares and thereafter tackle issues such as lobbying for 5th freedom traffic rights on selected routes. Participating airlines in the project include: Astral Aviation, Kenya Airways, ECAir, Air Zimbabwe, Air Namibia, Ethiopian Airlines, Royal Air Maroc, Air Burkina and Precision Air.

4.3 Ground Handling Steering Committee

The standards of ground handling at airports in Africa vary widely due partly to the lack of or inadequate oversight by the responsible authorities. Similarly, infrastructure and facilities for handling passengers/cargo in many airports are inadequate, dilapidated or limited. The effect of this is that, quality standards are low in many airports while handling cost is high. The handling charges and fees in African airports are among the highest in the world. AFRAA established the Ground Handling Project for its member airlines with the view to adopt and implement cost-effective common solutions that will address some of the handling challenges faced by airlines.

The AFRAA Ground Handling Project kicked off its activities in 2014 with an initial focus on joint procurement of ground services at selected airports in Africa and joint lobbying activities. The Committee launched its first tender in September 2014 with 7 members namely: Astral Aviation, EgyptAir, Ethiopian Airlines, Kenya Airways, South African Airways, TAAG Angola Airlines and RwandAir. Ground handlers were invited to bid for the provision of ground handling services to the Committee members at the targeted stations through an open tender process.

5. Lobbying Against AU Travel Tax

The Secretariat held a meeting with the AU in June 2014 to express the industry's opposition to the proposed AU Travel Tax. The Secretariat put across the case of the high charges, taxes and fees in Africa which makes air travel uncompetitive. The huge economic benefits of aviation were highlighted during the meeting. The Secretariat also underscored the numerous challenges faced by the industry on the continent including lack of full implementation of YD, inadequate infrastructure, the limited share of less than 20% of African carriers in intercontinental operations, the visa requirements, poor profitability and why any extra taxes would be very much unwarranted. The good examples were highlighted of the Gulf States that support their airlines with low taxes and charges whilst their governments are providing excellent infrastructure which make their hubs attractive and are deriving huge economic benefits for their states.

6. Development of AFRAA Land

AFRAA has a piece of valuable unused land at its headquarters in Nairobi. The Association wants to develop this land to generate additional revenue. This will enable AFRAA to fund more activities for the benefit of members. AFRAA engaged well renowned architects to draw proposed plans for the buildings to be constructed for each phase of the project. The Finance Oversight Committee (FOC) reviewed the preliminary report of the architects during its 3rd Meeting held at the AFRAA headquarters in Nairobi on 31 July 2014. The Committee noted that indicative repayment schedules were achievable within AFRAA internal resources and were of the view that the project was viable. The Committee tasked the Secretariat to obtain detailed drawings from the architect and engage quantity surveyors for the project estimates.

The FOC recommended the formation of the Project Oversight Task Force which would report to the FOC. The Project Oversight will be made up of South African Airways and Kenya Airways resource personnel to oversee the setup of the project.

7. AFRAA Aviation Stakeholders Convention

The AFRAA Secretariat successfully staged the third Aviation Stakeholders Convention in Nairobi, Kenya, from 4-6 May 2014 at the Safari Park Hotel. This initiative of AFRAA, now in its third year, had 294 registered delegates from 41 countries consisting mainly operators and service providers. The Convention was held under the theme, "Partnering for Aviation Business" and deliberated on issues covering the aviation industry in Africa with a focus on partnerships, cost control, demand expectations, technology and use of mobile applications in aviation.

The 3rd Suppliers Convention was held under the patronage of the Ministry of Transport and Infrastructure of the Republic of Kenya and the endorsement of Kenya Airways, the Kenya Airports Authority and Kenya Civil Aviation Authority. The conference provided a platform for users and suppliers of aviation products, solutions and services to showcase new developments and innovations, discuss industry trends, network and forge beneficial partnerships.

As part of the Convention, there are master classes where cutting edge ideas, industry best practices, new opportunities and practical solutions were presented and discussed as well as One-to-one meeting sessions where delegates get the most value from their participation and maximize the level of networking.

The next Aviation Convention will be held from 26-28 April 2015 at the Emperor's Palace in Johannesburg, South Africa with the support of South African Airways as the carrier of the event.

8. New Members and Partners

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

We warmly welcome the four member airlines and one partner that joined AFRAA this year. The new member airlines are: Astral Aviation, Tassili airlines, TACV Cabo Verde and Syphax Airlines. Air Transportation Support Group is the new partner who joined AFRAA in 2014.

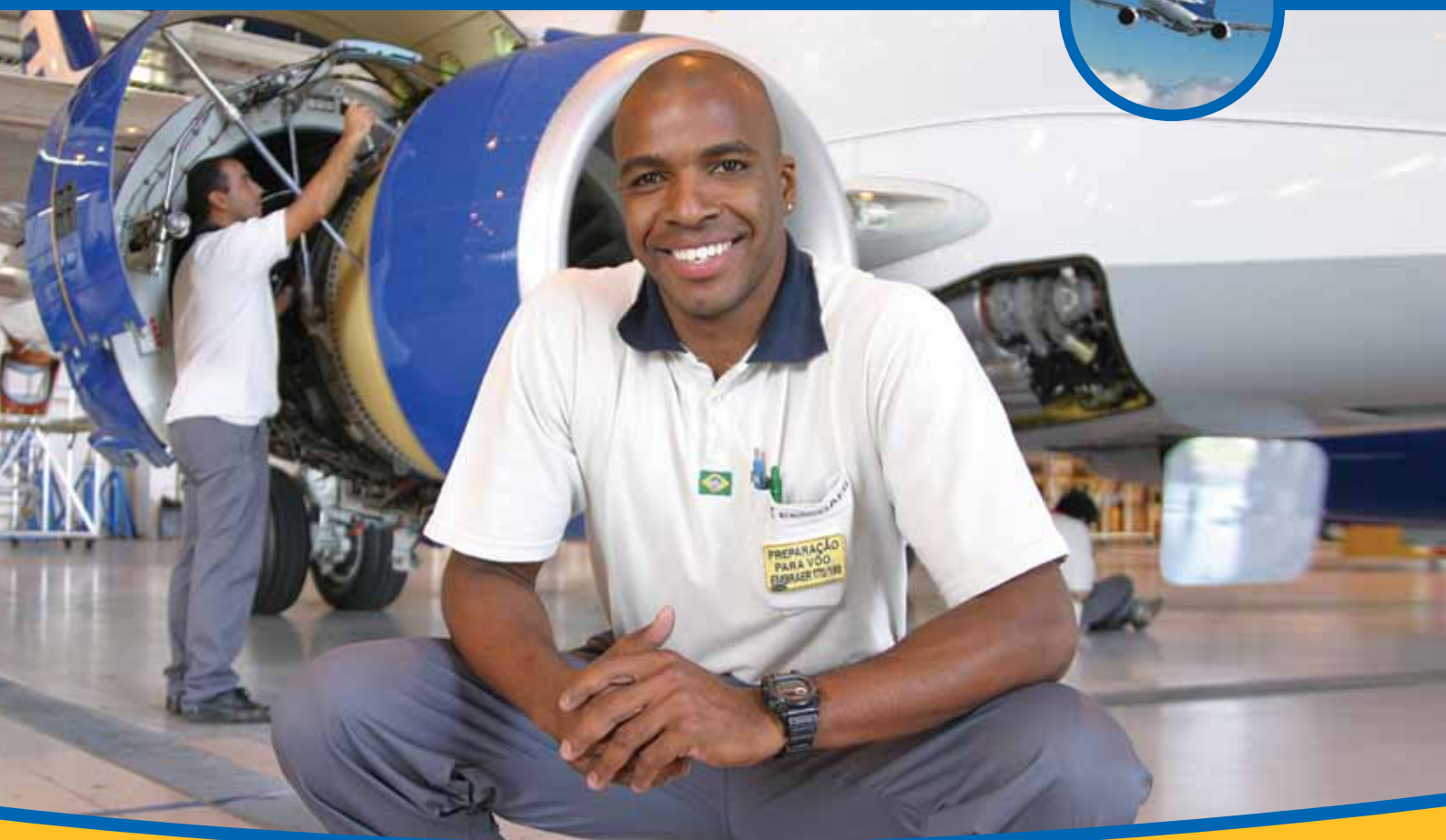
AFRAA partners continue to provide valuable support to the development of African aviation through financial and non-financial contributions to the Secretariat and member airlines. We greatly value their support.

9. Communication and Information Dissemination

One of the key areas of focus by AFRAA is to enhance the knowledge base of its members and partners about developments within the African aviation industry. In this regard, AFRAA has developed a number of communication channels through which it disseminates accurate, relevant and timely information to member airlines, partners and other stakeholders in the industry. The quality of both electronic and printed publications has been improved to match the new image of AFRAA. AFRAA members, partners and other stakeholders receive regular communication through a variety of general and specialised publications.

10. Working with Other Organisations

AFRAA cooperates with the African Union Commission, NEPAD, AfDB; other major industry organisations including IATA, AASA, AACO, ICAO, AFCAC, ACI-Africa; governmental and non-governmental bodies, Regional Economic Communities (RECs) – ECOWAS, EAC, COMESA, SADC, UEMOA; manufacturers and service providers. This collaboration accords AFRAA goodwill and a broad framework of resources and assistance that benefits members, protects their interest and provides support for better economic environment for their operations.



