



# AFRAA Annual Report 2015



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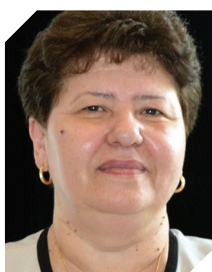
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## FOREWORD



African economies continue to grow at above global average rates with growth expected to be 4.5% and 4.8% in 2015 and 2016, respectively, according to UNECA. The growth momentum is expected to continue despite uncertainty in the global economy and weakening commodity prices. A number of internal and external risks remain, such as a continued slow recovery in the developed countries, a slowdown in China, tighter global financial conditions, political instability in a couple of states, terrorism and weather-related shocks.

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

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

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

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

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

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

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

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

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

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

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

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



**Dr. Elijah Chingosho,**  
AFRAA Secretary General





## Vision

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

## Mission

"To serve African airlines, promote and protect their common interests"

## Values

AFRAA believes in:

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

## Objectives

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



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## APPRECIATION

I would like to express heartfelt appreciation to all industry associations and members who contributed to the publication of this report by responding to our requests for data and to 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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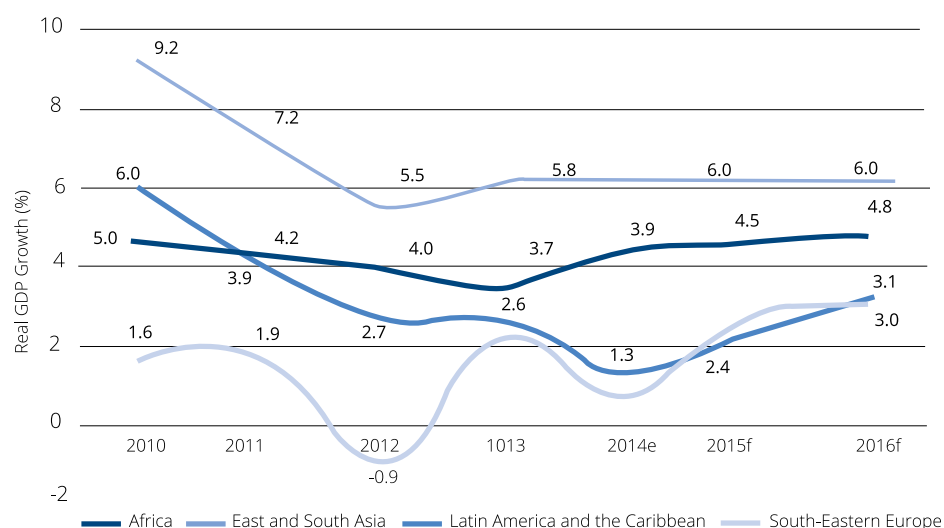
## SECTION ONE

### 1.1 Economic performance

Global growth in 2014 was estimated at 3.4%, reflecting a pickup in growth in advanced economies relative to the previous year and a slowdown in emerging market and developing economies (IMF, 2015). Complex forces that affected global activity in 2014 are still shaping the outlook. These include medium and long-term trends, such as population aging and declining potential growth; global shocks, such as lower oil prices; and many country or region-specific factors, such as crisis legacies and exchange rate swings triggered by actual and expected changes in monetary policies. IMF projects that global growth will further reach 3.5% and 3.8% in 2015 and 2016, respectively.

For 2015, advanced economies are expected to project stronger growth, while growth prospects are expected to be more subdued for some large emerging market economies and oil exporters. World Bank reported that high-income countries are likely to see an increase in growth for 2015-17 on the back of gradually recovering labor markets, ebbing fiscal consolidation, and still low financing costs. In developing countries, as the domestic headwinds that held back growth in 2014 ease and the recovery in high-income countries slowly strengthens, growth is projected to gradually accelerate, rising from 4.4% in 2014 to 4.8% in 2015 and 5.4% by 2017. Lower oil prices will contribute to diverging prospects for oil-exporting and oil-importing countries, particularly in 2015.

**Figure 1.1 GDP growth in emerging and developing regions, 2010-2016**



Source: UNECA, 2015

Note: data for Africa excludes Libya  
e = estimate; f=forecast

The positive growth registered in most developed economies for the first time since 2011 saw the global growth of GDP increasing marginally in 2014. According to World Bank, the divergence in economic performance across major advanced economies is narrowing, and developing-country growth is expected to remain stable in 2015, before strengthening in 2016. This worldwide expansion however, remains at risk, mainly owing to virtual stagnation in the Euro area, slowing growth in the major emerging economies (notably China, Russia and the large emerging economies in Latin America) and Japan's stumble into recession in the second half of 2014 (UNECA, 2015).

### 1.2 Africa's Economic Performance

Africa's growth was estimated at 3.9% in 2014, up from 3.7% in 2013 and is expected to increase to 4.5% and 4.8% in 2015 and 2016, respectively (UNECA, 2015). The growth momentum is expected to continue despite uncertainty in the global economy and weakening commodity prices underpinned by increasing domestic demand, coupled with improving regional business environment and macroeconomic management, increasing public investment – especially in infrastructure, a buoyant services sector and increasing trade and investment ties with emerging economies. According to the World Economic Situation and Prospects 2015 (WESP) report, growth in private consumption and investment are expected to remain the key drivers of GDP growth across all five sub-regions



and all economic groupings. Net exports will continue to moderately pull down growth. A number of internal and external risks remain, such as a continued slow recovery in the developed countries, a slowdown in China, tighter global financial conditions, the Ebola outbreak, political instability, terrorism and weather-related shocks.

### 1.2.1 The Ebola epidemic and what it highlights about systemic effects

The Ebola epidemic, which began in Guinea in December 2013 and quickly spread to Liberia and Sierra Leone saw all three economies reporting flat or negative income growth (and large resulting fiscal needs). All three were growing briskly in the first half of 2014. But full-year 2014 growth dropped. According to World Bank's report on Economic Impact of Ebola on Sub-Saharan Africa, the total fiscal impact felt by the three countries in 2014 was over half a billion dollars, nearly 5% of their combined GDP.

**Table 1.1** Main economic impact outside directly affected countries in 2015

Level of Impact	Countries Affected	Description	Impact Estimate for 2015 (in Lost GDP)
Some indirect impact on GDP	<ul style="list-style-type: none"> <li>• The Gambia</li> <li>• Senegal</li> <li>• Mali</li> <li>• Nigeria</li> <li>• Burkina Faso</li> <li>• Côte d'Ivoire</li> </ul>	Lost trade through closed borders, disrupted supply chains, marked reduction in travel and tourism, and cancellation of international events.	\$550 million
Slight but traceable impact on GDP	<ul style="list-style-type: none"> <li>• Tanzania</li> <li>• Kenya</li> <li>• South Africa</li> </ul>	Reported reduction in travel and tourism bookings for 2015.	
Negligible impact on GDP	Rest of sub-Saharan Africa	Small loss of commerce and drop in tourism (through aversion behaviour), but too small to detect in national accounts.	

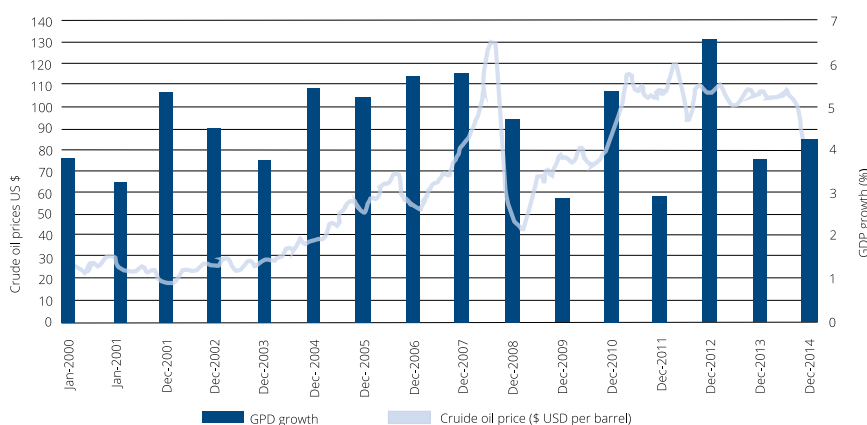
**Source:** World Bank, 2015

The Economic Commission for Africa estimate that Ebola will take off 0.1 percentage points from GDP growth for West Africa and 0.02 percentage points for the entire continent in both 2014 and 2015. Much of the economic impact of Ebola beyond the epicenter of directly affected West African countries is based on fear, the associated aversion behaviour and in some cases to misperceptions about African geography as certain economically affected countries have not experienced a single case of Ebola. There has been a marked reduction in travel and tourism in the directly affected countries and also across the continent. Some tourism destinations reported a significant decline in 2014 and expected 2015 visitor numbers. The likely impact of Ebola on the African economy has been reduced, through containment and preparedness efforts, by an order of magnitude: from perhaps more than \$30 billion, the annual output of a large African economy, to perhaps \$6 billion (World Bank, 2015).

### 1.2.2 The impact of oil price decline on Africa

The fall in oil prices between June 2014 and January 2015 is estimated at 57%. Calculations based on IMF 2015 and EIU 2015 data reveal that the impact of this decline on Africa's growth is marginal (contributing 0.03% to GDP), although local currencies in, for example, Angola, Ghana and Nigeria will depreciate.

**Figure 1.2** Crude oil price, January 2000-December 2014 (US\$/barrel)



**Source:** IMF, 2015

The Economic Commission for Africa reports that economic growth will not be significantly affected if the oil price continues declining at an average of 8.0% a month (the rate of decline from June to December 2014) or less. A significant impact is likely only if the price continues tumbling further. The marginal effect on Africa may be attributed to growth in the non-oil sectors of the African economy and also the ability of African countries, especially oil-exporting countries, to minimize shocks because they hedge themselves against the volatility of the crude oil price. They save more when the prices are higher and use their savings to attenuate the impact of a decline in crude oil prices on their economies.

## Effect of falling oil prices on Africa's overall current accounts

The sharp decline in oil prices has put substantial pressures on the fiscal and current account balances of oil exporters in Africa. Oil-exporting countries will keep their current account surpluses, but they will be much lower in 2015 than they were in 2013 and 2014, whereas current account deficits will persist in other economic groupings. According to the Economic Commission for Africa, the current account deficit of oil-importing countries deteriorated by 0.2 percentage points to 8.7% of GDP in 2014, but the deficit is expected to improve in 2015 to 8.6%.

### 1.2.3 Inflation

Inflation in Africa dropped in 2014 and is expected to continue declining as a result of prudent monetary policies, decreasing global prices for oil and other commodities, and recent good harvests. Over the medium term, oil-importing countries will be the major beneficiaries of reduced inflation. Inflation due to currency depreciation in some countries – especially frontier market countries – has been a concern though, prompting tighter monetary policy (UNECA, 2015). WESP 2015 forecasts that inflation in Africa will remain at an average of 6.9% in 2015, in the light of moderating global prices for commodities, food, oil and industrial imports as well as prudent monetary policies. Fiscal balances will remain negative, owing to infrastructure spending, public wage bills and social sector projects.

**Table 1.2** Inflation at sub-regional levels

	2014	2015
Central Africa	3.6	2.8
Southern Africa	6.2	6.0
East Africa	5.9	6.1
West Africa	7.6	8.8
North Africa	7.2	7.1

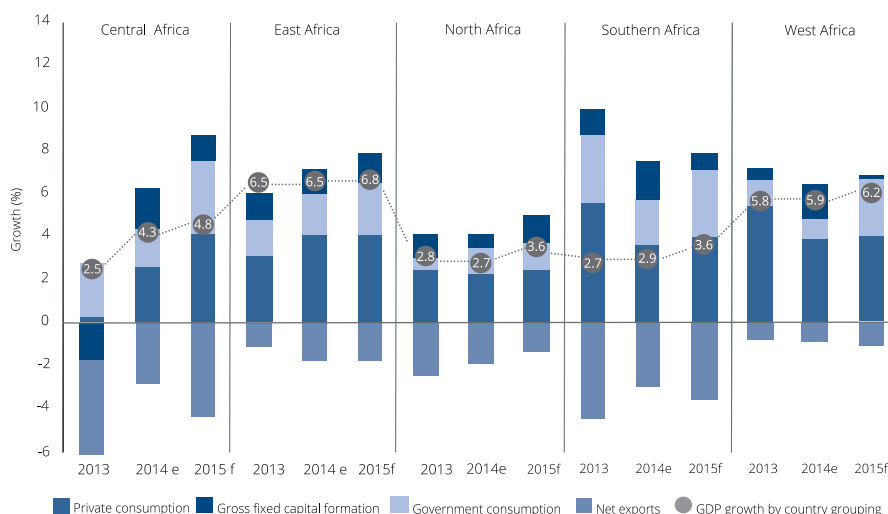
Source: WESP, 2015

### 1.2.4 Growth projection for Africa: Sub-regional variations

Sub-regional growth variations are expected to continue in 2015. Despite the continuation of relatively robust growth across the region, a number of internal and external downside risks may derail Africa's medium-term economic performance including: fall in oil and commodity prices, a renewed weakening in the developed economies, tighter global financial conditions in developed economies, the Ebola outbreak (for West Africa's medium-term growth prospects), political instability, terrorism, civil and labor unrest and weather-related shocks. Growth estimates and projections by UNECA and WESP for the sub-region are as follows (figure 1.3):

**Central Africa:** GDP growth is expected to rise from 4.3% in 2014 to 4.8% in 2015. Strong public spending on capital intensive infrastructure in Cameroon and the Congo and new oil and gas developments in Cameroon and Chad are expected to drive growth. However, increased political instability and terrorism in some of the countries in this region (e.g., Central African Republic, Mali and Nigeria) are preventing an even stronger expansion. The Ebola outbreak in West Africa constitute major downside risk for the outlook in the sub-region.

**East Africa:** Regional integration in the East African Community is expected to continue to boost GDP growth of this sub-region from 6.5% in 2014 to 6.8% in 2015, driven by Kenya and Uganda. Kenya's growth will benefit from the rapid expansion in banking and telecommunications services, the rise of the middle class, urbanization and investment in infrastructure, particularly railways, while Uganda's growth will be supported by increasing activity in sectors such as construction, financial services, transport and telecommunications.

**Figure 1.3** Africa's growth performance and components of growth by Sub-region, 2013-2015

**Source:** Calculations based on UN-DESA, 2014b, and EIU, 2014

**Note:** e = estimate; f = forecast. Data on growth for North Africa exclude Libya

**North Africa:** Growth in North Africa (excluding Libya) is expected to increase to 3.6% in 2015 from 2.7% in 2014, as stability consolidates in the sub-region's largest economy, Egypt. Growth is also expected to be supported by government spending on infrastructure, underpinned by improving political stability in Egypt and Tunisia, and strong growth in private consumption and investment. Weak commodity prices; tight monetary policies in Algeria, Egypt, Morocco and Sudan; and political instability in Libya may upset those forecasts.

**Southern Africa:** Growth for this region is expected to accelerate from 2.9% in 2014 to 3.6% in 2015. Angola, Mozambique and Zambia will stay the fastest-growing economies. Growth will be driven mainly by investment in the non-diamond sector in Botswana, recovery in private consumption in South Africa, increased investment in mining and natural gas exploration in Mozambique, and generally by private consumption. A continued slowdown in oil and mineral prices may derail these forecasts, as two thirds of those countries are mineral rich or oil exporting.

**West Africa:** Growth is expected to increase from 5.9% in 2014 to 6.2% in 2015, although forecasters are wary of political instability in Mali and Nigeria.

## 1.3 Tourism

The United Nations World Tourism Organisation (UNWTO) reported that international tourist arrivals (overnight visitors) increased by 4.3% in 2014, reaching a total 1133 million after topping the 1 billion mark in 2012. The Americas recorded the strongest growth with an 8% increase in international arrivals, followed by Asia and the Pacific and the Middle East (both +5%). In Europe arrivals grew by 3%, while in Africa they were up by 2%. International tourism receipts reached US\$ 1245 billion worldwide in 2014, up from US\$ 1197 billion in 2013, corresponding to an increase of 3.7% in real terms (taking into account exchange rate fluctuations and inflation). Forecasts prepared by UNWTO in January 2015 point to a 3% to 4% growth in international tourist arrivals in 2015 – in line with the Tourism Towards 2030 long-term forecast of 3.3% a year. By UNWTO region, prospects for 2015 are strongest for Asia and the Pacific and the Americas (both +4% to +5%), followed by Europe (+3% to +4%), the Middle East (+2% to +5%) and Africa (+3% to +5%).

**Table 1.3** Outlook for international tourist arrivals

	2009	2010	2011	2012	2013	2014 estimates	2015 projected ranges
World	-3.90%	6.50%	5.10%	4.10%	4.70%	4.70%	+3% and 4%
Europe	-5.40%	3.10%	6.60%	3.70%	5.00%	3.90%	+3% and 4%
Asia and The Pacific	-1.60%	13.10%	6.50%	6.90%	6.80%	5.40%	+4% and 5%
Americas	-4.70%	6.50%	3.50%	4.40%	3.50%	7.40%	+4% and 5%
Africa	3.40%	8.90%	-0.10%	5.20%	4.80%	2.30%	+3% and 5%
Middle East	-5.40%	13.10%	-3.50%	-5.60%	-3.40%	4.40%	+2% and 5%

**Source:** UNWTO, 2015

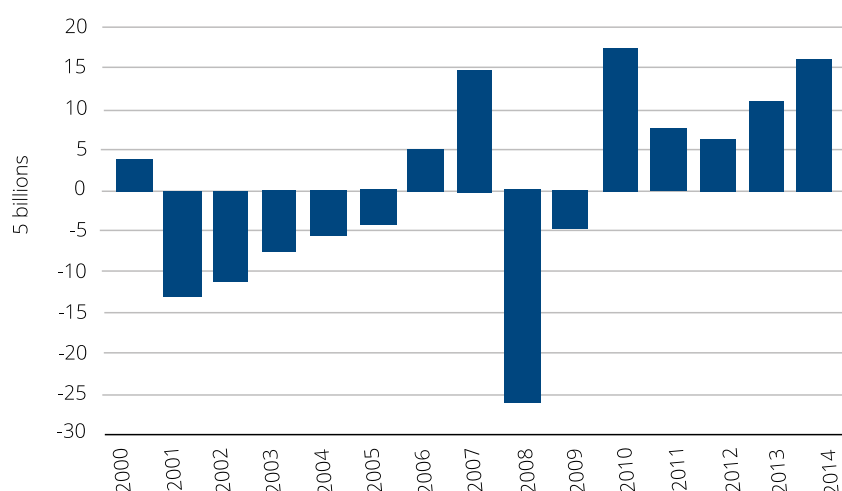


Africa saw weaker growth in most destinations in 2014. In absolute terms, the region welcomed a total of 56 million international tourists and a 3% share in tourism receipts. In North Africa, international tourist arrivals in leading destination Morocco grew by a modest 2%, following a strong performance in 2013, while arrivals in Tunisia decreased by 3%. Sub-saharan Africa grew by an estimated 3% in 2014. Arrivals to the sub-region's largest destination South Africa were flat in 2014. Worth mentioning among the other destinations for which data is reported are Côte d'Ivoire (+24%), Madagascar (+13%), Mauritius (+5%), Zimbabwe (+3%) and the Seychelles (+1%).

## 1.4 2014: Another strong year for aviation

The airline industry had another strong year in 2014, solidifying a positive trend in profitability after huge losses during the 2008-2009 global economic recession. According to IATA, net post-tax profit for 2014 was \$16.4 billion, a 2.2% margin on revenues. This was the fifth successive year of profitability, and it builds on the \$10.6 billion profit and 1.5% profit margin in 2013. The air transport industry's profitability in 2014 is owed primarily to improving global economic conditions, which underpinned robust growth in passenger and air cargo demand. Lower fuel costs also helped, but because of hedging some airlines have yet to experience the benefits of the decline in fuel prices (IATA, 2015).

**Figure 1.4 Industry net profits**



Source: IATA/ICAO

Aviation's economic performance showed notable variation among regions. It recorded the greatest improvement in mature economies, such as those of the United States and the United Kingdom. But it grew at a faster rate in some emerging countries, including China and India. In emerging economies, GDP growth has a bigger impact on air transport demand, as each unit of GDP generates more air travel in emerging economies than in mature markets. In 2014, this trend in demand was bolstered by significantly lower airline fares in markets outside the United States because of falling fuel prices.

There was also an increase in aircraft deliveries in 2014, to 1,627 new aircraft. The in-service fleet rose to 26,051 aircraft, from 25,187 in 2013. Replacements for older aircraft were generally larger in size than their predecessors, adding yet more seats to the global market. Overall, the number of seats available in the fleet rose to 3.5 million, adding 5% capacity to the market globally (IATA, 2015).

## Jet fuel

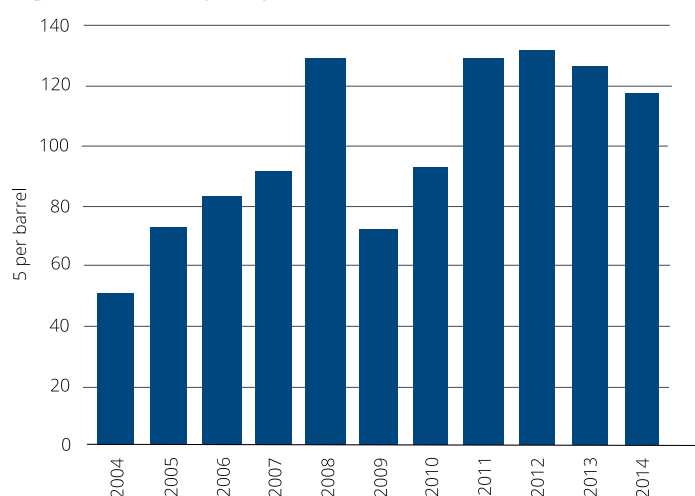
Jet fuel averaged \$116.6 a barrel in 2014, down 6% on the 2013 average price of \$124.5 a barrel. IATA reported that consumers benefited from cheaper travel, with the average return fare (before surcharges and tax) declining 3% in 2014 compared with 2013, after adjusting for inflation. Looking ahead, the financial performance of non-US carriers could be hampered by the strong appreciation of the US dollar. A strengthened dollar can adversely affect costs denominated in US dollars. Demand for cargo and passenger services, measured in freight tonne kilometres (FTKs) and in revenue passenger kilometres (RPKs), respectively, accelerated in 2014. This reflected an upturn in the global economy and an increase in world trade. Business confidence strengthened to its highest level since 2011.

