



2021

ANNUAL REPORT



AFRAA Executive Committee (EXC) Members 2021



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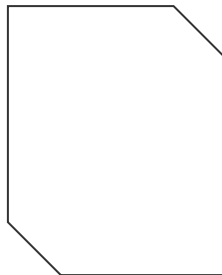
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Foreword

The year 2020 was unprecedentedly marked by the COVID-19 Outbreak.

The global economy drastically slowed down because of the decrease in almost all activities. This situation resulted in a contraction of 3.5% of the worldwide GDP, representing the worst recession since 1930. The World Bank reports that demand and supply of commodity markets declined, and almost all the commodity prices have reduced during the first quarter of the year. Crude oil prices fell drastically during the first semester and dropped by 70% between January and September 2020. The average crude oil price reduced to USD 41 compared to USD 64 in 2019.

The situation affected the travel and tourism sector, with the border closures, travels bans, and lockdown measures taken in almost all countries worldwide. International tourists' arrivals dropped in 2020 to **398 million worldwide**, compared to 1.46 billion in 2019. It represents a 72.8% year-on-year growth decrease.

The global economic environment affected Africa in the same way. According to African Development Bank, the GDP of the continent contracted by 2.1% in 2020, representing the first recession over the last 50 years.

The price of commodities, which support many economies in the continent, fell by 50% on average between March and April. The continent regressed in economic fundamentals: the nominal GDP per capita reduced by 10%, the core inflation increased in many countries, and some countries experienced currency depreciation.

Africa received only 18.1 million international tourists in 2020, a 74.2% decline compared to 2019.

The airline industry realised one of its lowest activity levels: industrywide, the RPK reduced by 65.9%, while ASKs declined by 56.7%. Global airlines carried 1.8 million passengers, 60.2% less than 2019. The passenger load factor also dropped by 17.4% compared to 2019, reaching 65.1%.

African airlines carried 34.7 million passengers, 63.7% less than in 2019. The continent has the weakest contribution to global air traffic: 1.9%.

Cargo activity also declined, but to a lesser extent: African airlines moved 960 thousand tonnes of cargo in 2020, representing a drop of 3.3% compared to 2019.

Globally, African airlines posted USD 10.21 billion Passengers revenue losses, representing 58.8% of 2019 Passengers revenues.

In terms of profitability, while the global industry posted Net post-tax loss of USD 137.7 billion and USD 76.2 per passenger, African airlines posted USD 2 billion Net post-tax loss and USD 44.6 per passenger.

As the global economy is slowly recovering from the Covid19 situation and shall grow in 2021, aviation is making an uneven recovery from the pandemic, with significant differences among regions.

From January to October 2021, African airlines RPKs slowly recovered to reach 51.2% of 2019 levels, while ASKs reached 40.78%.



For 2021, we estimate that African airlines will carry 43 million passengers, representing around 45% of 2019 traffic. In 2022, the traffic shall reach 67 million passengers.

In terms of Passengers revenues, we forecast that African airlines will lose for the full year 2021 USD 8.5 billion, approximately 49% percent of the entire year 2019 airlines' revenue.

Safety is continuously improving in Africa. In 2020, African commercial airlines did not experience fatal accidents. AFRAA and industry stakeholders, including governments, civil aviation authorities, airlines, airports, ground handlers, ICAO, IATA, AFCAC, and ACI, among others, are improving safety standards.

As an association and with our partners, AFRAA continues to restlessly work towards the recovery of the African aviation sector to ensure that airlines and the whole air transport ecosystem can get back on track. Although the industry is opening up, the recovery process has been much slower than anticipated, which could see more severe impacts in the absence of much-needed support. The slow vaccination rate in Africa represents a burden to the recovery of the aviation industry in the region.

We believe that recovery pathways must be grounded in collaboration and strategic rethinking of business models within the industry. The evolution of the virus remains unpredictable; therefore, the need for coordinated efforts by the African States, aviation stakeholders, and partners for the sustainable recovery of the air travel industry is now more than ever an essential building block for success.

This report reviewed the state of the African air transport industry in 2020. It highlights the Secretariat activities, which benefit member airlines, the Maintenance, Repair, and Overhaul (MRO) centers in Africa, and training centers, including providers of aircraft simulators to facilitate cooperation among African operators. The airlines' profile section will help readers get essential facts about all AFRAA member airlines. Finally, you will have a summary of our partners who are assisting the industry in taking advantage of the growing opportunities on the continent.

A handwritten signature in black ink, appearing to read 'Abd' and 'Berthé'.

Mr. Abdérahmane Berthé
AFRAA Secretary General



Vision

"A sustainable, interconnected and affordable Air Transport industry in Africa where African Airlines become key players and drivers to African economic development."

Mission

"To promote, serve African airlines and champion Africa's aviation industry."

Values

AFRAA believes in:

Professionalism
Integrity
Leadership
Communication
Commitment to serve
Partnerships
Transparency
Result orientation

Objectives

AFRAA as an association has the following strategic objectives:

- Safe, secure and reliable air transport;
Promote the industry best practices to support safe, secure and reliable air transport in Africa.
- Enhance the visibility, reputation and influence of African airlines in the global Aviation industry;
• Sustainable air transport;
Advocate for the reduction of costs of air transport services in Africa by reducing taxes, fees and charges.
Strive for the implementation of cost-effective Human Resource Development.
Lobby for market access to increase revenues and enhance connectivity for the aviation sector in Africa.
- Cooperation
Undertake the implementation of joint initiatives aimed at reducing operating costs for airlines, increase revenues and market share.
Facilitate and encourage partnership among African airlines.
- Data intelligence
Become a hub for data, intelligence and expertise on the African Aviation industry.

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Section One: Economic performance

1.1 Global economic performance

The COVID-19 outbreak unprecedentedly marked the year 2020.

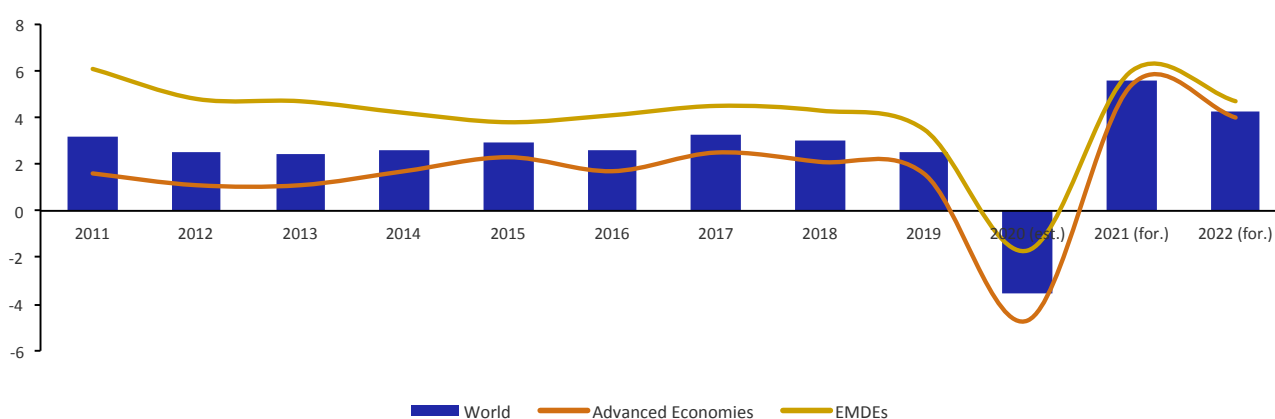
In response to the health crisis, governments took many restriction measures. Almost all countries went into lockdowns. Billions of people were asked to stay locked in their homes or reduce their movements to what is strictly necessary, in order to contain the spread of the virus.

Economic activity slowed down sharply, close to stop. This resulted in a contraction of 3.5% of the global GDP, representing the worst recession since the year 1930.

The Advanced economies were more affected, during 2020 experiencing a decline of 4.7%, because of the rapid spread of the virus in western countries.

In comparison, the decline was 1.7% for Emerging Markets and Developing Economies.

Figure 1.1: Global economic growth



Source: World Bank

According to the World Bank, both the demand and the supply of commodity markets were affected by the COVID-19 outbreak, because of all containment measures. As a result, almost all the commodity prices reduced during the first quarter of the year. However, the impact was different from one commodity to another.

Crude oil prices fell drastically during the first semester. The barrel price reduced from USD 70 in January 2020 to USD 20 in April, representing a 70% drop. Lockdowns caused a near stop on travel and transportation and although OPEC reduced the oil production during the year, the average crude oil price reduce to USD 41 compared to USD 64 in 2019.

The price of non-energy commodities however slightly increased. The World Bank reports that the small fall in metal prices was balanced by a rise in agricultural commodities prices.

The situation is improving. During the first quarter of 2021, the price of almost all commodities increased, and some even exceeded the pre-pandemic levels.

The price of crude oil recovered to reach USD 63 per barrel in April. Non-energy commodity prices rose by 12% during the first quarter compared to quarter 4 2021, according to the world bank.

The global economy is expected to grow by 5.6% for the year 2021.

1.2 Africa's economic performance

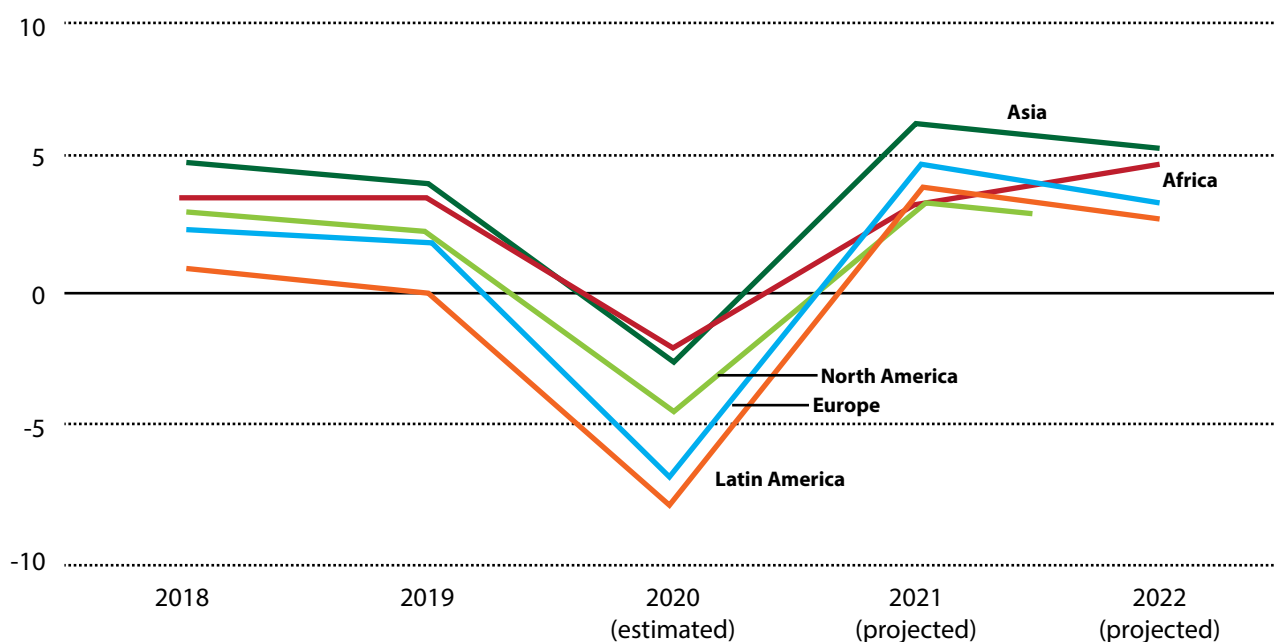
Like all other regions in the world, Africa was seriously impacted by the COVID outbreak.

The African Development Bank (AfDB) reports that the GDP of the continent contracted by 2.1% in 2020, the first recession in the continent over the last 50 years.

The continent's economy was mainly affected by the near-complete stop in tourism, the sharp drop in commodity prices, particularly crude oil.

Africa regressed in 2020 in terms of economic fundamentals.

According to the AfDB, commodity prices in Africa reduced by 50% between March and April 2020. From mid-year, the prices, especially for Energy

Figure 1.2: GDP growth projections in Africa 2018-22*Real GDP growth rate*

Source: AfDB

and metals rebounded, though they remain subdued.

The nominal GDP per capita is estimated to have reduced by 10% in 2020.

The health crisis caused a disruption of financial inflows, including foreign investments, portfolio investments and official development assistance.

The AfDB estimates that the debt has increased and the fiscal deficit has doubled in 2020 to reach 8.4% of the GDP.

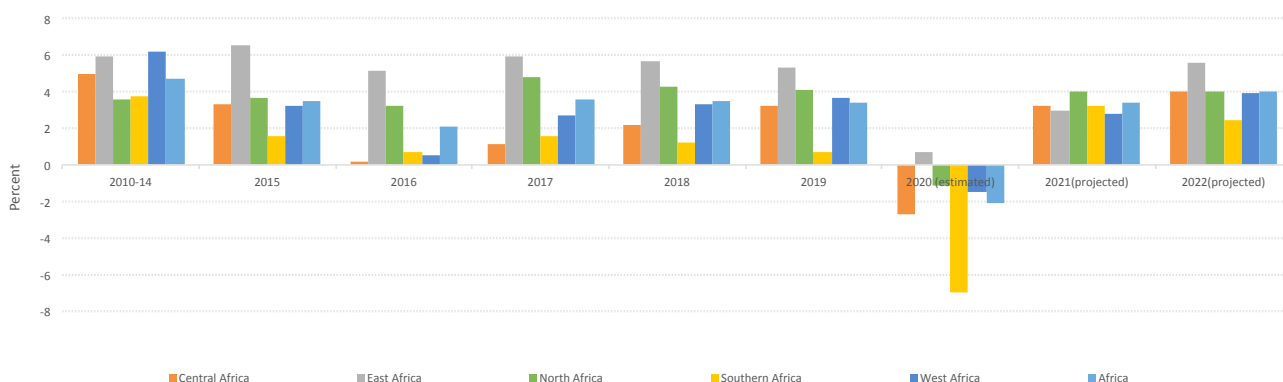
Even if the average inflation remains almost stable (10.4% compared to 9.2% in 2019), the core inflation increased in many countries.

Some countries have experienced currency depreciation, particularly frontier market economies, due to disruptions in external financial flows.

AfDB foresees a recovery in 2021, with an estimated GDP growth of 3.4%. The growth will be supported by a resumption of tourism in many African countries, a rebound in commodity prices and the gradual lifting of restrictions related to the pandemic.

1.3 Regional prospects for Africa

The AfDB African Economic Outlook reports that 2020 economic performance shows a lot of difference across African sub-regions, as well as recovery prospects.

Figure 1.3: Real GDP growth by sub-regions of Africa, 2010-20

Source: AfDB

Before COVID, **East Africa** was expected to realise a very fast growth of 14.2% in 2020. With the effect of the pandemic, the performance was very far from what was expected. However, the region was the only one not to record a GDP contraction, enjoying a 0.7% growth. The countries that led the growth are Djibouti, Kenya, Tanzania and Rwanda with 9.9%, 5%, 4.1% and 3.9% growth respectively.

The economy was supported by the diversification of exports and the low dependence on primary commodities. The sector of services has the biggest contribution to the regional GDP, with 53.8%, compared to 28.3% for agriculture.

The region expects a 3% growth in 2021.

North African region saw negative GDP growth of -1.1% in 2020. Egypt performed a 3.6% growth despite the severe impact of the pandemic. This good performance with regards to the challenging period represents a slowdown compared to the 5.6% realised in 2019. The other countries saw significant contraction.