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Section Ten: Airline MROs in Africa



Air Algerie Technics

Contact: Mr. Ali Guemmache
Commercial & Marketing Manager,
Technical Division
Tel: +213 21 50 93 93
Email: guemmache-a@airalgerie.dz /
guemmache.a@gmail.com



Atlantic Air Industries Maroc

Contact: Mr. Bécaye BA
Directeur Général
Tél: +212 (0) 523 297 724
Fax: +212 (0) 523 297 730
Mobile: +212 (0) 661 251 702
Email: becaye.ba@aai-eu.fr



EgyptAir Maintenance and Engineering

Contact: Walid Wahid
Customer Services Manager
Cellular: +2 01 017606695
Office: +2 02 22656855
Fax: +2 02 22656915
Email: c_service_me@egyptair.com

EgyptAir Maintenance and Engineering Technical Training

Contact: Eng. Tarek Darwesh
General Manager Technical Training
Tel: +2 01 06615367
Office: +2 02 22656855
Fax: +2 02 22656915
Email: Tarek_darwesh@egyptair.com



Ethiopian Airlines

Contact: Mr. Amare Gebreyes
Director MRO Sales & Marketing
Tel: +251 911 226 125
Email: AmareG@ethiopianairlines.com

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



Libyan Aircraft Engineering & Maintenance

Contact: Mr. Abdulla A. Mohamed
Maintenance & Engineering Director
Tel: +218 215635668
Email: a.abonaama@laem.ly /
anaama09@yahoo.com



Sneecma Engine Services

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



South African Airways Technical

Contact: Mr. Mike Kenny
Executive Manager Business
Development & Sales
Tel: +271 19789993
Email: mikekenny@flysaa.com /
SATMarketing@flysaa.com

Arson Malola-Phiri
General Manager – Commercial
Tel: +27119786625
Email: ArsonMalola-Phiri@flysaa.com



Tunisair Technics

TunisAir Technics

Contact: Nejmeddine TEBOURSKI
TUNISAIR TECHNICS
Maintenance Training Manager
Tel: +216 71 942-340
Email: nejmeddine.tebourski@tunisair.com.tn

Section Eleven: FAA or EASA Certified Airline Training Centres in Africa



Aldawlya for Training and Science

Contact: Mr. Abdulati Elmeshkhi
Chief Executive Officer
Tripoli, Libya
Tel/fax: +218 213622811/+218 7242395
Email: a.elmeshkhi@aldawlya-trn.com



EgyptAir Training Centre

Contact: Eng. Souad Farg
General Manager, Technical Training
Tel: +20 10 661 5367
Email: technical.traininggm@egyptair.com



Ethiopian Aviation Academy

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

Or Mrs. Menbere Tadesse
Jr. Marketing Officer
Tel: +251 0115 174016
Email: Menberet@ethiopianairlines.com



Kenya Airways Pride Centre

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



South African Airways Learning and Development

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



Tunisair Training Centre

Contact: Ms. Souad Bouchahoua
Director, Training Centre
Tel: +216 70 837 000 Ext. 2958
Email: souad.bouchahoua@tunisair.com.tn

Section Twelve: Providers of Aircraft Simulators



Aviation Training Center of Tunisia (ATCT)

2 A320 aircraft simulators

Contact: Mrs. Thouraya Ayadi
General Director
Tel: +216 71911811
Fax: +216 71911606
Email: atct@atct.com.tn



EgyptAir Training Centre

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

Tel: +202 2265 6262
Fax: 202 2265 6240
Email: trainingcenter@egyptair.com



Ethiopian Aviation Academy

B737NG and B757/B767 full flight simulator trainings

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

Or Mrs. Menbere Tadesse
Jr. Marketing Officer
Tel: +251 0115 174016
Email: Menberet@ethiopianairlines.com

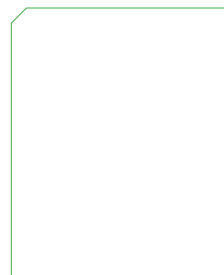
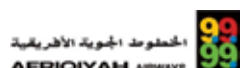


Kenya Airways Pride Centre

B737 NG full flight simulator

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

Section Thirteen: AFRAA Member Airlines Profiles



Mr. Abdulhakim Elfituri Fares
Chairman

ADDRESS

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

IATA CODE : 8U

ICAO CODE: AAW

AFRAA MEMBERSHIP

Became member in 2002
Established in 2001

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

N/A

DESTINATIONS SERVED

Domestic	4
Intra-Africa	5
International	5

EMPLOYEES

1086

FLEET

Airbus 319-111	3
Airbus 320-214	8
Airbus 330-200	1

FLEET ON ORDER

Airbus 320-214	1
Airbus 330-200	3
Airbus 330-300	3
Airbus 350-900	10



Mr. Mohamed Salah Boulouf
Chief Executive Officer

ADDRESS

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

IATA CODE: AH

ICAO CODE: DAH

AFRAA MEMBERSHIP

Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Aeroflot
Finnair
Luxair
Syrian Air
Kuwait Airways

DESTINATIONS SERVED

Domestic	31
Intra-Africa	10
International	29

EMPLOYEES

9,469

FLEET

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

Cargo

Lockheed L100-130	1
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FLEET ON ORDER

Airbus 330-200	3
Boeing 737-800	8
Boeing 787-800	8
ATR72-600	3
B737-700 Cargo	3



AIR BOTSWANA
Going Your Way



Mr. Tozizavipi Benster Dahwa
General Manager

ADDRESS

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

IATA CODE: BP

ICAO CODE: BOT

AFRAA MEMBERSHIP

Became member in 1991
Established in 1947

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	4
Intra-Africa	8

EMPLOYEES

361

FLEET

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



Mr. Abderahmane Berthé
Chief Executive Officer

ADDRESS

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

IATA CODE: 2J

ICAO CODE: VBW

AFRAA MEMBERSHIP

Became member in 2002
Established in 1967

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Air Côte d'Ivoire
Kenya Airways

DESTINATIONS SERVED

Domestic	2
Intra-Africa	7

EMPLOYEES

254

FLEET

Bombardier CRJ-200ER	1
McDonnell Douglas MD-87	2



Mr. Hugues Ratsiferana
President & Chief Executive Officer

ADDRESS

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

IATA CODE: MD

ICAO CODE: MDG

AFRAA MEMBERSHIP

Became member in 1975
Established in 1962

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Air France
Air Mauritius
Thai Airways International

DESTINATIONS SERVED

Domestic	13
Intra-Africa	7
International	4

FLEET

Airbus 340-300	2
ATR42-320	1
ATR42-500	1
ATR72-500	2
Boeing 737-300	3



Mr. André Viljoen
Chief Executive Officer

ADDRESS

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

IATA CODE: MK

ICAO CODE: MAU

AFRAA MEMBERSHIP

Became member in 1985
Established in 1967

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Air Austral
Air France
Air India
Air Madagascar
Emirates
Kenya Airways
Malaysia Airlines
Virgin Australia
South African Airways

DESTINATIONS SERVED

Regional	2
Intra-Africa	7
Intercontinental	12

EMPLOYEES

2,186

FLEET

Airbus 340-300E	2
Airbus 340-300	4
Airbus 319-100	2
Airbus 330-200	2
ATR 72-500	2



Mr. Rene Gsponer
Managing Director

ADDRESS

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

IATA CODE: SW

ICAO CODE: NMB

AFRAA MEMBERSHIP

Became member in 2000
Established in 1946

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Kenya Airways
TAAG Angola

DESTINATIONS SERVED

Domestic	6
Regional	8
Intercontinental	1

EMPLOYEES

748

FLEET

Airbus 319-100	4
Airbus A330-200	2
Embraer ERJ 135	4



Mr. Manoj Papa
Chief Executive Officer

ADDRESS

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

IATA CODE: HM

ICAO CODE: SEY

AFRAA MEMBERSHIP

Became member in 1993
Established in 1978

OWNERSHIP STRUCTURE

Government: 60%
Etihad Airways: 40%

COMMERCIAL PARTNERSHIP

Air Austral
airberlin
Alitalia
Cathay Pacific
Etihad Airways
South African Airways

DESTINATIONS SERVED

Domestic	2
Intra-Africa	2
Intercontinental	3

EMPLOYEES

878

FLEET

Shorts SD3-60-300	1
DHC-6-300	3
DHC-6-400	3
Airbus 330-200	2

FLEET ON ORDER

DHC-6-400	1
-----------	---



Capt. Milton Lusajo Lazaro
Ag. Managing Director and
Chief Executive Officer

ADDRESS

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

IATA CODE: TC

ICAO CODE: ATC

AFRAA MEMBERSHIP

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

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	6
Regional	2

EMPLOYEES

196

FLEET

Boeing 737-200	1
Bombardier Dash 8- Q300	1
Bombardier DHC 8Q-311	1



Mr. Edmund Makona
Ag. Chief Executive Officer

ADDRESS

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

IATA CODE: UM

ICAO CODE: AZW

AFRAA MEMBERSHIP

Became member in 1981
Established in 1946

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	3
Intra-Africa	1

EMPLOYEES

799

FLEET

Boeing 737-200	3
Boeing 767-200	2
Airbus A320-200	2
MA60	3



Mr. Yissehak Zewoldi
Chief Executive Officer

ADDRESS

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

IATA CODE: KP

ICAO CODE: SKK

AFRAA MEMBERSHIP

Became member in 2010
Established in 2009

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Ethiopian Airlines

DESTINATIONS SERVED

Domestic	1
Intra-Africa	18

FLEET

Boeing 737 (NG)-700	3
Bombardier Dash 8-400 NG	4



Mr. Sanjeev Gadhia
Chief Executive Officer

ADDRESS

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

IATA CODE: 8V

ICAO CODE: ACP

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

Fully owned by Kenyans

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED

Domestic	4
Intra-Africa	9
Intercontinental	2
Charters to over 50 destinations in Africa	

EMPLOYEES

30

FLEET

Boeing 747-400F	1
DC-9-34F	1
Boeing 727-200F	2
Fokker F27	1
Cessna 208 Caravan	2



Mr. Jean Paul Nana Sandjo
Director General

ADDRESS

Immeuble La Rotonde- Boulevard
de la liberté
BP 4852 Douala-Cameroun
Tel: +237 33 422010 / 33 422013
Fax: +33 422030 / 33 423015 /33 422980
/ 33 422985
<http://www.camair-co.cm/>

IATA CODE: QC

ICAO CODE: CRC

AFRAA MEMBERSHIP

Became member in 2012
Established in 2008
Commenced operations in 2011

OWNERSHIP STRUCTURE

100% by The Government of Cameroon

COMMERCIAL PARTNERSHIP

Air France

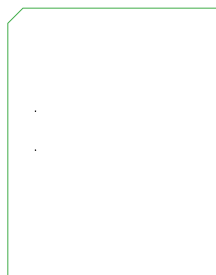
DESTINATIONS SERVED

Domestic	3
Intra-Africa	1
Intercontinental	1

EMPLOYEES

FLEET

Boeing 737-700	2
Boeing 767-300ER	1



Mr. Bienvenido Esono
Chief Executive Officer

ADDRESS

Calle Presidente Nasser
916, Malabo, Equatorial Guinea
Tel: +240333098149 /+240222013663
www.fly-ceiba.com

IATA CODE: C2

ICAO CODE: CEL

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

100% by The State of Equatorial Guinea

COMMERCIAL PARTNERSHIP

Air France

DESTINATIONS SERVED

Domestic	2
Intra-Africa	14
Intercontinental	1

FLEET

ATR 42-320	1
ATR 42-500	1
ATR 72-500	2
Boeing 777-200LR	1



Mrs. Fatima Beyina-Moussa
Director General

ADDRESS

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

IATA CODE: LC

AFRAA MEMBERSHIP

Established in 2011
Became member in 2012

OWNERSHIP STRUCTURE

100% by The Government of
the Republic of Congo

EMPLOYEES

260

DESTINATIONS SERVED

Domestic	3
Intra-Africa	2
Intercontinental	1

FLEET

Boeing 737-300	2
Boeing 737-700	1
Boeing 757-200	2
Boeing 767-300ER	1

FLEET ON ORDER

Boeing 737-700	1
----------------	---

**Capt. Sameh Elhefny**

Chairman and Chief Executive Officer,
EgyptAir Holding Co.