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

Growth in the US energy supply was one of the main reasons for the declines in crude oil and jet fuel prices in 2014. Energy supply from the US is expected to continue increasing in 2015. At the same time, demand for crude oil remains moderately weak, due mostly to economic sluggishness in the Eurozone and, to a lesser degree, in China. As a result, prices in the futures market for Brent crude oil are averaging around \$65 a barrel for 2015.

Fuel continues to be the largest number in the airline debit column, accounting, on average, for 29% of an airline's costs in 2014. But this average annual share does not reflect the end-of-year fall in jet fuel prices.

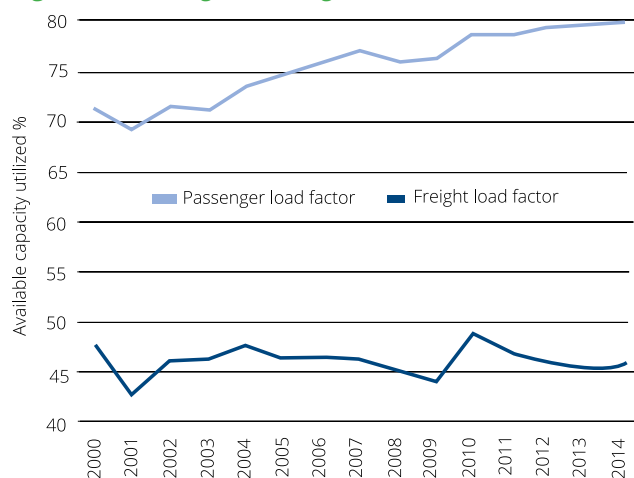
**Figure 1.5** Jet fuel price per barrel



Source: IATA/ICAO

According to the IATA 2015 annual review, the passenger load factor in 2014 was at a high of 80% while the cargo load factor remained weak at around 45%. An increasing number of passenger aircraft with belly-hold capacity is exacerbating a situation of capacity growing irrespective of demand. The breakeven load factor came down even further in 2014 because of lower fuel prices and the positive affect of higher ancillary revenues on yields.

**Figure 1.6** Passenger and freight load factors



Source: IATA

The average passenger yield in 2014 dropped in comparison to 2013. Fierce competition provided downward pressure, as did the fall in fuel costs, but increased ancillary sales and a more robust industry structure helped prevent additional weakness. As fuel costs drop further in 2015, lower passenger yields are expected. Cargo yield on the other hand, weakened further in 2014. Although the long-term trend of slow deterioration continued, the decline was gentler than in previous years. Subsequent chapters of this report will discuss the airline performance in detail.

## SECTION TWO

### AIRLINE PERFORMANCE

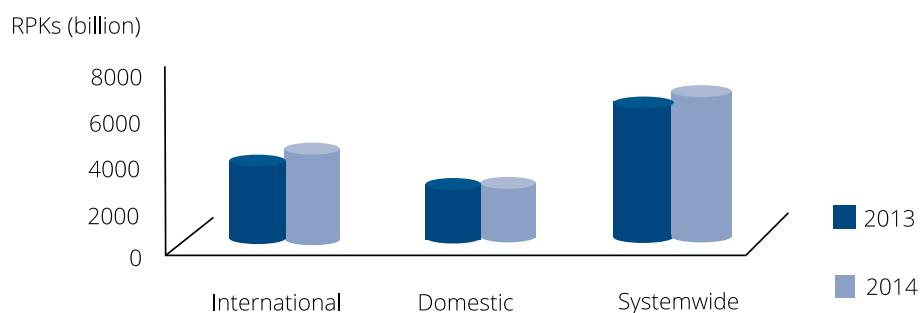
#### Global Performance

In 2014, world passenger traffic for scheduled operations measured in RPKs increased by 6.0% compared to 2013. International markets improved by 6.1% which was similar to 2013 while domestic markets grew by 5.7%.

Systemwide, seat capacity (ASKs) increased by 5.8% which was represented by 6.4% on international routes and 4.6% on domestic routes. In line with the upward trend, global average passenger load factors increased to 79.9% in 2014 from 79.7% in 2013.

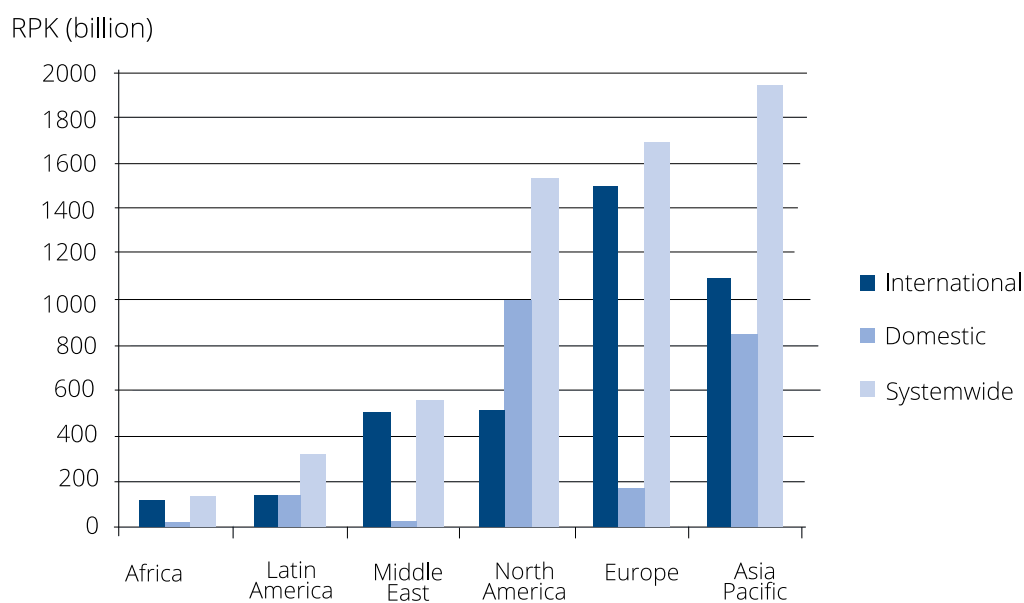
Increasing world trade and global economy growth supported stronger demand in cargo markets that led to 5.8% improvement in cargo traffic (FTK) in 2014. Capacity increased by 5.0% while cumulative load factors for all freight traffic and mixed operations remained low at 48%.

**Figure 2.1** World Scheduled Passenger Kilometres (RPKs) 2013-2014 (billions)



Source: IATA WATS/AFRAA

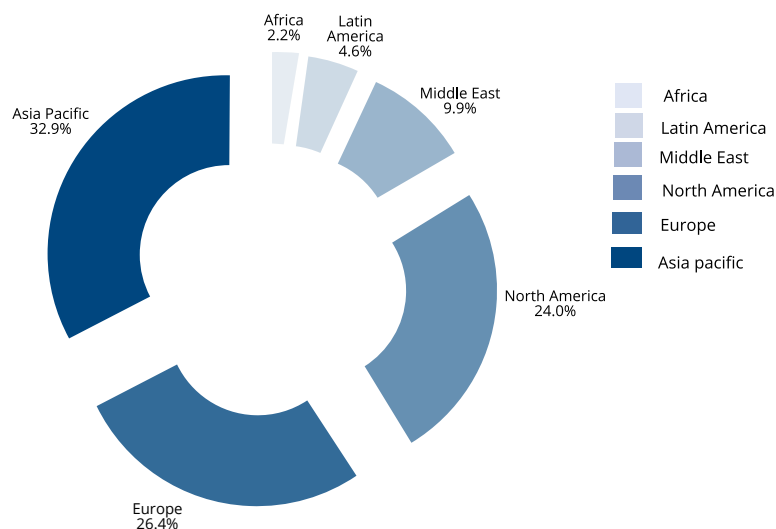
**Figure 2.2** Revenue Passenger Kilometres per region – IATA Schedule Services 2014



Source: IATA WATS/AFRAA

Asia Pacific region was the world's biggest air transport market in 2014 by RPKs and RTKs performed (31.42% of RPKs and 32.87% of RTKs), followed by Europe (27.12% of RPKs and 26.43% of RTKs), North America (24.93% of RPKs and 23.99% of RTKs), Middle East (8.95% of RPKs and 9.94% of RTKs), Latin America (5.27% of RPKs and 4.61% of RTKs) and Africa (2.31% of RPKs and 2.18% of RTKs).



**Figure 2.3** Revenue Tonne-Kilometres Performed per Region – IATA Scheduled Services 2014

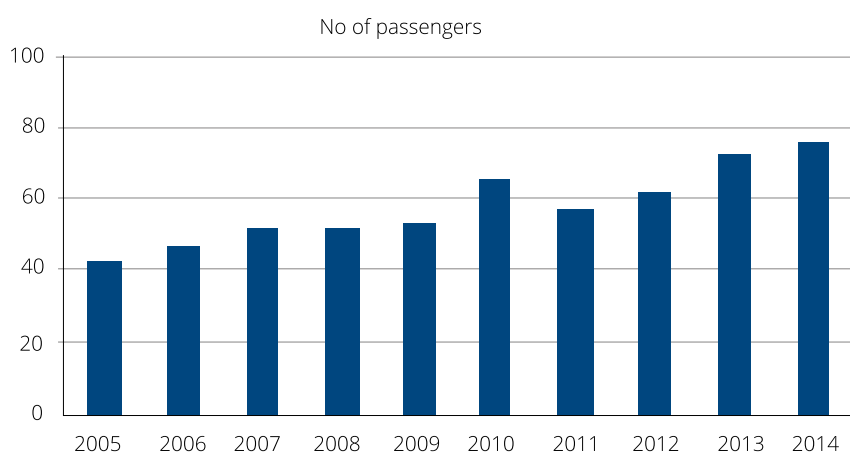
Source: AFRAA

## African Airlines Performance

### Passengers Carried

Globally, demand for the passenger business out-performed the 10-year average growth rate with a 5.9% expansion of demand in 2014. Overall, 3.3 billion passengers boarded aircraft in 2014, which is 170 million more than in 2013.

Compared to the other regions, African airlines experienced the slowest annual demand growth in 2014, up by 0.9% compared to 2013 with capacity up by 3.0%. The weakness in international air travel in Africa for regional carriers reflects negative economic developments in parts of the continent in 2014.

**Figure 2.4** Total Passengers Carried by Market: 2005-2014

Source: AFRAA

African airlines carried a total of 76.6 million passengers in 2014 up from 73.8 million in 2013. 46.8 million passengers were carried on international routes, while 29.8 were carried on domestic routes in 2014. The 22 AFRAA airlines that reported their passenger numbers carried a total of 50.03 million passengers in 2014 or 65.31% of total passengers carried by all African airlines. The top 5 passenger countries in Africa are: South Africa, Egypt, Morocco, Nigeria and Algeria.

**Table 2.1** Top 5 passenger countries in Africa in 2014

	2014 Passenger numbers	% growth from 2013
South Africa	20,895,193	2.5
Egypt	18,133,870	7.4
Morocco	13,966,080	12.9
Nigeria	8,615,889	12.9
Algeria	7,551,632	2.9

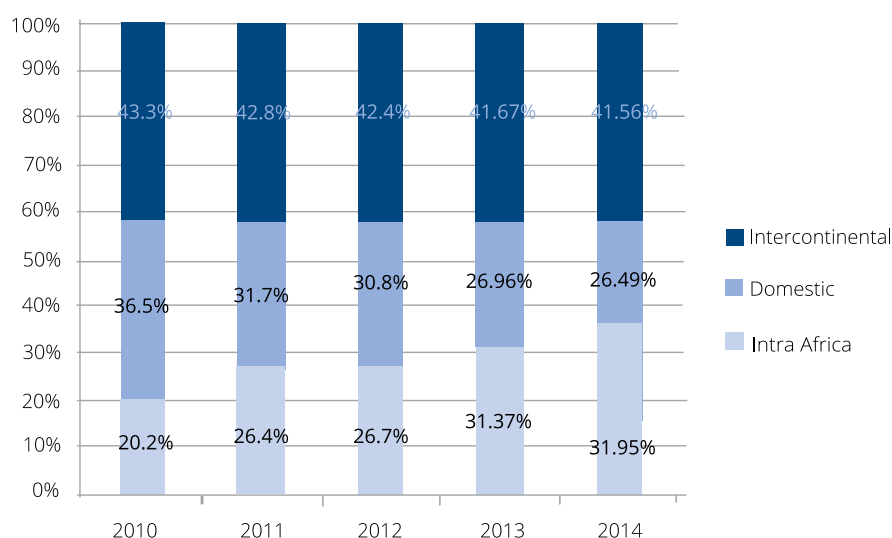
**Source:** IATA WATS

Africa's GDP growth increased by two percentage points in 2014 and the growth momentum is expected to continue as a result of increasing domestic demand, coupled with improving regional business environment and macro-economic management, increasing public investment – especially in infrastructure, a buoyant services sector and increasing trade and investment ties with emerging economies. Additionally, Africa international tourist arrivals were up by 2% in 2014 and this resulted in increased passenger numbers.

## Domestic and Intra-Africa Passengers

Domestic passenger numbers in 2014 increased by 3.1% to 29.7 million. The growing competition in many domestic markets and the resultant improvement in service quality and lower fares continue to stimulate demand. The demand in air travel is further stimulated by the rising middle class and high rate of urbanisation in the continent. 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: 2010-2014



**Source:** AFRAA

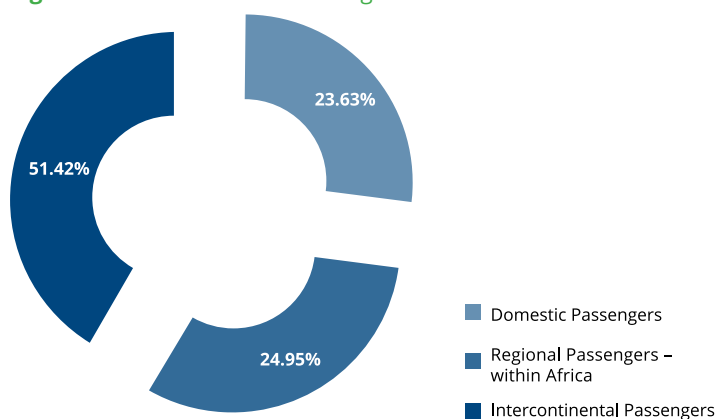
On the international routes, passenger numbers also went up by 1.9% to 46 million in 2014. For the AFRAA members that reported their data, intra-Africa passenger numbers stood at 31.95% of the total number of passengers carried in 2014.

With a population of over 1.1 billion, and the world's fastest urbanisation rate, there is huge potential for growth of air travel to, from, and within the continent. A major constraint to this growth is the slow pace of liberalisation and limited intra-African connectivity. This however is expected to change with the major developments that are currently taking shape in the industry for the full liberalisation of African skies. A group of 11 African States in January 2015 declared their solemn commitment to the immediate and unconditional implementation of the Yamoussoukro Decision towards the establishment of a single African air transport market by 2017. The Ministerial Working Group is working on the road map for the operationalisation of a single African air transport market by January 2017.

## Passenger Distribution

For AFRAA airlines, intercontinental passenger market segment remains the biggest with 51.42% of all passengers travelling between Africa and other regions of the world. The domestic market segment represents 23.63% while the intra-Africa market is 24.95%.

**Figure 2.6** African Airlines Passenger Distribution 2014

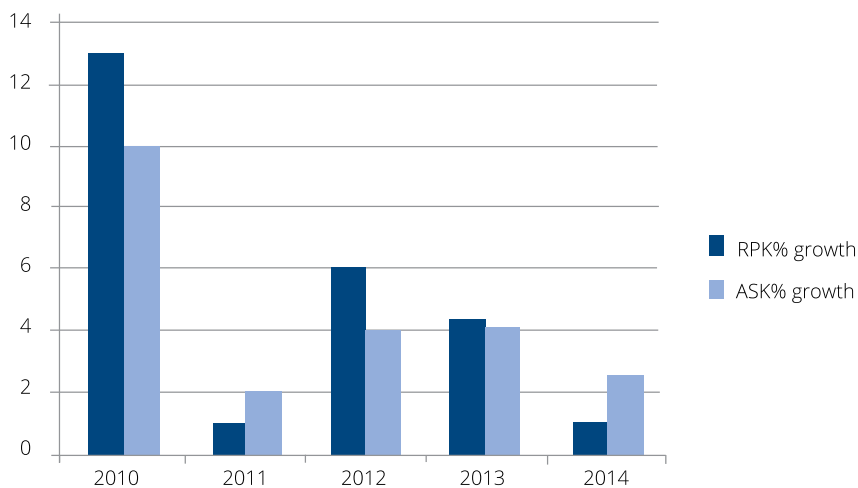


Source: AFRAA

## Passenger Traffic and Capacity

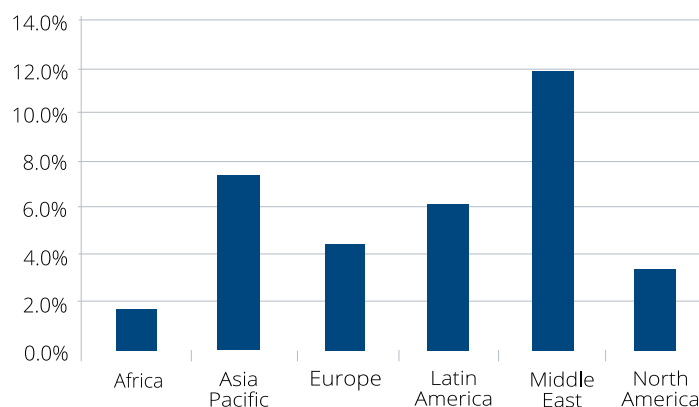
Based on RTKs globally, Middle East was the region that grew the most in 2014 with 11.9% compared with 2013 followed by Asia Pacific and Latin America with 7.4% and 6.2% growth respectively. Africa was still the smallest market growth in terms of RPKs at 1.7%.

**Figure 2.7** Africa Passenger Traffic and Capacity Annual Percentage Growth: 2010-2014



Source: AFRAA/IATA

**Figure 2.8** 2014 RTK growth per region



Source: AFRAA/IATA



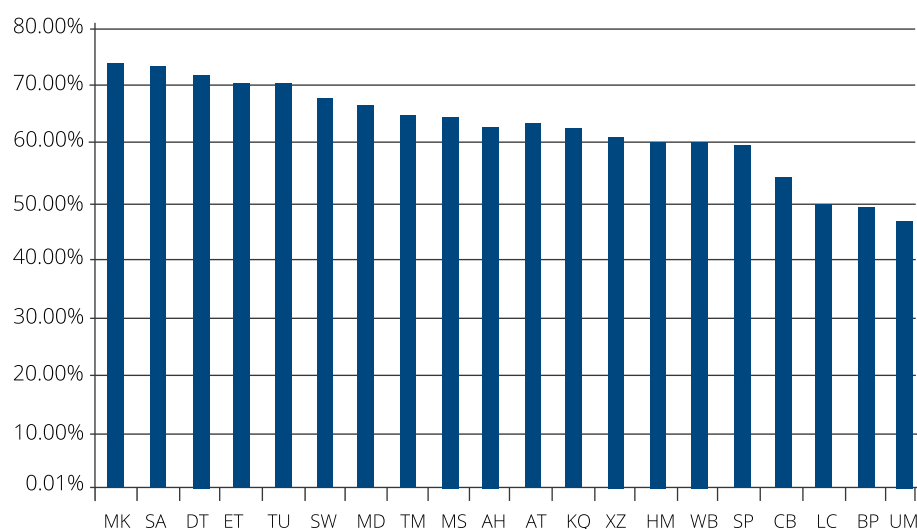
## Passenger Load Factor

There was slow traffic growth for African airlines in 2014 which was mainly attributed to various problems that disrupted tourism, the loss of market share and weak currencies. Many African airlines continue to record low load factors due to 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. Some airlines however were able to achieve adequate load factors in 2014.

Average passenger load factors (PLF) for African carriers dropped marginally to 68.2% from 69.6% recorded in 2013. This compared unfavourably to the global average load factor of 79.9% in 2014. Passenger load factors for domestic routes was 74.1% while intercontinental routes recorded 67.3%.

The top 5 AFRAA member airlines with the highest average passenger load factors in 2014 were: Air Mauritius (74%), South African Airways (73.1%), TAAG Angola (72%), Ethiopian Airlines (70.46%) and Tunisair (70.4%).

**Figure 2.9** Passenger Load Factors of some AFRAA Airlines in 2014 (%)



Source: AFRAA

North America was the world region with the highest passenger load factor of 83.6% in 2014 followed by Europe at 81.3% and Latin America at 79.3%. Africa and Asia Pacific regions saw a decrease in passenger load factors in 2014 by 1.4 and 0.4 percent respectively. Africa attained the lowest load factor of 68.2% in 2014.

**Table 2.2** Passenger and Weight Load Factor for all regions – 2014

	Passenger LF	% Change	Weight LF	% change
Africa	68.2%	-0.1	55.4%	-0.6
Asia Pacific	77.4%	-0.3	69.3%	0.0
Europe	81.3%	0.4	71.3%	0.1
Latin America	79.3%	1.5	65.4%	1.6
Middle East	78.3%	0.8	64.5%	1.4
North America	83.6%	0.3	64.5%	0.4
Industry Average	79.9%	-0.2	68.1%	0.2

Source: AFRAA/IATA WATS

## AFRAA Airlines Passenger Traffic

AFRAA airlines that reported performance in 2014 carried a total of 50,034,015 passengers of which intercontinental passengers made up 41.56%. The biggest airline by number of passengers carried in 2014 was EgyptAir, with over 8.5 million passengers transported.