GDP growth decreased by 60.3% in Libya, due to the severe drop in crude oil prices, and the political instability. Tunisia's GDP also contracted by 8.8% due to the reduction of economic activities. Morocco experienced its first recession in more than 20 years, as reported by AfDB, due to climate issues that affected agriculture, added to the repercussions of lockdown on tourism.

The regional economy should rebound by 4% in 2021.

In **West Africa**, some countries achieved positive growth in 2020, due to the relatively low spread of the virus and the less restrictive containment measures. However, the regional GDP globally contracted by 1.5%. Countries like Benin, Cote d'Ivoire and Niger posted positive economic growth, while others like Capo Verde, Liberia and Nigeria saw recession.

The region was affected by the reduction in global demand affecting exports sectors like agriculture, agro-food, forestry and petroleum products.

Security issues and terrorism also prevented the growth of the region.

The rebound in commodity prices and the ease of health restrictions will allow a GDP growth estimated at 2.8% in 2021.

The GDP of **Central Africa** suffered a negative growth of -2.7% in 2020. The Republic of Congo was

the most affected country with a GDP contraction of 7.9%, followed by Equatorial Guinea that recorded a -6.1% growth.

The less affected countries were Chad and Central African Republic with GDP growth of -0.6% and 0.4% respectively.

The region was generally affected by the decline in oil production and commodity prices in addition to the disruption in economic activities during the lockdown.

The GDP growth forecast for 2021 is 3.2%.

Southern Africa was the most impacted region of Africa, with the COVID-19 crisis. The GDP growth rate reduced from 0.7% in 2019 to a negative 7% in 2020.

Mauritius and Zimbabwe suffered two digits negative growth (15% and 10% respectively). The first-named was drastically affected by the strict lockdown applied to the island to contain the virus progression. The second was already in recession before COVID, and the effects of the economic instability worsened with the pandemic.

In South Africa, the largest economy of the region, the GDP contracted by 8.2%, mainly due to the decline in construction, transport and communication, manufacturing, and mining, according to the AfDB.

The region is expected to return to growth in 2021, with a positive rate of 3.2%.

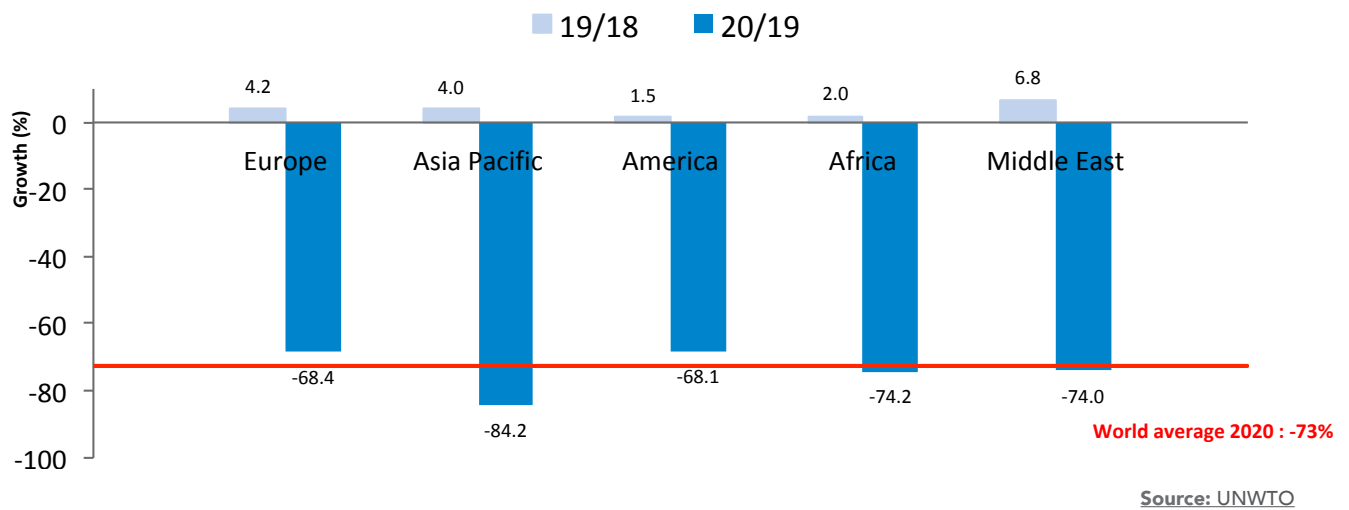
1.4 Tourism

1.4.1 International tourism

Facing the rapid spread of the virus, unknown in early 2020, almost all governments have taken strict measures to restrict movement. The lockdowns and travel restrictions had a devastating impact on the travel and tourism industry.

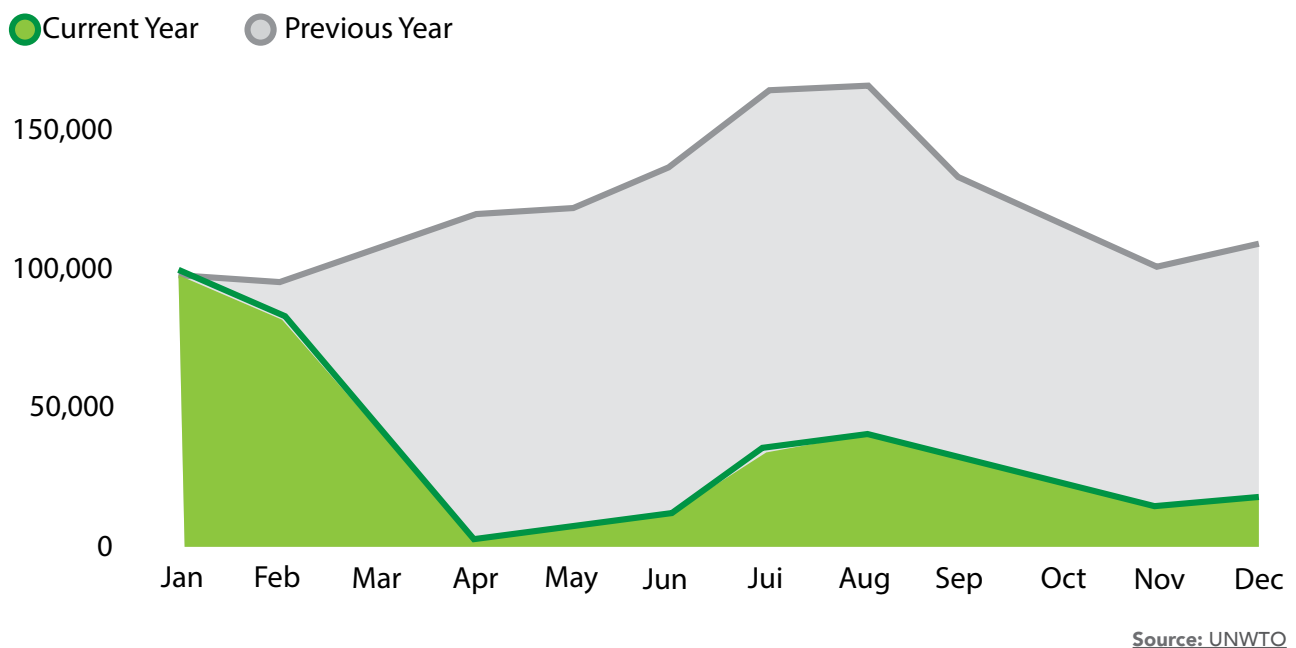
The number of international tourists arrivals was estimated at 398 million worldwide, a 72.8% drop compared to 2019 according to the World Tourism Organization (UNWTO). This represents a gap of 1.07 billion passengers.

Asia Pacific was the most impacted region with a decline of 84.1% of international tourists arrivals, the reason being that region saw the firsts COVID cases and had the highest level of travel restrictions. Middle East and Europe saw a tourist arrivals reduction of 74% and 68.5% respectively. America suffered the lowest impact with 68.2%.

Figure 1.4: International tourists arrivals growth per region

After a small rebound from July 2020 corresponding to the lift of strict lockdowns measures, the number of international tourists arrivals declined around

September, with the apparition of new variants and new waves of contamination.

Figure 1.5: Monthly international tourists arrivals 2020

As a result of the quasi complete stop of international travel during the second quarter of 2020, tourism receipts reduced by 63.6% all over the year. International tourism generated USD 536 billion, compared to USD 1466 billion in 2019, representing around USD 1.3 billion.

The level of international travels remained low during the first semester of 2021.

The surge in the number of new cases and the

appearance of new variants, more contagious and leading to more severe forms of the disease, have prompted some states to adopt new containment measures: partial lockdowns, travel restrictions, more stringent travel requirements, etc. All these limitations have led to a reduction of around 85% on international tourists arrivals.

Asia Pacific remains the most impacted region with a 95% drop.

1.4.2 Tourism in Africa

Even if the containment measures were less restrictive in Africa, tourism in the continent suffered from the travel restrictions in other regions of the world.

According to UNWTO, Africa received 18.1 million international tourists in 2020, a 74.2% decline compared to 2019 when the continent received 70.1 million international tourists. This drop is slightly superior to the world average drop of 72.8%.

In Northern Africa, Morocco and Tunisia reported the highest number of tourists.

In sub-Saharan Africa, the data available are limited. However, South Africa, Capo Verde, Madagascar, Mauritius and Seychelles that are highly touristic destinations, report a severe reduction of international tourists arrivals.

The flow of international tourists in 2020 generated USD 14.02 billion, distributed as follows: USD 8.9 billion in sub-Saharan Africa and USD 5.1 billion in North Africa.

Section Two: Airline performance

2.1 Global industry performance

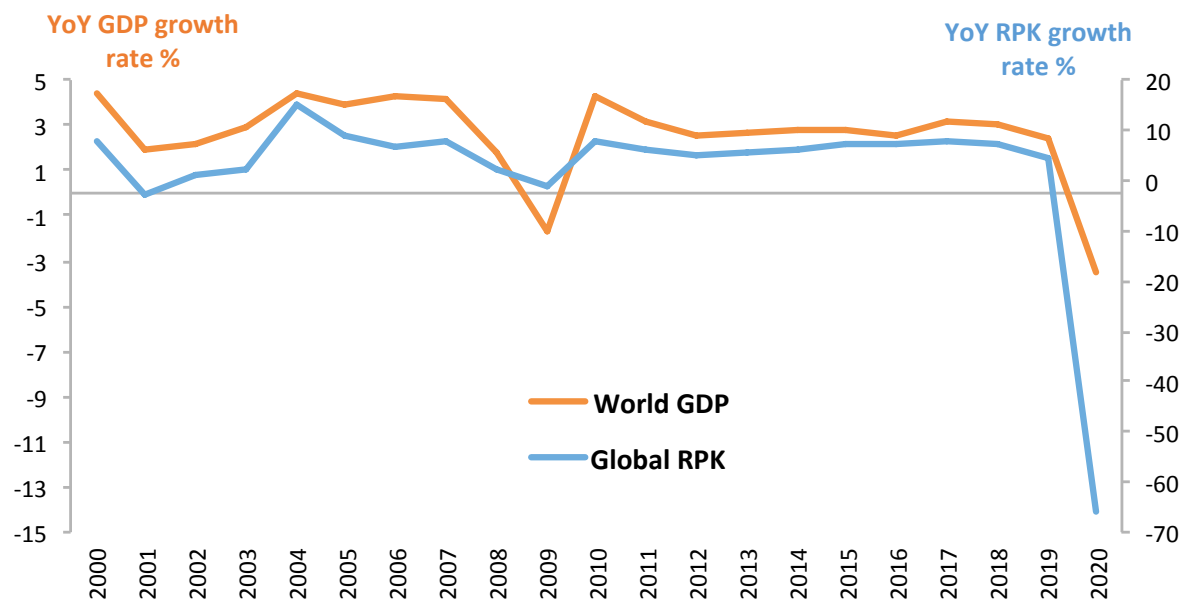
Passenger traffic

It is established that the COVID-19 pandemic had an unprecedented impact on the aviation industry.

According to IATA, the drop in passenger demand reached 60.2%, the second-largest decline since

the 1950s. Airlines worldwide carried 1.8 billion passengers in 2020 compared to the 4.5 billion realised in 2019. RPKs declined by 65.9%, while ASKs reduced by 56.7%.

Figure 2.1: Worldwide RPK and GDP growth



Source: IATA, IMF

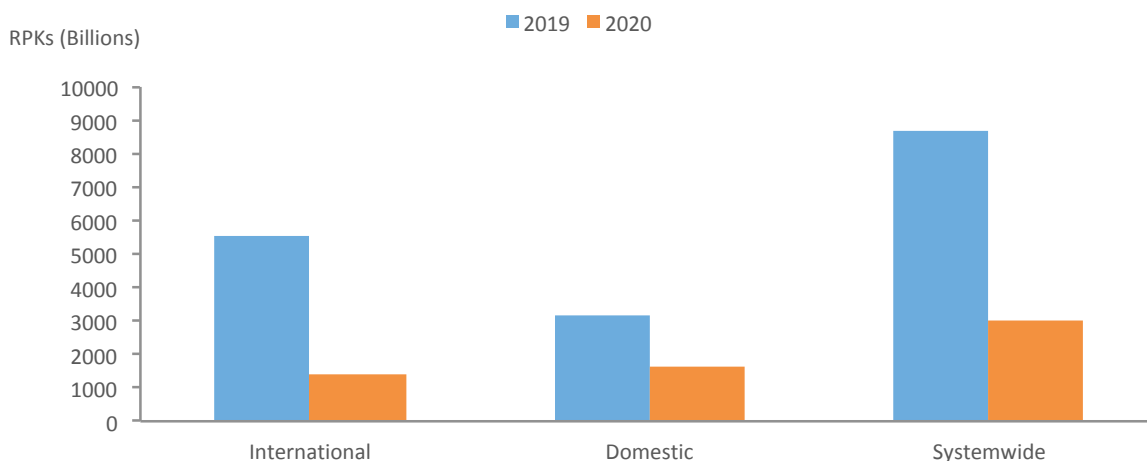
The average global return ticket fare reduced significantly, to reach USD 242 compared to the USD 310 achieved in 2019.

Domestic traffic showed more resilience than International traffic, as containment measures

were less strict within a country. The domestic RPKs reduced by 48.7% compared to 2019, while international RPKs dropped by 75.6%.

The share of domestic market RPKs systemwide increased from 36% in 2019 to 54% in 2020.

Figure 2.2: World Scheduled RPKs 2019-2020 (Billion)

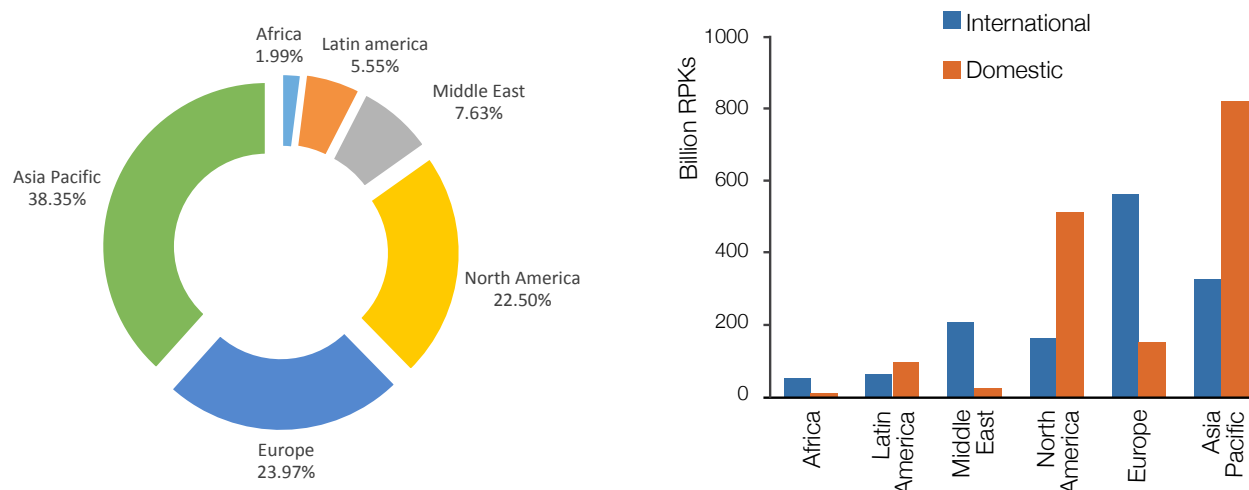


Source: IATA WATS / AFRAA

Despite the impact of the pandemic, Asia Pacific remains the region with the highest level of RPKs. The region represents 38.35% of the global RPKs.