ADDRESS

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

IATA CODE: MS**ICAO CODE:** MSR**AFRAA MEMBERSHIP**

Became member in 1968
Established in 1932

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Star Alliance

DESTINATIONS SERVED

Domestic	10
Intra-Africa	19
Intercontinental	54

EMPLOYEES

31,642

FLEET

Airbus 300-600RF	2
Airbus 300B4-200F	1
Airbus 330-200	7
Airbus 330-300	4
Airbus 320-200	13
Airbus 321-200	4
Airbus 340-200	1
Boeing 737-800	20
Boeing 737-500	4
Boeing 777-200ER	3
Boeing 777ER-300	6
Embraer ERJ-170	12

FLEET ON ORDER

Airbus 330-300	1
----------------	---

**Ato. Tewolde GebreMariam**

Chief Executive Officer

ADDRESS

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

IATA CODE: ET**ICAO CODE:** ETH**AFRAA MEMBERSHIP**

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

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

ASKY Airlines
LAM Mozambique
Star Alliance

DESTINATIONS SERVED

Domestic	18
Intra-Africa	50
Intercontinental	36

EMPLOYEES

7,801

FLEET

Boeing 737-800W	10
Boeing 737-400F	1
Boeing 737-700NG	5
Boeing 757-200ER	4
Boeing 757-260F	2
Boeing 767-300ER	10
Boeing 777-200LR	6
Boeing 777-200LRF	2
Boeing 777-300ER	2
Boeing 787-800	10
Q400NG DHC-8	17
McDonnell Douglas 11F	2

FLEET ON ORDER

Airbus 350-900	14
Boeing 777-200LRF	4
Boeing 787-8	3
Boeing 777-300ER	2
Boeing 737-800	4

**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

IATA CODE: D6**ICAO CODE:** ILN**AFRAA MEMBERSHIP**

Became member in 2001
Established in 1993

OWNERSHIP STRUCTURE

Private Shareholding

COMMERCIAL PARTNERSHIP

Air Austral

DESTINATIONS SERVED

Intra-Africa	16
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FLEET

Boeing 737-200	3
Boeing 767-200ER	1



Mr. Mbuvi Ngunze
Group Managing Director &
Chief Executive Officer

ADDRESS

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

IATA CODE: KQ

ICAO CODE: KQA

AFRAA MEMBERSHIP

Became member in 1977
Established in 1997

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Air Burkina
Air Mauritius
Air Namibia
Etihad Airways
Jet Airways
LAM Mozambique
Precision Air
SkyTeam

DESTINATIONS SERVED

Domestic	4
Intra-Africa	24
Intercontinental	14

EMPLOYEES

4,002

FLEET

Boeing 767 - 300ER	6
Boeing 777 - 200ER	4
Boeing 737 - 300	6
Boeing 777 - 300ER	3
Boeing 737 - 700	4
Boeing 737 - 800	5
Boeing 787-8	5
Embraer 170LR	3
Embraer 190AR	15

FLEET ON ORDER

Boeing 787-8	4
Embraer 190	6



Mr. Iacumba Ali Aiuba
Chief Executive Officer

ADDRESS

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

IATA CODE: TM

ICAO CODE: LAM

AFRAA MEMBERSHIP

Became member in 1976
Established in 1936

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Ethiopian Airlines
Kenya Airways
Precision Air
South African Airways
South African Express
TAP Portugal
TAAG Angola Airlines

DESTINATIONS SERVED

Domestic	10
Intra-Africa	7

EMPLOYEES

715

FLEET

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

FLEET ON ORDER

Boeing 737-700	3
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Eng. Khaled Ben Alewa
Chief Executive Officer &
Member of Board of Directors

ADDRESS

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

IATA CODE: LN

ICAO CODE: LAA

AFRAA MEMBERSHIP

Became member in 1968
Established in 1965

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	10
Regional	4
International	9

FLEET

Airbus 320-200	7
Airbus 330-200	1
Bombardier CRJ900	4
ATR 42-500	2

FLEET ON ORDER

Airbus 320-200	2
Airbus 330-200	1
Airbus350-800	4



Ms. Sauda Said Rajab
Chief Executive Officer

ADDRESS

PO Box 70770, Dar es Salaam,
Tanzania
Tel: +255 22 286 0701
Fax: +255 22 286 0725
www.precisionairtz.com

IATA CODE: PW

ICAO CODE: PRF

AFRAA MEMBERSHIP

Became member in 2006
Established in 1991

OWNERSHIP STRUCTURE

Kenya Airways: 41.23%
Michael Ngaleku Shirima: 42.91%
PW employees: 1.10%
Others: 14.76%

COMMERCIAL PARTNERSHIP

LAM Mozambique
Kenya Airways
RwandAir

DESTINATIONS SERVED

Domestic	8
Intra-Africa	2

EMPLOYEES

759

FLEET

ATR 72-500	5
ATR 42-300/500/600	4

FLEET ON ORDER

ATR72-600	3
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Mr. Driss Benhima
Chief Executive Officer

ADDRESS

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

IATA CODE: AT

ICAO CODE: RAM

AFRAA MEMBERSHIP

Became member in 1977
Established in 1957

OWNERSHIP STRUCTURE

Moroccan Government: 96.80%
Private Investors: 3.20%

COMMERCIAL PARTNERSHIP

Aeroflot
Etihad Airways
Iberia
SN Brussels
TAAG Angola Airlines
Turkish Airlines

DESTINATIONS SERVED

Domestic	18
Intra-Africa	24
International	44

EMPLOYEES

2,138

FLEET

ATR 72-600	4
Boeing 737-700	6
Boeing 737-800	30
Boeing 747-400	1
Boeing 767-300ER	4
Boeing 737-300F	1
Embraer E190	2

FLEET ON ORDER

Boeing 787-8	4
Embraer E190	2



Mr. John Mirenge
Chief Executive Officer

ADDRESS

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

IATA CODE: WB

ICAO CODE: RWD

AFRAA MEMBERSHIP

Became member in 2009
Established in 2002

OWNERSHIP STRUCTURE

Government: 99%
Bayigamba Robert: 1%

COMMERCIAL PARTNERSHIP

Brussels Airlines
Precision Air Services

DESTINATIONS SERVED

Domestic	2
Intra-Africa	13
International	1

EMPLOYEES

749

FLEET

Boeing 737-700	2
Boeing 737-800	2
Bombardier CRJ900 Next Gen	2
Bombardier Dash 8-Q400	1

FLEET ON ORDER

Bombardier Dash 8-Q400	1
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Mr. Monwabisi Kalawe
Chief Executive Officer

ADDRESS

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

IATA CODE: SA
ICAO CODE: SAA

AFRAA MEMBERSHIP

Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED

Domestic	4
Intra-Africa	24
International	10

EMPLOYEES

9,011

FLEET

Airbus 319-100	11
Airbus 330-200	6
Airbus 320-200	9
Airbus 340-600	9
Airbus 340-300E	6
Airbus 340-300X	2
Boeing 737-300F	2
Boeing 737-800	11

FLEET ON ORDER

Airbus 319-132	4
Airbus 320-232	6
Airbus 321-200	4



Mr. Inati Ntshanga
Chief Executive Officer

ADDRESS

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

IATA CODE: XZ

ICAO CODE: EXY

AFRAA MEMBERSHIP

Became member in 2003
Established in 1994

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

LAM Mozambique Airlines
SA Airlink
Congo Express

DESTINATIONS SERVED

Domestic	5
Intra-Africa	11

EMPLOYEES

1015

FLEET

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



Mr. James Eric Antwi
Co-Chief Executive Officer

ADDRESS

832 First Street
PO Box K026 Kanda,
Accra – Ghana
Tel: +233 245000000 or 18181 on MTN
www.flystarbow.com

IATA CODE: S9

ICAO CODE: IKM

AFRAA MEMBERSHIP

Became member in 2012
Established in 2011

OWNERSHIP STRUCTURE

Fully owned subsidiary of ASF Limited,
a Ghanaian private company

DESTINATIONS SERVED

Domestic	3
Regional	4

FLEET

British-Aerospace BAe 146-300	4
British-Aerospace BAe 146-200	1



Mr. Abd Elmahmoud Suleiman Mohammed
Managing Director

ADDRESS

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Street, Riaydh, Khartoum, Sudan
Tel: +249 9123 05604
Fax: +249 183 243717
www.sudanair.com

IATA CODE: SD

ICAO CODE: SUD

AFRAA MEMBERSHIP

Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE

Government: 51%
Private: 49%

COMMERCIAL PARTNERSHIP

Nasair

DESTINATIONS SERVED

FLEET

Airbus A300B4-600R	2
Airbus A320-200	1
Fokker 50	4
Boeing 737-300	1
Boeing 737-500	1



Mr. Christian Blanc
President and Chief Executive Officer

ADDRESS

Rue du lac Victoria,
les Berges du lac 1,
1053 Tunis
Tunisia

IATA CODE: FS

ICAO CODE: SYA

AFRAA MEMBERSHIP

Became member in 2014
Established in 2011

OWNERSHIP STRUCTURE

Privately owned

DESTINATIONS SERVED

Domestic	3
Intercontinental	2

FLEET

Airbus A319	2
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FLEET ON ORDER

Airbus A319	1
Airbus A320	1



Mr. Joaquim Teixeira da Cunha
President and Chief Executive Officer

ADDRESS

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

IATA CODE: DT

ICAO CODE: DTA

AFRAA MEMBERSHIP

Became member in 1978
Established in 1938

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Air France
Air Namibia
British Airways
Brussels Airlines
Iberia
Lufthansa
LAM Mozambique

DESTINATIONS SERVED

Domestic	13
Intra-Africa	11
Intercontinental	7

EMPLOYEES

3,589

FLEET

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

FLEET ON ORDER

Boeing 777-300ER	2
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Mr. Eng. Joao Pereira Silva
Chief Executive Officer

ADDRESS

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

IATA CODE: VR

ICAO CODE: TCV

AFRAA MEMBERSHIP

Became member in 2014
Established in 1958

OWNERSHIP STRUCTURE

Government: 100%

DESTINATIONS SERVED

Domestic	7
Intra-Africa	2
Intercontinental	8

FLEET

ATR 42-500	1
ATR 72-500	2
Boeing 737-800	1
Boeing 757-200	1



Mr. Kellil Faiçal
Chief Executive Officer

ADDRESS

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

IATA CODE: SF

ICAO CODE: DTH

AFRAA MEMBERSHIP

Became member in 2014
Founded in 1997
Commenced operations in 1998

OWNERSHIP STRUCTURE

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

DESTINATIONS SERVED

Domestic	14
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EMPLOYEES

1,165

FLEET

Boeing 737-800	4
Bombardier Dash 8-Q200	4
Bombardier Dash 8-Q400	4



Mrs. Saloua Sghaier
Chairman & Chief Executive Officer

ADDRESS

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

IATA CODE: TU

ICAO CODE: TAR

AFRAA MEMBERSHIP

Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE

Government: 74%
Others: 26%

COMMERCIAL PARTNERSHIP

Middle East Airlines

DESTINATIONS SERVED

Intra-Africa	15
Intercontinental	38

EMPLOYEES

3,709

FLEET

Airbus 320-200	18
(1 to be delivered in Nov 2014)	
Airbus 319-100	4
Boeing 737-600	7

FLEET ON ORDER

Airbus A320-200	5
Airbus A330-200	3



1,000 deliveries haven't changed the world. Only the way the world flies.