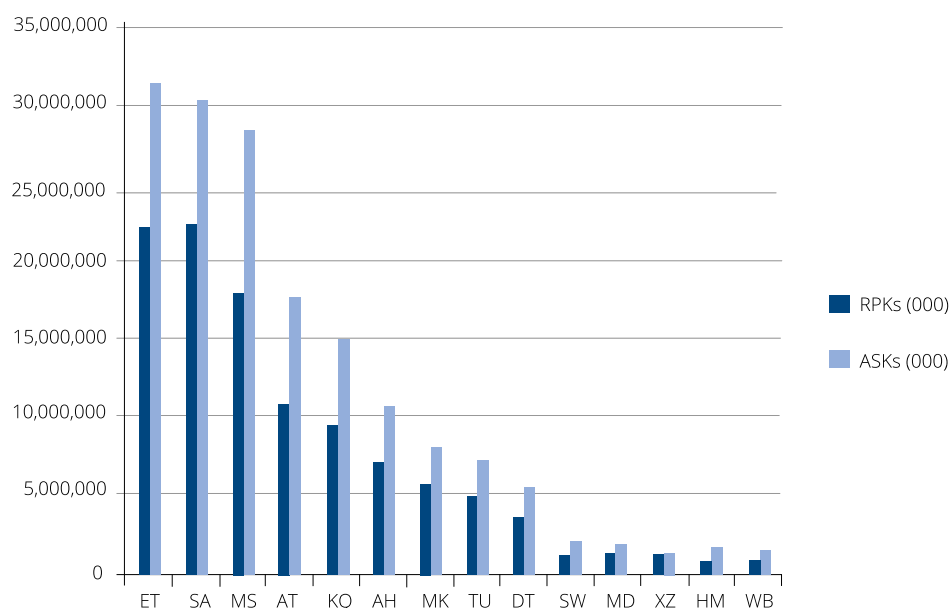
**Table 2.3** Total Passengers Carried by some AFRAA Airlines in 2014 (000)

	Domestic Passengers (000)	Regional Passengers – within Africa (000)	Intercontinental Passengers (000)	Total Passengers Carried (000)
Air Algérie	1,552.1	364.6	3,316.1	5,232.7
Air Burkina	2.6	104.9	-	107.6
Air Botswana	85.0	152	-	237
Air Madagascar	295.6	-	226.8	522.4
Air Mauritius	128.0	520	706	1,354
Air Namibia	91.2	317.8	121.6	530.6
Air Seychelles	165.4	253.11	-	418.5
Air Zimbabwe	102.0	94	-	196
Cronos	120.4	27.7	-	148.1
ECAir	271.9	632.0	41.0	944.9
EgyptAir	1,688.0	1,072	6,035	8,795
Ethiopian airlines	793.0	2,740	2,664	6,197
Kenya Airways	737.1	-	2,902.2	3,639.3
LAM Mozambique	524.0	226	1	751
Precision Air	232.9	218.8	-	451.8
RwandAir	22.0	394	87	503
Royal Air Maroc	806.0	1,035	4497	6,338
South African Airways	3,232.8	-	3,558.7	6,791.5
South African Express	1,197.8	243.4	-	1,441.1
TAAG Angola	715.0	227	471	1,413
Tassili Airlines	493.5	-	2.9	496.4
Tunisair		674.2	2,850.9	3,525.1
<b>TOTAL</b>	<b>13,256.3</b>	<b>15,984.3</b>	<b>20,793.4</b>	<b>50,034.0</b>

**Source:** AFRAA

The 21 reporting AFRAA airlines for 2014 performance put on the market a total of 167,016 million ASKs up from 160,138 million reported in 2013. Total reported RPKs for 2014 was 113,097 million up from 109,695 million in 2013, while the overall average passenger load factor reported for the 21 airlines in 2014 was 62.64%.

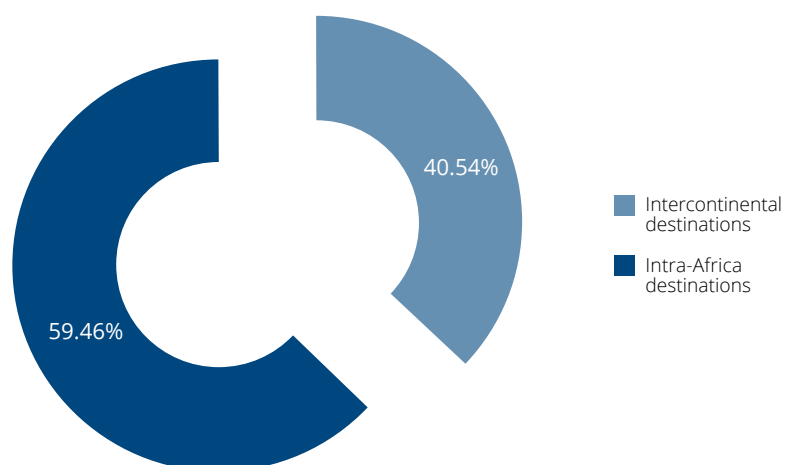
In terms of ASKs and RPKs, the top 5 largest African carriers are: Ethiopian Airlines (31,602 million ASKs, 22,267 million RPKs), South African Airways (30,533 million ASKs, 22,313 million RPKs), EgyptAir (28,562 million ASKs, 18,358 million RPKs), Royal Air Maroc (17,560 million ASKs, 11,165 million RPKs) and Kenya Airways (15,220 million ASKs, 9,567 million RPKs).

**Figure 2.10** ASKs and RPKs of some AFRAA Airlines in 2014 (000)**Source:** AFRAA

## New Routes

AFRAA airlines in 2014 continued with their aggressive route expansion on both intra-Africa and intercontinental routes. In 2014, 37 new routes were launched by 13 AFRAA member airlines to domestic, intra-Africa and intercontinental destinations. Of these, 15 destinations were intercontinental with the remaining 22 new routes within the continent.

**Figure 2.11** New Destinations by AFRAA Airlines in 2014



Source: AFRAA

**Table 2.4** New Destinations by 13 AFRAA Airlines in 2014

	Origin	Destination		Origin	Destination
1	Maputo	Nacala-Quelimane	20	Brazzaville	Beirut
2	Harare	Lusaka	21	Mauritius	Chengdu
3	Casablanca	Cape Verde	22	Dar es Salaam	Kigoma
4	Casablanca	Doha	23	Dar es Salaam	Laos-Mwanza-Dar es Salaam
5	Addis Ababa	Jakarta	24	Johannesburg	Abu Dhabi
6	Addis Ababa	Dublin	25	Johannesburg	Walvis Bay
7	Addis Ababa	Manila	26	Walvis Bay	Cape Town
8	Addis Ababa	Los Angeles	27	Windhoek	Katima Mulilo
9	Ababa Ababa	Goma	28	Casablanca	Turin Airport
10	Addis Ababa	Bangalore	29	Casablanca	Guelmime Airport
11	Addis Ababa	Hanoi	30	Windhoek	Rundu
12	Addis Ababa	Moscow	31	Johannesburg	Pilanesberg
13	Addis Ababa	Hyderabad	32	Johannesburg	Mafikeng
14	Addis Ababa	Istanbul	33	Cape Town	Pilanesberg
15	Addis Ababa	Lusaka-Gaborone	34	Pilanesberg	Mafikeng
16	Algiers	Lyon	35	Luanda	Kinshasa
17	Brazzaville	Libreville	36	Kigali	Nairobi-Entebbe
18	Brazzaville	Dakar	37	Kigali	Lusaka-Johannesburg
19	Brazzaville	Bamako			

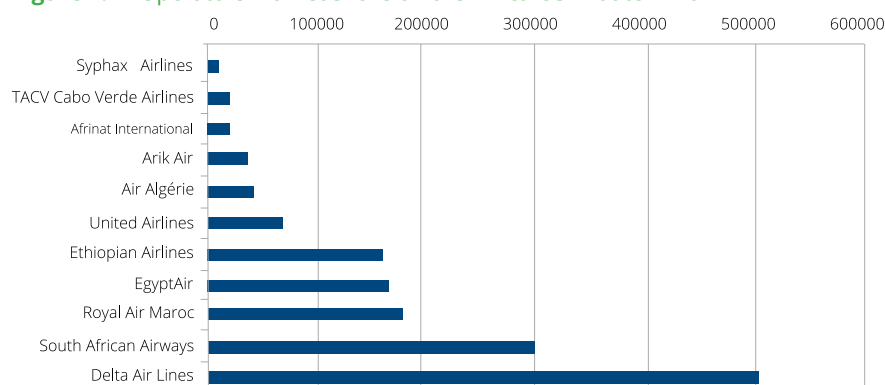
Source: AFRAA

## North America Operations

Delta Airlines continued its dominance on the Africa-North American route with 33% of the passenger capacity. Its total number of flights from Africa to North America in 2014 was 2130. United Airlines had a capacity of 312 flights out of Africa in the same period. The 2 North American carriers together operated 38% of all scheduled flights across the Atlantic to Africa.

Nine African airlines together operated 3,369 flights across the Atlantic in 2014. This represents 62% capacity by African carriers.

**Figure 2.12 Operators Market Share on the Africa-USA route in 2014**



**Source:** AFRAA/OAG

**Table 2.5 Africa to N. America Capacity Share 2014**

Operating Carrier	Flights in 2014	Seats in 2014	% share (seats)
Syphax Airlines	37	10,275	0.68%
Afrinat International	47	18,800	1.25%
TACV Cabo Verde Airlines	94	19,900	1.32%
Arik Air	157	37,393	2.48%
Air Algérie	181	45,431	3.01%
United Airlines	312	68,328	4.53%
Ethiopian Airlines	507	163,855	10.86%
EgyptAir	485	165,848	10.99%
Royal Air Maroc	708	176,020	11.66%
South African Airways	1,153	298,910	19.80%
Delta Air Lines	2,130	504,709	33.44%
<b>TOTAL</b>	<b>5,811</b>	<b>1,509,469</b>	<b>-</b>

**Source:** AFRAA/OAG Schedules

## Passenger Traffic Forecast

According to the IATA and Tourism Economics long-term air passenger forecasting service, the number of global air passenger journeys is expected to grow at an annual average rate of 4.1% over the 2014-2034 period. Airbus, Boeing and Embraer long-term forecast an average annual passenger demand growth (RPKs) of 4.7% – 5.0% for the next 20 years. ICAO's long-term outlook on the other hand, shows an estimated growth of 4.5% for the period 2011-2030. 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 2014 (billions)	RPKs in 2034 (billions)	Av. Forecast Growth (2014-2034)
Africa-Africa	56.6	206.4	6.7%
Africa-Europe	146.5	365.7	4.7%
Africa-Middle East	53.7	221.6	7.3%
Africa-North America	12.5	41.5	6.2%
Africa-Southeast Asia	3.7	15.6	7.4%

**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

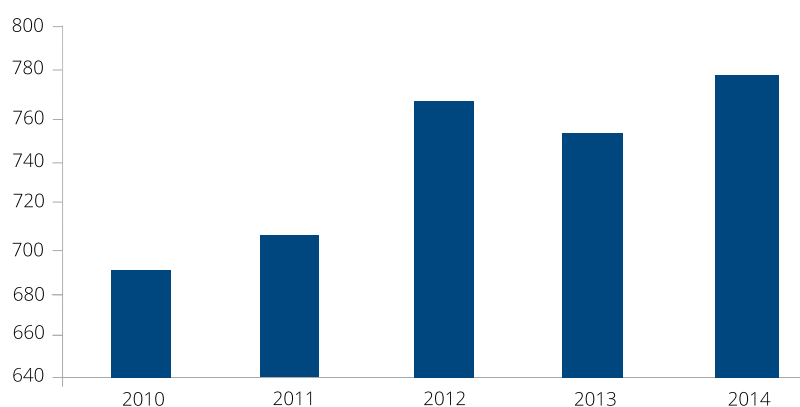
### Freight Carried and Traffic

Demand for cargo services, measured in freight tonne kilometres (FTKs) accelerated in 2014, with a 5.8% expansion. The upturn in the global economic performance which increased confidence and international trade resulted in increased demand for air freight. The freight load factor however, remained low, at 45.7%. Capacity, meanwhile, increased 3.7% for the year. Continued economic growth is expected to support further improvement in air freight performance.

Air freight performance in Africa is still very low. Scheduled freight operations by African airlines in 2014 carried about 777,000 tonnes, representing 1.54% of total global freight carried. In FTKs, performance by African airlines grew by 4.4% in 2014 compared to 0.4% in 2013. Middle East carriers recorded 9% year-on-year growth in air freight carried in 2014, which was the highest across all regions.

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

Freight carried (tonnes)



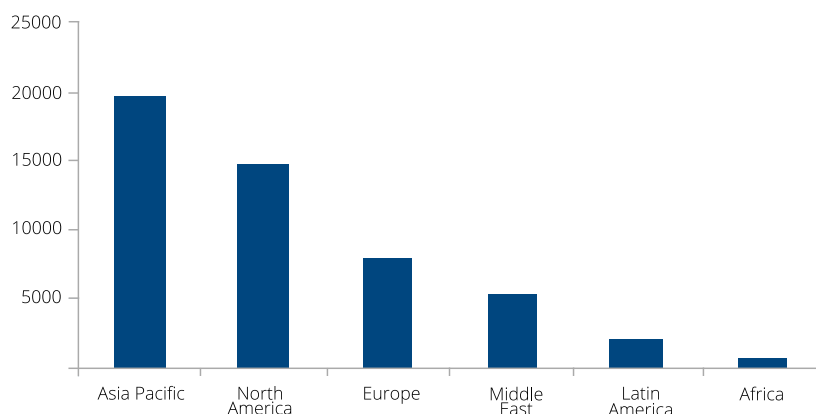
Source: AFRAA/IATA WATS

Although major economies namely Nigeria and South Africa underperformed during parts of 2014, regional trade activity held-up, supporting demand for air transport of goods. 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.

The trends in world economies and international trade are both forecast to continue growing strongly and lead to a return to capacity balance and profitable yields for air cargo traffic. Industries that require transport of time-sensitive and high-value commodities such as perishables, consumer electronics, high-fashion apparel, pharmaceuticals, industrial machinery, and automobile parts recognize the unparalleled speed and reliability that air freight offers. These customers see the value of air freight, which will continue to play a significant role in their shipping decisions.

**Figure 3.2 Freight Carried by region (tonnes) – 2014**

Freight (tonnes)

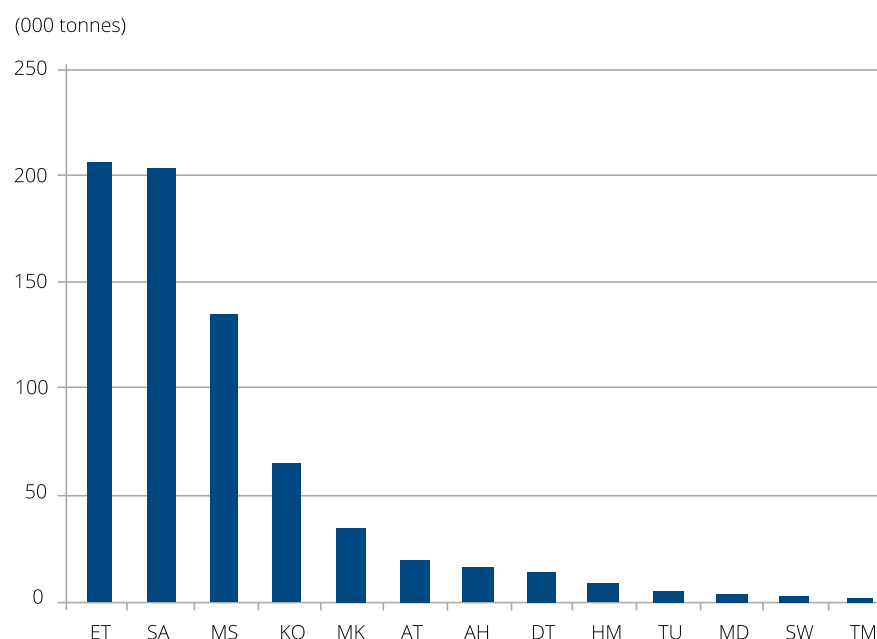


Source: AFRAA/IATA WATS

The underdeveloped cargo component of African airlines' 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 bottlenecks in customs clearance at airports.

17 reporting AFRAA airlines (scheduled passenger carriers) together moved 722,570 tonnes. 48.72% of the freight was carried on intercontinental routes, with 51.38% on domestic and regional routes. Ethiopian Airlines carried the largest portion of freight at 207,364 tonnes followed by South African Airways at 202,521 tonnes and EgyptAir at 134,720 tonnes.

**Figure 3.3** Total Freight Carried by some AFRAA Airlines in 2014 (000 tonnes)



Source: AFRAA

## Freight Traffic Forecast

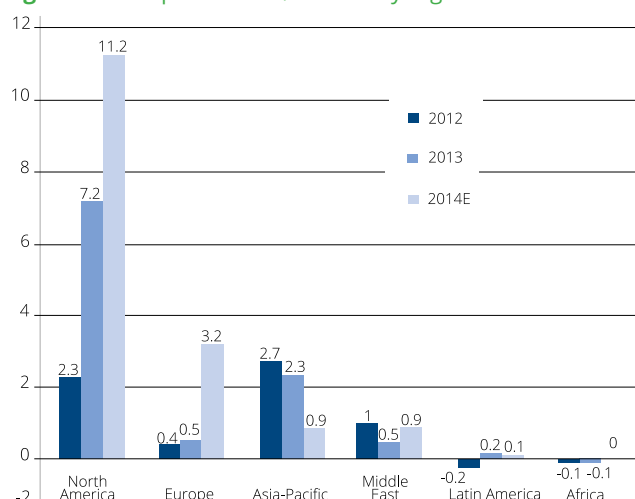
In spite of the positive prospects in the air freight market, expectations by various forecasters have been downgraded from last year's expectations. IATA's medium-term forecast shows that air freight is expected to grow at 4.1% over the next five years while an airline survey by IATA was less optimistic, showing that airlines on average expect air freight tonnes to grow by 3.5% annually over the next 5 years on international markets. Airbus and Boeing also downgraded their long term forecasts for air freight growth. Both manufacturers expect annual air freight demand (FTKs) growth to average 4.5 - 4.7% over the next 20 years, down from 4.8 - 5.0% as per the previous forecasts.

## SECTION FOUR

### Financial performance

Globally, airline profitability in 2014 improved significantly compared to 2013 with net profits increasing by over 50% to US\$16.3 billion according to IATA and ICAO. There was notable variation across regions, partly reflecting different economic conditions in various parts of the world but also increased efficiencies by airlines in some regions. North American airlines achieved the highest net profits in 2014 of US\$11.2 billion, followed by European airlines (US\$3.2 billion), Asia Pacific airlines (US\$0.9 billion), Middle East carriers (US\$0.9 billion) and Latin American carriers (US\$0.1 billion). African carriers broke even in 2014. The upward trend in airline profitability is expected to continue as airlines continue to focus on reducing costs and boosting revenues.

**Figure 4.1** Net profit in US\$ billions by region for 2012-2014



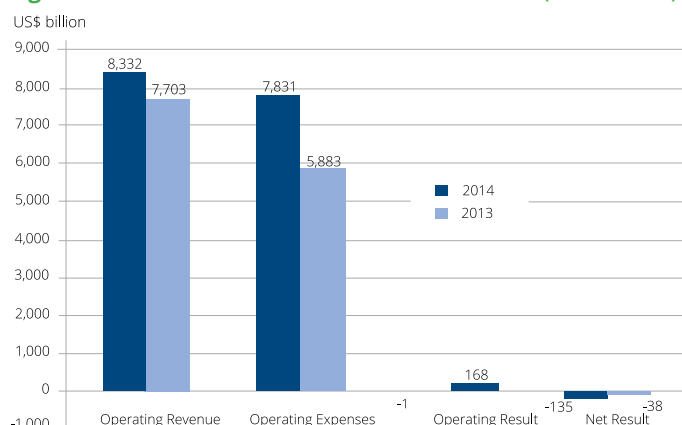
Source: IATA

On the cost side, the sharp decline in oil prices is a significant near-term tail wind, with fuel accounting for 29% of total airline operating costs, according to IATA. Lower oil prices also provide a stimulant to consumer incomes, and thus create an opportunity to open additional routes and frequencies that might not have been profitable at higher oil price levels.

### Operating revenue and expenses

*This analysis is limited to 14 AFRAA airlines that reported their financial results for 2014 and 2013.* The 14 AFRAA carriers' total operating revenue was US\$8.3 billion in 2014 compared to US\$7.7 billion in 2013. Operating expenses for 2014 was US\$7.8 billion resulting to an operating loss of US\$1.5 million and a net loss of US\$134 million. Of the 14 participating airlines, 6 reported net profit. Ethiopian airlines was the largest African carrier in 2014 with operating revenue topping US\$2.4 billion.

**Figure 4.2** Financial results of some AFRAA airlines (US\$ billions)



Source: AFRAA

African airlines are expected to post \$100 million profit in 2015 for a net margin of 0.8% (\$1.59/passenger) according to IATA. African airlines are also expected to see the slowest growth among developing markets with capacity and demand expansion of 3.3% and 3.2% respectively for 2015. The slow traffic growth for African airlines is mainly attributed to various problems that disrupted tourism such as the Ebola crisis in three West African States and terrorist attacks in Egypt, Kenya, Nigeria and Tunisia, the loss of market share and weak currencies particularly for oil exporters which will limit the benefits of lower fuel prices.

## SECTION FIVE

### African Airports Statistics

According to ACI Africa airport data, in 2014, African airports carried 179.8 million passengers. This represented an increment of 4.8 million passengers over the number of passengers carried in 2013. International passengers constituted 63% of the passengers carried in 2014.

The two biggest air transport markets in Africa are South Africa and Egypt featuring a total of 7 out of the top 20 busiest airports in Africa. O.R. Tambo International Airport is the busiest airport in Africa in terms of passenger numbers followed by Cairo International Airport in Egypt, Cape Town International Airport in South Africa and Aéroport Mohammed V in Morocco.