Europe and North America follow, representing 23.97% and 22,50% respectively. The share of Africa reduced to less than 2%.

Figure 2.3: RPK per region – Scheduled services



Source: IATA WATS / AFRAA

Unlike the previous years, the domestic market became dominant in many markets, namely North America, Asia Pacific and Latin America with a share of 76%, 72% and 61% respectively.

International traffic was leading in Europe, Middle East and Africa.

Passenger Load Factor

In 2020, the industry achieved a passenger load factor

of 65.1%, a 17.4% drop compared to 2019 where the industry load factor was 85.5%. The load factor of Domestic flights was 66.6% while International flights load factor was 63.4%.

Latin American airlines achieved the highest load factor with 75.4%. The other regions follow with Europe (68.7%), Asia Pacific (67.3%), Africa (60.1%), North America (59.4%) and Middle East (57.8%).

Table 2.1: Passenger Load factor for all regions 2020

	Passenger LF	% Change
Africa	60.1%	-12.2
Asia Pacific	67.3%	-14.5
Europe	68.7%	-16.5
Latin America	75.4%	-7.1
Middle East	57.8%	-18.4
North America	59.4%	-25.3
Industry Average	65.1%	-17.4

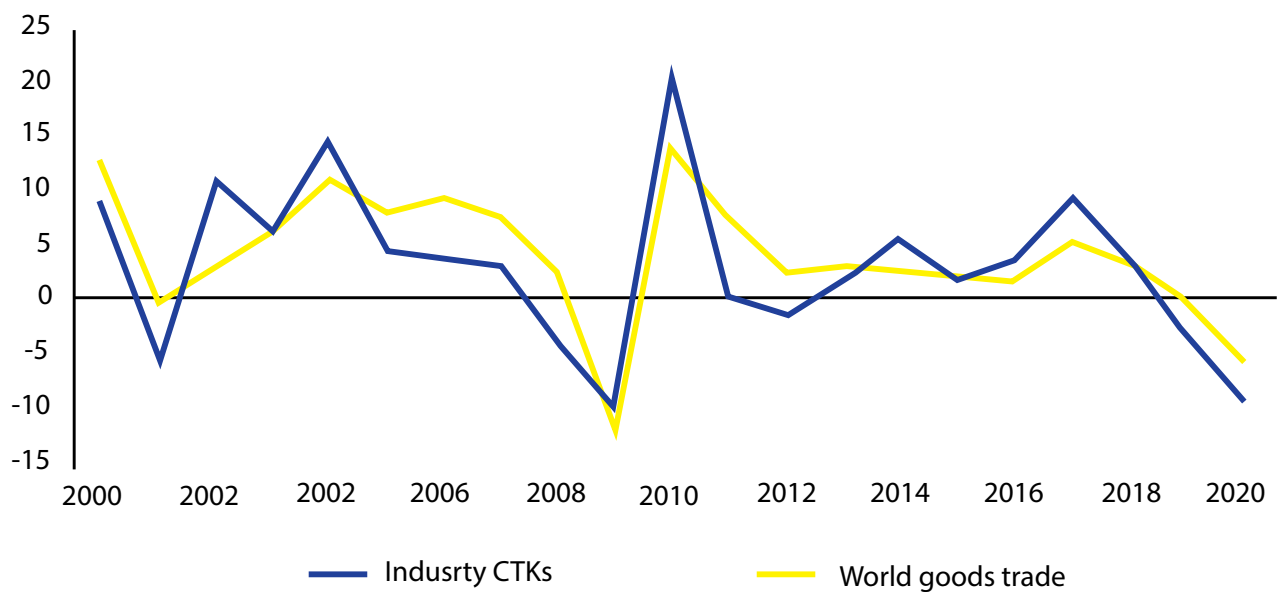
Source: IATA WATS

Freight traffic

The international trade tensions during the year had an impact on cargo operations.

According to IATA, Global airlines moved 57.5 million tonnes in 2020 compared to 60.965 million

in 2019. As a result, international CTGs reduced by 11.1%, impacting negatively the systemwide growth that reduced by 9.7%.

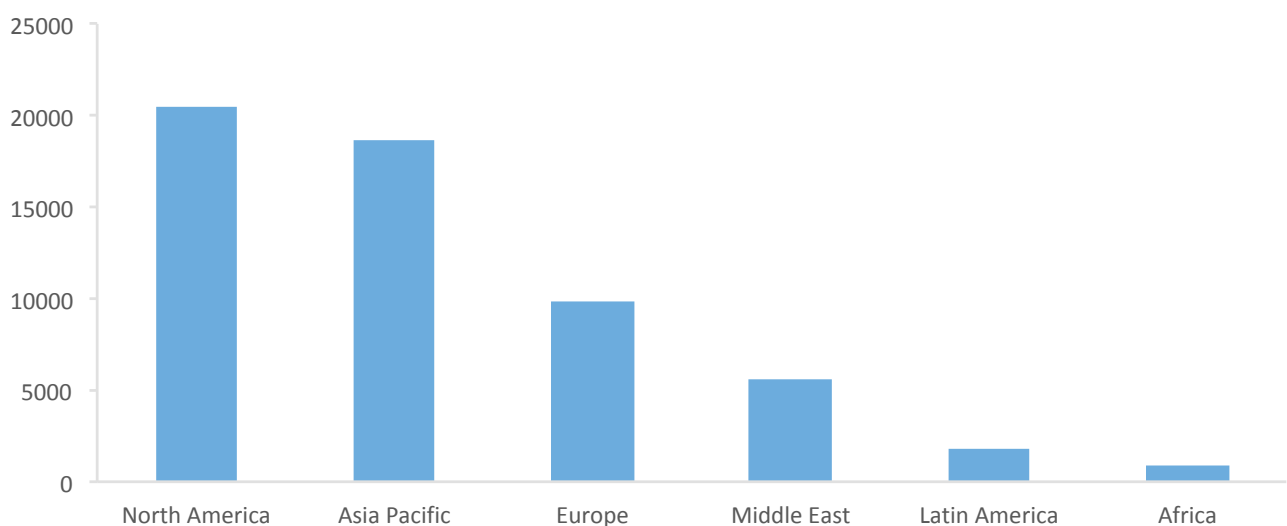
Figure 2.4: Worldwide CTK and world Goods Trade growth

Source: IATA, IM

The lockdowns imposed by many states in early 2020 led to a severe reduction of the belly cargo capacity, and also impacted the demand. However, with the partial lifting of containment measures and the surge in e-commerce, cargo traffic

rapidly recovered and by the end of the year, the level of CTKs was close to the pre-COVID level.

The cargo load factor increased by 7%, due to the reduced capacity, insufficient to accommodate the rebound in demand.

Figure 2.5: Freight Carried by Region (thousand tonnes) – 2020

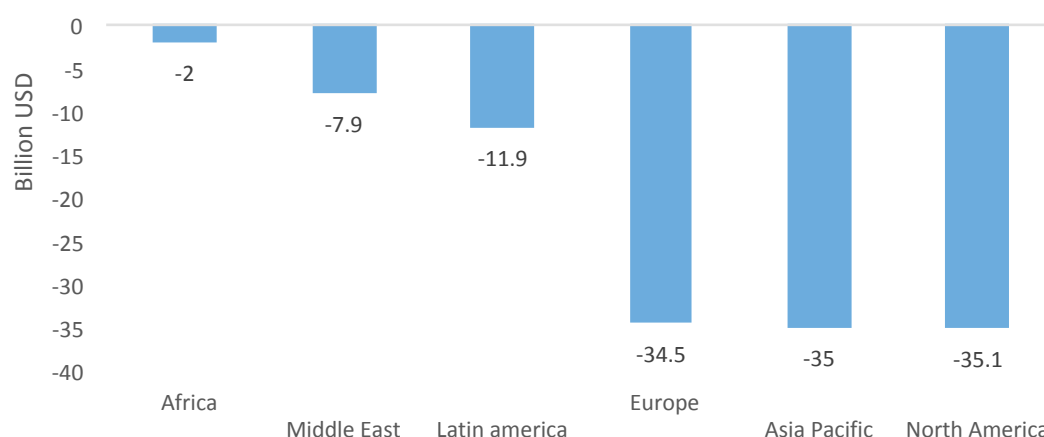
Source: IATA WATTS

Financial Performance

With the almost collapse in airlines activities due to the COVID-19 outbreak, the overall industry realised an unprecedented net loss of USD 137.7 billion in 2020.

All regions experienced losses. IATA reports that North American airlines, which achieved the best results in terms of profitability before the COVID

crisis, recorded revenue losses of more than 30% in 2020. European airlines realised the same performance. Asia Pacific airlines achieved 27% of revenues losses while airlines from Latin America posted losses of 33%. Middle East and African carriers both posted 19% revenue losses.

Figure 2.6: Net profit per region – Scheduled services 2020

Source: IATA WATS / AFRAA

The return on invested capital (ROIC) drastically dropped BY 19.3%, after a 5.8% positive growth in 2019, according to IATA. The global revenue per passenger stood at USD -76.2, a serious loss of

USD 82 compared to 2019. The financial situation is expected to improve slightly next year and the net profit per passenger will improve to reach a negative USD 22.7.

Table 2.2: Worldwide profitability and return on capital

Worldwide industry	2019	2020	2021(est.)
ROIC, % invested Capital	5.8%	-19.3%	-10.4%
Net post-tax profits, \$ billion	26.4	-137.7	-51.8
\$ per passenger	5.8	-76.2	-22.7

Source: IATA

By region, Africa realised the smallest loss per passenger, which is USD 44.6 in 2020. Latin American

airlines showed the worst performance with USD -89.3 per passenger, reported IATA.

Table 2.3: Airline profits per passenger by region

Region	Profit per passengers 2019 (US\$)	Profit per passengers 2020 (US\$)	Profit per passengers 2021 (US\$) (*Forecast)
North America	17.0	-66.4	-7.3
Europe	5.42	-66.54	-33.39
Asia-Pacific	2.9	-51.4	-12.3
Middle East	-6.8	-78.0	-55.9
Latin America	-2.2	-89.3	-34.5
Africa	-2.7	-44.6	-31.6
World Average	5.8	-76.2	-22.7

Source: IATA

Jet fuel price

Crude oil prices collapsed in 2020, particularly during the second quarter. In April, the price per barrel reduced by 70% compared to January.

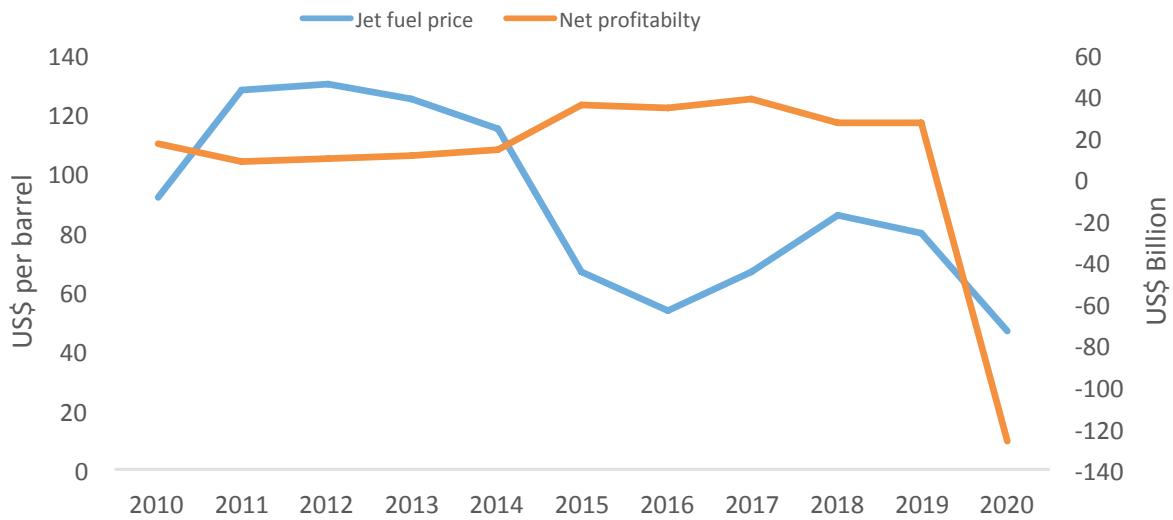
On average, the crude oil price reduced to USD 41 in 2020 compared to USD 64 in 2019.

This had an incidence on Jet fuel price, in addition

to the drop in demand, as airlines almost stopped operations.

The jet fuel price averaged at USD 46.6 per barrel in 2020, representing a reduction of 42% compared to 2019 according to IATA.

As a result, the share of jet fuel costs significantly reduced, from 23.5% in 2019 to 16.4% in 2020.

Figure 2.7: Evolution of Jet fuel price vs Net profitability

Source: IATA WATS

Global Passengers and freight traffic forecasts

The uncertainty about Air traffic remains, in the persistent COVID-19 context. Long-term forecasts are difficult to establish and subject to frequent modifications. The reason is that many new factors influence the demand, namely the vaccination rate, the appearance of new variants and the travel restrictions.

IATA estimates that Passenger traffic will grow at an annual rate of 2.6% over the period 2019-2024. Boeing forecast a 4% growth over the same period. ICAO on its hand foresees an annual growth of 4.2% up to 2038.

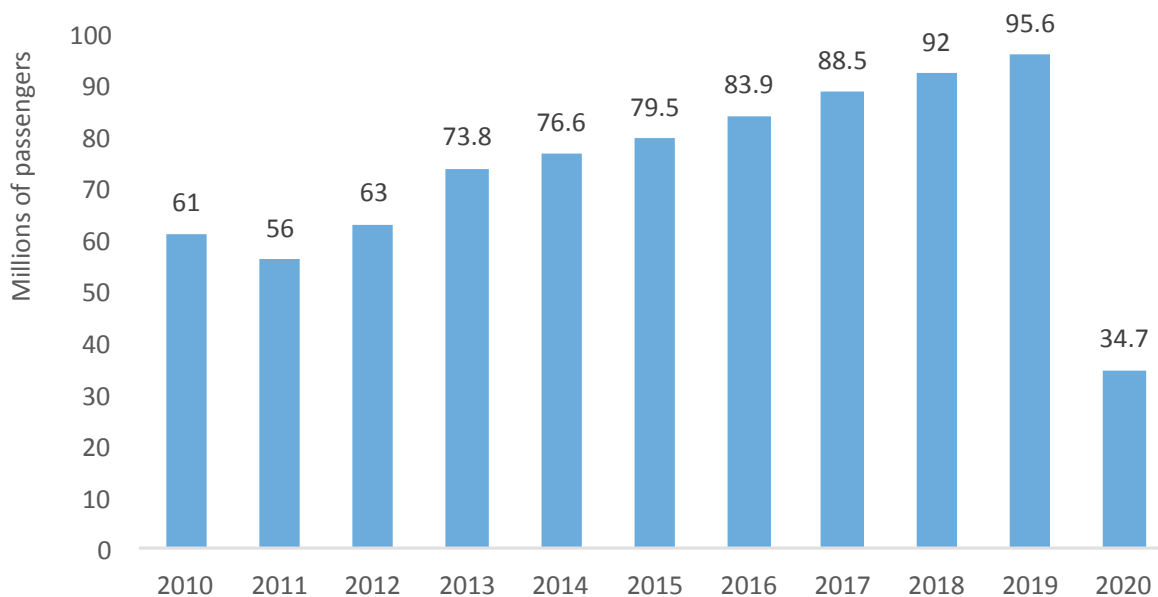
2.2 African Airlines performance

Passengers carried

As for all other regions, Africa saw a huge drop in passenger traffic in 2020. From 95.64 million passengers in 2019, African airlines carried only 34.7 million passengers in 2020, representing a year-on-year drop of 63.7%.