With our 1,000th E-Jet delivery, we pause to celebrate. And to applaud what our family of aircraft has meant for all of commercial aviation. For our airline customers. And for their passengers as well — those who benefit most directly from E-Jets as champions of change.

In that visionary role, E-Jets marked the creation of a whole new category — right-sized aircraft that blurred the line between regional and mainline jets. Aircraft that delivered a superior passenger experience, whether on short hauls or five-hour legs. Tools that carriers have used to build or expand their networks incrementally and therefore more profitably.

The result has been greater connectivity, more frequency, more choices for travelers. In fact, E-Jets have helped open whole new markets. For entirely new segments of consumers. People who now can afford the magic of flight for the very first time. It's an experience that still remains beyond the reach of many. But it seems a little closer as each E-Jet rolls off the line.

Section Fourteen: AFRAA Partners Profiles and Contacts



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

Our Auditing and Compliance division is one of only eight (8) IATA accredited Audit Organisations (AO) globally; with ACS being one of the original three (3) AOs that conducts the IATA Operational Safety Audit (IOSA) and IATA Safety Audit Ground Operations (ISAGO) of Ground Service Providers (GSP's). ACS is also an IATA Strategic Partner which through our participation in various IATA work groups and task forces helps us gain unique insights into airlines priorities and we are recognized for working together with IATA in serving the air transport industry. ACS is approved by the Flight Safety Foundation (FSF) to conduct Basic Aviation Risk Standard (BARS) Audits predominately for the resource industry.

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

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

Key contact: Mr. Matthew Miller

Executive Director - Business Development

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Direct: +61 39644 8404

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www.acsgroup.aero



Air Transportation Support Group is comprised of three aviation oriented companies: Aviation Spares and Services International, Global Inflight Products and Global Aviation Support. Our teams consist of multilingual professionals with over 100 cumulative years of experience in the aviation industry, so we fully understand your business and requirements. We consistently offer the best prices, high quality products and services.

Aviation Spares and Services International (ASSIC), founded in 1992, provides the world airline and aviation communities with a complete line of quality FAA-approved aircraft parts, supplies, and services, in the most cost effective and timely manner.

Since 1995 Global Inflight Products (GIP USA) has been a leading provider of onboard products and services for our worldwide airline customers. We guide airlines from consultancy and design, to manufacturing and product delivery, to create smart and innovative solutions to meet our customers' specific requirements. Our five major areas of expertise are: dine, relax, listen, refresh and clean. The products range from porcelain to glassware, headsets to amenity kits, pillows to blankets, and they are designed to enhance the passengers' inflight experience.

Global Aviation Support (GAS), established in 1990, provides specialized export financing, aircraft sales support and other services to the airline industry.

Key contacts: Zine A. Badissy
Chairman & President

Aviation Spares and Services International (ASSIC),
Global Inflight Products (GIP) and
Global Aviation Support (GAS)

Email: zine@badissy.com

www.assic.com

www.gipusa.com - www.gasjets.com

Ms. Lisa W. Benzaoui

Chief Executive Officer

Aviation Spares & Services International Co.
(ASSIC) & Global Inflight Products (GIP)

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Redmond, WA 98052 USA

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Email: lisa@gipusa.com

Amine Benkirane

Vice President

Global Inflight Products (GIP) and
Global Aviation Support (GAS)

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Jean-Molf Taillefer

General Manager

Aviation Spares and Services
International (ASSIC)

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

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

Across all its fly-by-wire aircraft families Airbus' unique approach ensures that aircraft share the highest possible degree of commonality in airframes, on-board systems, cockpits and handling characteristics, which reduces significantly operating costs for airlines.

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

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

AIRBUS

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Tel: +33 5 61 93 31 39
Fax: +33 5 67 19 15 31
Email: hadi.akoum@airbus.com



Aero Industrial Sales Company, (AIS), located, since 1986, at the global aviation hub: The New York JFK International Airport, is an FAA AC 0056A / ASA-100 accredited distributor for commercial aviation spare parts, avionics, components, chemicals as well as GSE (Ground Support Equipment). Subjected to regular FAA/ASA-100 surveillance and audit, AIS maintains up-to-date Inspection and Quality Control System.

Led by a veteran of the provisioning team for the First African Commercial JET fleet in 1962, AIS is run by dynamic young bloods who have taken the steam off the word AOG. As easy as a LUFTHANSA AOG at JFK for a major component, which we supplied them within the hour, or a 747 stranded at JOB'RG for an aileron because of a food truck damage, our location gives us global reach unmatched by many.

Over the last few years, AIS has successfully undertaken major Initial Provisioning for Boeing 777 & 737 NG fleet as well as complete renovation of ground support and delivery of over one hundred latest technology GSE. Talk about GSE: AIS was honored and certified as the "Best Distributor in Africa for 2012" by the global leader in GSE – The TLD Group of France.

AIS has a proud exposure in AFRICA, and we show our appreciation of the AFRICAN Airlines development by regularly assisting and participating in the AFRAA CONFERENCES. Throughout our African colorful booth, you might have noticed our theme which emphasizes that the "African Economic Independence is through Interdependence". It's not the unit price of the bolt you were quoted; as it's what it costs you on arrival at your door. We make that difference.

Key contacts:

Mohammed Mahmoud
President

Aero Industrial Sales Company, (AIS)

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URL: www.aeroindustrialsales.com

Dahir Mohammed
V.P. Sales & Marketing
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amadeus

Your technology partner

Amadeus is a leading provider of advanced technology solutions for the global travel industry. Customer groups include travel providers (e.g. airlines, hotels, rail and ferry operators, etc.), travel sellers (travel agencies and websites) and travel buyers (corporations and travel management companies).

The Amadeus group employs more than 12,000 people worldwide, across central sites in Madrid (corporate headquarters), Nice (development) and Erding (operations), as well as 71 local Amadeus Commercial Organisations globally. In Africa, Amadeus is present in more than 50 countries and has Regional Solution Centre in South Africa.

The group operates a transaction-based business model. For the year ended December 31, 2013 the company reported revenues of €3,103.7 million and EBITDA of €1,188.7 million. Amadeus is listed on the Spanish Stock Exchange under the symbol "AMS.MC" and is a component of the IBEX 35 index as well as the Dow Jones Sustainability Index International (DJSI-World).

Amadeus regularly produces white papers and industry reports that set the tone for industry discussions. Thinking like a retailer – Airline Merchandising is the latest example; it presents five key merchandising considerations for airlines. All these reports are available online in the Airline IT Resource Centre.

To find out more about Amadeus, please visit www.amadeus.com and to learn more about the Amadeus solutions for airlines, visit the Airline Solutions section.

Key contact: Mr. Christoph Althoff
Regional Director Western Europe & Sub-Saharan Africa,
Airline Account Management, Europe & Africa
Amadeus IT Group S.A.
Tel: +34 91 582 1461
Email: calthoff@amadeus.com



American General Supplies, Inc. (AGS) is an after-market commercial aviation spare parts and services supplier, founded in Chicago in 1982. Now based in Gaithersburg, Maryland, AGS has over the past 30+ years, diversified and constantly grown to become a well-known, respected and reliable full service commercial aviation supplier. We are a proud partner of AFRAA. We represent Honeywell Aerospace, Trepel Airport Equipment Company GmbH, TUG Technologies, Malabar International, SWITLIK, the Stinar Corporation and Clyde Machines in sub-Saharan Africa.

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

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

AGS is committed to rendering better service through its well-known quality and safety standards and always strives to meet its customers' needs. Call us... we can help. Our business is to keep you flying!

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

ARINC

Customers in the Aviation and Critical Infrastructure Security sectors turn to Rockwell Collins for secure and reliable solutions for information transmission and management. Our seamless solutions bond our aviation network services and ground systems infrastructure — along with flight support, communications services and information processing — with information-enabled avionics and communications systems.

We recognise the specific needs of our regional customers. We are sensitive to their political, economic, and technical environments, and Rockwell Collins has the dedicated industry experts to implement the best possible solutions for their own specific requirements.

Rockwell Collins' growing presence in this region means that companies can now enjoy a strong alternative for their aviation technology solutions – with our competitive pricing, cost-effective solutions and full, customer driven commitment. This means that airports and airlines all over Africa can now reap the benefits that come with having a choice when looking for suppliers.

“What we constantly hear from customers is how other suppliers tend to provide what they want the customer to have. That's not how we operate. We aim to give customers exactly what they want, tailored to their needs,” says Tony Lynch, Rockwell Collins' Regional Director for Africa, Information Management Services.

For more information on our range of services and products contact emea@arinc.com or visit www.rockwellcollins.com/arinc

Key contact:

Mr. Paul Humphries
Senior Marketing Manager / EMEA Marketing Information Management Services
Pegasus One, Pegasus Place, Gatwick Road, Crawley, West Sussex, RH10 9AY UK
Tel: +44 (0)1293-641323
Email: paul.humphries@arinc.com



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

Atlantic FuelEx works closely with the clients by alerting them round-the-clock on the internationally fluctuating fuel prices; besides providing a comprehensive list of related services such as Fuel Management, unique VAT-Exempt and VAT-Compliant aviation fuel policies, Tax Consultation Services (Federal Excise Tax, State, Local and etc.) and Zero Cost Consultation. Furthermore, it provides customized advises and suggestions which will surely help clients to choose ideal locations to refuel their aircrafts and enjoy maximum saving on each and every purchase.