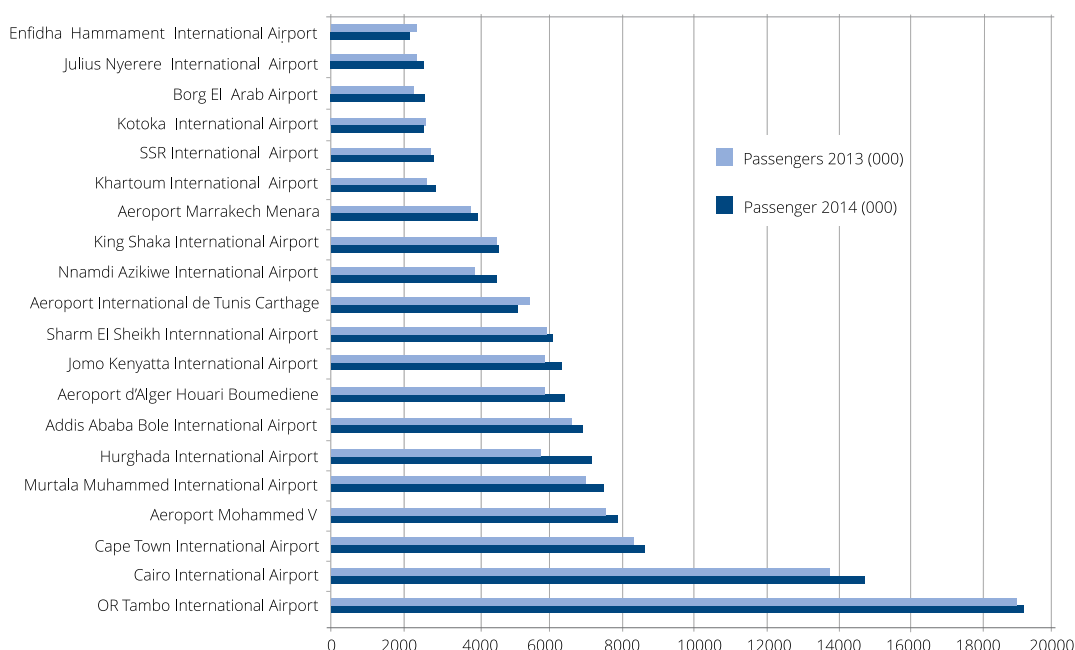
**Table 5.1** Top African Airports by Passengers Carried in 2014 and 2013 (000)

	City	Country	Airport	Domestic Passengers		International Passengers	
				2014	2013	2014	2013
1	Johannesburg	South Africa	OR Tambo International Airport	9,468,988	9,347,668	9,559,981	9,445,801
2	Cairo	Egypt	Cairo International Airport	2,039,265	1,795,546	11,803,350	10,957,330
3	Cape Town	South Africa	Cape Town International Airport	7,067,382	6,872,554	1,568,912	1,476,300
4	Casablanca	Morocco	Aéroport Mohammed V	783,445	663,785	7,163,059	6,870,946
5	Lagos	Nigeria	Murtala Muhammed International Airport	3,947,314	3,493,941	3,361,767	3,395,097
6	Hurghada	Egypt	Hurghada International Airport	530,240	449,641	6,692,896	5,331,859
7	Addis Ababa	Ethiopia	Addis Ababa Bole International Airport	845,614	717,055	6,085,430	5,844,968
8	Algiers	Algeria	Aéroport d'Alger Houari Boumédiène	1,730,128	1,688,727	4,727,667	4,229,405
9	Nairobi	Kenya	Jomo Kenyatta International Airport	1,313,097	1,010,725	3,991,981	3,783,987
10	Sharm El Sheikh	Egypt	Sharm El Sheikh International Airport	801,132	643,061	5,434,732	5,308,255
11	Tunis	Tunisia	Aéroport International de Tunis Carthage	249,281	215,207	4,868,639	5,144,113
12	Abuja	Nigeria	Nnamdi Azikiwe International Airport	3,274,986	3,015,803	1,294,806	851,073
13	Durban	South Africa	King Shaka International Airport	4,200,527	4,234,030	295,447	270,899
14	Marrakech	Morocco	Aéroport Marrakech Ménara	183,837	166,932	3,817,626	3,612,679
15	Khartoum	Sudan	Khartoum International Airport	496,623	492,827	2,299,290	2,060,225
16	Plaine Magnien	Mauritius	SSR International Airport	130,292	126,118	2,632,643	2,600,173
17	Accra	Ghana	Kotoka International Airport	719,018	772,298	1,650,520	1,669,542
18	Borg El Arab	Egypt	Borg El Arab Airport	137,278	133,239	2,364,426	2,117,558
19	Dar es Salaam	Tanzania	Julius Nyerere International Airport	1,155,051	1,077,354	1,192,290	1,136,560
20	Enfidha	Tunisia	Enfidha Hammamet International Airport	2,108	3,828	2,172,430	2,235,290

Source: AFRAA/ACI-Africa



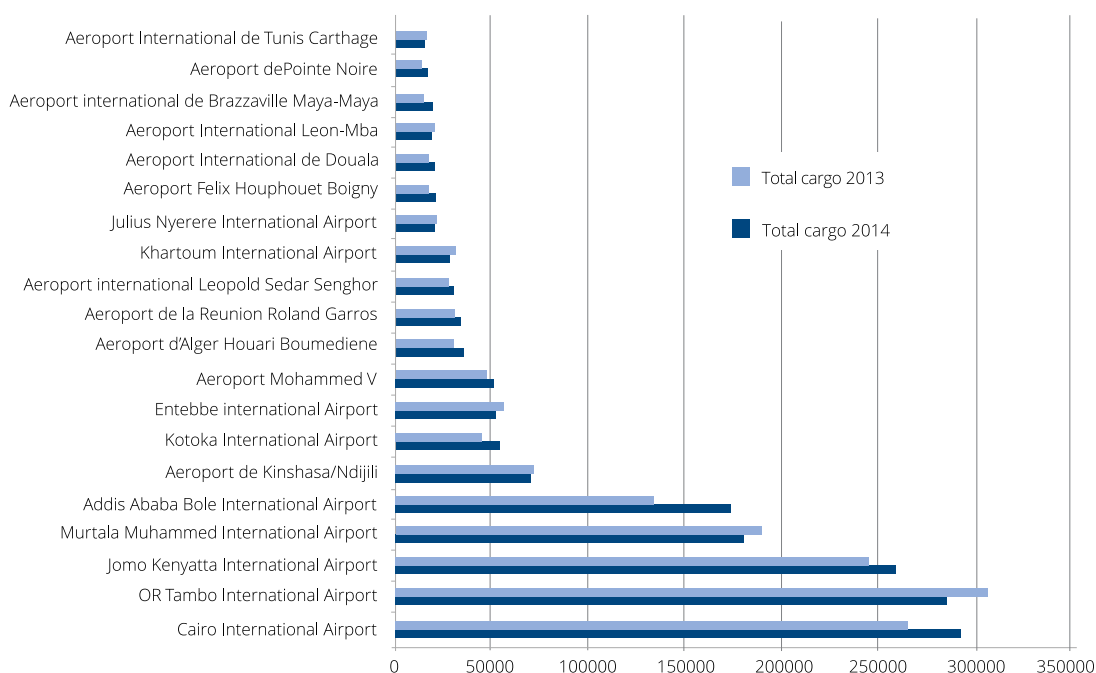
**Figure 5.1 Top 20 African Airports by Total Passengers Carried (000)**



Source: AFRAA/ACI-AFRICA

In 2014, freight traffic at African airports increased by 5.8% to 1.9 million tonnes compared to 2013. Cairo International Airport in Egypt was the major cargo airport in 2014 accounting for 293,658 tonnes. The other cargo hubs among the top 5 in the continent include: O. R. Tambo International (286,358 tonnes), Jomo Kenyatta International Airport (259,143 tonnes), Murtala Muhammed International Airport (181,050 tonnes) and Addis Ababa Bole International Airport (175,635 tonnes).

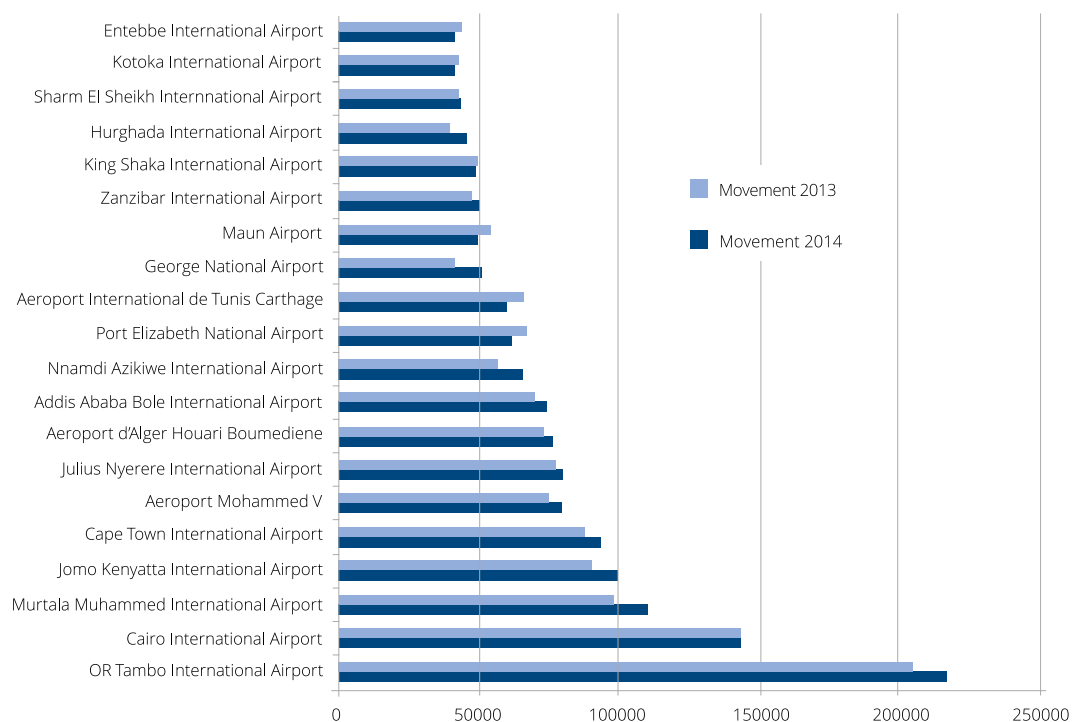
**Figure 5.2 Top 20 African Airports by Total Cargo Handled in 2014**



Source: AFRAA/ACI-AFRICA

Aircraft movements at African airports increased by 0.5% in 2014. The top 5 African airports ranked by aircraft movements in 2014 are: OR Tambo International Airport (216,392), Cairo International Airport (142,576), Murtala Muhammed International Airport (110,044), Jomo Kenyatta International Airport (99,725) and Cape Town International Airport (90,118).

**Figure 5.3 Top 20 African Airports in 2014 by Aircraft Movement**



Source: AFRAA/ACI-AFRICA

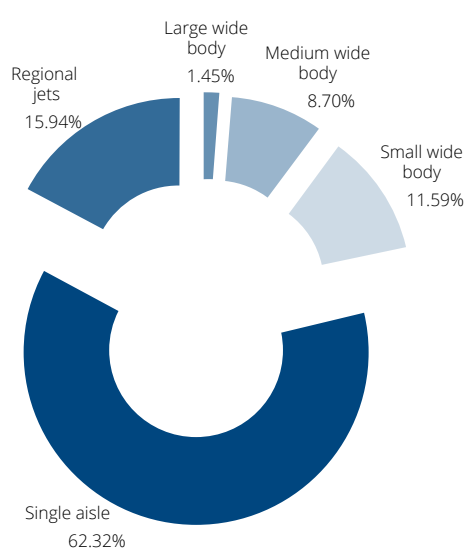
## SECTION SIX

### Fleet Composition and Development

Worldwide, aircraft deliveries in 2014 increased to 1,627 new aircraft and the number of in-service fleet increased from 25,187 in 2013 to 26,051 aircraft in 2014 according to IATA. Overall, the number of seats available in the fleet rose to 3.5 million, adding 5% capacity to the market globally. IATA seat count calculations indicate that the number of total seats by aircraft type in 2014 was 78% by narrow body aircraft, 17% by widebody aircraft and 5% by propeller aircraft.

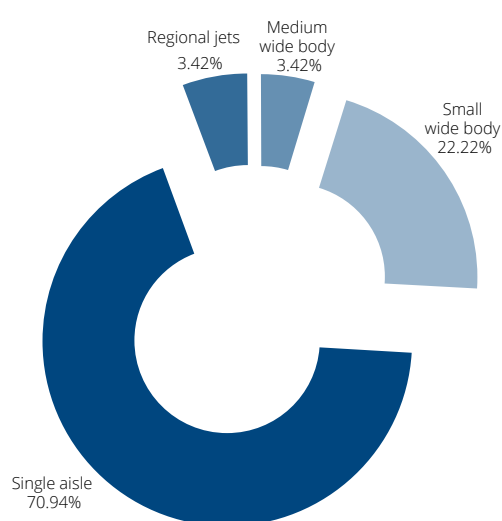
Between 2014 and 2034, 38,050 new aircraft are expected to be added to or replace some existing fleet in operation. The total cost of the additional fleet is estimated at over US\$5,570 billion.

**Figure 6.1** Africa fleet composition – 2014



Source: Boeing Market Outlook

**Figure 6.2** Africa's 2034 fleet demand forecast



Source: Boeing Market Outlook

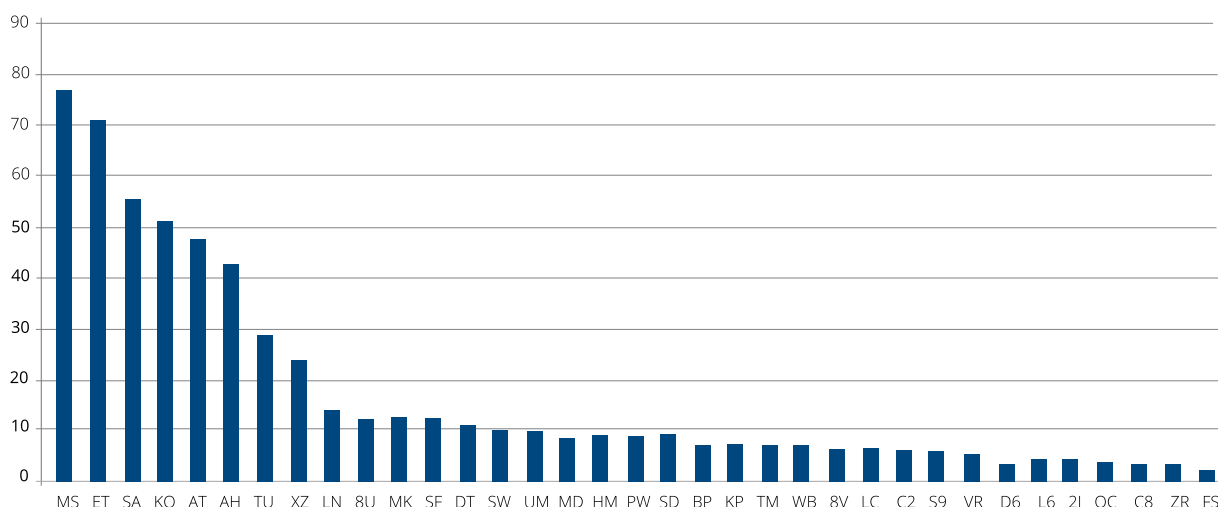
Africa currently has 690 aircraft which makes up (3.2%) of the total global fleet. AFRAA airlines in 2014 operated a total of 593 aircraft or 85.9% of total African commercial fleet (see details in annex 2).

**Table 6.1** Global aircraft in service in 2014 and additional demand by 2034

	2014	2034	New Planes	Value (2014 \$B catalog prices)
Large wide body	740	670	540	230
Medium wide body	1,620	3,800	3,520	1,220
Small wide body	2,520	5,800	4,770	1,250
Single aisle	14,140	30,630	26,730	2,770
Regional jets	2,580	2,660	2,490	100
<b>Total</b>	<b>21,600</b>	<b>43,560</b>	<b>36,770</b>	<b>5,200</b>

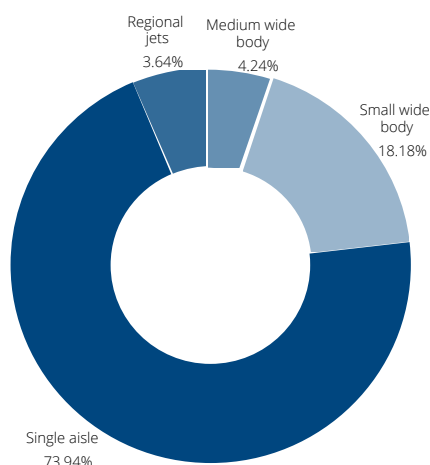
Source: Boeing Market Outlook

Currently, 430 (62.32%) aircraft in operation in Africa are made up of single aisle type. The other aircraft sizes are represented by: regional jets (15.94%), small wide body (11.59%), medium wide body (8.7%) and large wide body (1.45%). The top 5 airlines with the largest fleet size in 2014 are Egypt Air, Ethiopian Airlines, South African Airways, Royal Air Maroc and Kenya Airways.

**Figure 6.3** Fleet of AFRAA Airlines in 2014**Source:** AFRAA

## Fleet Forecast

Over the next 20 years, the number of in-service aircraft worldwide according to Boeing is expected to reach 43,560. To achieve this number, 38,050 new airplanes will be needed, 70% of which will be single-aisle planes, 13% small widebody aircraft, 9% Medium widebody aircraft, 7% Regional jets and 1% Large widebody aircraft. For freighter aircraft, replacement of aging airplanes, plus the industry's growth requirements, will create a demand for 2,340 freighter deliveries over the next 20 years. Of these, 1,420 will be passenger airplane conversions and the rest will be new airplanes. The overall freighter fleet will increase by 70% from 1,720 airplanes in 2014 to 2,930 by 2034. Africa's fleet composition in 2034 is expected to comprise of 73.94% single aisle aircraft (1,220 aircraft), 18.18% small wide body aircraft (300 aircraft), 4.24% medium wide body aircraft (70 aircraft), and 3.64% regional jets (60 aircraft).

**Figure 6.4** Africa's 20 year fleet composition forecast**Source:** Boeing Market Outlook

In Africa, the increase in urbanization, economic growth and positive growth trends are expected to stimulate demand for air travel to, from, and within the continent. This coupled with the need to replace the region's aging fleet will result in a demand for 1,170 new airplanes over the next 20 years.

Of this, about 71% will be single aisle aircraft, 22.2% small wide body aircraft, 3.4% medium wide body aircraft, 3.4% will be regional jets. The total number of commercial aircraft to be in operations in Africa by 2034 will increase by about 140% to 1,650.

## SECTION SEVEN

### Employee Productivity

Employment by airlines worldwide in 2014 reached 2.42 million, representing a gain of 3.2% over 2.35 million employees in 2013 according to IATA. Employee productivity in 2014 measured in ATK/employee improved by 2.7% with the average employee generating 471,389 ATKs compared to 461,517 ATK/employee in 2013. That strong trend improvement in productivity is helping airlines to keep unit labour costs under control and unit labour costs are expected to drop by 0.5% in 2015.

**Table 7.1** Worldwide airline industry employment and employee productivity

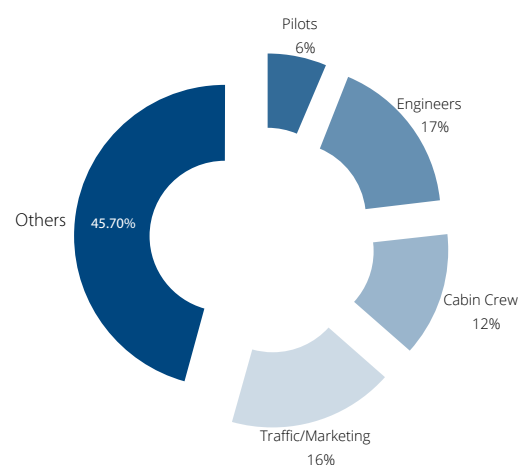
	2013	2014
Employment (million)	2.35	2.42
ATK/employee	461,517	471,389
Unit labour cost: \$/ATK	0.125	0.125

Source: IATA, ICAO, ATAG, Oxford Economics

The analysis below is based on the reported data by 22 AFRAA member airlines.

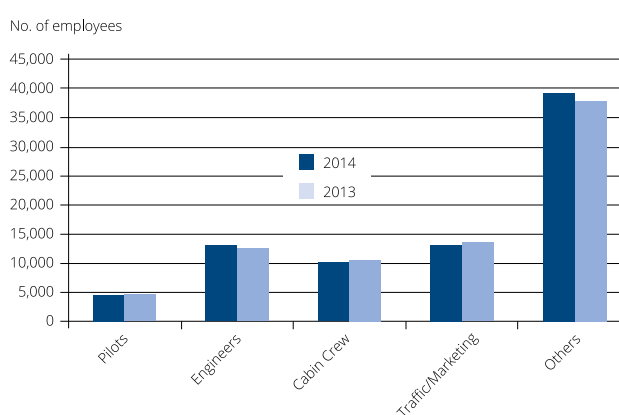
The total number of people employed directly by the 21 AFRAA member airlines that reported their data in 2014 dropped by 0.31% from 82,127 in 2013 to 81,871 employees in 2014.

**Figure 7.1** 2014 AFRAA Airlines Employees by Job Type



Source: AFRAA – Reported AFRAA airlines only

**Figure 7.2** AFRAA Airlines Employment by Job Type (2014)



Source: AFRAA

**Table 7.2** Employee Performance Indicators

	2013	2014
ATK/employee	307,606	336,745
RTK/employee	168,556	203,337
Number of passengers/employee	612	611
Employee/aircraft	154	138

Source: AFRAA – Reported AFRAA airlines only

The figures show that employee productivity of AFRAA member airlines is below global average at 71% of the worldwide average in 2014. This may be an indication of overmanning in African airlines.

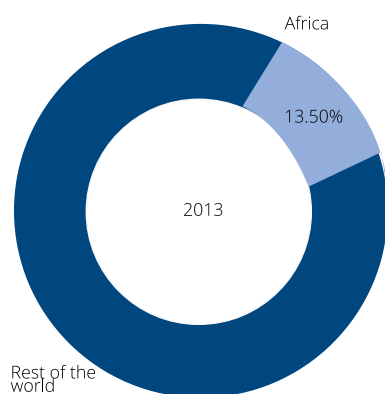


## SECTION EIGHT

### Safety

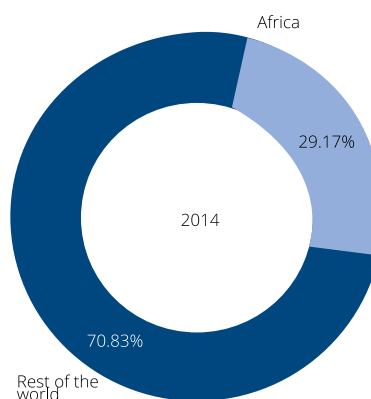
In 2014, there were 24 fatal airline accidents worldwide with 991 fatalities according to statistics from the Flight Safety Foundation. This is a marked reduction from 38 fatal airline accidents in 2013. However, the fatalities in 2014 were a significant increase from 2013 when 300 fatalities were recorded. 7 of the accidents in 2014 or 29% were in Africa with 125 fatalities. This is an increase from 6 fatal airline accidents in 2013 with 60 fatalities. Five of the accidents involved cargo aircraft which indicates the need for more stringent safety oversight in this area.