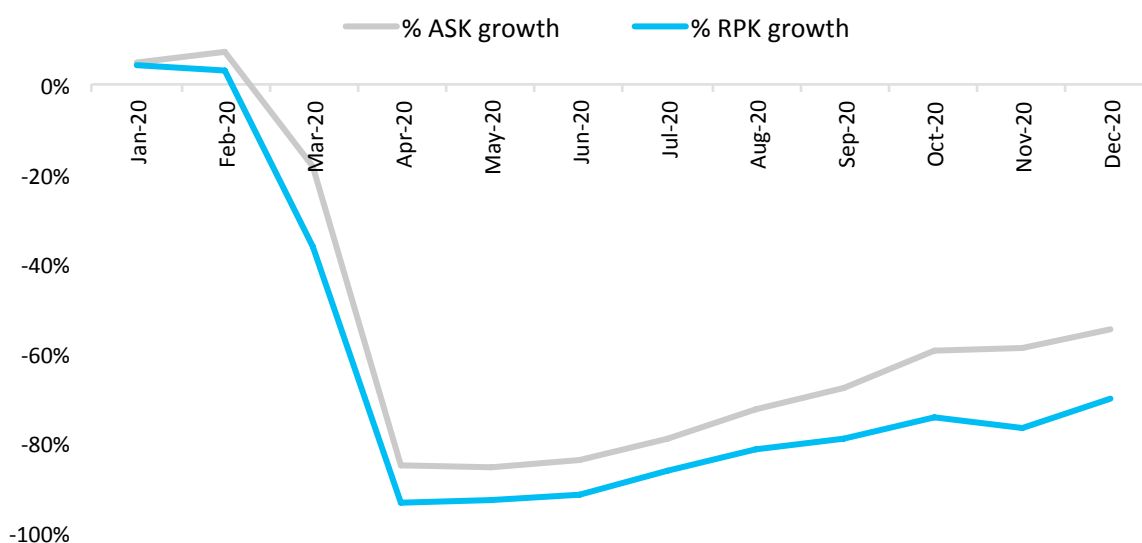
The continent has the weakest contribution to the global air traffic: the share of African airlines traffic reduced from 2.11% in 2019 to 1.9%.

Figure 2.8: Passengers carried by African airlines scheduled operations



Source: IATA/AFRAA

Figure 2.9: African airlines ASK and RPK growth



Source: AFRAA /OAG

African airlines' Asks and RPKs followed the same trend as the global industry. From the end of March, the majority of carriers grounded their aircraft, causing a drastic ASK and RPK drop of

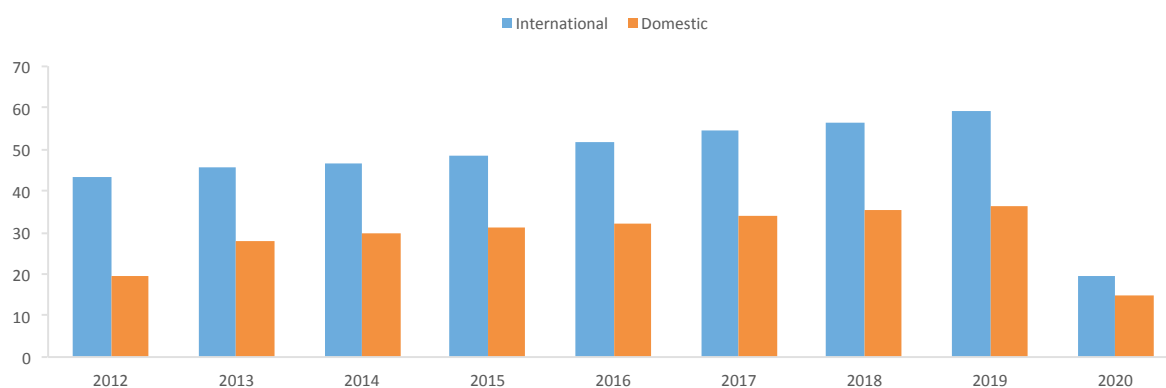
85% and 94% respectively in April. The reduction in traffic continued until June, before reversing with the gradual reopening of borders.

Domestic and International traffic

The traffic repartition shows that African airlines globally carried more domestic traffic in 2020, around 43% of the total traffic compared to 38%. In absolute figures, this represents 15.06 billion passengers.

International traffic represented 57%, breaking down into 19% of Intra-African and 38% of intercontinental passengers.

Figure 2.10: African airlines Passenger split 2012-2020



Source: IATA WATS

The top 5 African countries in terms of passengers in 2020 are as follows:

Table 2.4: Top 5 passenger countries in Africa in 2020 (domestic + international traffic)

	2020 Passengers	%growth over 2019
South Africa	11423346	-63,3
Egypt	8975048	-59,8
Morocco	6642788	-65,2
Ethiopia	5196775	-54,2
Nigeria	5604073	-21,2

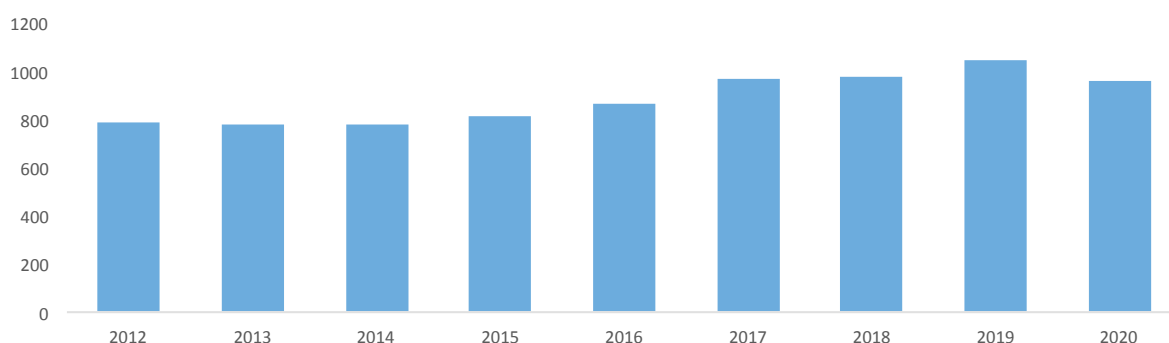
Source: AFRAA / OAG

Freight Carried

In terms of cargo traffic, IATA reports that African airlines moved 960 thousand tonnes of cargo in 2020. This represents a drop of 3.3% compared to the 2019 cargo traffic.

As for passenger traffic, the contribution of African airlines is marginal to the global cargo traffic: only 1.66%.

Figure 2.11: African Airlines Year-on-Year Freight Carried (thousand tonnes) – 2020



Source: AFRAA/IATA WATS

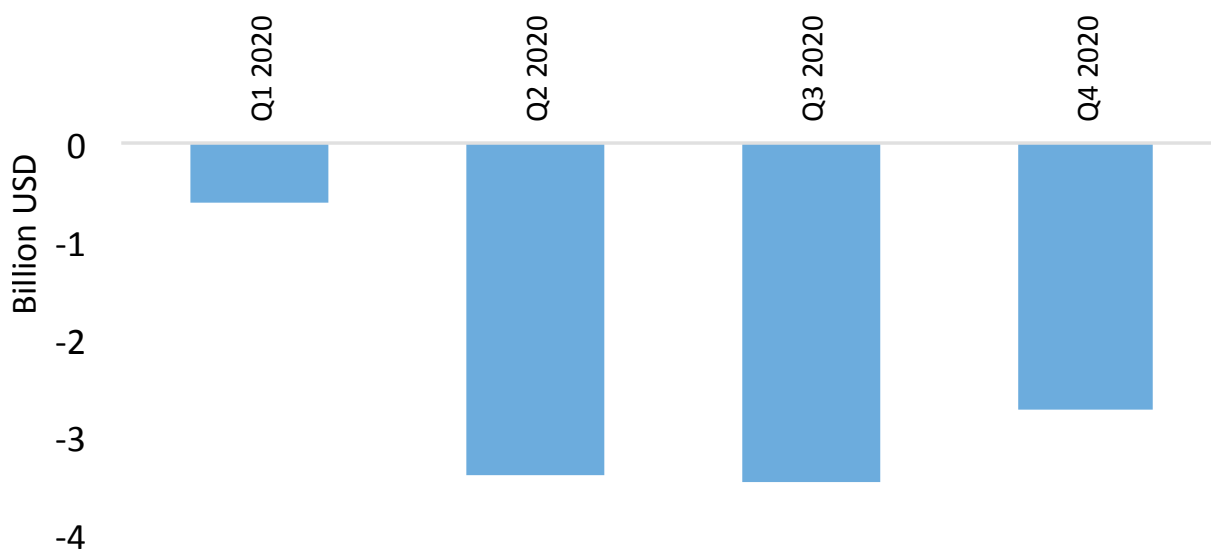
Financial performance

The COVID-19 crisis had a devastating impact on airlines' finance around the world.

For African airlines, whose financial situation was

already precarious, the impact was even greater. For the year 2020, the Passenger revenue loss is estimated at USD 10.21 billion.

Figure 2.12: African Airlines Passenger revenue losses – 2020



Source: AFRAA

Quarter 2 and 3 were the most affected, before a smooth recovery during the 4th quarter.

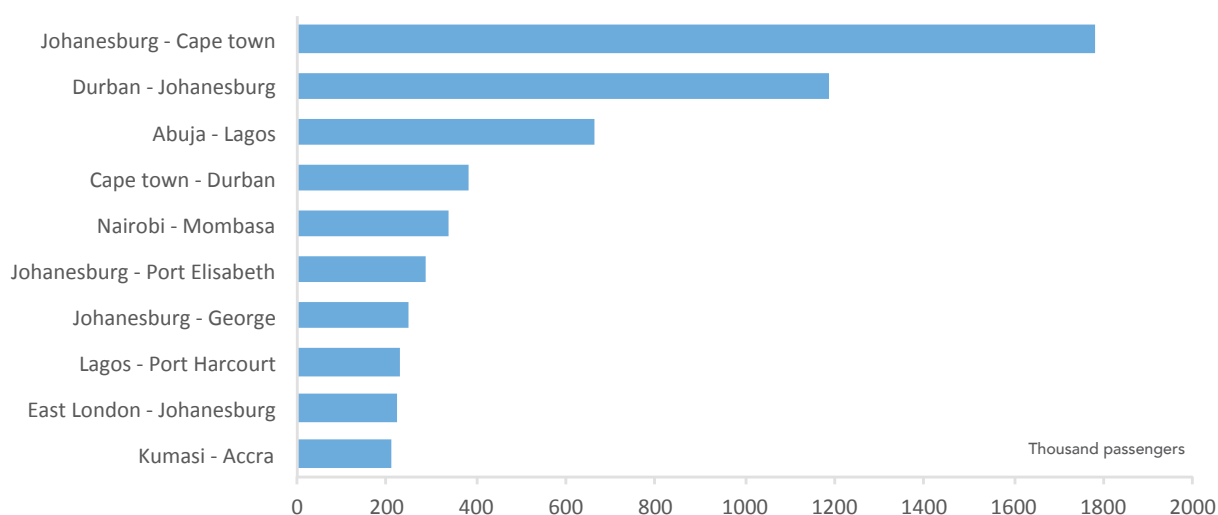
According to our forecasts, African airlines will continue to lose money in 2021, even if the amount will reduce. We estimate the overall

Passenger revenue losses for 2021 at USD 8.35 billion.

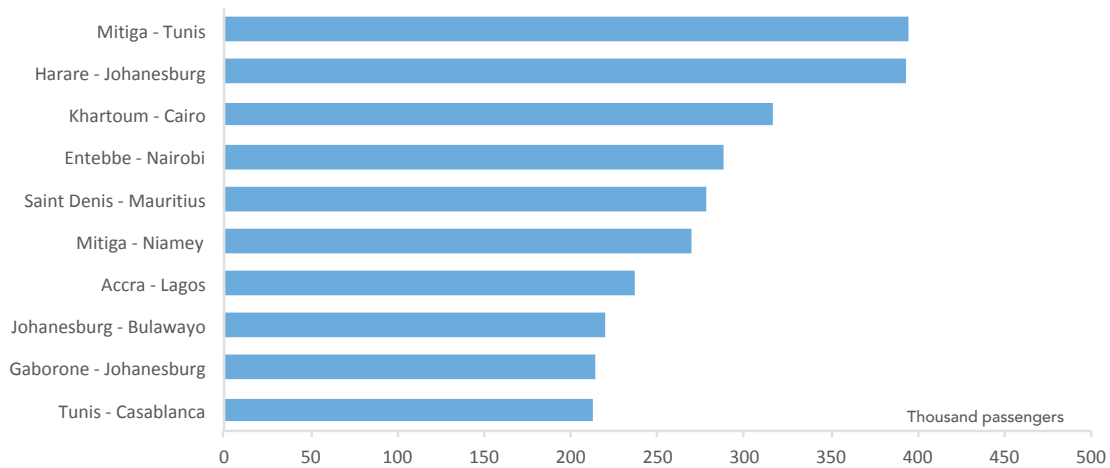
Routes ranking

In terms of routes, the top 10 airport pairs for regional and intercontinental routes are as follows:

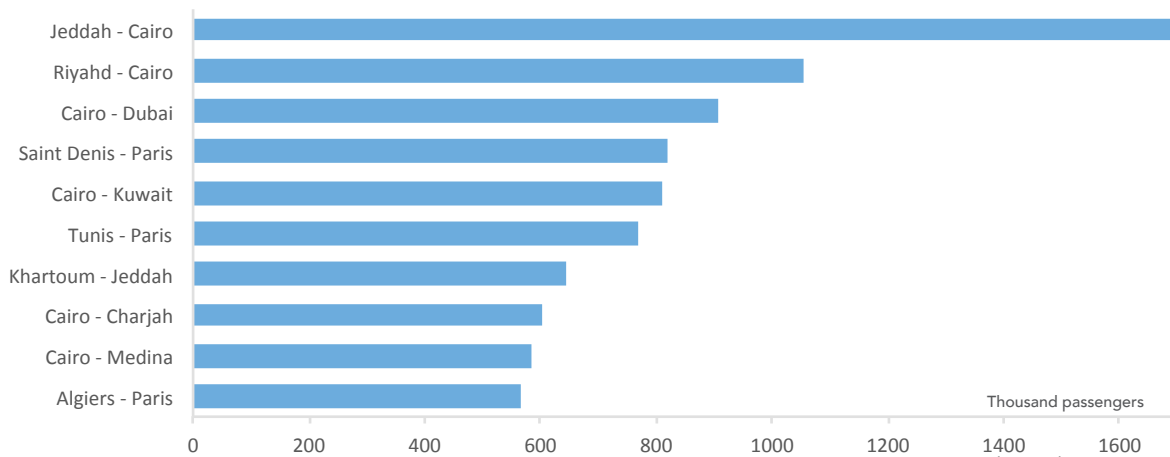
Figure 2.13: Top 10 domestic routes in Africa in 2019 by passengers carried



Source: AFRAA / OAG

Figure 2.14: Top 10 Intra-African routes in Africa in 2020 by passengers carried

Source: AFRAA / OAG

Figure 2.15: Top 10 international routes to/from Africa 2020 by passengers carried

Source: AFRAA / IATA WATS

2.3 AFRAA Airlines performance

The AFRAA airlines' performance below is based on the report of 16 members that submitted their data.