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

Key contact: Mr. Rani Awad

President & Chief Executive Officer
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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. Today, we work with more than 450 airlines worldwide, supplying more than 99 percent of the industry's intermediated fare data to all the major airfare pricing engines.

Customers get more than just a fare collection and distribution system with ATPCO. They gain the knowledge of an industry leader with unmatched experience developing solutions for the entire life cycle of the fare, from pricing to settlement. Our fully customizable solutions help customers promote their ancillary services, recoup fees and surcharges, and efficiently settle with their interline partners.

Most importantly, our customers help shape the collective future of the industry. ATPCO brings together airlines and systems in a spirit of open engagement and dialogue, mediating the industry agreements necessary for effective global standards. We're then first to market with standards-based products and services, proving our continued promise to providing solutions for the travel industry.

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

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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 150 countries. Boeing products and tailored services include commercial and military aircraft, satellites, weapons, electronic and defense systems, launch systems, advanced information and communication systems, and performance-based logistics and training.

Boeing partnerships in Africa date back more than 60 years. Since the introduction of the jet airplane, Boeing airplanes have formed the backbone of the continent's commercial fleet, and Boeing continues to be one of the largest U.S.-based companies doing business on the continent.

With more than 40 African airline customers operating more than 400 airplanes, Boeing represents approximately 68 percent of the airplane market currently in service across the continent.

[Read more...](#)

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BOMBARDIER

Bombardier Commercial Aircraft, a business unit of Bombardier Inc., is a world leader in the design and production of aircraft that seat up to 145 passengers. Its mission is to provide a complete range of commercial aircraft optimized for best-in-class efficiency with the highest level of customer service. The product portfolio is comprised of the Q400 NextGen turboprop airliner, the CRJ NextGen family of regional jets, and the CSeries jetliners, which are the world's newest and most advanced single-aisle, mainline aircraft for the 100- to 149-seat market segment.

Bombardier commercial aircraft are already significantly present in Africa with more than 160 Dash 8/Q-Series and CRJ aircraft in service with, or ordered by, 40 operators and leasing companies in over 20 countries on the continent. Africa is poised for growth and Bombardier is excited by the potential opportunities for expanding commercial aviation in the region and its role in that development. The company's market forecast for the 2012-2031 timeframe predicts that African airlines will take delivery of 550 aircraft in the 20- to 149-seat segment industry wide. The majority of that demand is expected to be in the 100- to 149-seat market segment for which our all-new CSeries family of airliners is being developed, while the remainder is expected to be mainly in the 60- to 99-seat market segment for which our Q400 NextGen and CRJ NextGen aircraft are optimized.

For news and more information, please follow us on Twitter @Bombardier_Aero or visit our [websites: www.bombardier.com](http://www.bombardier.com); www.cseries.com; www.crjnextgen.com and www.q400nextgen.com.

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CFM INTERNATIONAL, A GLOBAL LEADER

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

Pioneers and visionaries

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

The CFM spirit

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

The work split

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

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Embraer's Commercial Aviation is present in Africa with 1 E-Jets dedicated maintenance center in Egypt and, 1 ERJ aircraft maintenance center in Morocco to support a total fleet of 42 E-Jets for 7 operators and 43 ERJs for 16 operators.

Embraer's headquarters are located in São José dos Campos, São Paulo, and it has offices, industrial operations and customer service facilities in Brazil, China, France, Portugal, Singapore, and the U.S. In the Middle East, where Embraer Founded in 1969, the Company designs, develops, manufactures and sells aircraft and systems for the commercial aviation, executive aviation, and defense and security segments. It also provides after sales support and services to customers worldwide. For more information, please visit www.embraer.com.br.

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Through FLYHT's demonstrated track record in Africa, the company sees a perfect fit between its AFIRS™, UpTime™ products and the desire for African airline operators to improve flight safety, increase operational efficiencies and save on fuels costs.

FLYHT signed its first customer in Africa in 2008 and then has continued to work in Africa to help increase safety and operational efficiencies within the industry. FLYHT has worked extensively with the Nigerian Civil Aviation Authority (NCAA) to establish an Operations Command Centre in Lagos to track all commercial aircraft independent of ATC radar and more recently develop a new Safety Management System Dashboard that will allow for real-time tracking of all Nigerian registered assets' flight profiles. FLYHT works with six of the ten domestic carries in Nigeria and seen interest in its AFIRS offering from operators in Angola, Kenya, Ethiopia, Uganda, Rwanda and South Africa.

Since 1998, FLYHT has been providing proprietary technological products and services designed to reduce costs and improve efficiencies in the airline industry. The company has patented and commercialized three products and associated services currently marketed to airlines, manufacturers and maintenance organizations around the world. It's premier technology, AFIRS, UpTime, enables airlines to monitor and manage aircraft operations anywhere, anytime, in real-time. FLYHT's triggered data streaming mode, FLYHTStream, automatically streams vital data, normally secured in the black box, to designated sights on the ground in real time in the event that an aircraft encounters an emergency.

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

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

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When HADID International Services was born more than 30 years ago, the aviation industry was very different from today. Aviation industry has been characterized by continuous and dramatic development and change since the first sustained engine-powered flight in the early 1900s.

HADID saw a gap in the market, a real need for a dynamic, constantly evolving aviation services partner that could keep up with the rapid changes in the industry. HADID was formed to fill that gap. Over the past 30 years, HADID has been committed to staying ahead of the curve. To learning and anticipating its clients' changing requirements. This commitment has paid off. HADID is proud to have very long standing relationships with its clients, suppliers, partners and Civil Aviation Authorities around the world.

HADID International Services is one of the world's leading providers of on-demand aviation services. With more than three decades of experience and dedication to the industry, HADID International Services offers its clients unrivalled expertise in complete flight planning. An impressive and continually growing client list is testament to the company's high quality standards and the trust it has built over years of getting to know its customers' every need.

As a global market leader in the provision of bespoke aviation services, HADID's clients benefit from over 30 years of experience in providing overflying and landing permits at short notice, superior ground handling services and all related services such as catering, transportation, hotel accommodation, security and fuel at most competitive rates, state of the art flight planning and tailor made charter brokerage across the world. With over 200 employees, the company is headquartered in Dubai, UAE, with branches in Algeria, Niger, India and Pakistan, in addition to a worldwide network of representative offices. This network gives HADID a truly global reach across seven continents. HADID's currently serving commercial airlines both passenger and cargo, Private & business operators, medevac (Ambulance) flights, VIP flights, Amiri/ Royal flights.

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Hahn Air is the leader in the airline distribution industry.

More than any other airline, we have specialised in global distribution for our partner airlines. We have more than 260 implemented interlining agreements in place and we have access to 91,000 travel agencies and 3,700 HR Ticketing Centres in over 190 markets.

By connecting to our worldwide sales network system, we exploit significant high yield incremental revenue streams for you.

Services in a nutshell:

- We take the complexity out of your global sales while increasing your revenue.
- We manage your global distribution niches.
- We connect your airline to the global travel agent network.

A connection with Hahn Air's e-ticketing platform became an industry's standard for every airline. By now every 7 seconds a passenger checks in with a Hahn Air E-Ticket at one of almost 4,000 boarding points worldwide.

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ILyushin Finance Co.” is the largest specialized aircraft lessor in Russia. The company was founded in 1999 on the principles of public-private partnership with the Government of the Russian Federation. “IFC” has financed and delivered to customers 45 aircraft. The current order book consists of around 120 aircraft of different types.

Given the growing African air traveling market and increasing demand for new cost-effective aircraft we would be glad to assist African airlines to expand the capacity and profitable business, arrange fleet planning, route analysis, deliveries, financing of aircraft and more. We offer to lease the following new generation jets: CS-300 Bombardier narrow-body 140-160 passenger aircraft, Antonov-148/-158 & Sukhoi SSJ-100 regional jets, MC-21 Irkut narrow-body 180-200 passenger airliner.

The main activities of “IFC” include:

- Finance and operating leasing of the commercial aircraft;
- Arrangement of export financing facility for foreign airlines to take the delivery of Russian aircraft;
- Comprehensive after-sale support of our customers, including pilot, cabin crew and technical staff training, engineering, spare parts support.

The main advantages of our services:

- Vast experience in aircraft leasing in Russia and abroad (including structured financing of aircraft purchase, arranging loan financing for clients, sale via export agencies, sales of active lease contracts);
- Flawless credit history, cooperation with the largest Russian and international banks;
- Wide experience of aircraft customization for full satisfaction of the client’s needs;
- Comprehensive after-sales service.
- Highly skilled and devoted team of marketing, technical, legal and financial professionals;
- Established connections with Russian aviation authorities;
- The largest order book among Russian lessors;

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

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

Kenyon Consulting Services provide incident-experienced planning and training specialists who work with your organization to develop and implement crisis management plans and systems. For those organizations with developed plans and systems, Kenyon conducts exercises to test those systems for real-world response.

Headquarters in the United States, it has offices and facilities in the United Kingdom, Australia, Lebanon, and Dominican Republic.

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

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

We don't stop there. We believe in providing on-going support to ensure the long term success of the programme – so we provide regular feedback, recommendations and implementable solutions to ensure that you are sending the right messages to your customers!

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

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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.

Lufthansa Consulting serves clients in many regions around the world and our business policy relies on a deep insight into the aviation business blended with an understanding of the local conditions in the client's business environment. This combination ensures that our experts provide the appropriate solutions with optimal results.

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

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

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

Lufthansa Systems provides the full range of IT services – from IT consultancy, development and implementation of industry solutions to the operation in its own data centers. The IT solutions cover all airline business processes, including planning, passenger and cargo management, finance, flight operations, and aircraft maintenance.

Lufthansa Systems not only develops individual applications but also provides airlines with integrated platform solutions which optimize their core processes. These platforms combine applications into a seamless solution, thereby placing information within the context of a particular business process.

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

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Marsh, a global leader in insurance broking and risk management, teams with its clients to define, design, and deliver innovative industry-specific solutions that help them protect their future and thrive. It has approximately 26,600 colleagues who collaborate to provide advice and transactional capabilities to clients in over 130 countries.