**Figure 8.1 Africa-Vs-Rest of World Accidents – 2013**



Source: Aviation Safety Network

**Figure 8.2 Africa-Vs-Rest of World Accidents – 2014**



Source: Aviation Safety Network

According to IATA, the 2014 global jet accident rate (measured in hull losses per 1 million flights) was 0.23, which was the lowest rate in history and the equivalent of one accident for every 4.4 million flights. This was an improvement over 2013 when the global hull loss rate stood at 0.41 (an average of one accident every 2.4 million flights) and also an improvement over the five-year rate (2009-2013) of 0.58 hull loss accidents per million flights jet.

The average age of aircraft involved in fatal accidents in Africa was 27.8 years which is about the same as the world average of 27.61 years. The newest aircraft involved in fatal accident in Africa was 18 years which tends to indicate that ageing aircraft are not being adequately maintained or that operators are using aged aircraft due to lack of adequate resources resulting in accidents. All this points for the need for regulatory authorities to adequately carry out their oversight responsibilities so as to meet the target to reduce accident rates significantly by 2015. The detailed accident statistics are available as Annex 3.

Three of the fatal accidents in 2012 were in DRC, a country which consistently registers fatal airline accident each year. However, in 2014, one fatal accident involved a DRC carrier which is a marked reduction from previous years which reflects outcomes of the joint efforts to reduce accidents in that country.

AFRAA and IATA are working diligently in areas of capacity building to help airlines preparing for IOSA audits. We are confident that these efforts plus the efforts by ICAO and AFCAC to strengthen the oversight capacity of African States will continue to help to raise the safety culture in African aviation to global standards.

### IOSA (IATA Operational Safety Audit)

As of August 2015, Africa had 41 airlines on the IOSA registry comprising almost all the major carriers on the continent. 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.

## AFRAA Member Airlines on IOSA Registry (26):

- Afriqiyah Airways
- Air Algérie
- Air Botswana
- Air Burkina
- Air Madagascar
- Air Mauritius
- Air Namibia
- Air Seychelles
- Air Zimbabwe
- ASKY Airlines
- EgyptAir
- Ethiopian Airlines
- Interair South Africa
- Kenya Airways
- LAM Mozambique Airlines
- Precision Air Services
- Royal Air Maroc
- RwandAir
- Tunisair
- South African Airways
- South African Express Airways
- Starbow Airlines
- Sudan Airways
- TAAG Angola Airlines
- TACV Cabo Verde Airlines (Cape Verde)
- Tassili Airlines (Algeria)

## Non AFRAA member airlines on IOSA registry (15):

- Aero Contractors Nigeria
- Air Austral (Reunion Islands)
- Air Cairo (Egypt)
- Almasria Universal Airlines (Egypt)
- ALS Limited (Kenya)
- Arik Air (Nigeria)
- Comair (South Africa)
- Equajet (Congo Republic)
- Equafight Société SARL (Congo Republic)
- Nesma Airlines
- Nile Air (Egypt)
- Nouvelair (Tunisia)
- SAFAIR (Proprietary) Ltd
- South African Airlink
- Trans Air Congo (Congo Republic)

## Improvement of Safety in AFI Region

Following the resolution of the Abuja Declaration to improve safety in the region, significant progress has been realised in terms of improved safety oversight by several States and many more airlines attaining IOSA registration. Several small carriers are currently in the process of finalising the IOSA registration process.

An example of strides made in improving safety is that in 2014, there was no single Western built jet fatal airline accident in Africa. However, the momentum needs to be kept by all stakeholders to enhance safety standards and a safety culture in the region.

This year, there have been a number of additions to the IOSA registry and more are expected before the year end. Most of the major airlines on the continent are IOSA registered and those not on the register are the exception rather than the norm.

## ISAGO (IATA Safety Audit for Ground Operations)

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

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

## ISAGO Registry

The ISAGO registry lists all ground handling companies that have undergone an ISAGO audit and have cleared all findings. The following are the organisations in Africa on the ISAGO registry as of August 2015.

**Table 8.1** Ground Handling Companies on ISAGO registry in Africa

	Ground Service Provider (GSP)	Country	Location		Ground Service Provider (GSP)	Country	Location
1	Aero Services Egypt	Egypt	Alexandria	28	International Aviation Business	Egypt	Cairo
2	Aero Services Egypt	Egypt	Cairo	29	Kenya Aerotech	Kenya	Nairobi
3	Aero Services Egypt	Egypt	Hurghada	30	Kenya Airways Limited	Kenya	Mombasa
4	Aero Services Egypt	Egypt	Luxor	31	Kenya Airways Limited	Kenya	Nairobi
5	Aero Services Egypt	Egypt	Sharm el-Sheikh	32	Link Aero Trading Agency	Egypt	Cairo
6	Air Mauritius	Mauritius	Port Louis	33	Link Aero Trading Agency	Egypt	Hurghada
7	Airline Supervisors Experts	Morocco	Agadir	34	Link Aero Trading Agency	Egypt	Luxor
8	Airline Supervisors Experts	Morocco	Marrakech	35	Menzies Aviation	South Africa	Cape Town
9	BIDAir Services (Pty) Ltd	South Africa	Cape Town	36	Menzies Aviation	South Africa	Johannesburg
10	BIDAir Services (Pty) Ltd	South Africa	Durban	37	National Handling Services Private Limited	Zimbabwe	Bulawayo
11	BIDAir Services (Pty) Ltd	South Africa	Johannesburg	38	National Handling Services Private Limited	Zimbabwe	Harare
12	Congo Handling S.A	Congo	Brazzaville	39	National Handling Services Private Limited	Zimbabwe	Victoria Falls
13	Congo Handling S.A	Congo	Pointe Noire	40	Nigerian Aviation Handling Company PLC	Nigeria	Abuja
14	DAS Handling Ltd	Uganda	Entebbe	41	Nigerian Aviation Handling Company PLC	Nigeria	Lagos
15	EgyptAir	Egypt	Aswan	42	Royal Air Maroc	Morocco	Casablanca
16	EgyptAir	Egypt	Cairo	43	Senegal Handling services	Senegal	Dakar
17	EgyptAir	Egypt	Hurghada	44	Signon Aviation	Kenya	Nairobi
18	EgyptAir	Egypt	Luxor	45	Signon Aviation	Kenya	Nairobi
19	EgyptAir	Egypt	Sharm el-Sheikh	46	Skyway Aviation Handling Company Limited	Nigeria	Lagos
20	Egyptian Aviation Services	Egypt	Cairo	47	Swissport	South Africa	Johannesburg
21	Egyptian Aviation Services	Egypt	Hurghada	48	Tiger Aviation Services	Egypt	Cairo
22	Egyptian Aviation Services	Egypt	Luxor	49	Tradewinds Aviation Services Ltd	Kenya	Mombasa
23	Egyptian Aviation Services	Egypt	Aswan	50	Tradewinds Aviation Services Ltd	Kenya	Nairobi
24	Egyptian Aviation Services	Egypt	Sharm el-Sheikh	51	Tunisair handling	Tunisia	Tunis
25	Entebbe Handling Services	Uganda	Entebbe	52	ZAS (Z-Aviation Services )	Egypt	Cairo
26	Ground2Air (Equity Aviation Indian Ocean Ltd)	Mauritius	Port Louis	53	ZAS (Z-Aviation Services )	Egypt	Hurghada
27	Handling Partner Gabon	Gabon	Libreville	54	ZAS (Z-Aviation Services )	Egypt	Sharm el-Sheikh

It is heartening to note that the number of African ground handling companies with ISAGO registration has increased from 42 in August 2014 to 54 by August 2015. AFRAA is lobbying to increase the momentum to get more companies on the ISAGO registry.

AFRAA encourages member airlines to engage ISAGO certified ground handling companies whenever possible.

## SECTION NINE

### AFRAA Secretariat Value Added Activities

#### 9.1 Safety

##### 9.1.1 IOSA Registered Airlines

As of October 2015, Africa had 41 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.

##### 9.1.2 IATA Standard Safety Assessment (ISSA)

AFRAA is collaborating with IATA to promote the ISSA program to enhance a safety culture to all operators in the African region. ISSA offers the entry into an IATA Assessment Registry to operators that utilize aircraft with a maximum take-off weight (MTOW) below 5,700kg. The ISSA is a voluntary evaluation program, produced at the request of the industry, to extend the benefits of operational safety and efficiency that emanated from the IATA Operational Safety Audit (IOSA) Program to the operators of smaller aircraft that are not eligible for the IOSA program. ISSA is a global safety standard for commercial operators not covered by existing programs. It measures operator's conformity with relevant ICAO requirements. It involves gradual implementation of safety management system (SMS) elements. Like IOSA, it provides improved conditions for reduction of insurance premiums.

AFRAA hosted an ISSA course for various small operators in Nairobi. The course was facilitated by the Flight Safety Foundation.

##### 9.1.3 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 44 in October 2014 to 54 by October 2015.

#### 9.2 Training and Human Capital Development

In 2015, AFRAA Secretariat put emphasis on cost reduction related commercial courses for the airlines to promote profitability and revenue management among the member airlines. IATA Airline Training Fund (IATF) partnered with AFRAA and Kenya Airways (KQ) Pride Center to co-sponsor these commercial courses offered to African airlines at no cost. The courses conducted in the training calendar are as follows:

**Table 9.1 Courses, Seminars and Workshops conducted during 2015**

I. AFRAA Courses			
	Course	Course date	Host
1	Crew Resource Management (Refresher)	20 - 22 April	Rwanda
2	Dangerous Goods Regulations (Refresher)	23 - 24 April	Rwanda
3	Human Factors (Initial)	25 - 29 April	Rwanda
4	Airside Safety Management	1 - 3 May	Rwanda
5	Crew Resource Management (Refresher)	14 - 16 May	Rwanda
6	Dangerous Goods Regulations (Refresher)	18 - 19 May	Rwanda
7	Safety Management Systems	1 - 3 June	Rwanda
8	Instructional Technics	1 - 5 June	Rwanda
9	Instructional Design	8 - 12 June	Rwanda

II. Courses in conjunction with other organizations			
a. IATA Courses for Committees			
10	Air Contract Law	3 - 6 March	AFRAA
11	Aviation Fuel Management	16 - 18 March	AFRAA
12	SGHA-SLA	13 - 17 April	AFRAA
13	Airport Slots and Scheduling	18 - 20 April	Tunisair
IATA DIPLOMA PROGRAMME			
14	Leading Practices & cost Reduction Strategies	15 - 19 June	AFRAA
15	Alliances & Strategic Partnership FFP	13 - 17 July	AFRAA
16	Dynamic Pricing & Revenue Management	18 - 21 August	KQ Pride Centre
17	Dynamic Pricing & Revenue Management	24 - 27 August	KQ Pride Centre
18	Network, Fleet & Schedule	21 - 25 September	KQ Pride Centre
19	Route Forecasting & Developing	12 - 16 October	KQ Pride Centre
20	Airline Business Models & competitive Strategies	16 - 20 November	KQ Pride Centre
21	Airline Business Models & competitive Strategies	23 - 27 November	KQ Pride Centre
b. Safety Partner - Flight Safety Foundation			
22	BARS Auditors Programme	1 - 3 Sep	AFRAA
III. Workshops & Seminars			
23	AFRAA/IATA/ICAO Aeropolitical Forum	10 November	Brazzaville
24	Embraer Airline Business Seminar	8 - 9 December	Egypt

## 9.3 Seeking to Fully Open African Skies

### 9.3.1 Full liberalization of African Skies

The Secretariat is working with the AU to facilitate the full liberalisation of African skies which received a major boost when African Heads of States at their Summit in January 2015 made a solemn commitment to the implementation of the Yamoussoukro Decision (YD) towards the establishment of a single African air transport market by January 2017. This pledge was further boosted by a group of 11 States that declared their solemn commitment to the immediate and unconditional implementation of the YD towards the establishment of a single African air transport market by 2017.

The 11 states were constituted as a Working Group at ministerial level in order to facilitate the opening up of African skies for African operators. The Ministerial Working Group is already established with AFCAC, AFRAA and other entities being part of the working group. The 11 States have already started work on the road map of the establishment of a single African air transport market. Among other activities, the 11 States with the participation of AFRAA, AFCAC, IATA and other stakeholders held a meeting in March 2015 on the promotion of a single African air transport market.

It is envisaged that the technical regulations for the smooth management of the single African air transport market will be completed by December 2015. The signature of a continental open sky agreement is expected by June 2016 while the establishment of an African Civil Aviation Arbitration Tribunal is envisaged to be finalised by December 2016. By January 2017 the single African air transport market is scheduled to be operational.

### 9.3.2 Creation of a Level Playing Field

Whilst working towards full liberalisation of African skies, the Secretariat continues to lobby the AU and African Governments to intervene to create a level playing field and guard the African air transport industry against unfair and restrictive business practices by carriers from outside the continent. These non-African carriers currently transport over 80% of intercontinental traffic to/from Africa.



### 9.3.3 VISA Requirements

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

## 9.4 AFRAA Projects

### 9.4.1 AFRAA Fuel Project

AFRAA Fuel Committee conducted its fifth joint tender for the purchase of fuel in 2015. The tender process was concluded in November 2015 with the notification of the awards to the successful fuel suppliers. The Project has 14 participating airlines, namely: ASKY, Astral Aviation, Air Namibia, Air Botswana, Air Burkina, Ethiopian Airlines, Kenya Airways, Precision Air, RwandAir, LAM Mozambique, Malawian Airlines, TAAG Angola, South Africa Airways and TACV Cabo Verde Airlines. The participating airlines have realized cost savings through the project.

### 9.4.2 AFRAA/IATA campaigns against high fuel charges and taxes

AFRAA and IATA continue to work closely together to campaign against high fuel taxes and charges. In Lusaka, the lobbying efforts were successful where the two Associations achieved the adoption of a transparent formula pricing by the Energy Regulatory Board. Other lobbying efforts are being conducted in Douala, Gabon, Ethiopia, Uganda and India. The Secretariat will continue its lobbying efforts to reduce the high industry costs on the continent.

### 9.4.3 Route Network Coordination Project

Following the relaunch of the AFRAA Route Network Coordination Project in 2014, positive progress on commercial cooperation amongst the participating airlines has been achieved in 2015. Several airline pairs have realized commercial cooperation such as Interline Electronic Ticketing Agreements, codeshares and Special Pro-rate Agreements on various routes. AFRAA is working with Milanamos as the data partner for the Project. Milanamos' tool, PlanetOptim.Future, will be used to provide scenarios on viable routes for schedule realignment, network rationalization, codeshares and other commercial and tactical partnerships among airlines. The tool will also be useful for conducting demand and costs/benefits analysis on selected city-pairs therefore maximizing traffic and revenues for airlines.

The participating airlines in the Project include: Afriqiyah, Air Algérie, Air Burkina, Astral Aviation, Kenya Airways, EgyptAir, ECAir, Air Zimbabwe, Air Namibia, Ethiopian Airlines, Royal Air Maroc, RwandAir, South African Airways, South African Express, Syphax Airlines, TAAG Angola Airlines, Precision Air, Tassili Airlines and Tunisair.

### 9.4.4 AFRAA Ground Handling Project

The AFRAA Ground Handling Project which was established in 2014 conducted its second tender for the joint procurement of ground handling services for its participating members. The tender covered selected airports both within and beyond Africa. The 11 participating member airlines the Project include: Air Botswana, Air Zimbabwe, Astral Aviation, EgyptAir, Ethiopian Airlines, Kenya Airways, Malawian Airlines, Precision Air, South African Airways, TAAG Angola Airlines and Tunisair.

Other activities of the project cover areas on safety, capacity building and lobbying for the reduction of high charges and for the opening up of markets to competition where this is sustainable.

## 9.5 AFRAA Cargo Days Workshop

AFRAA held its first ever Cargo Conference from 30 September – 01 October 2015. This was in recognition of the fact that the airfreight sector of airline business often does not receive the attention it deserves and thus airlines are missing significant opportunities to enhance their revenues. The conference was attended by various stakeholders in the cargo business including airlines cargo departments, airfreight companies, freight forwarders and consolidators, ground handlers, courier services, as well as from ICAO, IATA, Airports and Civil Aviation Authorities. Based on the outcome of the conference, the Secretariat obtained important feedback which it will use to provide advice on how member airlines can fully exploit this important sector of the industry and lobby governments and other stakeholders to remove constraints to the development of the sector.

## 9.6 Development of AFRAA Land

Significant progress was made in 2015 towards the development of AFRAA parcel of land located at its headquarters in Nairobi.

Following the Technical team's selection of an architect and sourcing of a suitable financial institution to fund the project through a competitive process, the Executive Committee of AFRAA authorized the Secretariat to proceed with the implementation of the first phase of the project under the guidance and support of a Task Force composed of AFRAA member airlines. The Project aims to finalise the setup, formal engagement of consultants and conclude the funding agreements by the end of 2015. The member airlines that constitute the project Task Force include: Kenya Airways, RwandAir, Precision Air and South Africa Airways.

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

## 9.7 AFRAA Aviation Stakeholders Convention

AFRAA Secretariat successfully staged its 4th Aviation Stakeholders Convention from 28-30 April 2015 at the Emperors Palace in Johannesburg – South Africa. The event had over 350 registered delegates from 40 countries consisting of airlines, suppliers, solution providers, airports, Civil Aviation Authorities and ATNSs. The Convention, which was held under the theme, **"Building and Sustaining Strong Partnerships"** deliberated on issues covering the aviation industry in Africa and provided a conducive forum for stakeholders to dialogue, interface, exchange knowledge, information and experiences and build networks that identified and proposed feasible solutions to industry challenges.

The Convention was held under the patronage of the Department of Transport of the Republic of South Africa and was co-hosted by South African Airways. 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.

The next Aviation Convention will be held from 08-10 May 2016 at the Serena Hotel in Kigali – Rwanda with the support of RwandAir as the co-host and official carrier of the event.

## 9.8 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 three member airlines and five partners that joined AFRAA in 2015. The new member airlines are: Cronos Airlines, Mauritania Airlines and Punto Azul. The new partners include: Acorn Petroleum Plc, APG, L'Académie Tuniso-Française de Formation en Sûreté de l'Aviation Civile (AFSAC), Manyatta Engineering Services Ltd and Milanamos.

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.

## 9.9 ISO 9001: 2008 Certification for AFRAA

In recognition of the need for industry best practices in corporate governance of the Association and the need for world-class quality of Secretariat activities, the Secretariat embarked on a project to attain ISO 9001:2008 certification. Adopting ISO 9001 certification will improve the Association's internal management and operational processes. This should help the Secretariat to meet or exceed the needs of its stakeholders more effectively. We aim to increase employee productivity and results including improved cost management through the integration and alignment of internal processes. We expect improved communication, planning and administration processes. Significant progress has been made and it is anticipated that the certification will be attained this year.

## 9.10 Working with United Nations World Tourism Organisation (UNWTO)

In recognition of the mutually reinforcing and inter-dependent relationship of the tourism and air transport sectors, the Secretariat participated and made presentations at three major conferences jointly hosted by ICAO and UNWTO during the course of the year. The two sectors have pledged to collaborate and cooperate more closely and jointly lobby for the removal of constraints faced by both industries including the high industry costs, need for better facilitation particularly visa requirements, need for full liberalisation of the African aviation industry, need to contribute in the fight against illegal trade in wildlife and joint branding of Africa. AFRAA and the UNWTO are planning to sign a Memorandum of Understanding to facilitate closer cooperation and collaboration.



# The power to succeed.

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*Commercial Aviation*

## SECTION TEN

## EASA/FAA Certified MROs in Africa

**Aerotechnic Industries (ATI)**

**Contact:** Mr. Dominique Le Plat  
CEO, Aerotechnic Industries  
Tel. France: +33 (0)6 60 18 30 80  
Tel. Morocco: +212 66 16 85 344  
Fax: +212 52 25 39 733  
Email: [doleplat@airfrance.fr](mailto:doleplat@airfrance.fr)

**Mr. Fouad Benbrahim**

Regional Sales Director, AFI KLM E&M  
Tel: +33 (0)1 49 34 85 70  
Fax: +33 (0)1 49 34 89 31  
Email: [fobenbrahim@airfrance.fr](mailto:fobenbrahim@airfrance.fr)

**Air Algérie Technics**

**Contact:** Mr. Ali Guemmache  
Commercial & Marketing Manager,  
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Email: [guemmache-a@airalgerie.dz](mailto:guemmache-a@airalgerie.dz) /  
[guemmache.a@gmail.com](mailto:guemmache.a@gmail.com)

**EgyptAir Maintenance and Engineering**

**Contact:** Eng. Souad Farg  
Advertising & Communication Directorate  
Cellular: +2 0122 2152757  
Office: +2 02 22656855 / 202-22657445  
Fax: +2 02 22656873 / 202-22685749  
Email: [advertising\\_me@egyptair.com](mailto:advertising_me@egyptair.com) /  
[contactus\\_me@egyptair.com](mailto:contactus_me@egyptair.com)

**Ethiopian Airlines**

**Contact:** Mr. Nebil Mohammed Shash  
Director MRO Sales & Marketing  
Tel: +251 911 226 125  
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**Aman Siraj (Mr.)**

Manager Sales & Business Development  
Tel: +251-115-174013  
Fax: 251-116-651200  
Email: [Amans@ethiopianairlines.com](mailto:Amans@ethiopianairlines.com)

**Kenya Airways Engineering & Maintenance**

**Contact:** Mr. Cornelius Mayende  
Ag. Manager Technical Sales  
and Marketing  
Tel: +254 738006458  
Email: [technical.sales@kenya-airways.com](mailto:technical.sales@kenya-airways.com)  
Website: [www.kqmro.com](http://www.kqmro.com)

**South African Airways Technical**

**Contact:** Mr. Mike Kenny  
Executive Manager Business  
Development & Sales  
Tel: +27119789993  
Email: [mikekenny@flysaa.com](mailto:mikekenny@flysaa.com) /  
[SATMarketing@flysaa.com](mailto:SATMarketing@flysaa.com)

**Snecma Morocco Engine Service**

**Contact:** Mr. Alexandre BRUN  
General Manager  
Tel: +212 522 536 900  
Email: [snecma.morocco@snecma.ma](mailto:snecma.morocco@snecma.ma)

**TunisAir Technics**

Nejmeddine TEBOURSKE  
TUNISAIR TECHNICS  
Maintenance Training Manager  
Tel: +216 71 942-340  
Email: [nejmeddine.tebourski@tunisair.com.tn](mailto:nejmeddine.tebourski@tunisair.com.tn)



## SECTION ELEVEN

### Airline Training Centres in Africa



#### EgyptAir Training Centre

**Contact:** Eng Souad Farg  
General Manager, Technical Training  
Tel: +20 10 661 5367  
Email: [technical.traininggm@egyptair.com](mailto: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](mailto:TewodrosB@ethiopianairlines.com)



#### Kenya Airways Pride Center

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



#### South African Airways Learning & Development

**Contact:** Ms. Nivy Moodley  
Head of SAA Learning & Development  
Email: [NivyMoodley@flysaa.com](mailto:NivyMoodley@flysaa.com)



#### Tunisair Training Center

**Contact:** Mr.Charfeddine Bessaadi  
Director, Training Centre  
Tel: +216 70 837 000 Ext. 2958  
Email: [charfeddine.bessaadi@tunisair.com.tn](mailto:charfeddine.bessaadi@tunisair.com.tn)

## SECTION TWELVE

### Providers of Aircraft Simulators



#### Aviation Training Center of Tunisia (ATCT)

2 A320 aircraft simulators

Contact: Mr. Mohammed Mzah

CEO

Tel: +216 71911811

Fax: +216 71911606

Email: [atct@atct.com.tn](mailto: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](mailto: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](mailto:TewodrosB@ethiopianairlines.com)



#### Kenya Airways Pride Centre

B737 NG full flight simulator

Contact: Dr. Mbithe Anzaya

Head of Learning and Development – Pride Centre

Tel: +254 020 264 22846/64.