Passenger Traffic

The 15 AFRAA member airlines that reported their 2020 data carried 14.2 million passengers, representing 41% of the total number of passengers transported by African airlines. 52.7% of this traffic

was intercontinental. Domestic and Intra-African traffic represented 23.5% and 23.8% respectively.

The top 5 airlines by passengers carried on scheduled passengers are as follows: Ethiopian Airlines (4.940 million), EgyptAir (2.844 million), Royal Air Maroc (2.250million), Tunisair (0.974 million) and South Africa Airways (0.938 million).

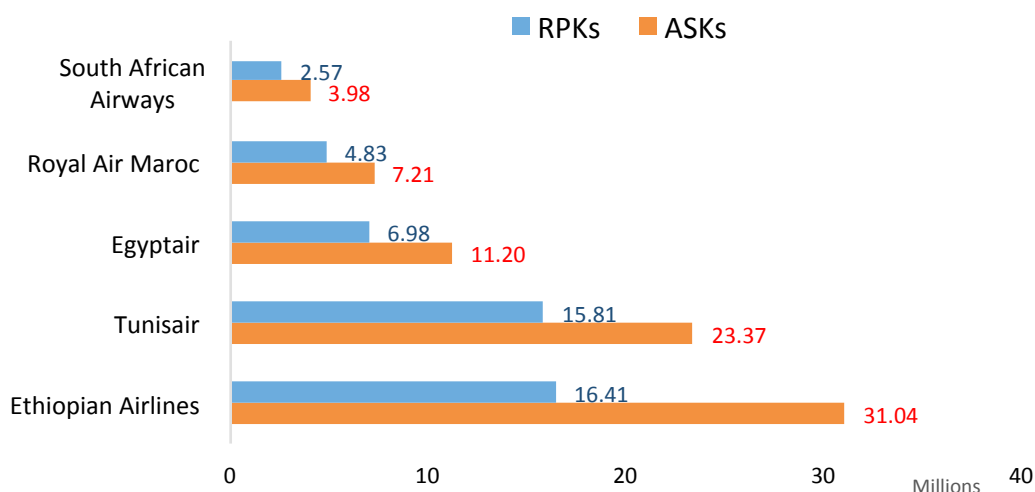
Table 2.5: Total Passenger Carried by 15 AFRAA member airlines in 2020

Airline Name	Domestic Passengers (000)	Regional Passengers (000)	Intercontinental Passengers (000)	Total (000)
Ethiopian Airlines	997	1 988	1 956	4 940
EgyptAir	546	350	1 948	2 844
Royal Air Maroc	434	457	1 360	2 250
Tunisair	0	121	853	974
South African Airways	770	54	114	938
Air Mauritius	90	147	171	407
TAAG Angola	134	84	141	359
Rwandair	6		340	346
Nile Air	92	0	235	327
Nouvelair Tunisie	0	0	319	319
Precision Air	190	55	0	245
Overland Airways	74	0	0	74
Uganda Airline	0	61	0	61
Air Djibouti	0	42	6	48
Air Madagascar	0	13	16	29

The reporting AFRAA airlines put a total capacity of 84.7 billion ASKs in 2020 compared to 162.11 billion in 2019. The same airlines reported a total of 51.14 billion RPKs far less than the 117.23 billion RPKs reported in 2019.

The top five largest African carriers in terms of ASKs and RPKs are as follows:

Figure 2.16: ASKs and RPKs of some AFRAA airlines – 2020



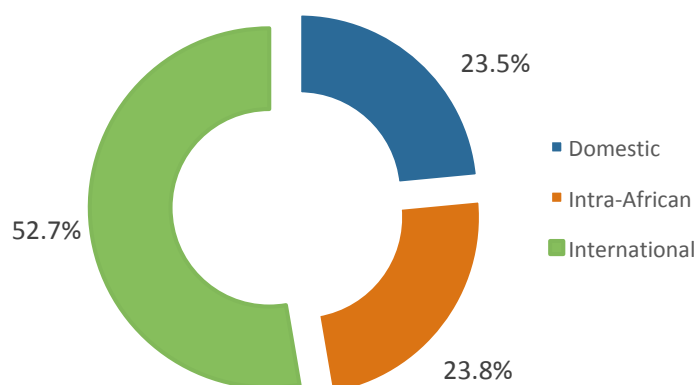
Source: AFRAA

Passenger distribution

The AFRAA member airlines that reported their 2020 data carried 14.2 million passengers, representing 41% of the total number of passengers transported

by African airlines. 52.7% of this traffic was intercontinental. Domestic and Intra-African traffic represented 23.5% and 23.8% respectively.

Figure 2.17: 15 AFRAA member airlines' passenger distribution 2020



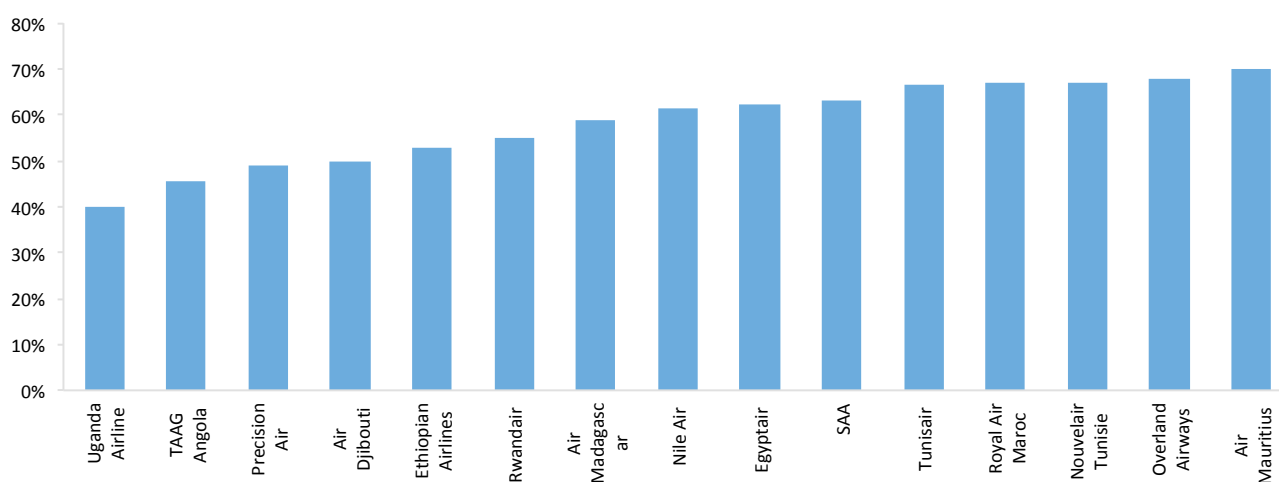
Source: AFRAA/OAG

Load Factor

The 15 airlines achieved a load factor of 60.3%, around 5% less than the industry average that is 65.1% and 11.9% less than the 2019 level.

As for all other regions, the load factor reduced because of the huge traffic drop, due to the COVID-19 crisis.

Figure 2.18: Passenger Load Factor for 15 AFRAA member airlines – 2020



Source: AFRAA/OAG

Among the member airlines that reported their statistics, the highest average passenger load factors in 2019 were achieved by: Air Mauritius with

70%, Overland Airways with 67.8%, Nouvelair Tunisie with 67%, Royal Air Maroc with 67% and Tunisair with 66.6%.

Freight Carried

12 AFRAA airlines reported on freight performance in 2020. Together, they moved 718.3 thousand tonnes of cargo in 2020. This represents 74.8% of the scheduled freight by African carriers.

The freight performance increased compared to 2019, as the same airlines carried 686.3 thousand tonnes last year. The intra-African freight traffic represents 21.3% while intercontinental have a share of 78.7% of the total traffic.

Table 2.6: Total Freight Carried by some AFRAA member airlines in 2020 (tonnes)

Airline Name	Domestic Freight (tonnes)	Regional Freight (tonnes)	Intercontinental Freight (tonnes)	Total (tonnes)
Ethiopian Airlines	1467	130820	427256	559544
EgyptAir	107	10884	112696	123686
Royal Air Maroc	280	3588	9991	13859
Air Mauritius	37	5378	6384	11799
Rwandair	-		6049	6049
Tunisair	-	258	2326	2584
Air Madagascar	-	16	440	456
Nouvelair Tunisie	-	-	105	105
Air Djibouti	-	72	16	88
Nile Air	-	-	80	80
South African Airways	2	4	7	12
TAAG Angola	1	1	4	6

Source: AFRAA

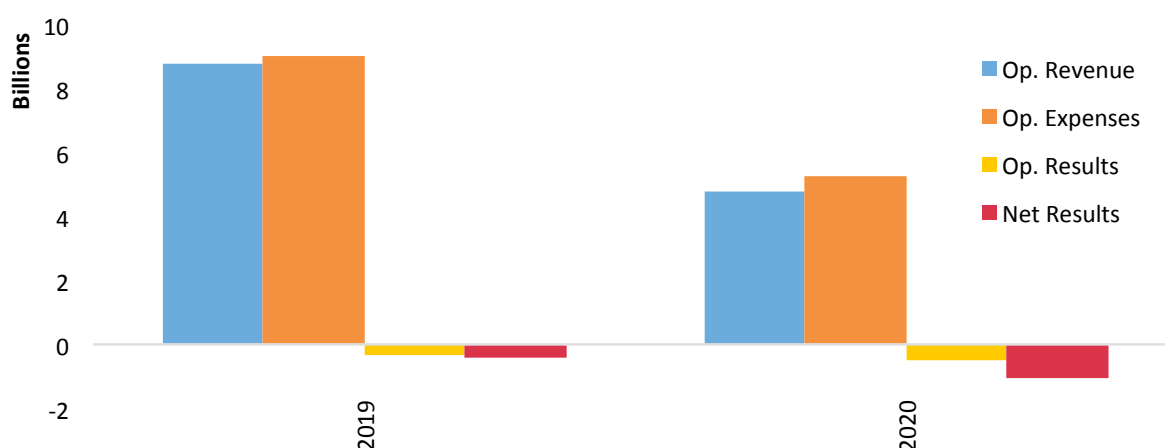
Financial performance

The 12 reporting AFRAA airlines produced USD 8.797 billion of total operating revenue in 2020. Due to the severe impact of the COVID-19 crisis on operations, this reduced to USD 4.767 billion in 2020.

Operating expenses stood at USD 5.259 billion, resulting in a negative Net result of USD 1.059 billion.

3 of the 12 airlines reported a positive net result: Ethiopian Airlines ranked first with a profit of USD 267.144 million, versus USD 160.714 million in 2019. Overland Airways and Air Djibouti also realised profits of USD 2.159 million and USD 866.112 thousand respectively.

Figure 2.19: Financial results of 12 AFRAA airlines in 2020



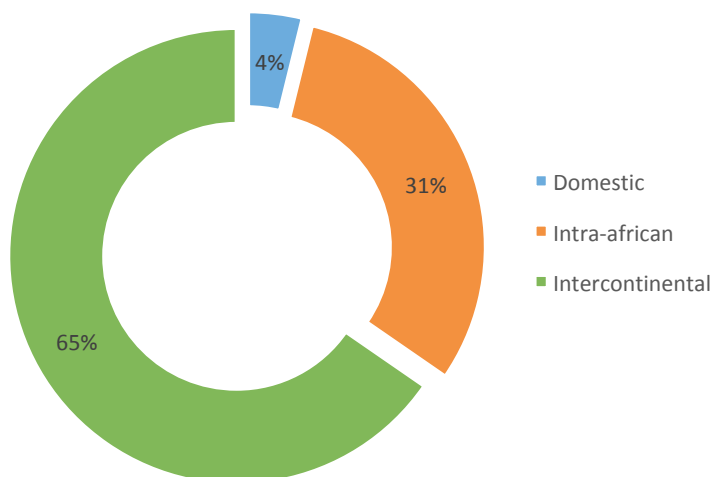
Source: AFRAA

Routes

AFRAA airlines that reported in 2020 expanded their networks on both intra-Africa and intercontinental routes. 26 new destinations were opened by

6 airlines. Only 1 was domestic, 8 intra-Africa and 17 were intercontinental destinations.

Figure 2.20: New destinations by 7 AFRAA airlines – 2020



Source: AFRAA

Table 2.7: New routes by 6 AFRAA airlines in 2020

	Airline	New Destinations
1	Air Djibouti	Bosaso – Jeddah
2	EgyptAir	Aqaba -Burgas - Sofia- Ljubljana - Prague - Colombo - Lilongwe - Niamey - Ostrava - Malta - Conakry - Ankara
3	Ethiopian Airlines	Zhengzhou - Dhaka - Wuhan
4	Precision Air	Mbeya
5	Royal Air Maroc	Dubai - Beijing - Dusseldorf
6	Uganda Airlines	Mombasa - Zanzibar - Bujumbura - Kinshasa - Kilimanjaro

Source: AFRAA

Passenger traffic forecast in Africa

The great uncertainty on the Global air traffic forecast also applies to the African continent.

Even if the travel restrictions are relatively low across the continent, the slow pace of vaccination is a burden to the full restart of air travel.

AFRAA estimates that African airlines will carry 43 million passengers in 2021, representing around 45% of 2019 traffic. In 2022, the traffic is expected to reach 67 million passengers.

Section Three: Fleet

In its 2021 Commercial Market Outlook, Boeing estimates that the global commercial airline fleet was composed of 25,900 aircrafts. From 2021 to 2040, the number of new aircraft deliveries is

forecasted at 43,610, and this will bring the fleet to 49,405 in 2040. The deliveries will come in addition or to replace the existing fleet.

Table 3.1 Global aircraft in service in 2019 and additional demand by 2040

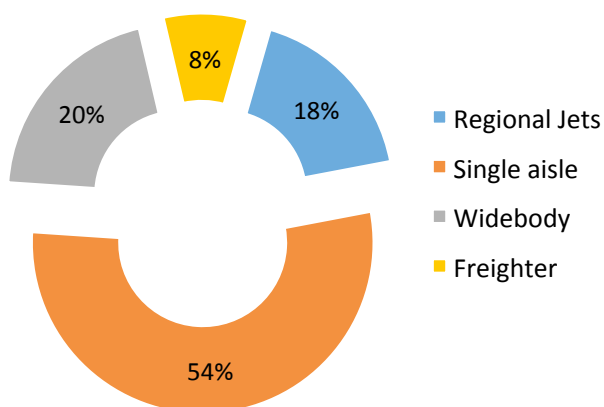
	2019	2040	Deliveries
Regional Jets	2,710	2,390	2,710
Single aisle	16,520	32,660	34,360
Wide body	4,660	7670	8900
Freighter	2,010	890	3435
Total	25,900	43,610	49,405

Source: AFRAA/Boeing

For the African region, the fleet is estimated at 1,030 aircraft. The continent expects 740 new deliveries

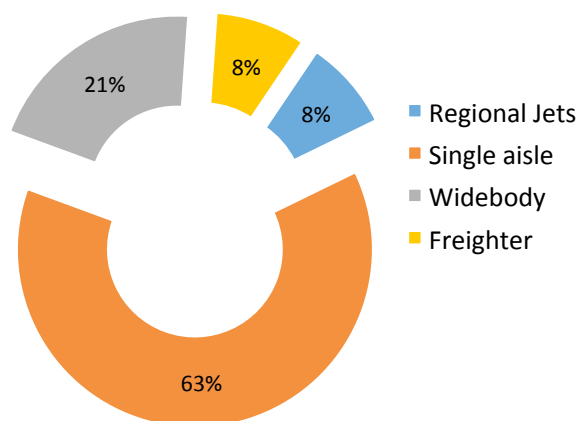
over the next 20 years. The fleet is estimated to grow by 3.6% over 20 years.