Marsh is a wholly owned subsidiary of Marsh & McLennan Companies (NYSE: MMC), a global team of professional services companies offering clients advice and solutions in the areas of risk, strategy and human capital. With 55,000 employees worldwide and annual revenue exceeding US\$12.3 billion, Marsh & McLennan Companies is also the parent company of Guy Carpenter, a global leader in providing risk and reinsurance intermediary services; Mercer, a global leader in human resource consulting and related services; and Oliver Wyman, a global leader in management consulting.

Marsh Aviation and Aerospace is headquartered in London and has over 300 professionals, operating through 18 specialist aviation hubs around the world – including South Africa. With a global airline market share of over 37% and owned/partner offices in 43 of the 53 countries in Africa, Marsh is a regional leader for aviation insurance and risk advisory services.

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Get passengers and cargo to their destinations — safely and on time. That's the promise of every airline. Rising complexity puts the burden on technology to keep it. Which is where mercator comes in. Every airline Chief Executive Officer knows that profits only follow when planes and processes really flow.

Our aviation heritage gives us unequalled insight into what this requires. In 1995, mercator was created to support Emirates Airline — and dnata soon after, the fourth largest airport services company in the world. By delivering IT solutions for these major organizations, we became intimate with both the big picture and micro needs of the industry.

Our team developed an extensive portfolio of solutions, testing them at the highest level in the real world. Today, we offer these systems and the process knowledge of Emirates and dnata on the commercial market. Our solutions combine across five key areas of service excellence: Safety, Passenger, Cargo, Loyalty and Finance.

Our clients span the globe and include award-winning carriers, hybrid, low-cost and regional airlines. While aviation has always driven our technology, the variety of operations we serve has taken our industry expertise to another level. Our IT infrastructure helps any airline reduce costs, streamline processes and increase productivity-enabling you to deliver your essential promise.

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MTU Maintenance, a business division of MTU Aero Engines, is one of the world's leading provider of commercial engine maintenance services. It offers services ranging from the maintenance, repair and overhaul (MRO) of commercial aircraft engines, to component repair and accessory maintenance. The company's portfolio includes aircraft engines in all thrust classes – from small turboprop engines to the largest engine ever developed: General Electric's GE90-110B/-115B. MTU Maintenance operates globally with facilities in Hannover and Berlin-Brandenburg (Germany), Rzeszów (Poland), Vancouver (Canada), Dallas (U.S.A.), Amsterdam (Netherlands), Zhuhai (China) and close to Kuala Lumpur (Malaysia).

Aside from core engine maintenance, MTU Maintenance stands out for its service orientation, consistently providing flexible solutions that are individually tailored to suit its customers' needs and achieve the maximum benefit with exceptional value. Some of these options include: on-site support and on-wing repairs, accessories and LRU management. It further offers MTUPlus Engine Trend Monitoring, logistics support, 24/7/365 AOG service and fleet management up to Total Engine Care (TEC®) packages for all engine types in its portfolio.

While many MRO providers, when faced with a defective part, may be quick to reach for replacement parts, MTU's maintenance experts would prefer to repair if possible. As a result of its innovative processes and decades of experience, MTU Maintenance can successfully repair heavily worn parts, components and accessories delivering excellent value. Its high-tech repair techniques are unique globally.

Collectively known as MTUPlus repairs, they have been developed internally by MTU Maintenance and are approved and appropriately certified by EASA and FAA agencies. These techniques cover the spectrum of processes, from automated selective stripping of coatings to specialty high-temperature brazing, and high-precision welding and joining using automated lasers.

MRO portfolio at a glance:

- Turboprops: PT6A, PW100
- Helicopters: PT6B/-C/-T, PW200
- Business jets: JT15D, PW300, PW500
- Regional jets: CF34-3/-8/-10E
- Narrow-bodies: V2500 series, CFM56-3/-5B/-7, PW2000*, PW6000
- Wide-bodies: CF6-50*/-80C2, GE90-110B/-115B, GP7200

* Including military applications (KC10, C-17)

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Nigerian Aviation Handling Company Plc. (Nahco Aviance) is a Nigerian diversified enterprise with interests in aviation cargo, aircraft handling, crew and passenger transportation service delivery and power distribution.

The company currently serves more than 30 airlines at seven airports across Nigeria, with plans to expand operations to other African countries. It handles about 70% of domestic and foreign airlines operating in Nigeria.

Since 2005, Nahco Aviance has embarked on business diversification programme that cut across industries and geography, as a result of which it has developed strategic global alliances through its membership of Aviance, the global alliance of 10 reputable airport service providers operating from 112 stations in 17 countries, and The International Air Cargo Association (TIACA), which exists to promote the air cargo industry and world trade. In 2010, Nahco Aviance was awarded the ISAGO certification, the IATA Safety Audit for Ground Operations, becoming the first and only ground handling company in West Africa to receive one of the aviation industry's highest honours for safety and service quality. Nahco Aviance is rated Aa- by Augusto and A- by GCR

Pursuant to the company's commitment to exceptional value creation for shareholders, the company is currently consolidating its aviation services operations and expanding across Africa. Also, the company is diversifying into power distribution, following the deregulation of Nigeria's power sector.

In 2010, it incorporated NAHCO Energy & Power Limited – a joint venture of nahco aviance, Rosehill Group and Empower of Finland, which is a technical partner. The company also incorporated NAHCO FTZ Limited to drive the initiative into the power sector and enhance operational efficiency and competitiveness.

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OAG processes and distributes flight schedules data, live and historical flight status information, travel planners, flight timetables, flight network mapping software, business travel planning products, aviation market reports and flight schedules analysis tools for the air passenger and air cargo markets. You can receive the OAG aviation data via an API to use in your own IT systems, or online, mobile, print or CD formats compatible for display on your desktop, laptop, smartphone or tablet.

To register with OAG and to discuss your aviation data requirements with one of our specialist advisors, please visit the website: <http://www.oagaviation.com/>.

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Pratt & Whitney, a United Technologies Corp. company is a world leader in the design, manufacture and service of aircraft engines, industrial gas turbines and space propulsion systems. The company's 36,000 employees support more than 11,000 customers in 195 countries around the world.

Pratt & Whitney was founded in Hartford, Conn., in 1925 by Frederick Rentschler. Pratt & Whitney's first aircraft engine was the 410-horsepower, air-cooled Wasp, which delivered unprecedented performance and reliability for the time and transformed the aviation industry. Pratt & Whitney has been leading change ever since.

Pratt & Whitney builds engines for front line fighters, like the F-15 Eagle, F-16 Fighting Falcon, F-22 Raptor and F-35 Joint Strike Fighter, as well as the C-17 Globemaster III military transport.

The company continues to develop new engines and work with its partners in International Aero Engines and the Engine Alliance to meet airline customers' future needs.

Pratt & Whitney's broad portfolio of businesses includes industrial gas turbines that light cities and power ships. The company's PureCycle® power system converts heat from geothermal resources, oil and gas wells and other sources into clean electricity.

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

In February 2011, Servair announced its membership to AFRAA (African Airlines Association), the Association of African airlines, which is an organization mandated to ensure effective cooperation among companies and to accelerate the economic and social integration of African countries. Servair units in Africa offer a wide range of services in all aspects of catering and meals. In addition, they deploy the expertise of the company, namely: Respect for hygiene and food safety standards, the use of advanced technologies, the culinary expertise, African units master all culinary and logistical skills to meet the increasingly diverse needs and transmission of knowledge.

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

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Its portfolio covers every aspect of the industry from managed global communications, to passenger, baggage, flight and aircraft operations, border management and air-to-ground communications. With a presence at more than 400 airports around the world, SITA provides a unique service to its 450 air transport industry members and 2,800 customers in more than 200 countries. In 2013, SITA had consolidated revenues of US\$1.63 billion.

SITA's subsidiaries and joint ventures include OnAir, CHAMP Cargosystems and Aviareto. For further information please go to www.sita.aero.

SITA has been awarded Aviation ICT Service Provider of the Year by AFRAA for the second year running. SITA was selected again this year because of its community initiatives and consistent support for the African air transport industry, in addition to providing innovative, cutting-edge technology.

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Travelport is a leading distribution services and e-commerce provider for the global travel industry.

With a presence in over 170 countries, approximately 3,500 employees and 2012 net revenue of more than US\$2.0 billion, Travelport is comprised of the global distribution system ("GDS") business, which includes the Galileo and Worldspan brands, its Airline IT Solutions business and a joint venture ownership of eNett.

Headquartered in Atlanta, Georgia, Travelport is a privately owned company.

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Our goal of providing the industry's best customer service has allowed UAS to provide world-class international trip support services for well over a decade and to become a recognized leader in aviation solutions.

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Wirecard AG is one of the world's leading independent providers of outsourcing and white label solutions for electronic payment transactions. The Wirecard Group has been supporting companies in accepting electronic payments from all sales channels. A global multi-channel platform bundles international payment acceptances and methods, supplemented by fraud prevention solutions. When it comes to issuing their own payment instruments in the form of cards or mobile payment solutions, Wirecard provides companies with an end-to-end infrastructure, including the requisite licenses for card and account products.