Email: [learning.development@kenya-airways.com](mailto:learning.development@kenya-airways.com)



## SECTION THIRTEEN

### AFRAA Airlines – Individual Summary Facts



**Eng. Abubaker Elfortia**  
Chairman of the Board of Directors

#### 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](http://www.afriqiyah.aero)

**IATA CODE:** 8U

**ICAO CODE:** AAW

#### AFRAA MEMBERSHIP

Became member in 2002  
Established in 2001

#### OWNERSHIP STRUCTURE

Government: 100%

#### DESTINATIONS SERVED

Domestic	4
Intra-Africa	5
International	5

#### EMPLOYEES

1,086

#### FLEET

Airbus 319-111	3
Airbus 320-214	7
Airbus 330-200	2

#### FLEET ON ORDER

Airbus 320-214	1
Airbus 330-200	1
Airbus 330-300	2
Airbus 350-900	10



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

#### ADDRESS

1 Place Maurice Audin, Alger, Algeria  
Tel: +213 21 637070  
Fax: +213 21 744425  
[www.airalgerie.dz](http://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

9,095

#### FLEET

Airbus A330-200	5
Boeing B767-300	3
Boeing B737-800	17
Boeing B737-600	5
ATR72-500	12
ATR72-600	1

#### Cargo

Lockheed L100-130	1
-------------------	---

#### FLEET ON ORDER

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



**Mr. Tozivazvipi Benster Dahwa**  
General Manager

#### ADDRESS

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

615

#### 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 5031 7174  
[www.air-burkina.com](http://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

239

#### FLEET

Embraer E170	2
--------------	---



**Mr. Gilles Filiatreault**  
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](http://www.airmadagascar.com)

**IATA CODE:** MD

**ICAO CODE:** MDG

#### AFRAA MEMBERSHIP

Became member in 1975  
Established in 1962

#### OWNERSHIP STRUCTURE

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

#### COMMERCIAL PARTNERSHIP

Air France  
Kenya Airways  
South African Airways  
Thai Airways  
Air Austral

#### DESTINATIONS SERVED

Domestic	13
Intra-Africa	7
International	4

#### EMPLOYEES

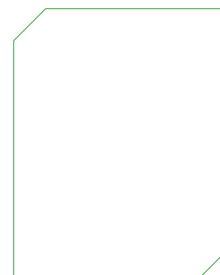
1,182

#### FLEET

AIRBUS A340	2
B737-300	1
ATR72-600	2
ATR72-500	2
ATR42-500	1
DHC6	2

#### FLEET ON ORDER

Boeing B738-800	1
-----------------	---



**Mr. Indrader (Raja) Buton**  
Officer Incharge

#### ADDRESS

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

**IATA CODE:** MK

**ICAO CODE:** MAU

#### AFRAA MEMBERSHIP

Became member in 1985  
Established in 1967

#### OWNERSHIP STRUCTURE

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

#### COMMERCIAL PARTNERSHIP

Air 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

2990

#### FLEET

A340-300	4
A340-300E	2
A330-200	2
A319-100	2
ATR72-500	2



**Advocate Mandi E. Samson**  
Ag. Managing Director

**ADDRESS**

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

**DESTINATIONS SERVED**

Domestic	6
Regional	8
Intercontinental	1

**EMPLOYEES**

693

**FLEET**

Airbus A319-100	4
Airbus A330-200	2
Embraer ERJ 135	4



**Mr. Roy Kinnear**  
Chief Executive Officer

**ADDRESS**

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



**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](http://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**

543

**FLEET**

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



**Mr. Henok Teferra**  
Chief Executive Officer

#### ADDRESS

BIDC-ECOWAS Building  
128, Boulevard du 13 Janvier  
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Fax: +228 220 89 00  
[www.flyasky.com](http://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  
Air Burkina

#### 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](http://www.astral-aviation.com)

**IATA CODE:** 8V

**ICAO CODE:** ACP

#### AFRAA MEMBERSHIP

Became member in 2011  
Established in 2007

#### OWNERSHIP STRUCTURE

Fully owned by Kenyans

#### COMMERCIAL PARTNERSHIP

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

#### DESTINATIONS SERVED

Domestic	4
Intra-Africa	9
Intercontinental	2

Charters to over 50 destinations in Africa

#### EMPLOYEES

30

#### FLEET

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

#### FLEET ON ORDER

Boeing 737F	4
-------------	---



**Mr. Jean Paul Nana Sandjo**  
Director General

#### ADDRESS

Immeuble La Rotonde-Boulevard  
de la liberté  
BP 4852 Douala-Cameroun  
Tel: +237 334220 10 / 33422013  
Fax: +33 422030 / 33423015 /  
33 4229 80 / 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

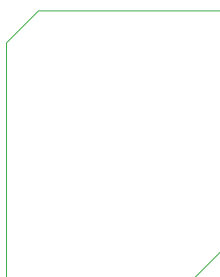
#### DESTINATIONS SERVED

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](http://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



**Capt. Andreas Kaiafas**  
Chief Executive Officer

**ADDRESS**

C/Enrique NVO S/N  
Edificio AMANDA N89  
Malabo-Bioko Norte  
[www.cronosair.com](http://www.cronosair.com)

**IATA CODE:** C8

**ICAO CODE:** CRA

**AFRAA MEMBERSHIP**

Became member in 2015  
Established in 2007

**OWNERSHIP STRUCTURE**

Privately owned

**DESTINATIONS SERVED**

Domestic	2
Regional	3

**EMPLOYEES**

90

**FLEET**

BAe 146	1
ATR72	1
ERJ-135LR	1



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

**ADDRESS**

1604, Avenue des Trois Martyrs  
Quartier Batignolles  
Brazzaville  
République du Congo  
Email: [info@flyecair.com](mailto:info@flyecair.com)  
[www.flyecair.com](http://www.flyecair.com)

**IATA CODE:** LC

**AFRAA MEMBERSHIP**

Established in 2011  
Became member in 2012

**OWNERSHIP STRUCTURE**

**EMPLOYEES**

475

**DESTINATIONS SERVED**

Domestic	3
Intra-Africa	5
Intercontinental	3

**FLEET**

Boeing B737-300	2
Boeing B737-700	2
Boeing B757-200	2
Boeing B767-300	1

**FLEET ON ORDER**

Boeing 737-700	1
Boeing 787-8	2



**Mr. Sherif Fathi**  
Chairman & CEO EgyptAir Holding Co.

#### ADDRESS

EGYPTAIR Admin. Complex, Middle Bldg.  
3rd Floor  
PO Box 11776, Airport Road,  
Cairo, Egypt  
Tel: +202 2267 6542/+202 2267 4650  
Fax: +202 269 63334  
[www.egyptair.com](http://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 330-200	7
Airbus 330-300	4
Airbus 320-200	13
Airbus 321-200	4
Airbus 300-600F	2
Airbus 300-B4-200F	1
Airbus 340-200	1
Boeing 737-500	4
Boeing 777-200ER	3
Boeing 777-300ER	6
Boeing 737-800	20
ERJ-170	12

#### FLEET ON ORDER

Airbus 330-300	1
Airbus A330-200F	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](http://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  
Star Alliance

#### DESTINATIONS SERVED

Domestic	20
Intra-Africa	52
Intercontinental	40

#### EMPLOYEES

8,425

#### FLEET

Boeing 777-300ER	4
Boeing 777-200LR	6
Boeing 787-8	13
Boeing 767-300ER	7
Boeing 757-200	4
Boeing 737-800NG	14
Boeing 737-700	5
Bombardier Q400	17
Boeing 777-200LRF	4
Boeing 757-260F	2

#### FLEET ON ORDER

Airbus 350-900	14
Boeing 777-200LRF	2
Boeing 737-MAXSs	20
Boeing 787-8	6



**Mr. Gary Tokoph**  
Ag. 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](http://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 & CEO

**ADDRESS**

PO Box 19002, Nairobi, Kenya  
Tel: +254 20 6422010  
Fax: +254 20 823757  
[www.kenya-airways.com](http://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	45
Intercontinental	14

**EMPLOYEES**

4,002

**FLEET**

Boeing 767 - 300ER	6
Boeing 777 - 200ER	4
Boeing 737 - 300F	2
Boeing 777 - 300ER	3
Boeing 737 - 700	4
Boeing 737 - 800	8
Boeing 787-8	7
Embraer 170LR	3
Embraer 190AR	15

**FLEET ON ORDER**

Boeing 787-8	3
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](http://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](http://www.libyanairlines.aero) or [www.ln.aero](http://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	3
Airbus 330-200	3
Bombardier CRJ900	2

**FLEET ON ORDER**

Airbus350-900	6
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**Mr. Mohamed Radhy Ould Bennahi**  
Chief Executive Officer

#### ADDRESS

PO Box 7991  
Nouakchott International Airport  
Mauritania

IATA CODE: L6

ICAO CODE: MAI

#### AFRAA MEMBERSHIP

Became member in 2015  
Established in 2010

#### OWNERSHIP STRUCTURE

100% government owned

#### DESTINATIONS SERVED

Domestic	1
Intra-Africa	5

#### FLEET

Boeing 737-500	2
Boeing 737-700	1
Embraer 145	1



**Ms. Sauda Said Rajab**  
Chief Executive Officer

#### ADDRESS

PO Box 70770, Dar es Salaam, Tanzania  
Tel: +255 22 286 0701  
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[www.precisionairtz.com](http://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

635

#### FLEET

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

#### FLEET ON ORDER

ATR72-600	4
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**Mr. Paul Richards**  
Chief Executive Officer

#### ADDRESS

Centro de Trabajo Arcangel  
Barrio de Paraiso S/n, Ctra.  
Aeropuerto Km3  
Malabo, Equatorial Guinea  
[www.flypuntoazul.com](http://www.flypuntoazul.com)

IATA CODE: ZR

ICAO CODE: PUN

#### AFRAA MEMBERSHIP

Became member in 2015  
Established in 2012

#### OWNERSHIP STRUCTURE

100% privately owned by Equatorial  
Guinea Nationals

#### COMMERCIAL PARTNERSHIP

Africa World Airlines – Ghana  
Ceiba Intercontinental – Equatorial  
Guinea

#### DESTINATIONS SERVED

Domestic	1
Intra-Africa	5

#### EMPLOYEES

120

#### FLEET

Embraer 145	3
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**Mr. Driss Benhima**  
Chief Executive Officer

**ADDRESS**

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Casablanca, Maroc  
Tel: +212 522 912000  
Fax: +212 522 912021  
[www.royalairmaroc.com](http://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	5
Boeing 737-300F	1
Boeing 737-800	30
Boeing 767-300ER	4
Boeing 737-700	6
Boeing 787-8	2
Embraer E190	4
Boeing 747-400	1

**FLEET ON ORDER**

Boeing 787-8	3
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**Mr. John Mirenge**  
Chief Executive Officer

**ADDRESS**

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Tel: +250 25250 3687  
Fax: +250 25250 3686  
[www.rwandair.com](http://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	14
International	1

**EMPLOYEES**

749

**FLEET**

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

**FLEET ON ORDER**

Airbus 330-200/300	2
Boeing 737-800	1
Boeing 787-8	2



**Ms. Thuli Mpshe**  
Ag. Chief Executive Officer

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Tambo International-Johannesburg,  
South Africa  
Tel: +27 11 978 1908  
Fax: +27 11 978 6055  
[www.flysaa.com](http://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

<b>FLEET</b>	
B737-800	17
A319-100	8
A320-200	12
A330-200	6
A340-300E	6
A340-600	9
A340-300X	2
B737-300F	2

**FLEET ON ORDER**

Airbus 330-300	5
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**Mr. Inati Ntshanga**  
Chief Executive Officer

#### ADDRESS

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OR Tambo International Airport,  
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Fax: +27 11 978 9456  
[www.flyexpress.aero](http://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

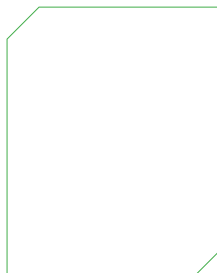
Domestic	5
Intra-Africa	11

#### EMPLOYEES

1,015

#### FLEET

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



**Mr. James Eric Antwi**  
CO-CEO

#### ADDRESS

832 First Street  
PO Box K026 Kanda,  
Accra, Ghana  
Tel: +233 245000000 or 18181 on MTN  
[www.flystarbow.com](http://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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Obeid-Khatim Street, Riaydh,  
Khartoum, Sudan  
Tel: +249 9123 05604  
Fax: +249 183 243717  
[www.sudanair.com](http://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

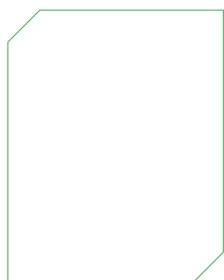
Nasair

#### DESTINATIONS SERVED

Domestic	10
Africa and Middle East	14

#### FLEET

Airbus A300B4-600R	2
Fokker 50	3



**Mr. Hatem Chabchoub**  
Chairman and CEO

**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**  
Chairman and CEO

**ADDRESS**

123, Rua da Missao, Luanda, Angola  
Tel: +244 222 327596  
Fax: +244 222 390739  
[www.taag.com](http://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**

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

**FLEET ON ORDER**

B777-300ER	2
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**Eng. Joao Pereira Silva**  
CEO

**ADDRESS**

Avenida Amilcar Cabral  
No. 1 Praia  
Republic of Cabo Verde  
[www.fytacv.com](http://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
Airbus A320-100/200	1
Boeing 737-800	1
Boeing 757-200	1



**Mr. Kellil Faiçal**  
CEO

#### ADDRESS

BP319, Route de Oued Smar,  
Dar El Beida  
Algiers, Algeria  
Tel: 00213 (0) 21754867  
Fax: 00213 (0) 21754866  
[www.tassiliairlines.dz](http://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
International	7

#### EMPLOYEES

1,165

#### FLEET

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



**Mrs. Sarah Rejeb**  
Chairman & CEO

#### 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 319 -100	4
Airbus 320-200	17
Boeing 737-600	7
Airbus 330-200	1
Airbus A300-600	3
Boeing 737-500	2

#### FLEET ON ORDER

Airbus 320-200	4
Airbus 330-200	2



## SECTION FOURTEEN

### AFRAA Partners – Profiles and Contacts



Acorn Petroleum commenced business in 1981 as a registered marketer of refined Petroleum products and lubricants. The company has in the last 34 years grown to be recognised as a provider of quality product and services in the Nigerian oil and gas industry. With an increasing number of players in the Aviation industry, airlines are faced with increasing challenges associated with fuel supply and distribution, quality product and the consequent negative impact this has on the Aviation industry.

Acorn Petroleum Plc is strategically positioned to support airlines through the delivery of quality aviation fuel in the most efficient manner. This is demonstrated to current customers like Aero Contractors, Atlantic Aviation, Dana Airlines, Caverton, Bristow Helicopters to mention a few.

Acorn Petroleum is leveraging on over two decades of experience in the downstream sector, the company's global alliances and relationships, the ingenuity of its people and the understanding of the operating environment to deliver quality service to airlines. Acorn Petroleum's state-of-the-art bowsters are strategically positioned at the company's aviation fuel depot in Warri, Port-Harcourt and Lagos, for this purpose.

Acorn Petroleum invites airlines to patronise its fuelling services in Lagos, Port-Harcourt and Warri at a competitive price. The dedicated team of experienced hands provides uninterrupted Jet A1 supply, buffer stock and overall management program ultimately improving and adding value to fuelling programs, increasing overall efficiency, helping reduce costs and eliminate waste.

#### Key contacts:

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Website: [www.acornpetroleum.com](http://www.acornpetroleum.com)

Funke Alli  
Aviation Senior Commercial Executive  
Email: [funke.alli@acornpetroleum.com](mailto:funke.alli@acornpetroleum.com)

Oladiji Vera-Cruz  
Aviation Commercial Executive  
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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 contacts:

Ms. Tony Briffa  
Deputy Chief Operating Officer  
ACS  
Global HQ, Suite 120, 87 Turner Street  
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Email: [tbriffa@acsgroup.aero](mailto:tbriffa@acsgroup.aero)  
Website: [www.acsgroup.aero](http://www.acsgroup.aero)

Mr. Jake Milford  
Chief Operations Officer  
ACS Aviation Solutions  
Global HQ  
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Australia  
Email: [jmilford@acsgroup.aero](mailto:jmilford@acsgroup.aero)



Académie Tuniso-Française de Formation en sûreté de l'Aviation Civile (AFSAC) is an authorized training institution by the Tunisian Civil Aviation Authority (DGAC) to conduct training of civil aviation security under an agreement with the National School of Civil Aviation ENAC (Ecole Nationale de l'Aviation Civile) located in Toulouse, France. AFSAC is also an accredited Training Center from Arab Air Carriers Organization (AACO) to conduct aviation security trainings.

AFSAC offers a comprehensive range of aviation training courses through its collaboration agreements with well-known entities in aviation which enable it to provide training based on international standards to meet the training needs of the regional and international aviation community.

Through its collaboration with ICAO, AFSAC provides specialized training in Safety and Security of Civil Aviation based on the standards and recommended practises of ICAO SARPs and AVSEC/ICAO training of airport personnel, airlines, civil aviation authorities and any other organization working in the field of safety and security.

Moreover, AFSAC has expanded & diversified its activities to include training solutions for engineers, technicians, air traffic controllers, commercial pilots, managers, and aviation instructors. Training curriculums have been carefully prepared through highly qualified and knowledgeable instructors who are specialized in their fields to comply with national and international civil aviation requirements.

Over the past years and through its constant endeavour to evolve and progress, AFSAC has adapted and applied the know-how and experience to move into new markets in the civil aviation industry.

#### Key contacts:

Mr. Hassan SEDDIK  
Chairman  
Mobile: 00216 98 333 330 / 00216 27 333 330  
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[admin@afsactunisie.com](mailto:admin@afsactunisie.com)  
07 Avenue Taha Houssein Montfleury  
1008-Tunis – Tunisia  
Website: [www.afsactunisie.com](http://www.afsactunisie.com)

Mr. Jimmy Cardona  
Marketing Consultant  
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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:

Mr. Zine A. Badissy  
Chairman & President  
Aviation Spares and  
Services International (ASSIC),  
Global Inflight Products (GIP)  
and Global Aviation Support (GAS)  
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[www.assic.com](http://www.assic.com) – [www.gipusa.com](http://www.gipusa.com),  
[www.gasjets.com](http://www.gasjets.com)

Ms. Lisa W. Benzaoui  
CEO  
Aviation Spares &  
Services International Co. (ASSIC) &  
Global Inflight Products (GIP)  
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Phone: 425-558-2778 x302  
Email: [lisa@gipusa.com](mailto:lisa@gipusa.com)

Mr. Amine Benkirane  
Vice President  
Global Inflight Products (GIP) &  
Global Aviation Support (GAS)  
Email: [amine@gipusa.com](mailto:amine@gipusa.com)  
  
Mr. Jean-Molf Taillefer  
General Manager  
Aviation Spares and  
Services International (ASSIC)  
Email: [jean-molf@assic.com](mailto:jean-molf@assic.com)



Airbus is the world's leading aircraft manufacturer whose customer focus, commercial know-how, technological leadership and manufacturing efficiency have propelled them 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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31707 Blagnac Cedex, France  
Tel: +33 5 61 93 31 39  
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Aero Industrial Sales Company (AIS), is 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.

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## amadeus

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

Amadeus' ambition is to facilitate the entire travel journey from door-to-door, in the process improving the travel experience for over a billion people every year: from initial search to making a booking, from pricing to ticketing, from managing reservations to managing check-in and departure processes.

Operating in 195 countries through a network of 71 Amadeus Commercial Offices (ACOs), Amadeus has a worldwide team of more than 13,200 people and keeps the travel sector moving by connecting key players: travel agencies, corporations, airlines, airports, ground handlers, hotels, railways and more.

In 2014 over 500 million travel bookings were made via the Amadeus Selling Platform, including 40.7% of all travel agency air bookings made globally. Meanwhile almost 700 million passengers boarded airplanes using the Amadeus Altéa solution during 2014; we estimate that this will increase to close to one billion by 2017, based upon contracts signed for airlines to migrate to our system.

The foundation of Amadeus' approach is its innovative technology. Amadeus invested around \$3.5 billion in R&D between 2004 and 2014. The group operates a transaction-based business model, which allows its customers to convert certain fixed technology costs into variable costs that vary with passenger volumes; it also links our revenue to global travel volumes rather than travel spending, thus reducing the volatility of its operating results.

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American General Supplies, Inc. (AGS) is an after-market commercial aviation spare parts and services supplier, founded in Chicago in 1982. Now based in Gaithersburg, Maryland, AGS has over the past 30+ years, diversified and constantly grown to become a well-known, respected and reliable full service commercial aviation supplier. AGS is a proud partner of AFRAA.

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

- Commercial aircraft spare parts supply including all related materials and equipment such as shop and ground support equipment, aircraft tires, etc;
- Aircraft, engines, and other component maintenance through marketing alliances and maintenance agreements with organizations that have the capability, such as Summit Aerospace of Miami, Florida, Ethiopian Airlines, etc;
- Technical assistance to customer airlines through personnel secondment on site and /or providing training in the USA;
- Facility audits and capability development for customer airlines;
- Technical writing assistance such as maintenance 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!