Figure 3.1: Africa fleet composition – 2019



Source: Boeing Market Outlook

Figure 3.2: Africa fleet forecast – 2040



Source: Boeing Market Outlook

According to Boeing, 54% of the aircrafts in operation in Africa are made up of single-aisle type. Freighters represent 8%, wide-body aircrafts 20%, and regional jets 18%.

For AFRAA member airlines, the top 10 operators with the largest fleet size in 2020 is shown in the following table:

Table 3.2 Top 10 AFRAA airlines in terms of Fleet in 2020

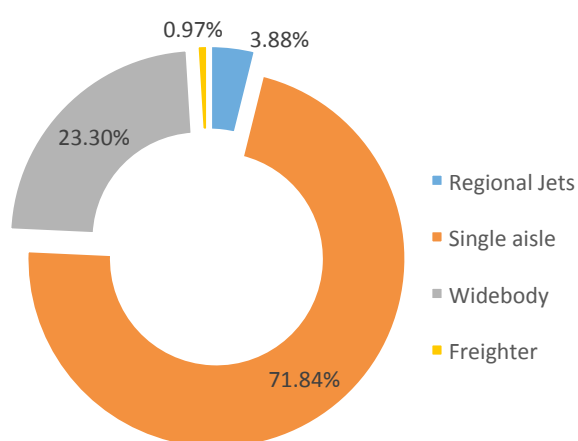
Airline	No of aircraft in service
Ethiopian Airlines	127
EgyptAir	68
Royal Air Maroc	59
Air Algerie	28
South Africa Airways	19
Kenya Airways	15
Tunisair	13
Air Mauritius	12
Tassili Airlines	10
Taag Angola	10

Source: AFRAA

Fleet Forecast

According to Boeing's previsions, the world's active fleet is expected to grow at an average annual rate of 3.1% over the next 20 years. The number of aircrafts in service will reach 43,610 airplanes by the year

2040. By region, it is estimated that approximately 2.36% of the new airplanes will be delivered to African airlines, while Asia-Pacific will receive 40.46% of new deliveries.

Figure 3.3 Africa's 20-year fleet deliveries forecast

Source: AFRAA / Boeing

1,030 new aircrafts are expected to be delivered to African airlines over the 20 next years. Among those aircrafts, 71.8% will be single-aisle airplanes,

23.3% will be wide-body airplanes, regional jets will account for 3.9% and freighters for less than 1%.

Section Four: Employee productivity

IATA estimates that total employment by airlines declined from 2.93 million in 2019 to 2.48 million in 2020. This represents a year-on-year reduction of 15.6%. The governments' relief measures helped to

mitigate the adverse effects of the Covid pandemic. Unit labour costs reduced significantly by 18.1% in 2020 and IATA forecasts a small positive growth of 1% for the year 2021.

Table 4.1 Worldwide airline industry employment

	2019	2020	2021 (est.)
Labour costs, US\$ billion	189	155	156
Employment (million)	2.93	2.48	2.48
Unit labour cost: \$/ATK	0.123	0.180	0.159

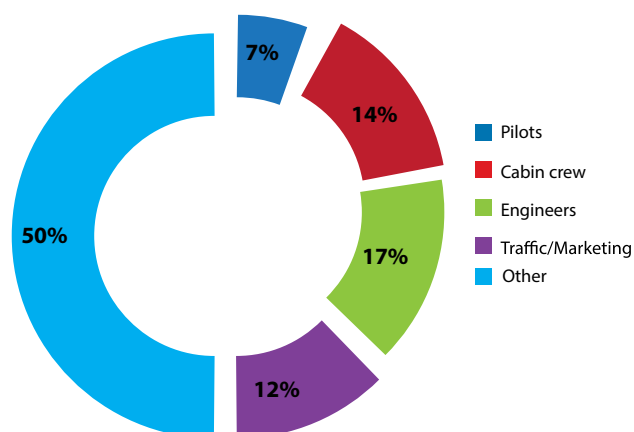
Source: IATA, ICAO, ATAG, Oxford Economics

The analysis below is based on the reported data by 15 AFRAA member airlines

The 15 AFRAA member airlines that reported their

data in 2020 directly employed 58,352 persons in 2020, compared to 61,747 in 2019, representing a reduction of 3395 jobs.

Figure 4.1 AFRAA airlines Employees by Job Type in 2020



Source: AFRAA – Reported AFRAA airlines only

Figure 4.2 AFRAA airlines Employment by Job Type 2019/2020

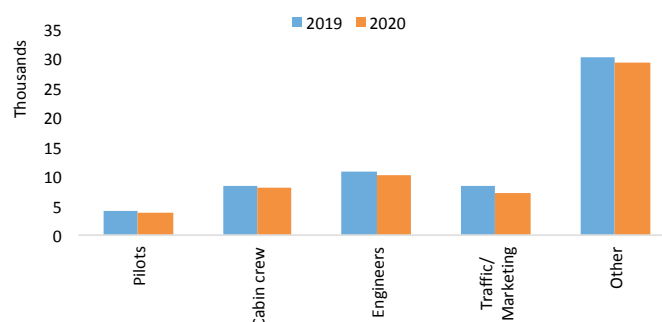


Table 4.2: Employee Performance Indicators for AFRAA reporting airlines

	2019	2020
ATK/employee	395 242	247 079
RTK/employee	236 729	122 469
Number of passengers/employee	747	214
Employee/aircraft	167	131

Source: AFRAA – Reported AFRAA airlines only

The employee productivity of AFRAA members seriously reduced in 2020. The ATK per employee, as well as the RTK per employee, were both

reduced by more than 30%.

The number of employees per aircrafts dropped by 71%.

Section Five: Airports statistics

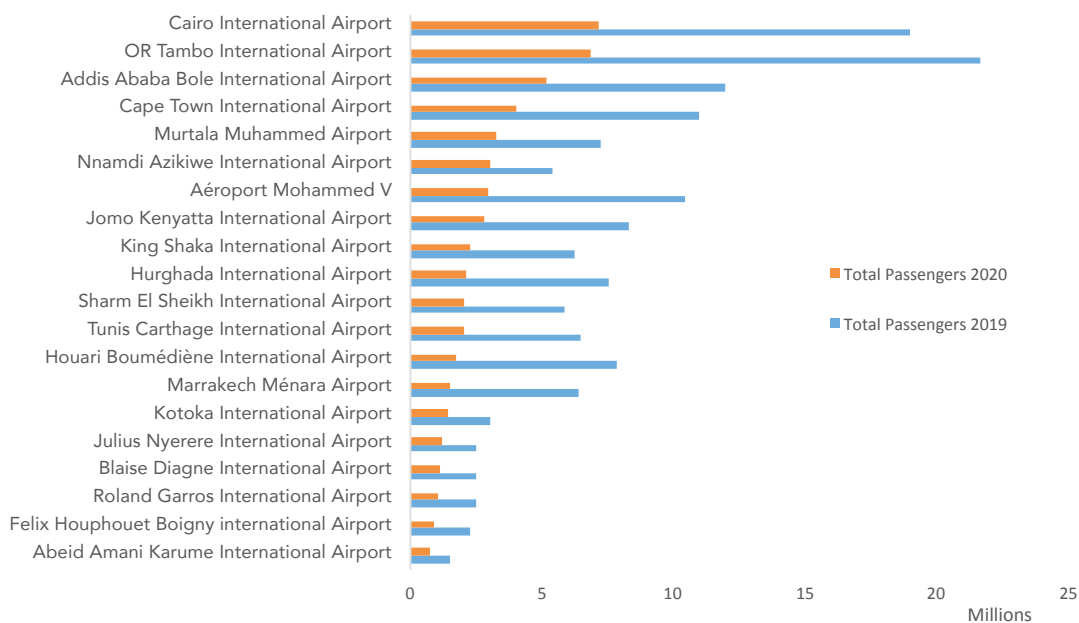
ACI Africa reports that African airports recorded 228 million passengers in 2019. With the pandemic, the traffic reduced to 73 million in 2020. This represents a year-on-year drop of 68%.

The traffic is distributed as follows: 56.7% of

international passengers, 40.6% of domestic passengers, and 2.7% of direct transit passengers.

Cairo was the busiest airport in terms of traffic, with 7.1 million passengers. Johannesburg and Addis are following with 6.8 million and 5.2 million passengers respectively.

Figure 5.1: Top 20 African Airports by total passengers carried 2019 - 2020



Source: AFRAA / ACI AFRICA

Freight traffic reduced in 2020 by 789 thousand tonnes compared to 2019.

Addis Ababa Bole airport achieved the highest

performance, increasing its freight traffic by more than 240 thousand tonnes.

Figure 5.2: Top 20 African Airports by total cargo carried 2019 - 2020



Source: AFRAA / ACI AFRICA

Section Six: Safety

The total number of fatal accidents involving commercial airlines in 2020 was 5, resulting in 301 fatalities. This is an improvement compared to 2019, where we had 8 fatal accidents, but 249 fatalities.

No fatal accidents occurred in the African region or involving African regular carriers.

Table 6.1: World Airline Fatal Accidents in 2020

	Date	Aircraft Type	Operator	Fatalities	Flight Type	Location
1	1/8/2020	Boeing 737	Ukraine International Airlines	176	Scheduled Passenger	Near Sabashahr (Iran)
2	2/5/2020	Boeing 737	Pegasus Airlines	3	Scheduled Passenger	Istanbul (Turkey)
3	2/8/2020	Cessna 501	Remonia Air	4	Passenger	Near Fairmount (USA)
4	5/22/2020	Airbus A320	Pakistan International Airlines - PIA	97	Scheduled Passenger	Karachi (Pakistan)
5	8/7/2020	Boeing 737	Air India Express	21	Passenger	Kozhikode-Calicut Airport (India)
Total				301		

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

African airlines continue to improve on safety standards in the continent due to the efforts by various stakeholders including AFRAA, Governments, civil aviation authorities, airlines, airports, ground handlers, ICAO, IATA, AFCAC, AFRAA, ACI and others. These efforts need to continue to be enhanced.

AFRAA is currently running with its partners IATA and AFCAC a 3 years project, which aim is to identify eligible airlines, conduct gap analyses and recommend corrective actions, in order to prepare those airlines for IOSA or ISSA certifications. In addition, participating airlines' personnel will receive quality and safety management systems training.

IOSA

As of October 2021, Africa had 43 airlines on the IOSA registry comprising almost all the major carriers on the continent.

Below is the list of African airlines on the IOSA registry:

- Africa World Airlines
- Afrijet Business Service
- Air Algérie
- Air Austral Et Ewa Air
- Air Botswana
- Air Burkina S.A.
- Air Cairo
- Air Cote D'Ivoire
- Air Madagascar
- Air Mauritius Ltd
- Air Peace Limited
- Air Seychelles Ltd
- Air Tanzania Company Ltd
- Allied Air Ltd
- Almasria Universal Airlines
- Azman Air Services Ltd
- Cameroon Airlines
- Compagnie Aérienne Asky
- Congo Airways
- EgyptAir
- Ethiopian Airlines Group
- Flyegypt
- Jambojet Limited
- Kenya Airways Limited
- Lam - Linhas Aéreas De Moçambique
- Mango Airlines

- Mauritania Airlines International
- Nesma Airlines
- Nile Air
- Nouvelair
- Overland Airways Limited
- Petroleum Air Services, Pas.
- Precision Air Services Plc
- Ram Express
- Royal Air Maroc
- Rwandair
- S.A. Airlink (Pty) Limited
- Safair Operations (Pty) Ltd
- South African Airways
- Taag Angola Airlines
- Tacv Cabo Verde Airlines
- Tassili Airlines
- Tunisair

ISAGO

The ISAGO (IATA Safety Audit for Ground Operations) is a standardized audit program designed for the Ground Service Providers (GSPs) operating at airports. The audits assess a GSP's conformance with standards developed by global industry experts for the management, oversight and implementation of ground operations. The aim is to improve flight safety and reduce ramp accidents and incidents.

AFRAA urges all 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.

Since the start of 2018, 51 accreditations were granted to 36 airports in total, after an ISAGO audit in the AFI Region.

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

ISSA

The IATA Standard Safety Assessment (ISSA) is an evaluation program, produced on request, to assess the operational management and control systems of an operator.

ISSA is designed for the operators of small aircrafts, which are not eligible for the IOSA program.

The conditions to participate in ISSA are as follows:

- Be a commercial passenger and/or cargo operator
- Have aircrafts with one or more turbine-powered and/or multiple reciprocating engines
- Operate single and/or two-pilot
- Operate IFR and/or VFR
- Have aircraft below 5,700 kg MTOW

The program consists of an initial assessment, followed by biennial renewal assessments.

The ISSA program is an opportunity to improve safety standards for commercial operators that are not covered by existing programs, and to help them comply with ICAO requirements.

Section Seven: AFRAA Secretariat Value-Adding Activities

7.0 The Establishment of AFRAA Technical Operations and Training Committee

In line with the Executive Committee directive, The Technical Operations and Training Committee (TOTC) provides a single coordination forum for engineering, maintenance, ground & flight operations in 2020.

A member airline called for assistance during the year under review, seeking COVID-19 lessening measures; AFRAA negotiated with South Africa and obtained a Flight Operator's Permit for the said air carrier's B737-200 operations in the RSA.

7.1 Safety

7.1.1 IOSA and ISSA Audit Organization in Africa

AFRAA bylaws require the registration of either IATA Operational Safety Audit (IOSA) or IATA Safety Assessment Standard (ISSA) for membership. None of the IATA-endorsed audit organization's operational base is in Africa. Consequently, the travel expenses of the auditors based outside Africa inflate the recurrent audit costs. Locating an AO in the Region will be beneficial in terms of travel and labor costs. Hence, the TOTC suggested that AFRAA engage IATA to seek ways for an AO establishment in Africa.

The Secretariat included IOSA and ISSA Audit Organization in Africa, among the subjects IATA DG and AFRAA Member Airline CEOs' Meeting held on 5th November 2020.

The TOTC first meeting proposed a three-member task force to put up the road map towards creating an African AO.

Several aviation professionals accomplished training and served foreign AOs as freelance auditors. Africa could set its Audit Organization and fairly compete in conducting IOSA and ISSA based on these safety practitioners.

7.1.2 AFI Regional Programs – AFI ATS Safety Incident Analysis

In 2012, African Transport Ministers adopted Abuja safety targets to reduce aviation accident rates to align with the global average by 2015. To that end, the strategy focused on reducing accidents and serious incidents of three accident categories: runway-related accidents, controlled-Flight-Into-Terrain (CFIT), and Loss of Control – In-flight (LOC-I) to decrease the overall accident rate towards the world average.