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AFRAA Member Airline Two-Letter Codes

Afriqiyah Airways	8U	Interair SA	D6
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Air Burkina	2J	Libyan Arab Airlines	LN
Air Madagascar	MD	Precision Air	PW
Air Mauritius	MK	Royal Air Maroc	AT
Air Namibia	SW	RwandAir	WB
Air Seychelles	HM	South African Airways	SA
Air Tanzania	TC	South African Express	XZ
Air Zimbabwe	UM	Starbow Airlines	S9
ASKY Airlines	KP	Sudan Airways	SD
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Annex 1: Fatal Accident Statistics

Fatal Airline Accidents in 2013

	DATE	AIRCRAFT TYPE	OPERATOR	LOCATION	FATALITIES	AGE OF AIRCRAFT (YEARS)
1	4-Jan	BN-2A Islander	Transaero 5074	between Los Roques and Caracas, Venezuela	6	44.75
2	15-Jan	Cessna 208B Super Cargomaster	Martinaire	Pellston Regional Airport, USA	1	19
3	23-Jan	DHC-6 Twin Otter 300	Kenn Borek Air	Queen Alexandra Range Antarctica	3	33.3
4	29-Jan	CRJ-200	SCAT	near Almaty Airport, Kazakhstan	21	12
5	13-Feb	Antonov 24RV	South Airlines	Donetsk Airport, Ukraine	5	39
6	20-Feb	Hawker Beechcraft 390 Premier	The Vein Guys	Thomson-McDuffie County Airport, GA, USA	5	5
7	4-Mar	Hawker Beechcraft 390 Premier	Global Jet Luxembourg	Annemasse Airport, France	2	5
8	4-Mar	Fokker 50	Compagnie Africaine d'Aviation	Goma Airport, DRC (Cargo)	7	20.3
9	6-Mar	Beechcraft B200 King Air	ATSA	near Pias Airport, Peru	9	13
10	8-Mar	Beechcraft 1900C-1	ACE Air Cargo	NE Dillingham Municipal Airport, AK, USA	2	24
11	17-Mar	Hawker Beechcraft 390 Premier	Digicut Systems	S of South Bend Regional, IN, USA	2	6
12	7-Apr	Beechcraft 1900C-1	Sahel Air Service	off São Tomé Island Airport, Sao Tome and Principe	1	23
13	29-Apr	Boeing 747-428BCF	National Airlines (National Air Cargo)	Bagram Air Base, Afghanistan	7	20.25
14	29-Jun	Embraer EMB-110P1 Bandeirante	Batair Cargo	NW of Francistown Airport, Botswana (Cargo)	2	24
15	6-Jul	Boeing 777-28EER	Asiana Airlines	San Francisco International Airport, CA, USA	3	7.3
16	7-Jul	DHC-3T Texas Turbine Otter	Rediske Air	Soldotna Airport, AK, USA	10	54
17	14-Aug	A300F4-622R	United Parcel Service	Birmingham-Shuttlesworth International Airport, BHM, USA	2	10
18	22-Aug	DHC-3T Vazair Turbine Otter	Transwest Air	Ivanhoe Lake, NT, Canada	1	53
19	9-Sep	Dornier 228-202K	CorpFlite	S of Viña del Mar Airport, Chile	2	26
20	25-Sep	Cessna 208B Grand Caravan	Morningstar Air Express	Hudson Bay, Canada	1	18
21	29-Sep	Cessna 525A CitationJet CJ2	CREX-MML LLC	Santa Monica Airport, CA	4	10
22	3-Oct	Embraer 120RT Brasília	Associated Aviation	Lagos-Murtala Muhammed International Airport (Nigeria)	16	23
23	6-Oct	Pilatus Britten-Norman BN-2A-8 Islander	Air Flamenco (Cargo)	6,5 km W off Cayo Luis Peña, Puerto Rico	1	42
24	10-Oct	de Havilland Canada DHC-6 Twin Otter 310	MASwings	Kudat Airport Malaysia	2	25
25	14-Oct	Cessna 208B Grand Caravan	AereoServicio Guerrero	26 km W of Loreto Airport, Mexico	14	11
26	16-Oct	ATR-72-600	Lao Airlines	8 km NW of Pakse Airport, Laos	49	0.6
27	18-Oct	Cessna 500 Citation I	Dufresne Inc.	SE of Derby, KS USA	2	38
28	3-Nov	Swearingen SA227-AC Metro III	Aerocon	Trinidad Airport (TDD/SLTR), Bolivia	8	24
29	10-Nov	Swearingen SA227-AC Metro III	Bearskin Airlines	0,8 km S of Red Lake Airport, Canada	5	22
30	17-Nov	Boeing 737-53A	Tatarstan Airlines	Kazan Airport, Russia	50	23.5
31	19 Nov	Learjet 35A	Aero J.L.	5 km NE off Fort Lauderdale Intl Airport, Florida, USA	4	34
32	25-Nov	Cessna 208B Grand Caravan	Tropicaire	Near Kibeni, Papua New Guinea	3	6
33	29-Nov	Embraer ERJ 190-100 IGW (ERJ-190AR)	LAM	Bwabwata National Park (Namibia)	33	1
34	29-Nov	Cessna 208B Grand Caravan	Era Alaska	Near Saint Mary's Airport, USA	4	15
35	02 Dec	Swearingen SA 227-AC Metro III	IBC Airways (cargo)	La Alianza Arecibo, Puerto Rico	2	37
36	11 Dec	Cessna 208B Grand Caravan	Makani Kai Air	Near Kalaupapa Airport, Hawaii, USA	1	11
37	26 Dec	Antonov 12	Irkut	Irkutsk Airport, Russia	9	50
TOTAL					299	22.4



TRAFFIC DATA	AIR ALGERIE	AIR BURKINA	AIR MADAGASCAR	AIR MAURITIUS	AIR NAMIBIA	AIR SENEGAL	AIR ZIMBABWE	ECAR	EGYPTAIR	ETHIOPIAN AIRLINES	KENYA AIRWAYS	LAM MOZAMBIQUE	PRECISION AIR	ROYAL AIR MAROC	SOUTH AFRICAN AIRWAYS	SOUTH AFRICAN EXPRESS	TAAG ANGOLA	TUNIS AIR	TOTAL
Domestic Passengers (000)	1,521	7	303	122	78	189	70	175	1,493	678	885	462	430	686	3,494	1,121	669		12,363
Regional Passengers – within Africa (000)	326	122	103	1,196	288	188	81	22	1,242	2,432	1,869	220	314	5,227	3,670	233	211		17,724
Intercontinental Passengers (000)	2,856	–	133		113		0	11	5,778	2,484	939	2					442		23,586
Total Passengers Carried (000)	4,703	129	539	1,196	458	356	151	207	8,513	5,594	3,693	684	743	5,227	3,670	1,354	1,322	3,245	41,784
Domestic Freight Carried (000)	1,223	5	455		6		111	0	817	258	1,076	3,647		1,638	48,305		2,037	–	59,578
Regional Freight Carried (000)	899	254	894		1,033		298	0	8,214	35,832		588			159,735		2,643	7,533	219,561
Intercontinental Freight Carried (000)	13,655	–	4,224		4,218		–	0	111,611	281,569		46		19,836			10,610		613,037
Total Freight Carried (000)		259	5,573		5,257		409	0	120,642	317,659	58,638	4,281		19,836	208,040		15,290	7,533	763,417
Revenue Passenger-Kilometres – RPK (000)	6,343,771		1,372,482	5,957,862	1,346,154	686,145	72,959	200,934	15,914,206	19,836,076	9,322,205	749	332,359	12,003,675	23,345,005	993,418	3,710,820	4,368,561	108,907,371
Available Seat-Kilometres – ASK (000)	9,546,791	210,495	1,861,579	7,868,368	2,012,171	1,281,876	120,408	469,460	29,461,113	27,886,371	13,916,342	1,110	508,064	18,524,583	31,071,726	1,562,264	5,245,509	6,384,555	157,932,785
Passenger Load Factor – PLF (%)	66.45%	59.00%	73.73%	75.70%	67.00%	53.50%	60.59%	43.00%	64.20%	71.49%	67.00%	67.50%	70.00%	54.70%	75.10%	63.60%	71.00%	68.40%	
Passenger Tonne-Kilometres – PTK (000)	570,939	336	123,523	537,951	148,271	72,148	6,129		1,866,528	2,601,507	838,998	67,000	39,439	1,218,371	2,081,238		333,974	432,289	10,938,641
Freight & Mail Tonne-Kilometres – FTK (000)	2,669	865	34,558	181,141	170,164	26,336	240		372,554	863,521	254,602	6,000	–	56,637	1,145,078		70,432	21,834	3,206,631
Revenue Tonne-Kilometres – RTK (000)	573,608		158,082	719,092	318,435				2,239,082	3,465,028	–	73,000	39,439	1,275,008	3,226,316		404,406	454,123	12,945,619
Available Tonne-Kilometres – ATK (000)	866,285		257,337	1,165,801	651,264				4,423,791	5,602,083	1,821,222	119,000	48,266	2,483,044	5,309,385		880,637	711,031	24,339,146
Weight Load Factor – WLF (%)	66.21%		61.43%	61.70%	48.89%	42.80%			50.60%	61.85%	60.00%	61.00%	65.40%	61.70%	60.80%		46.00%	63.90%	
EMPLOYEES DATA																			
Pilots	403.00	16	60	167	118	51	47	2	807	557	511	36	66	470	770	242	133	322	4,778
Engineers	1,481	41	165	348	18	67	235	–	4,985	1,829	551	96	17	250	2,973	262	13		13,331
Cabin Crew	1,044	30	119	495	143	129	184	59	2,328	1,334	648	70	99	698	1,786	200	453	759	10,578
Traffic/Marketing	4,308	108	134	139	2	39	143	58	2,750	2,263	505	313	16	460	596	13	618	1,140	13,605
Others	2,233	59	700	1,004	467	341	190	141	20,772	1,818	1,787	200	561	900	2,897	420	2	1,488	35,780
Total No. of Employees	9,469	254	1,178	2,153	748	627	799	258	31,642	7,801	4,002	715	759	2,778	8,822	1,137	1,219	3,387	77,748
DESTINATIONS SERVED																			
Domestic – within the country	31	1	22		6		3	3	10	18	4	10	8				13		129
Intra-Africa – within Africa	10	7	5		8		1	2	19	48	45	5	2				11		163
Intercontinental – Africa to other Regions	29	–	1		1		0	1	53	31	13	0					7		136
New Destinations (all markets)																			
FLEET IN OPERATION	43	1	8	12	10	8	5		81	73	44	14	9	76	55	26	12	31	508

Source: AFRAA

Annex 3: AFRAA Member Airlines Fleet – 2014

	A300	A319/ 320/321	A330	A340	B727	B737- 200	B737- 300/400	B737- 600/700/800	B747	B757	B767	B777	B787	MD-87	MD-90	CRJ 200	CRJ 700	CRJ 900	ERJ- 120/135/ 145/170/ 175/ 190/ 195	EMB 120	Bae 146- 100/ 200/300	F27	F50	Dash-8	ATR 42	ATR 72	DHC- 6-8	Shorts 360	Lockheed	Cessna	Xian MA60
1		11	1																												12
2			5				22				3															12			1		43
3																					2				3	2					7
4														2		1															3
5				2			3																		2	2					9
6		2	2	6																					2	2					12
7		4	2																4												10
8			2																												9
9						1																					6	1			3
10		2				3					2																1			3	10
11							3																	4							7
12					2				1							1							1							1	6
13								2			1																				3
14												1																			5
15							2	1	2	1																					6
16		3	17	11	1		4	20				9							12												77
17							1	15	6	10	10	10	10			2												17			71
18						3					1																				4
19							6	9			6	7	5						18												51
20							1	1											2												7
21		7	1															4							2	2					14
22																									4	5					9
23							1	36	1	4									2							4					48
24							4											2						1							7
25							2	11																							56
26		20	6	17																				10							24
27																					5										5
28		2	1				2															4									9
29			2																												2
30							5					6																			11
31							1	1																	1	2					5
32								4																8							12
33			22				7																								29
Totals	5	88	30	26	2	7	22	141	2	9	28	33	15	2	3	11	4	6	38	0	7	1	4	27	14	31	24	1	1	3	586