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APG Network is the world's leading network for commercial and distribution services for airlines. Through our 108 worldwide offices, we now cover 176 countries across all continents with unrivalled links with the travel industry in each market.

APG brings together key independent players in each country, creating a team of highly experienced local managers and a strong presence in all areas of the world.

APG's key goals are to help airlines exploit small and medium-sized markets on a "variable cost" basis, to generate more revenue for less cost, and to maximize an airline's distribution network with a comprehensive approach based on a tailored portfolio of APG's various distribution products. APG's product range includes its core airline representation services, as well as ABCS, APG local BSP support services which APG has operated for over 100 airlines, and APG interline e-ticketing hub, APG IET, again with over 100 airline participants. APG is constantly investing in new products for the future with the aim of assisting airlines improve their worldwide distribution.

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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," 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](mailto:emea@arinc.com) or visit [www.rockwellcollins.com/arinc](http://www.rockwellcollins.com/arinc)

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

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

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

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

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

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

Boeing has been the premier manufacturer of commercial jetliners for more than 40 years. Today, the company manufactures the 737, 747, 767, 777 and 787 families of airplanes and the Boeing Business Jet. New product development efforts include the Boeing 787-10 Dreamliner, the 737 MAX, and the recently launched 777X. More than 10,000 Boeing-built commercial jetliners are in service worldwide, which is roughly 48 percent of the world fleet. The company also offers the most complete family of freighters, and about 90 percent of the world's cargo is carried onboard Boeing planes.

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

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## BOMBARDIER

the evolution of mobility

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

Bombardier commercial aircraft are already significantly present in Africa with more than 160 Dash 8/Q-Series and CRJ 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.

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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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### Commercial Aviation

Embraer, a global Brazilian company, is the world's leading manufacturer of commercial jets that seat up to 130 passengers. The E-Jets family includes four state-of-the-art aircraft offering a balanced proposition of capacity between 70 and 130 seats. The E170, E175, E190 and E195 set the standard in their category with their advanced engineering, high degree of efficiency, spacious and ergonomic cabins with two-by-two seating, combined with attractive operating economics.

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

Supporting the fleet of 2,000 aircraft, Embraer Commercial Aviation currently has 37 service centers worldwide servicing E-Jets, ERJ 145 family and Brasília and Bandeirante turboprops. The Embraer global Services & Support structure provides prompt responses to a full range of needs, including field and technical support, material and spare parts, flight and maintenance operations consulting, aircraft upgrades and modifications and comprehensive crew and personnel training. It also incorporates eSolutions, a platform of web-based tools on the FlyEmbraer website, which is a single point that connects Embraer customers with a digital portfolio of services at any time, on any device. It is designed to maximize aircraft productivity and avoid unnecessary operating costs and delays through both corrective and preventive maintenance.

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GE Aviation is a world-leading provider of jet engines, components and integrated systems for commercial and military aircraft. GE Aviation has a global service network to support these offerings.

From the turbosupercharger to the world's most powerful commercial jet engine, GE's history of powering the world's aircraft features more than 90 years of innovation.

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HADID International Services, headquartered in Dubai, UAE provides a diverse range of flight support services such as Permits, Handling, Fueling, Charter, Flight Planning, and Concierge services worldwide. HADID is the oldest company in the corporate flight planning industry in the MENA region delivering locally developed knowledge and expertise with global impact.

Pioneering in flight support for over 30 years, HADID's focus has turned to a higher level of support services and extra care for business aviation flights. Today its services are requested over 3000 times a day worldwide.

Having an international leading network of local flight support supervisory agents covering each and every airport enables HADID to provide expertise on the ground supplying exceptional services delivery with absolute reliability on time every time.

HADID's 24/7 team of qualified and certified dispatchers use high tech industry-standard flight systems to secure the smoothest flight planning and tracking.

Professional employees are the true key to HADID's success, for us vision means thinking outside the box, attention to detail, and understanding flexibility.

HADID ensures your aviation vision of tomorrow will be safe, reliable, easy and fast.

Fly the future you want with HADID International Services.

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For more than 15 years, we are the experts in providing global distribution solutions for our airline partners. With more than 300 air & rail partners and access to 95,000 travel agencies in over 190 markets, we are the designated choice to exploit high yield incremental revenue streams for you. Whether you are already participating in a GDS or not and regardless of your business model, Hahn Air is your ticketing expert for global, secure sales and optimised revenue.

#### Hahn Air services in a nutshell:

- Hahn Air takes the complexity out of airline's global indirect sales while increasing revenues.
- Hahn Air manages airlines distribution niches worldwide - risk-free and cost-efficient.
- Hahn Air connects airlines to a global network of 95,000 travel agencies.

Connect with Hahn Air ticketing platform and join Hahn Air global network. Today, every 7 seconds a passenger checks in with a Hahn Air ticket at one of almost 4,000 boarding points worldwide.

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"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 55 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.

**Ilyushin Finance offers to lease the following new generation jets:**

- Sukhoi SSJ100 regional jets,
- CS-300 Bombardier narrow-body 140-160 passenger aircraft,
- MC-21 Irkut narrow-body 150-200 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 Ilyushin Finance 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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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

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

Lufthansa Systems: Know-how, expertise and innovative IT solutions for the airline industry.

Lufthansa Systems GmbH & Co. KG is one of the world's leading providers of IT services in the airline industry. It draws its unique strengths from an ability to combine profound industry know-how with technological expertise and many years of project experience. The company offers its more than 300 airline customers an extensive range of successful and in many cases market-leading products for the aviation industry.

The innovative IT products and services in this portfolio offer customers a wide range of economic benefits while also contributing to improving efficiency and competitiveness. In addition, Lufthansa Systems also supports its customers both within and outside the Lufthansa Group with consulting services and the experience it has gained in projects for airlines of every size and business model.

Lufthansa Systems offers airlines a unique range of products covering all of an airline's business processes – in the cockpit, in the cabin and on the ground. Furthermore, its portfolio is focused on meeting the respective demands of different airline business models. Network airlines, regional airlines and low-cost carriers all benefit from solutions that are customized to their respective needs.

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## Manyatta Engineering Services Ltd

Manyatta Engineering Services Ltd is a maintenance service provider for airlines in Nigeria and the rest of Africa with offices in Abuja, Kaduna and London.

Manyatta Engineering Services has a new Boeing 737-size hangar in Abuja and plan to construct additional facilities in Abuja and Port Harcourt. The company is also involved in sale of fixed wing and rotary aircraft.

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

Marsh is a wholly owned subsidiary of Marsh & McLennan Companies (NYSE: MMC), a global team of professional services companies offering clients advice and solutions in the areas of risk, strategy and human capital. With 55,000 employees worldwide and annual revenue exceeding \$12.3 billion, Marsh & McLennan Companies is also the parent 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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Mercator, headquartered in Dubai, is a leading provider of software and tech-enabled outsourcing solutions and services to the global travel, transportation, and logistics industry. The company enables clients to simplify the movement of people and goods around the world.

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

Key solutions and services include Cargo & Logistics Management, Revenue Accounting, Customer Experience, and Passenger Services. Mercator technologies manage critical processes for all segments of the TTL industry.

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

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Big Data Insight for the Travel Industry

Milanamos makes use of the latest innovation in Big Data and data science to deliver disruptive and innovative network planning solutions to airlines, airports, railway operators, consultancy firms and bus operators. Milanamos has been recognised among the top 110 companies by the World Innovation Challenge for its vision of transportation in 2030.

Contact Milanamos to create your own market studies and simulations based on a unique massive database that aggregates multimodal traffic and revenue data and complex mathematical forecasting models. Analyse the past and forecast the future in a comprehensive user interface that helps concentrating on results and not on data. Build strategic development plans, optimise fleet utilisation and identify multimodal partners with the first multimodal competitive intelligence solution!

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

A compelling choice tailored services span the entire life cycle of an engine and allow customers to benefit from minimized operational and maintenance costs. Among these are on-site and on-wing services, spare engine support, engine condition monitoring as well as accessory and LRU management. This broad range of comprehensive services can be combined under MTU's all-encompassing modular service package Total Engine Care (TEC®). MTUPlus Mature Engine Solutions help maximize asset values through optimized end-of-life material and asset management. In addition, MTU is well-respected for its globally unique high-tech repairs. Developed in-house and certified by EASA and FAA, they are marketed as MTUPlus repairs and guarantee above-average performance and extended on-wing time.

**MRO portfolio at a glance:**

- Turboprops: PT6A, PW100/1501
- Business jets: CF34-1/-3, JT15D1, PW300, PW500, PW6001
- Narrowbodies: CFM56-3/-5B/-7, PW1100G2, PW20003, PW6000, V2500
- Helicopters: PT6B/C/T1, PW200
- Regional jets: CF34-3/-8/-10E
- Widebodies: CF6-503/-80C2, GENx4, GENx4, GE90-110/-115B, GP72005
- IGTs: LM2500, LM2500+, LM5000, LM6000

1) P&WC Customer Service Center Europe

3) Including military applications

5) Low Pressure Turbine (LPT)

2) Planned

4) Turbine Center Frame (TCF)

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Mitsubishi Aircraft Corporation, "Mitsubishi Aircraft" commenced operations in April 2008, to conduct the designed, type certification, sales & marketing and customer support for the Mitsubishi Regional Jet (MRJ). Headquartered in Nagoya, Japan, Mitsubishi Aircraft has two overseas subsidiaries in the U.S and Europe. Mitsubishi Aircraft is capitalized at 100 billion yen, with financing furnished by, among others, Mitsubishi Heavy Industries Ltd., Mitsubishi Corporation, Toyota Motor Corporation, Sumitomo Corporation and Mitsui & Co. Ltd.

The MRJ is a family of 70-90 seat next-generation aircraft featuring the Pratt & Whitney's revolutionary PurePower® engine and state-of-the-art aerodynamics to drastically reduce fuel consumption, noise and emissions, while offering top-class operational benefits, an outstanding cabin designed for heightened passenger flying comfort, and large overhead bins.

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The world leader in aviation intelligence, OAG is relied upon globally for essential information and insight. Only OAG has the capability to deliver accurate, comprehensive and up-to-the-minute aviation data – and the expertise to convert this information into market-leading intelligence and innovative travel solutions. Our mission is to be the power behind the best decisions in global aviation.

Unique trusted and respected within the industry for over 80 years, OAG is best known for its airline schedules and flight status databases, which holds future and historical flight details for over 900 airlines and more than 4,000 airports. OAG has been at the heart of the air transport industry since the start of commercial flights. Our data and products, unrivalled in their comprehensiveness and accuracy, have become the trusted source for the world's global distribution systems and now drives the internal systems of many travel portals, airlines, airports, air traffic control systems, aircraft manufacturers, and government agencies worldwide.

OAG's market leading global airline distribution and aviation analytics services are perfectly complimented by our advanced suite of multi-media products designed for airlines, airports and travel related businesses helping aviation analysts, route development teams, software developers, business travellers and travel arrangers make better business decisions.

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Pratt & Whitney has approximately 33,500 employees who support more than 11,000 customers around the world. Frederick Rentschler founded Pratt & Whitney in 1925. Our first aircraft engine transformed the aviation industry. It was the 410-horsepower, aircooled Wasp, which delivered unprecedented performance and reliability for the time. We have been leading change ever since.

Today, Pratt & Whitney develops game-changing technologies for the future, such as the PurePower® PW1000G engine, with patented Geared Turbofan engine technology. The company's worldwide large commercial engine maintenance, repair and overhaul network provides innovative services that add value and delight customers around the globe. Pratt & Whitney's large commercial engines power more than 25 percent of the world's mainline passenger fleet. The company continues to develop new engines and work with its partners in International Aero Engines and the Engine Alliance to meet airline customers' future needs.

Pratt & Whitney has built a long and distinguished record of providing top-of-the-line military engines to 29 armed forces around the world. Our engines power front line fighters, such as the F-15 Eagle, F-16 Fighting Falcon, F-22 Raptor and F-35 Lightning II, as well as the C-17 Globemaster III military transport and Boeing's KC-46 Tanker.

Pratt & Whitney Canada has produced more than 80,000 engines, of which there are currently more than 50,000 engines in service by more than 10,000 operators in 200 countries.

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

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

Our aviation electronics systems and products are installed in the flight decks of nearly every air transport aircraft in the world. Our airborne and ground-based communication systems transmit nearly 70 percent of all U.S. and allied military communication. Whether developing new technology to enable network-centric operations for the military, delivering integrated electronic solutions for new commercial aircraft, or providing a level of service and support that increases reliability and lowers costs for aircraft operators throughout the world, we deliver on our commitments.

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

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Rolls-Royce's vision is to create better power for a changing world via two main business divisions, Aerospace and Land & Sea. These business divisions address markets with two strong technology platforms, gas turbines and reciprocating engines. Aerospace comprises Civil Aerospace and Defence Aerospace. Land & Sea comprises Marine, Nuclear and Power Systems.

Rolls-Royce has customers in more than 120 countries, comprising more than 380 airlines and leasing customers, 160 armed forces, 4,000 marine customers including 70 navies, and more than 5,000 power and nuclear customers.

Rolls-Royce business is focused on the 4Cs:

- Customer – placing the customer at the heart of our business
- Concentration – deciding where to grow and where not to
- Cost – continually looking to increase efficiency
- Cash – improving financial performance.

Annual underlying revenue was £14.6 billion in 2014, around half of which came from the provision of aftermarket services. The firm and announced order book stood at £76.5 billion at 30 June 2015. In 2014, Rolls-Royce invested £1.2 billion on research and development. We also support a global network of 31 University Technology Centres, which position Rolls-Royce engineers at the forefront of scientific research.

Rolls-Royce employs over 54,000 people in more than 50 countries. Over 15,500 of these are engineers. The Group has a strong commitment to apprentice and graduate recruitment and to further developing employee skills. In 2014 we employed 354 graduates and 357 apprentices through our worldwide training programmes. Globally we have over 1,000 Rolls-Royce STEM ambassadors who are actively involved in education programmes and activities; we have set ourselves a target to reach 6 million people through our STEM outreach activities by 2020.

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Sabre Airline Solutions® is a leading SaaS based business serving the global airline industry. Airline Solutions provides comprehensive technology solutions that give airlines the freedom to better market their airline, sell their products, serve their customers and efficiently operate the way they want.

The breadth of the Airline Solutions' portfolio provides a unique opportunity to help our customers solve complex market problems. Our investments typically focus on areas identified in partnership with airlines through regular and frequent engagement at all levels of customer organisations. Primary investment areas include Airline Retailing, Customer Experience, Data and Analytics, and the Connected Airline. Deep industry knowledge, leading operations research, and targeted professional services complement our technology to drive meaningful value for our customers.

Supporting over 225 global airline customers, Airline Solutions is proud to partner with some of the world's leading, network, hybrid and low cost carriers. In 2014 Airline Solutions commercial solutions managed US\$ 75 billion in airline inventory, greater than Google's revenue for the year. Our operational solutions track over 100,000 flights per day. Our reservation systems handle reservations for 511M+ passengers boarded traveling within 195 countries per year. Airlines around the globe rely on us to help increase revenues, decrease costs and improve customer service.

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### Seabury – Global presence. Global reach.

To create value we operate with integrity by respecting our clients and using our knowledge to leave behind competency not dependence. This is why we take a different approach with our clients. We understand their needs first and then act – together.

We believe expert support makes a difference. This is why our teams blend former industry executives, top-tier consultants and seasoned investment bankers.

We believe designing projects with change in mind allows our clients to navigate faster towards improved results that are more sustainable. This is why we prefer to work on-site with our clients, sharing our expertise to build competence.

We believe strong business intelligence capabilities strengthen feedback loops which allow our clients to continually learn and innovate. This is why we always respect and use the data at hand, and it is why we have developed a suite of world-class network planning and software tools and best practice models and databases.

We love to work with clients to help them confront big challenges. This is why since 1995 we have advised on more than 1,100 client engagements globally, including assignments involving negotiating new or existing aircraft orders totaling over \$250 billion (list prices) and structuring over \$80 billion of equity and debt capital transactions, and have served as the restructuring adviser for 10 of the largest 15 airline turnarounds.

We enjoy bringing our broad airline and aerospace experience, varied technical expertise, and our proprietary software to evaluate your unique choices. This is why we are confident that if we work together with you, your business will experience the fun that comes with big wins.

We understand the unique challenges faced by African airlines in harnessing the potential the continent offers. This is why we bring teams with experience in working across Africa, on strategic issues such as fleet campaigns, mergers and alliances, as well as tactical opportunities including commercial and revenue enhancement, maintenance and cost reduction, and workforce efficiency improvements.

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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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SITA is the world's leading specialist in air transport communications and IT solutions. Owned by the industry, SITA delivers solutions to airlines, airports, GDSs and governments over the world's most extensive communications network.

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](http://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 \$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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### International Trip Support

UAS International Trip Support is a leading global trip support provider, trusted by royals, VVIPs, Fortune 500 companies and business jet operators worldwide.

With a global network that includes continental headquarters in Houston, Johannesburg, Hong Kong and Dubai, regional offices in Lagos, Nairobi, Beijing and New Delhi and ground presence in 37 countries, we offer clients unrivalled connectivity while taking care of all their aviation needs.

Named 'Ground Service Provider of the Year' at the Aviation Business Awards 2014, our record of operational excellence for our clients is unparalleled.

Our experienced international industry experts provide 24/7 support, executive travel and air charter services. UAS International Trip Support offers clients a comprehensive one-stop-shop for the best solutions for all their aviation needs. UAS is truly 'Your local partner with global reach.'

We understand

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Wirecard AG is a global technology group that supports companies in accepting electronic payments across all sales channels. Our Multi-Channel Payment Gateway, which is linked to more than 200 international payment networks (banks, payment solutions, card networks), provides payment and acquiring acceptance via the Wirecard Bank and global banking partners. This comprises integrated risk, fraud management systems and tokenization services as well. At present, we provide financial technology to more than 20,000 customers around the world, including many airlines. Wirecard also has effective connections and partnerships with all key industry-specific providers in the travel segment. For example, Wirecard is a strategic partner of both IATA and AFRAA.

Wirecard is unique in offering a portfolio featuring a flexible combination of technology, services and banking solutions, while also operating our own acquiring service for airline customers, including eCommerce, BSP acquiring and POS acquiring. We currently accept more than 140 different currencies and facilitate direct settlement in more than 20 currencies. In addition to our Principal Membership with Visa and MasterCard, acquiring licence agreements are also in place with JCB, American Express, Discover/Diners, UnionPay and UATP. Banking services such as foreign exchange management supplement the outsourcing of financial processes.

Our expertise in issuing solutions enables us to switch pure airline loyalty cards into payment cards. Wirecard also issues branded loyalty prepaid payment cards, mostly Visa and MasterCard. Furthermore, we provide mobile payment systems – i.e. for public transportation systems, apps, mPOS and more.

Our flexible end-to-end solutions are integrated in almost all airline booking and reconciliation systems. This range of versatile integration options and plug-ins can be easily added to booking platforms and corporate processes. With our solutions all available via a single interface, airlines are therefore able to simplify their processes.