Based on RASG-AFI annual reports, the three accident categories decreased from 2012 to 2016; in the best year, 2016, none of the three categories of accidents occurred. In addition, no CFIT accident occurred from 2015 to 2019. From 2017 to 2019, Runway safety-related accidents continue to affect AFI safety results more than LOC-I.

The Runway Safety Teams must effectively manage and prevent runway safety events from worsening the Region's overall safety results.

Worldwide and in Africa, the non-IOSA registered airline accident rate was four times higher than for IOSA registered airlines in 2020.

Hence, in the SAATM implementation framework, African Development Bank provided a grant to AFCAC. The latter initiated a project to raise IOSA and ISSA-certified airlines in Africa to improve Africa's safety. As part of the AfDB grant, AFCAC contracted IATA in collaboration with AFRAA to prepare four (4) and twelve (12) airlines for IOSA and ISSA, respectively, over three years.

7.1.2 Regional Infrastructure and Operational Activities

AFRAA participated in AFI ATS Incident Analysis Group (AIAG) meeting held in March 2020 in Johannesburg, South Africa. The AIAAG database incidents provided the required inputs to compute air collision risk in the Region before implementing Reduced Vertical Separation Minimum (RVSM) in 2008.

AFRAA TOTC called upon the airlines to send the copies of Air Safety Reports (ASRs) they file with ANSPs to the AIAG Secretariat (IATA JNB Office) for follow-up with the ANSPs. AFRAA also encouraged member airlines to attend AIAAG annual meetings.

7.1.3 IGOM and Ground Handling Activities

The Secretariat encourages members to implement IGOM as ground service providers (GSP) and requires the same standards for their operations when contracting the services of a GSP.

Regulations for ground operations at ICAO and individual State levels are few; therefore, IATA Ground Operation Manual (IGOM) remains the only industry reference for the standardization.

AFRAA remains at member airlines' disposal to collect and file any differences African operators may have

with IATA. Of course, the fewer these differences are, the lower the confusion of ground handling staff and the lower the safety risks will become.

7.2 Training

7.2.1 AFRAA Training Activities 2020

AFRAA is committed to developing people so that African aviation continues to grow using highly trained and capable personnel. We appreciate that people are the foundation upon which aviation organizations build their strategic success, continue to develop and adapt to the enormous changes in the operating environment.

The COVID-19 Pandemic has significantly impacted training activity as most borders remain closed and

aircraft grounded. Despite the pandemic challenges, our member airlines still need high-quality training services yet at an affordable cost to help in the resumption and sustenance of operations within our member airlines.

In this spirit, AFRAA has developed a list of virtual training courses based on a training needs survey from our member airlines. These courses will be offered by highly experienced and capable instructors with proficiency in various areas of aviation activities yet at a low cost to our members.

Member airlines are highly encouraged to take advantage of the highly discounted virtual training courses. The list of courses is as follows:

Course Title	Duration	Dates	Cost Per Participant (USD\$)
Safety Management System for Airlines	5 Days	30 th Aug - 3 rd Sept 2021	\$ 500
Human Factors in Aviation	5 Days	13 th - 15 th Sept 2021	\$ 500
Aviation Internal Auditor	3 Days	14 th - 17 th Sept 2021	\$ 350
Safety Management System implementation	4 Days	20 th Sept - 24 th Sept 2021	\$ 400
Aviation Lead Auditor	3 Days	27 th Sept - 29 th Sept 2021	\$ 350
Security Management Systems (SeMS)	4 Days	4 th - 7 th October 2021	\$ 400
Safety Risk Management	5 Days	4 th - 8 th October 2021	\$ 500
Governance and Risk Management	3 Days	12 th - 14 th October 2021	\$ 350
Dangerous Goods Regulations	3 Days	18 th - 20 th October 2021	\$ 350
Strategic Planning & Leadership	3 Days	20 th - 22 nd October 2021	\$ 350
Dangerous Goods Regulations Refresher CAT 8,9,10,11,12	1 Day	26 th October 2021	\$ 200
Financial Management (Finance for Non-Finance Managers/Budgeting)	3 Days	27 th - 29 th October 2021	\$ 350
Quality Management System	4 Days	2 nd - 5 th November 2021	\$ 400
Airline Documentation management and control	5 Days	8 th - 12 th November 2021	\$ 500
Business Continuity and Succession Planning	3 Days	16 th - 18 th November 2021	\$ 350
ISAGO Awareness	3 Days	23 rd - 25 th November 2021	\$ 350
Aircraft Accident & Incident Investigation	5 Days	22 nd - 26 th November 2021	\$ 500
Emergency Response Planning & Crisis Management	5 Days	29 th November - 3 rd December 2021	\$ 500
ISAGO for Ground Service Providers	3 Days	7 th - 9 th December 2021	\$ 350
IOSA/ISSA Airline Auditor	5 Days	6 th - 10 th December	\$ 500

7.2.2 AFRAA Cooperation with Members' Approved Training Organizations

During its 179th meeting, the Executive Committee directed the Secretariat to cooperate with Africa training centers. This cooperation provides the appropriate solution to achieve better the objectives of the cooperation initiative such as:

- Ensuring that offered courses are at an affordable cost;
- Reducing travel expenses to attend training outside Africa;
- Safeguarding that the design of the lessons meets the airline-specific needs.

AFRAA had made significant steps in implementing the EXC directive relating to the cooperation with member airlines Training Centers. The Secretariat had already signed a Memorandum of Understanding with one airline and submitted an MOU to three other ATOs.

As a first implementation opportunity, IATA, in collaboration with AFRAA, assisted African airlines in the SAATM States to prepare them for ISSA or IOSA. To implement the MOUs, the Secretariat will call upon a couple of member ATOs' instructors to facilitate two QMS/SMS courses in this IATA AFRAA collaboration framework.

7.2.3 Instructor Development Program for AFRAA member airlines (IDPA)

During the 51st AFRAA Annual General Assembly held on 10th-12th November 2019 in Port Louis, Mauritius, it was resolved that an Instructor Development Program for AFRAA member Airlines (IDPA) be set up through RES AGA 51/12. The IDPA project objective is to produce 100 highly qualified instructors in 5 years (20 per year) with sponsored tuitions.

To respond to the significant shortage in the number of aviation instructors in Africa, IATF provided five training courses collaborating with Precision Air in Dar Es Salaam, Tanzania. Twelve participants completed the five training courses and were awarded the IATA Corporate Instructor Diploma in November 2019.

Towards attaining the target of 20 instructors for the year 2020, AFRAA took the initiative to train those participants who participated in the program but fell short of completing the diploma by one course. AFRAA, in collaboration with IATA, undertook to train five participants through the sponsorship of AFRAA. The five trainees were enrolled in the Instructional Techniques virtual training course held from 6-8 October 2020.

Four out of the five trainees completed the training course and attained the IATA Corporate Instructor Diploma. Due to budget constraints, however, AFRAA could not sponsor more trainees for the program in 2021. The Secretariat endeavors to continue implementing this program as the adverse effects of COVID-19 ease.

7.3 AFRAA Projects

7.3.1 AFRAA Fuel Project

Due to the impact of the COVID-19 Pandemic, the airlines opted to roll over their existing contracts to cover the 1st half of 2021. However, in February 2021, the AFRAA Fuel committee opted for a tender process where negotiations with suppliers were conducted virtually. This tender will cover the period starting 1st July 2021- 30th June 2022.

The tender process was hugely successful, with the participating airlines set to make savings in most of the locations in the tender. Despite the effects of Covid-19, the AFRAA Fuel Committee aims to have this critical tender process conducted as it is one of the key initiatives aimed at faster recovery for our member airlines.

7.3.2 AFRAA /IATA campaigns against high fuel charges and taxes

AFRAA and IATA are actively involved in joint lobbying activities so as to foster better pricing for jet fuel in various African destinations. These activities are being undertaken by the Africa Fuel Working Group (AFWG) in which AFRAA is a member.

So far, the main locations of focus include Mauritius, Cote D'Ivoire, Nigeria, Tanzania, and Ghana. Authorities and aviation-related departments in these states have increased the fees, taxes, and charges on jet fuel during the COVID-19 Pandemic period, which will hinder the recovery efforts for our members.

7.3.3 Line Maintenance Pools

The Executive Committee approved the concept note establishing the Technical & Operations Task Force, including the revival of AFRAA line maintenance pool activities.

The Secretariat reported the outcome of the Technical Operations Task Force meeting to Executive Committee at its 180th session, which approved the AFRAA Line Maintenance Pool initiative, designed to decrease operating cost while enhancing safety and efficiency.

The COVID-19 Pandemic struck airline operations significantly; the traffic demands disappeared, and the 2024 forecast indicates that traffic levels may reach those of 2019.

AFRAA prepared a service agreement in line with Recovery Plan, both Pillars 6 and 9, on cost reduction and sustainability. Therefore, the Line Maintenance Pool Service Agreement waives the AFRAA Line Maintenance Pool membership fee. As an added value of AFRAA membership, to become an AFRAA Line Maintenance Pool member, an AFRAA airline needs to sign the Line Maintenance Pool Service Agreement.

After signing the Line Maintenance Pool Service Agreement, the airline may join any AFRAA line maintenance pool at various stations. Participating operators will pay:

- Their bills to participate in pooling activities at a specific airport and;
- Their bills to access specific pool items.

AFRAA has developed the AFRAA Line Maintenance Pool Portal. It will be accessible to approved staff members of airlines having signed the Line Maintenance Pool Service Agreement. AFRAA Secretariat will ensure the administration functions of the Portal.

The Portal will be launched by the end of 2021 so that the intended users can sign up and enjoy its capabilities.

7.3.4 Marketing AFRAA Member MROs outside Africa and Opportunity to Market Excess Inventory Spare parts

Focusing on adding values to member airlines, AFRAA COVID-19 Recovery Plan comprises cost-saving initiatives and innovative projects for airlines' economic sustainability. Thus, AFRAA and its partner United Aviation Solution have engaged in an MRO Joint Venture (JV) with the view to promoting African airlines' MROs to provide maintenance services to airlines, MROs, and OEMs in the USA. The scheme mainly targets the MROs with approvals of either the FAA or EASA. Ultimately, the project could also arrange a mobile workforce of member airlines' engineers and instructors to conduct technical courses in the USA ad hoc.

The Secretariat invited member airlines' MROs to share their maintenance capability lists towards the project's implementation. Three MROs provided their respective detailed capability lists: EgyptAir, Ethiopian Airlines, and Kenya Airways.

Towards the end of the year, AFRAA and its partner UTD focused their efforts in developing an Addendum to the JV to serve as a basis of the project

implementation to be signed by an MRO, UTD, AFRAA.

7.3.5 Aircraft Capacity Sharing Portal

The **Aircraft Sharing Portal** is up and running with:

- Number of registered users: 106 Approved users
- Number of airlines registered: 33 Airlines
- Number of other entities registered: 19 non-airlines
- Number of Aircraft Posted: 38 Aircraft.

So far, no transaction has occurred through this Portal, but we believe it will gradually be a prominent marketplace for all aircraft requirements.

AFREXIMBANK, together with Africa CD of the AUC, developed a portal referred to as the Africa Medical Supplies Platform (AMSP) to enable the States to place orders. AFRAA has already engaged Africa CDC for the possibility of linking the two portals as they complement each other. AUC has accepted that the AFRAA and Africa CDC's IT teams link the two platforms. Discussions are ongoing to facilitate the belief they complement each other and foster greater feasibility and hence adoption.

7.3.6 Data Intelligence Tool to Reduce Air Navigation Bills

The high-cost environment of doing business in Africa influences African air operations negatively. Several aviation studies point out "high airport facility fees" and "high air navigation charges" in Africa compared to other regions. In collaboration with other stakeholders, AFRAA embarks on lobbying efforts in engaging aviation authorities on the Continent.

Excessive air navigation charges increase African airlines' available seat-kilometer costs. This paper introduces an innovative solution to control and cut down air navigation bills. In line with the recovery plan, pillars six on cost-saving and nine on economic sustainability, in partnership with FliteGain, developed the data intelligence tool to reduce air navigation service charges.

The application implementation automates the invoice verifications against flight operation data. As much as lobbying results depend on exogenous stakeholders, implementing the proposed IT solution depends on the demonstration's factual findings.

AFRAA and the partner conducted a webinar dedicated to the tool's launch.

7.3.7 Direct Routings towards Flexible Routes in AFI Airspace

Following the COVID-19 outbreak, ASECNA provided direct routings in ASECNA States' airspace throughout 2020. AFRAA called upon African States/

ANSPs to provide direct routing services to support flight operations while reducing CO2 emissions.

7.4 AFRAA Committees

7.4.1 Route network coordination and cargo committee

AFRAA Route Network Coordination and Cargo Committee held its first meeting of the year 2021 in virtual format on Zoom platform on 15 April.

During the call members were reminded about the importance of the role of Route Network and Cargo committee during these challenging times. The COVID 19 pandemic has impacted African airlines' connectivity adversely. To mitigate the connectivity gaps, AFRAA is working with Predictive Mobility a partner and platform provider, which will enable airlines to address the challenges of connectivity. AFRAA in collaboration with the partner to set up a portal to allow members determine connectivity gaps and the market/business potential on identified city-pairs.

According to attendees, the COVID situation has shown the critical of Cargo in sustaining airlines business. Cargo is also playing an important role in transportation of vaccine across the continent. The launch of African Continental Free Trade Area (AfCFTA) is a great opportunity for both passengers and cargo businesses for African airlines. It was also agreed that, cooperation among members is needed to take advantage and make better use of all the opportunities presented by AfCFTA.

Participants at the meeting noted that there is need to prioritize aviation by African governments to ensure airlines survival and growth. These priorities are:

- Continual financial relieves and the release of committed funding support.
- On the safe opening of borders a lot of work is being done by the industry supported by AU and other stakeholders. Challenges remain on unilateral restrictions and quarantines measures introduced in some countries.
- On the ongoing safe re-start of operations, the industry (AFRAA, IATA, AFCAC) in collaboration with other stakeholders are working hard to ensure that operations are getting back to normal. Nevertheless, a lot needs to be done so that airlines may have a sound plan to successfully carry on with their operations.

The second meeting in the year 2021 is scheduled to take place on 09 November.

7.4.2 Aeropolitical committee

In the year 2021 the AFRAA Aeropolitical committee held two meetings in virtual format on Zoom platform. The first meeting was held on 14 April 2021 and the

second meeting took place on 12 October 2021. The meetings emphasized that much was expected from the Aero-political committee due to its strategic role in addressing very important matters relating to regulatory developments, operational performance and tracking of changes impacting airlines.

The first meeting focused on:

- Status on the recommendations on the AU HLTF on industry recovery
- SAATM implementation roadmap - JPAP 2021
- YD/SAATM Key Performance Indicators (KPIs)
- External policy guidelines for negotiation of Air Service Agreements

While during the second meeting members of the committee pay particular attention to:

- The deliberations on the Capacity Building workshop that was held on 29-30 October 2021. Participants noted that the workshop is the third in a series of events planned by the AU and AFCAC to sensitise various stakeholder groups and the RECs on the institutional and regulatory texts.
- On Fees, Charges and Taxes the meeting learned that in the month of August AFRAA held a joint meeting with IATA, ICAO, ACI and CANSO on airport and air navigation user charges. The aviation virtual workshop which was held on 19 August 2021, gave an overview of ICAO framework for setting user charges, looked at the concept of building blocks in aviation charges and also discussed actions to restore a sustainable economic equilibrium for airports and African aviation ecosystem. The industry needs to take appropriate actions for the implementation of policies on aeronautical user charges for future success of the aviation industry.
- The other important event on taxes and charges is the coming AFRAA LAB on High Taxes and Charges scheduled to take place in Q1 2022.
- On financial support to airlines, the AFRAA Secretariat continues to advocate for financial support to airlines, as it is critical to the survival of airlines that are currently experiencing dire challenges from the COVID-19.