Source: AFRAA

Annex 4: AFRAA Member Airlines Commercial Partnership – 2014



	8U	AH	BP	2J	MD	MK	SW	HM	TC	UM	KP	8V	QC	C2	LC	MS	ET	D6	KQ	TM	LN	PW	AT	WB	SA	XZ	S9	SD	FS	DT	VR	TU	Total
Africqyah																																	
Air Algérie																																	
Air Botswana																																	
Air Burkina																																	1
Air Madagascar																																	1
Air Mauritius																																	3
Air Namibia																																	2
Air Seychelles																																	1
Air Tanzania																																	
Air Zimbabwe																																	1
ASKY Airlines																																	
Astral Aviation																																	
Camair-Co																																	
ECair																																	
Egyptair																																	2
Ethiopian Airlines																																	4
Interair																																	
Kenya Airways																																	5
LAM Mozambique																																	6
Libyan Airlines																																	
Precision Air																																	3
Royal Air Maroc																																	1
Rwandair																																	1
South African Airways																																	5
South African Express																																	1
Starbow																																	
Sudan Airways																																	
Syphax Airlines																																	
TAAG Angola																																	3
Tassili Airlines																																	
TACV Cabo Verde																																	
Tunisair																																	
Total				1	1	3	2	1			1					2	4		5	6		3	1	1	5	1				3			

Annex 5: MRO Facilities in Africa

MRO	Country	National Approval Type	Training School	Maintenance Capability			Engines Overhaul & Testing
				Airbus	Boeing	Other A C	
AeroContractors	Nigeria	EASA, Nigeria CAA			B737-300, 400 & 500		
Aeronexus Technical	South Africa	SA CAA			B707, B727, B737-200,	DC8, DC9, MD80, Fokker 28	
Aerotech	Zimbabwe	South Africa SACAA, Zambia DCA Zimbabwe CAA, South Africa CAA, Malawi(DCA)				Cessna, Beecraft	
Air Algerie Technics	Algeria	EASA 145	Yes	A330	B737NG, B767 and B727	L100-30C, ATR72, Fokker 27	
AirQuarius Aviation Maintenance	South Africa	South Africa CAA, Tanzania CAA				Fokker F-28	Rolls Royce Spey
Air Mauritius	Mauritius	JAR 145 - France DGAC, Mauritius DCA, EASA 145, EASA 147	Yes	A320 Series, A330 & A340		ATR72-500	
Air Zimbabwe	Zimbabwe	Zimbabwe CAA, Malawi DCA, Botswana CAA	Yes		B707, 767, 737 Classic	BAe146 and MA60	JT-3D, JT-8D, PW4000, Modular Maintenance
Atlas Aerotechnique Industries	Morocco	FAA, France DGAC, EASA 145	Yes	A320	B737 Classics & NG, B757, B767 & B747		
Denel Aviation Transport Aircraft Maintenance	South Africa	United States FAA, South Africa SACAA, AS 9100, EASA Europe, ISO 9001:2000	Yes		B707, B727, B737	C130, L100, BAe146	
Egyptian Company for Aircraft Maintenance	Egypt	Egypt ECAA		A320	Boeing 737-200 /-300 /-400 /-500, 707		
EgyptAir Maintenance & Engineering Company	Egypt	Egypt ECAA, EASA 145, FAA, EASA 147	Yes	A320, A321, A330, A340	B767, B757, B777-200 /-300	Bombardier DHC-8 Fokker F-50	V2500 A1/A5 GFM56, PW4090/4158, JT9 and Trent 700
Ethiopian Airlines	Ethiopia	EASA 145, EASA 147, FAA, Ethiopia CAA, Saudi GACA, UAE GCAA, Kenya CAA, Gambia CAA, Tanzania CAA, Jordan CAA	Yes		Boeing 737 Classic & NG, 757, 767, B777	Fokker50, DHC-8 Q400, MD-11, DA40/42	PW127, PW121, PT6, CFM56-3/7 APUs, GTPC331-200 Modular Maintenance, PW4000 & PW2000
ExecuJet Maintenance	South Africa and Nigeria	ISO 9002, United Arab Emirates GCAA, Bermuda BDCA, South Africa SACAA, Botswana DCA, Angola DGCA, EASA 145, Namibia CAA				Bombardier, Beechcraft, Dassault, Gulfstream, Embraer Aircraft	
Global Aviation	South Africa	SA CAA	Yes			MD-82, DC-9-30, DC-10	JT8D-15, 217A&C,-219
Haroug	Libya	Libyan CAA, Mali CAA, United Arab Emirates GCAA			B707, 727		
Interjet (AMETA)	South Africa	SA CAA, Angola DGCA, Botswana CAA, Namibia CAA	Yes			Embraer, King Air, Learjets, Beechcraft, Challengers & Gulfstreams	
Kenya Airways	Kenya	EASA 145, Kenya CAA, Tanzania CAA, CAA Uganda, Zambia DCA,	Yes		B737-NG, 757, 767, B777	E170, 190	
Libyan Aircraft Engineering & Maintenance (LAEM)	Libya	EASA145, Libyan CAA,		A300-600, A310-200			
Linhas Aereas de Mocambique LAM	Mozambique	Mozambique CAA			B737-200/500		
SAFAIR Technical (JetWorx)	South Africa	FAA, EASA 145 and SACAA			B737, B727	DC-9, MD80, Hercules L382	
Solentia Aviation	South Africa	South Africa CAA, Cote d'Ivoire CAA, Zambia DCA				ATR42, B1900, B200 King, and Cessna	
SNECMA Morocco Engine Services	Morocco	EASA 145, FAR-145, Moroccan DAC					CFM56 (-2A, -2B, -2C, -3, -5A, -5C, -7B) GE90, GP7200
South African Airways Technical	South Africa	FAA, SACAA, Angola DGCA, EASA 145	Yes	A319, A320, A321, A330 and A340	B737 Classic/NG, B747, B767	MD11	JT8, JT9 & GTPC 85 Series engines and APU
TunisAir	Tunisia	EASA 145, Tunisia DGAC	Yes	A330-200	B737-NG	ATR72-500	



Annex 6: Airlines Capabilities

NAME	MAINTENANCE TRAINING	CREW TRAINING	SIMULATOR TRAINING	EASA/ FAA certification	OTHER TRAINING CAPABILITIES	WEBSITE
Aldawlya for Training and Science, Libya	Aircraft/ engine basic and recurrent training on A320 series, A330 and CRJ 900 Aircraft	Pilot, flight attendant and flight dispatcher training	-	-	Safety, Security, Commercial courses and Ground handling	www.aldawlyalya.ly
Air Algerie	Aircraft/ engine basic and recurrent training on B737NGs, A330 and ATR 72	Basic and recurrent pilot and cabin crew training	Full flight CAE for B737NG and B747- 8	EASA 145 EASA 147	Safety, Security, Managerial/ leadership, commercial (Marketing, Cargo, Finance etc.) and ground handling	www.airalgerie.dz/
Air Botswana	Aircraft/ engine basic and recurrent training on ATR 42/ 72, BAe 146	-	-	-	-	http://www.airbotswana.co.bw
Air Madagascar	Aircraft/ engine basic and recurrent training on ATR 42/ 72, B737-200 and B767	Flight and Cabin crew training on B737/ B767 and ATR 42/ 72	-	EASA 147	Safety and rescue training, English language proficiency	www.airmadagascar.com
Air Mauritius	Aircraft/ engine basic and recurrent training on A320 series, A330, A340, ATR 42/72 and Bell Jet Ranger	-	-	-	IATA authorised training center	www.airmauritius.com
Air Zimbabwe Training School	B737 - 200, B767 - 200, BAe 146 and MA 60	Flight and cabin crew training on B737-200, B767 and MA 60	-	-	Safety, Security, Cargo and Ground handling training	www.airzimbabwe.co.zw
Comair Training* Center, South Africa	Aircraft/ engine basic and recurrent training on B737 - classics & NG and ATR 500	Pilot and cabin crew, dispatcher basic and recurrent training	B737 NG & classics and ATR 42/72 full flight simulator	EASA 145 EASA 147	Safety, Security and Commercial courses	www.comair.co.za
EgyptAir Training Center	Basic type, overhaul, boroscope and engine module courses on B737NG, B757, B767, B777, A320 series and A330	Pilot, Cabin crew on B737NG, B757, B767, B777, A320 series and A330	A320, A330, B727NG & B777 full flight simulator training	EASA 145 EASA 147	Safety, Security, Cargo, Ground services, commercial and IATA courses (IATA authorised training center)	http://training.egyptair.com/
Ethiopian Airlines Training Academy	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic pilots, basic and recurrent cabin crew training	B737NG & B757/ B767 full flight simulator	FAA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	www.ethiopianairlines.com/en/schools/
Kenya Airways Pride Center	Aircraft/ engine basic system and recurrent/ refresher training on B737NG/ classics, B767, B777 and Embraer 170	Basic and recurrent cabin crew training	B737NG full flight simulator	EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training, (IATA authorised training center)	www.kenya-airways.com
LAM Mozambique	Aircraft/ engine basic and recurrent training on B737 - 200 and Embraer 190	-	-	-	-	www.lam.co.mz/en
Royal Air Maroc Training Academy	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B747, A320 series, A330, ATR 42/72 and CRJ-190 at Royal Air Maroc Academy	Basic pilots, basic and recurrent cabin crew training	B737NG & B757/ B767 full flight simulator	EASA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	http://www.royalairmaroc.com/
South African Airways Training Center	Aircraft/ engine basic and recurrent training on B737 NG & classics, B747, B767, A320 series, A330 and A340	Basic pilots, basic and recurrent cabin crew training	-	EASA 145 EASA 147 FAA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training, (IATA authorised training center)	www.flysaa.com
TAAG Angola Airlines	-	-	-	-	Safety, Security and Commercial courses	www.taag.com
Tunisair Training Center	Aircraft/ engine basic and recurrent training on A300, A320 series, A330 and B737NG	Basic and recurrent cabin crew training	B737NG & A320 series full flight simulator	EASA 145	(IATA authorised training center)	www.tunisair.com

* Comair Training Center is not a member of AFAA but it has been included since it provides services to various airlines in Africa

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