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## ANNEX 1: Summary of 2014 Airline Performance

TRAFFIC DATA	AIR ALGERIE	AIR BURUNDI	AIR BOTSWANA	AIR MADAGASCAR	AIR MAURITIUS	AIR NAMIBIA	AIR SEYSELLES	AIR ZIMBABWE	CRONOS	ECAR	EGYPTAIR	ETHIOPIAN AIRLINES	KENYA AIRWAYS	LAM MOZAMBIQUE	PRECISION AIR	RWAND AIR	ROYAL AIR MAROC	SOUTH AFRICAN AIRWAYS	SOUTH AFRICAN EXPRESS	TAG AIR ANGOLA	TASSIL AIRLINES	TUNIS AIR	TOTAL
Domestic Passengers (000)	1,552	3	85	295.60	128	91	165.41	102	120	272	1,688	793	737.13	524	233	22	806	3,233	1,198	715	493		13,256
Regional Passengers – within Africa (000)	365	105	152		520	318		94	28	632	1,072	2,740		226	219	394	1,035	3,559	243	227		674	12,603
Intercontinental Passengers (000)	3,316	-		226.80	706	122	253.11	0	-	41	6,035	2,664	2,902.20	1	87		4,497		-	471	3	2,851	24,176.11
<b>Total Passengers Carried (000)</b>	5,233	108	237	522	1,354	531	419	196	148	945	8,795	6,197	3,639	751	452	503	6,338	6,792	1,441	1,413	496	3,525	50,035.11
Domestic Freight Carried (000)	944	3	161	846	72	36	18	188		0	645	234		3,748			2,000	46,389	2,075	1,895		704	61,151
Regional Freight Carried (000)	1,087	182			13,389	680		346		0	7,291	44,662		618			2,000		59	2,499		5,758	78,571
Intercontinental Freight Carried (000)	12,877	-	639	4,215	20,801	3,975	7,314	-		0	126,784	162,468	63,847	47			15,000	156,132		9,453			583,552
<b>Total Freight Carried (000)</b>	14,908	186	800	5,061	34,262	4,691	7,332	534		0	134,720	207,364	65,040	4,413			19,000	202,521	2,133	13,847		5,758	722,570
Revenue Passenger-Kilometres – RPK (000)	71,49,845		125,000	1,286,695	6,119,529	1,433,771	980,457	129,912	32,559	419,162	18,358,476	22,267,110	9,567,303	802	190,048	862,255	11,165,537	22,313,041	1,079,464	4,033,134	437,516	5,146,348	113,097,964
Available Seat-Kilometres – ASK (000)	10,834,683	178,460	254,000	1,935,699	8,297,970	2,108,452	1,631,867	264,341	74,368	840,895	28,562,217	31,602,020	15,220,292	1,241	323,094	1,547,835	17,560,800	30,533,231	1,766,282	5,588,830	760,325	7,308,334	167,195,236
<b>Passenger Load Factor – PLF (%)</b>	63.25%	65.00%	49.00%	66.50%	74.00%	68.00%	60.10%	46.50%	54.00%	50.00%	64.00%	70.46%	62.90%	64.60%	59.00%	60.00%	63.00%	73.10%	61.00%	72.00%	60.00%	70.40%	
Passenger Tonne-Kilometres – PTK (000)	643,486	117,826	115,283	115,792	551,810	1,059,266	102,947	1,402	4,655		1,804,557	2,881,789	959,862	72,000			1,218,019	1,992,676		362,982	34,714	417,804	12,456,870
Freight & Mail Tonne-Kilometres – FTK (000)	2,017	41,132	275,460	31,348	199,245	328,378	32,453	388,792	1,173	-	4,880	2,109	265,319	6,000	18		41,716	1,104,559		65,571	0	12,670	4,240,009
Revenue Tonne-Kilometres – RTK (000)	645,503		390,743	147,150	751,054	1,387,644	135,401	390,194	5,828		2,216,230	3,914,293	1,225,181	78,000	70		1,316,734	3,097,235		428,553	0	517,658	16,647,401
Available Tonne-Kilometres – ATK (000)	980,993		304,800	258,933	1,242,815	2,404,271	219,833		8,829	4,242,395	6,175,835	6,175,835	1,995,015	127,000			2,889,986	5,216,861		972,798	34,714	768,897	27,569,655
<b>Weight Load Factor – WLF (%)</b>	65.80%		49.00%	56.90%	60.30%	58.00%	61.70%		66.00%		52.00%	63.38%	61.40%	61.30%			46.00%	59.40%		44.00%	18.00%	67.30%	
<b>EMPLOYEES DATA</b>																							
Pilots	385	15	49	58	185	98	53	44	7	2	786	545	519	37	59		462	766	246	162	121	312	4,911
Engineers	1,431	41	52	173	341	20	69	102	5	-	4,880	2,109	595	108	18		272	3,021	5	398	213	80	13,933
Cabin Crew	1,010	25	44	159	486	139	154	51	11	62	2,262	1,323	646	91	70		228	1,772	184	494	104	770	10,085
Traffic/Marketing	4,082	65	34	99	127		43	79	47	58	2,679	1,289	492	354	11		659	548	3	946	62	1,145	12,822
Others	2,187	93	436	693	1,019	456	355	267	26	353	20,336	3,159	1,791	207	477		554	3,210	710	1,631	707	1,453	40,120
<b>Total No. of Employees</b>	9,095	239	615	1,182	2,158	713	674	543	96	475	30,943	8,425	4,043	797	635		2,175	9,317	1,148	3,631	1,207	3,760	81,871
<b>DESTINATIONS SERVED</b>																							
Domestic – within the country	33	1	4	22	1	8		3	2	3	10	20	4	12	8	2	20	5	12	13		4	
Intra-Africa – within Africa	10	7	8	5	7	7		1	3	5	20	39	45	5	2	15	26	24	7	11		15	
Intercontinental – Africa to other Regions	31	-	0	1	13	1		0	0	3	61	58	13	0		1	46	11	-	7		34	
New Destinations (all markets)																			2				

## ANNEX 2: AFRAA Member Airlines Fleet 2015

		A300	A319/ 320/321	A330	A340	B727	B737- 200	B737- 300/500	B737- 600/700	B747	B757	B767	B777	B787	MD- 87	MD- 9-11	CRJ 700	CRJ 900	ERJ-120/ 135/145/ 170/175/ 190/195	EMB 120	BAe 146-100/ 200/300	Fokker F27	Fokker F50	Dash -8 Q200/ Q400	ATR 42	ATR 72	DHC- 6-8	Shorts 360	Lock- heed	Cessna	Xian MA60				
1	Afriqiyah Airways		10	2																												12			
2	Algerie			5					22			3														13			1			44			
3	Air Botswana																				2				3	2						7			
4	Air Burkina																		2													2			
5	Air Madagascar				2			1																								10			
6	Air Mauritius		2	2	6																											12			
7	Air Namibia		4	2															4													10			
8	Air Seychelles			2																												9			
9	Air Zimbabwe		2				3					2																6	1			1	8		
10	ASKY Airlines								3															4								7			
11	Astral Aviation						2			1					1							1							2			7			
12	Camair-Co								2			1																				3			
13	Celba Intercontinental												1																			5			
14	Cronos																								2	2						3			
15	ECair							2	2		2	1							1							1						7			
16	EgyptAir	3	17	11	1			4	20					9					12													77			
17	Ethiopian Airlines								19		6	7	14	13										17								76			
18	Inter Air South Africa						3					1																				4			
19	Kenya Airways							2	12			6	7	7				18														52			
20	LAM Mozambique							1	1									2						3								7			
21	Libyan Airlines		3	3														2														8			
22	Mauritania Airlines International								3										1													4			
23	Precision Air																									4	5					9			
24	Punto Azul																		3													3			
25	Royal Air Maroc							1	36	1		4		2					4							5							8		
26	Rwandair								4									2						2									62		
27	South African Airways		20	6	17			2	17																								24		
28	SA Express Airways																10	4						10									5		
29	Starbow																				5												5		
30	Sudan Airways							2														3										2			
31	Syphax Airlines		2																														11		
32	TAAG Angola Airlines								5				6																				6		
33	TACV Cabo Verde		1						1		1															1	2							12	
34	Tassili Airlines								4															8										34	
35	Tunisair	3	21	1				2	7																										564
Totals		6	82	34	26	2	6	17	158	2	9	25	37	22	0	1	10	4	4	47	0	8	1	3	44	11	36	8	1	1	2	1			

## ANNEX 3: Fatal Accident Statistics

### 2014 World Airlines Fatal Accidents Statistics

	Date	Type	Operator	Locations	Fatalities	Age
1	18th January	Cessna 208B Grand Caravan (Cargo)	Trans Guyana Airways	Olive Creek, Guyana	2	14
2	16th February	DHC-6 Twin Otter 300	Nepal Airlines	Sandhikhark, Nepal	18	43
3	17th February	BAe-748-371	IOM (International Organization for Migration)	Rubkona Airport, South Sudan	1	34
4	21st February	Antonov 26 (Cargo – Ambulance)	Libyan Air Cargo	near Grombalia, Tunisia	11	Not indicated
5	8th March	Boeing 777-200	Malaysia Airlines	Indian Ocean	239	12
6	19th April	BAe-125-700A	LACSA (Mexico)	Near Saltillo-Plan de Guadalupe International Airport, Mexico	8	32
7	8th May	DC-3 (Cargo)	ALIANSA, Colombia	Near San Vicente del Caguán, Colombia	6	71
8	24th June	Airbus A310-324	Pakistan International Airlines - PIA	near Peshawar, Pakistan	1	21
9	2nd July	Fokker 50 (cargo)	Skyward International Aviation	Near JKIA, Kenya	4	22
10	17th July	B777-200	Malaysia Airlines	Hrabove, Ukraine	298	17
11	23rd July	ATR 72-500	TransAsia Airways	Magong Airport, Taiwan	48	14
12	24th July	MD-83	Air Algérie	near Gossi, Mali	116	18
13	10th August	HESA IrAn-140-100	Sepahan Airlines	Near Tehran-Mehrabad Airport, Iran	39	6
14	23rd August	Let L-410 UVP (cargo)	Doren Air Cargo	Mulume Munene, DRC	4	32
15	30th August	Antonov 12BK (cargo)	Ukraine Air Alliance	S of Tamanrasset Airport, Algeria	7	46
16	31st August	Fokker F-27 (cargo)	Safari Express Cargo, Kenya	Near Kogatende, Tanzania	3	29
17	20th September	DHC-6Twin Otter 300 (charter)	Hevilift	Near Port Moresby-Jackson Papua New Guinea	4	38
18	29th October	Shorts 360-200 (cargo)	SkyWay Enterprises	Near Sint Maartens-Juliana Airport, Netherlands Antilles	2	28
19	14th November	Bae-748 (cargo)	Global Airlift	Panyagor Airstrip, South Sudan	2	33
20	8th December	Embraer EMB-500	Sage Aviation	NW of Gaithersburg-Montgomery County Airport, MD, USA	3+3	5
21	18th December	Learjet 25 D	T-Air LLC	Near Champoton, Mexico	2	36
22	28th December	Airbus A 320-200	Indonesia AirAsia	Java Sea Indonesia	162	6
23	28th December	BN-2A-6 Islander (Cargo)	Air Serices	Guyana	2	43
24	28th December	Antonov 26 (cargo)	Air Sirin (Ukrainian)	25 km from Uvira, DRC	6	35
					991	Average Age: 27.61 yrs

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



## ANNEX 4: AFRAA Member Airlines Commercial Partnerships (Codeshares and Interline Electronic Ticketing)

		8U	AH	BP	2J	MD	MK	SW	HM	UM	KP	8V	QC	C2	C8	LC	MS	ET	D6	KQ	TM	LN	L6	PW	AT	WB	SA	XZ	S9	SD	FS	DT	VR	SF	TU
	Afriqiyah	8U																																	
	Air Algerie	AH																																	
	Air Botswana	BP																																	
	Air Burkina	2J																																	
	Air Madagascar	MD																																	
	Air Mauritius	MK																																	
	Air Namibia	SW																																	
	Air Seychelles	HM																																	
	Air Zimbabwe	UM																																	
	Askya Airlines	KP																																	
	Astral Aviation	8V																																	
	Camair - Co	QC																																	
	Celiba Intercontinental	C2																																	
	Cronos Airlines	C8																																	
	Ecair	LC																																	
	EgyptAir	MS																																	
	Ethiopian Air	ET																																	
	Interair SA	D6																																	
	Kenya Airways	KQ																																	
	LAM Mozambique	TM																																	
	Libyan Airways	LN																																	
	Mauritania Airlines	L6																																	
	Precision Air	PW																																	
	Royal Air Maroc	AT																																	
	RwandAir	WB																																	
	South African Airways	SA																																	
	South African Express	XZ																																	
	Starbow Airlines	S9																																	
	Sudan Airways	SD																																	
	Syphax Airlines	FS																																	
	TAAG ANGOLA	DT																																	
	TACV Airlines	VR																																	
	Tassili Airlines	SF																																	
	TunisiAir	TU																																	

## ANNEX 5: MRO Facilities in Africa

MRO	Country	National Approval Type	Training School	Maintenance Capability			Engines Overhaul & Testing	Website
				Airbus	Boeing	Other A/C		
AeroContractors	Nigeria	EASA, Nigeria CAA			B737-300, 400 & 500			<a href="http://www.acn.aero">http://www.acn.aero</a>
Aeronexus Technical	South Africa	South Africa CAA			B707, B727, B737-200 & B767	DC8, DC9, MD80, Fokker 28		<a href="http://www.aeronexus.aero">www.aeronexus.aero</a>
Aerotech	Zimbabwe	South Africa CAA, Zambia DCA, Zimbabwe CAA, South Africa CAA, Malawi(DCA)				Cessna, Beecraft		<a href="http://www.aerotech.co.zw">www.aerotech.co.zw</a>
Aerotechnic Industries (ATI)	Morocco	EASA 145, Moroccan DAC		A320	B737-NG			<a href="http://www.royalairmaroc.com/corporate/Groupe-RAI/Industrie">http://www.royalairmaroc.com/corporate/Groupe-RAI/Industrie</a>
Air-Tech	Mauritius & South Africa	South Africa CAA				L410 UVP-E20, L420 Beechcraft 90/200 & PAC 750XL		<a href="http://www.air-tech.com/">http://www.air-tech.com/</a>
Air Algerie Technics Maintenance	Algeria	EASA 145	Yes	A330	B737NG, B767 and B727	L100-30C, ATR72, Fokker 27		<a href="http://www.airalgerie.dz/">http://www.airalgerie.dz/</a>
Air Express Algeria	South Africa	South Africa CAA, Tanzania CAA				Fokker F-28	Rolls Royce Spey	<a href="http://www.airexpressdz.com">http://www.airexpressdz.com</a>
Air Mauritius	Algeria	EASA, Algerian Directorate of Civil Aviation, South Africa CAA				LET410, Beechcraft 1900-D, PC-6		<a href="http://www.airmauritius.com/">http://www.airmauritius.com/</a>
Air Zimbabwe	Mauritius	JAR 145 - France DGAC, Mauritius DCA, EASA 145, EASA 147	Yes	A320 Series, A330 & A340		ATR72-500		<a href="http://www.airzimbabwe.aero">www.airzimbabwe.aero</a>
Denel Aviation Transport Aircraft Maintenance	Zimbabwe	Zimbabwe CAA, Malawi DCA, Botswana CAA	Yes		B707, 767, 737 Classic	BAe146 and MA60	JT-3D, JT-8D, PW4000, Modular Maintenance	<a href="http://www.denel.co.za/">http://www.denel.co.za/</a>
Egyptian Company for Aircraft Maintenance	South Africa	United States FAA, South Africa SACAA, AS 9100, EASA Europe, ISO 9001:2000	Yes	A320	B707, B727, B737	C130, L100, BAe146		<a href="http://www.ecam-egypt.com">www.ecam-egypt.com</a>
EgyptAir Maintenance & Engineering Company	Egypt	Egyptian CAA			737-200/300/400/500, 707			<a href="http://www.egyptair-me.com/">http://www.egyptair-me.com/</a>
Ethiopian Airlines	Egypt	Egypt ECAA, EASA 145, FAA, EASA 147	Yes	A320, A321, A330, A340	B737 (Classic & NG), B767, B777-200 /-300	Embraer E170/190	V2500 A1/A5, CFM56-3/5C, PW4060/4158 and Trent 700	<a href="http://www.ethiopianairlines.com">www.ethiopianairlines.com</a>
Execujet Maintenance	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, B757, B767, B777	Fokker50, DHC-8 Q400, MD-11, DA40/42	PW127, PW121, PT6, CFM56-3/7 APUs: GTP331-200 Modular Maintenance: PW4000 & PW2000	<a href="http://www.execujet.net">www.execujet.net</a>
Fields Airmotive	South Africa and Nigeria	ISO 9002, United Arab Emirates GCAA, Bermuda BDC, South Africa SACAA, Botswana DCA, Angola DGCA, EASA 145, Namibia CAA				Bombardier, Beechcraft, Dassault, Gulfstream, Embraer Aircraft		<a href="http://www.fieldsairmotive.com">http://www.fieldsairmotive.com</a>
Global Aerotech	South Africa	South Africa CAA, FAA	Yes			MD-82, DC-9-30, DC-10	Rolls Royce Dart JT8D-15, 217A&C, -219	<a href="http://www.globalaviation.com/">http://www.globalaviation.com/</a>
Horou Aircraft Maintenance & Ground Services	South Africa	South Africa CAA						<a href="http://www.horou.com">www.horou.com</a>
Interjet (AMETA)	Libya	Libyan CAA, Mali CAA, United Arab Emirates GCAA			B707, 727			<a href="http://www.interjet.co.za">www.interjet.co.za</a>
Kenya Airways	South Africa	South Africa CAA, Angola DGCA, Botswana CAA, Namibia CAA	Yes			Embraer, King Air, Learjets, Beechcraft, Challengers & Gulfstreams		<a href="http://www.kamro.com">www.kamro.com</a>
Libyan Aircraft Engineering & Maintenance (LAEM)	Kenya	EASA 145, Kenya CAA, Tanzania CAA, CAA Uganda, Zambia DCA	Yes		B737-NG, 757, 767, B777	E170, 190		<a href="http://www.laem.ly">www.laem.ly</a>
Linhas Aereas de Mocambique LAM	Libya	EASA 145, Libyan CAA		A300-600, A310-200				<a href="http://www.lam.co.mz">www.lam.co.mz</a>
National Airways Corporation	Mozambique	Mozambique CAA			B737-200/500			<a href="http://www.nac.co.za">www.nac.co.za</a>
OSA Aeronautical Engineering Services	South Africa	South Africa CAA, ISO 9001:2008 & BARS	Yes			Bel206/206L/407/222/230 /430/412	Rolls Royce	<a href="http://qsamorocco.com/">http://qsamorocco.com/</a>
Sabena Technics	Morocco	EASA 145, Morocco DAC, Egypt CAA, UAE GCAA, Qatar GCAA	Yes	A318/A319/A320/A321/A330-200/300, A340-500/600	B737Classic & NG, B747-400, B767-200/300/400ER, B777-200/300		RR Trent 500/700/800, CFM56, PW4000, GE, Genx	<a href="http://www.sabenatechnics.com/">http://www.sabenatechnics.com/</a>
SAFAIR Technical (JetWorx)	Tunisia	EASA, FRA 145, Tunisia DGCA, South Africa CAA, Canada TCAC	Yes	A300 B2-B4, A300-600, A310, A320, A330, A340	B737 CG & NG, B747/747-400, B757, B767, B777	DC 10, MD 11, MD80, MD 90, ATR 42, ATR 72, Bae 146, CRJ 100/200, CRJ 700, ERJ 135, ERJ 145, F70, F100		<a href="http://www.jetworx.co.za/">www.jetworx.co.za/</a>
Solenta Aviation	South Africa	FAA, EASA 145 and SACAA			B737, B727	DC-9, MD80, Hercules L382		<a href="http://www.solenta.com">www.solenta.com</a>
SNECMA Morocco Engine Services	South Africa	South Africa CAA, Cote d'Ivoire CAA, Zambia DCA				ATR42, B1900, B200 King, and Cessna		<a href="http://www.sneema.com">www.sneema.com</a>
South African Airways Technical	Morocco	EASA 145, FAR-145, Moroccan DAC			B737 (Classic & NG)		CFM56-3/5B/7	<a href="http://www.flysaa.com/saa-technical">www.flysaa.com/saa-technical</a>
Tunisair Technics	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	<a href="http://www.tunisair.com">www.tunisair.com</a>
	Tunisia	EASA 145, Tunisia DGAC	Yes	A300-600, A319/320/321, A330-600	B737-NG	ATR 42-200/300, ATR72-100/200	GEFCF34/6, PW4000, CFM56, RR Trent 700	

## ANNEX 6: Aviation Training Institutions in Africa

NAME	MAINTENANCE TRAINING	CREW TRAINING	SIMULATOR TRAINING	EASA/ FAA certification	OTHER TRAINING CAPABILITIES	WEBSITE
Air Algérie	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	Safety/ Security, Managerial/ leadership, commercial (Marketing, Cargo, Finance etc.) and ground handling	<a href="http://www.airalgerie.dz">www.airalgerie.dz</a>
Air Botswana	Aircraft/ engine basic and recurrent training on ATR 42/ 72, BAe 146	-	-	-	-	<a href="http://www.airbotswana.co.bw">www.airbotswana.co.bw</a>
Air Madagascar	Aircraft/ engine basic and recurrent training on ATR 42/ 72, B737-200 and B767, A340	Flight and Cabin crew training on B737/ B767 and ATR 42/ 72	-	EASA 145	Safety and rescue training, English language proficiency	<a href="http://www.airmadagascar.com">www.airmadagascar.com</a>
Air Mauritius	Aircraft/ engine basic and recurrent training on A320 series, A330, A340, ATR 42/72 and Bell Jet Ranger	-	-	EASA 145	IATA authorised training center	<a href="http://www.airmauritius.com">www.airmauritius.com</a>
Air Zimbabwe	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	<a href="http://www.airzimbabwe.aero">www.airzimbabwe.aero</a>
Comair Training* Center, South Africa	Aircraft/ engine basic and recurrent training on B737 - Classic & NG, ATR 42-300/500 and ATR 72- 500	Pilot & cabin crew, dispatcher basic & recurrent training	B737 classics & NG and ATR47/72 full flight simulator	EASA 145 EASA 147	Safety, Security and Commercial courses	<a href="http://www.comair.co.za/">http://www.comair.co.za/</a>
EgyptAir	Basic type, overhaul, boroscope and engine module courses on B737NG, B757, B767, B777, A320 series and A330	Pilot, Cabin crew	A320, A330, B727NG & B777 full flight simulator training	EASA 145 EASA 147	Safety, Security, Cargo, Ground services, commercial and IATA courses (IATA authorized center)	<a href="http://training.egyptair.com">http://training.egyptair.com</a>
Ethiopian Airlines	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	EASA 145 EASA 147	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	<a href="http://www.ethiopianairlines.com">http://www.ethiopianairlines.com</a>
Kenya Airways	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic and recurrent cabin crew training	B777NG full flight simulator	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training (IATA authorized training center)	<a href="http://www.kenya-airways.com">www.kenya-airways.com</a>
LAM Mozambique	Aircraft/ engine basic and recurrent training on B737 - 200 and Embraer 190	-	-	-	-	<a href="http://www.lam.co.mz">http://www.lam.co.mz</a>
Royal Air Maroc	Aircraft/ engine basic system and recurrent/ refresher training B737NG/ classics, B757, B767, B777 and Q400	Basic pilots, basic and recurrent cabin crew training	B737 Classic & NG & B757/ B767 full flight simulator	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	<a href="http://www.royalairmaroc.com">http://www.royalairmaroc.com</a>
South African Express	Q400 refresher training	-	-	-	-	<a href="http://www.flyexpress.aero">www.flyexpress.aero</a>
South African Airways	Aircraft/ engine basic and recurrent training on B737 - 200 and Embraer 190	Basic pilots, basic and recurrent cabin crew training	-	EASA 145	Safety, Security, Cargo, Management and Leadership, Commercial (marketing & finance) training	<a href="http://www.flysaa.com">www.flysaa.com</a>
TAAG Angola Airlines	Aircraft/ engine basic system and recurrent training on B737 classic/ NG and B777 aircraft	Basic and recurrent cabin crew training	-	-	Safety, Security and Commercial courses	<a href="http://www.taag.com">www.taag.com</a>
Tunisair	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	Safety, Security and Commercial courses	<a href="http://www.tunisair.com">www.tunisair.com</a>

\* Comair Training Center is not a member of AFRAA but it has been included since it provides services to various airlines.

## AFRAA Member Airline Two-Letter Codes

Afriqiyah Airways	8U	Kenya Airways	KQ
Air Algérie	AH	LAM Mozambique Airlines	TM
Air Botswana	BP	Libyan Arab Airlines	LN
Air Burkina	2J	Mauritania Airlines International	L6
Air Madagascar	MD	Precision Air	PW
Air Mauritius	MK	Punto Azul	LR
Air Namibia	SW	Royal Air Maroc	AT
Air Seychelles	HM	RwandAir	WB
Air Zimbabwe	UM	South African Airways	SA
ASKY Airlines	KP	South African Express	XZ
Astral Aviation	8V	Starbow Airlines	S9
Camair-Co	QC	Sudan Airways	SD
Ceiba Intercontinental	C2	Syphax Airlines	FS
Cronos Airlines	C8	TAAG Angola Airlines	DT
ECair	LC	Tassili Airlines	SF
EgyptAir	MS	TACV Cabo Verde	VR
Ethiopian Airlines	ET	Tunisair	TU
Interair SA	D6		

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