7.5 Industry Affairs

7.5.1 State of the Industry

The number of new infections in Oceania and Europe, particularly in Northern and Eastern Europe has steadily risen, as the region grapples with its worst outbreak since the pandemic started. In Africa, although inoculation efforts lag with only 5.23% of adults fully vaccinated, we can note a reduction of the number of new cases since September.

Globally, the number of cases has reached 244 million and 8.5 million in Africa.

In the month of October, air passenger traffic reached 49.9% compared to the same month in 2019. Similarly, capacity reached 59.7% as of October. The low evolution of ASK is explained by the remaining travel restrictions and the low willingness of travelers.

Domestic market maintained the biggest share for capacity but reduced traffic in August 2021, with demand for passenger outperforming intra-Africa and intercontinental at 41.1% compared to 28.8% for intra-Africa and 30.1% for intercontinental. As regards passenger seats offered, domestic, intra-Africa and intercontinental account for 42.9%, 21.6%, and 35.5% respectively.

Across the continent in general, passenger traffic volumes continue to be low due to the inconsistencies in the messaging regarding border closures, health protocols and continued surge in Covid-19 infections in some countries.

7.5.2 The SAATM capacity building workshop

The capacity building workshop on the institutional and regulatory instruments of the Yamoussoukro Decision jointly organised by AU, AFCAC and AFRAA and hosted by AFRAA took place on 29-30 September 2021 in a virtual format.

The workshop was organised following the adoption of the following Institutional and Regulatory Instruments of the Yamoussoukro Decision (YD) by the 30th Ordinary Summit of the African Union Assembly of Heads of States and Government summit held in Addis Ababa, Ethiopia in January 2018:

- Powers and Functions of the Executing Agency (EA),
- Competition Rules and
- Consumer Protection Regulations

This workshop is the third in a series of events planned by the AU and AFCAC to sensitise various stakeholder groups and the RECs on the institutional and regulatory texts. The earlier two were held in February and August 2019 in Addis Ababa and Niamey respectively.

At the end of the workshop delegates were:

- Taken through the various institutional and regulatory text to enhance their understanding and appreciation.
- African Airlines are now equipped with knowledge on how to apply the Instruments in their operations
- Backed by the knowledge acquired airlines are encouraged to join in the advocacy to gets more States to Commit to the Solemn Commitment of SAATM.

- Airlines also shared their experiences Competition and Consumer Protection regulations implementation and highlighted areas that need improvement.

7.5.3 Financial Support

The AFRAA Secretariat continues to advocate for financial support to airlines, as it is critical to the survival of airlines that are currently experiencing dire challenges from the COVID-19. As at October 2021, a total of US\$2.9 billion in various forms of support has been extended to some airlines by their governments. The most recent to announce such support are Air Mauritius.

7.5.4 Fees, Charges and Taxes

In the month of August AFRAA held a joint meeting with IATA, ICAO, ACI and CANSO on airport and air navigation user charges. The aviation virtual workshop which was held on 19 August 2021, gave an overview of ICAO framework for setting user charges, looked at the concept of building blocks in aviation charges and also discussed actions to restore a sustainable economic equilibrium for airports and African aviation ecosystem. The industry needs to take appropriate actions for the implementation of policies on aeronautical user charges for future success of the aviation industry.

The other important event on taxes and charges is the coming AFRAA LAB on High Taxes and Charges scheduled to take place in Q1 2022.

7.5.5 Industry Affairs Forum and Skyconnect Dialogues

The Secretariat continues with its monthly Industry Affairs Fora and Skyconnect dialogues. Since the last EXC meeting, we have held 5 industry affairs events and 4 Sky connect dialogues. These events continue to attract good participations as the information shared is well researched and adds values to members.

The events are held as follows:

- Industry Affairs – every last Wednesday of the month;
- Skyconnect dialogue – every first wednesday of the month.

7.5.6 Upcoming Events

- 1) IGHC Ground Handling Conference 2021, 15 - 18 November
- 2) ICAO Air Services Negotiation Event (ICAN2021), 6 - 10 December 2021
- 3) AFRAA LAB on High Taxes and Charges – Q1 2022

Section Eight: FAA or EASA Certified African MROs



Aerotechnic Industries (ATI)

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Email: doleplat@airfrance.fr



Air Algérie Technics

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Commercial & Marketing Manager, Technical Division

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Email: guemmache-a@airalgerie.dz
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Atlantic Air Industries Maroc

Directeur Général

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Email: becaye.ba@aai-eu.fr | Support.clients@aaimaroc.com



EgyptAir Maintenance and Engineering

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Marketing and Maintenance

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Office: +2 02 22656848/202-22686180

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Email: advertising_me@egyptair.com
contactus_me@egyptair.com



Ethiopian Airlines

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Dir. MRO & Aviation Training Sales & Bus Dev't

Tel: +251115178130, Cell: +251911223005

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Kenya Airways Engineering & Maintenance

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Technical and MRO

Tel. Number: +254 020 6422226

Email: technical.sales@kenya-airways.com;

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Dalmas.Okendo@kenya-airways.com;



Sabena Technics

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Sabena technics MIR

General Manager

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South African Airways Technical

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Sneecma Engine Services

Contact: Mr. Alexandre Brun

General Manager

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Email: sneecma.morocco@sneecma.ma



Tunisair Technics

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Director, Tunisair Technics

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Tel +216 70 837000 EXT. 3111

E-mail: ali.saidane@tunisair.com.tn

Section Nine: FAA or EASA Certified Training Centers



Aldawlya for Training and Science

Contact: Mr. Abdulati Elmeshkhi
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EgyptAir Training Centre

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General Manager, Technical Training
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Ethiopian Aviation Academy

Contact: Mr. Shiferaw Kebede
Head of Aircraft Maintenance Training
Ethiopian Airlines Aviation Academy
Email: shiferawk@ethiopianairlines.com
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Kenya Airways Pride Centre

Contact: Mr. Jack Maina
Training Coordinator
Tel: (254) 020 264 22846/64
Mob:
Email: learning.development@kenya-airways.com;
Jack.Maina@kenya-airways.com



Royal Air Maroc Academy

Contact:
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Fax: +212 (0)22.91.25. 81
E-mail: ramacademy@royalairmaroc.com



Tunisair Training Centre

Contact: Mr. Khaled Essafi
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Tel: +216 70 837 000 Ext. 2914
E-mail: khaled.essafi@tunisair.com.tn

Section Ten: Airlines with Aircraft Simulators



Aviation Training Center of Tunisia (ATCT)

2 A320 aircraft simulators
 Contact: Captain Nabil Rais
 Head of Training
 Tel: +216 71.274.401
 Fax: +216 71.274.510
 Email: atct@atct.com.tn
commercial@atct.com.tn



EgyptAir Training Centre

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 General Manager, Technical Training
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 Email: trainingcenter@egyptair.com



Ethiopian Aviation Academy

Contact: Mr. Shiferaw Kebede
 Head of Aircraft Maintenance Training
 Ethiopian Airlines Aviation Academy
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Kenya Airways Pride Centre

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Jack.Maina@kenya-airways.com



CasaAero S.A.S

B737 NG full flight simulator
 Direction de la formation Technique
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 +212 5 22 42 07 00
 Fax: +212 5 22 91 28 94
 Email: dft@royalairmaroc.com

Section Eleven: AFRAA member airlines - Individual Summary Facts



Mr Ayad Bourhane
Chief Executive Officer

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Moroni, Malouzini Union des
Comoros
Tel: +2693286969
Cel: +2693391705
http: www.flyabaviation.com

IATA CODE : Y6
ICAO CODE: CIK

AFRAA MEMBERSHIP
Became member in 2017
Established in 2010

OWNERSHIP STRUCTURE
Privately Owned

COMMERCIAL
PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 4
Regional 1
International 0

FLEET
EMB 120 3

Capt. Mustafa Matuug
Chairman

ADDRESS
PO Box 83428, Ali Khalifa Zaidi St,
Tripoli, Libya
Tel: +218-21-444 4409
Fax: +218-21-4449128
SITA: TIPABXH
www.afriqiyah.aero

IATA CODE : 8U
ICAO CODE: AAW

AFRAA MEMBERSHIP
Became member in 2002
Established in 2001

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 6
Intra-Africa 2
International 1

FLEET
Airbus 320-200 4
Airbus 330-300 1

Mr. Mesroua Amine Debaghine
Chief Executive Officer

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

IATA CODE : AH
ICAO CODE: DAH

AFRAA MEMBERSHIP
Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 32
Intra-Africa 9
International 30

FLEET
Airbus A330-200 8
Boeing B737-800 25
Boeing B737-700 2
Boeing B737-600 5
ATR72-500 15
LC-100-30 1



Ms. Agnes Khunwana
General Manager

ADDRESS

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

IATA CODE: BP
ICAO CODE: BOT

AFRAA MEMBERSHIP
Became member in 1991
Established in 1947

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 4
Intra-Africa 4

FLEET
ATR72-600 2
Embraer E170 1

Capt. Blaise Sanou
Chief Executive Officer

ADDRESS

29, Avenue de la Nation
BP 1459 Ouagadougou,
Burkina Faso

IATA CODE: 2J
ICAO CODE: VBW

AFRAA MEMBERSHIP
Became member in 2002
Established in 1967

OWNERSHIP STRUCTURE
American Global Development
Group 80%
Government 20%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 2
Intra-Africa 9

FLEET
EMB 195 2
EMB 175 1

Mr. Abdourahman Ali Abdillahi
Chief Executive Officer

ADDRESS

9-11 Rue de Geneve,
Republic of Djibouti, Djibouti

IATA CODE: DJ
ICAO CODE: JIB

AFRAA MEMBERSHIP
Became member in 2018
Established in 1963

OWNERSHIP STRUCTURE
Great Horn Investment Holding: 70%
Djibouti International Airport: 30%

DESTINATIONS SERVED
Intra-Africa 4
International 1

EMPLOYEES
403

FLEET
EMB 145 2



Mrs. Hanitra Rasetarinera
Acting CEO & CFO

ADDRESS

31 Avenue de l'Indépendance,
BP 437, Antananarivo 101
Madagascar
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Fax: +261 34 02 22230
www.airmadagascar.com

IATA CODE: MD

ICAO CODE: MDG

AFRAA MEMBERSHIP

Became member in 1975
Established in 1962

OWNERSHIP STRUCTURE

Malagasy state:	55.88%
Air Austral Invest:	43.78%
ARO:	0.22%
SONAPAR:	0.10%
Air France:	0.01%
NY HAVANA:	0.01%
Staff:	0%

COMMERCIAL PARTNERSHIP

Air Mauritius
Air Austral
Tsaradia
Ewa Air
Air France
Air Seychelles
Thai Airways Int'l Ltd
South African Airways
EgyptAir
Ethiopian Airlines
Klm Royal Dutch Airlines

DESTINATIONS SERVED

Domestic	0
Intra-Africa	6
International	3

EMPLOYEES
740

FLEET

A340-313	1
B737-800	1
ATR72	6
DHC6 – 300	1

Mr. Indradev Raja Buton
Officer-in-Charge and
Accountable Manager

ADDRESS

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www.airmauritius.com

IATA CODE: MK

ICAO CODE: MAU

AFRAA MEMBERSHIP

Became member in 1985
Established in 1967

OWNERSHIP STRUCTURE

Air Mauritius Holding Ltd – 40.35%
Airports of Mauritius – 20.88%
Government of Mauritius – 6.62%
State Investment Corporation – 3.59%
Rogers & Company Ltd – 3.39%
Compagnie Nationale Air France – 2.2%
Air India – 2.02%
Other Shareholders – 19.34%

COMMERCIAL PARTNERSHIP

Air France
Air Madagascar
Air Austral
Emirates
Virgin Australia Airlines
Malaysia Airlines
Hong Kong Airlines
Air India
Singapore Airlines
South African Airways
Kenya Airways
KLM – Royal Dutch Airline

DESTINATIONS SERVED

Domestic	1
Intra-Africa	8
Intercontinental	13

EMPLOYEES
1984

FLEET

A350-900	4
A330-900	2
A330-200	1
ATR72-500	3

Mr. Allen Onyema
Chief Executive Officer

ADDRESS

Air Peace Limited
No. 25 Sobo Drobiodu Street,
G.R.A
Ikeja State, Lagos
Nigeria
info@flyairpeace.com
www.flyairpeace.com

IATA CODE: P4

ICAO CODE: APK

AFRAA MEMBERSHIP

Became member in 2019
Established in 2013

OWNERSHIP STRUCTURE

Privately owned

DESTINATIONS SERVED

Domestic	18
Regional	6
Intercontinental	0

FLEET

Boeing 737-300	8
Boeing 737-500	5
Boeing 777-200	1
Boeing 777-300	2
Embraer ERJ 195	4
Embraer ERJ 145	8



Mr. Ibrahima Kane
Chief Executive Officer

ADDRESS

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<https://flyairsenegal.com>

IATA CODE: HC

ICAO CODE: SZN

AFRAA MEMBERSHIP

Became member in 2019
Established in 2016

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

N/A

DESTINATIONS SERVED

Domestic	3
Regional	12
Intercontinental	7

FLEET

Airbus A321-211	2
Airbus A319-100	3
Airbus A330-900	2
ATR 72 – 600	2

Eng. Ladislaus Everist Matindi
Chief Executive Officer

ADDRESS

Air Tanzania, P.O. Box 543,
Dar es Salaam, Tanzania
Tel: +255 22 2113329
Fax: +255 22 2134069
www.airtanzania.com

IATA CODE: TC

ICAO CODE: ATC

AFRAA MEMBERSHIP

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

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

N/A

DESTINATIONS SERVED

Domestic	12
Regional	6
Intercontinental	2

EMPLOYEES

N/A

FLEET

Airbus220-300	4
Bombardier Dash 8- Q400	5
Boeing 787-8	2

Mr. Joseph Makonise
Chief Executive Officer

ADDRESS

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

IATA CODE: UM

ICAO CODE: AZW

AFRAA MEMBERSHIP

Became member in 1981
Established in 1946

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

N/A

DESTINATIONS SERVED

Domestic	3
Intra-Africa	2

FLEET

Boeing B767-200ER	2
Boeing B777-200ER	2
Boeing B737-200	2
Airbus A320-200	1
Embraer 145	1



Mr. Valentine Tongo
Chief Executive Officer

ADDRESS

Ground F1.,
Sahcol Office Complex
MM International Airport
Tel: +234 8033495011
<http://alliedairng.com>

IATA CODE: 4W

ICAO CODE: AJK

AFRAA MEMBERSHIP

Became member in 2018
Established in 1988

OWNERSHIP STRUCTURE

Privately Owned

COMMERCIAL PARTNERSHIP

N/A

DESTINATIONS SERVED

Domestic	2
Regional	7
Intercontinental	4

FLEET

Boeing 737-400F	3
Boeing 737-800F	1

Mr. Mesfin Tasew
Chief Executive Officer

ADDRESS

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

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	0
Intra-Africa	21

EMPLOYEES

N/A

FLEET

Boeing 737-700	5
Boeing 737-800	4

Mr. Sanjeev Gadhia
Chief Executive Officer

ADDRESS

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

IATA CODE: 8V

ICAO CODE: ACP

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

Fully owned by Kenyans

COMMERCIAL PARTNERSHIP

Ethiopian Airlines
Kenya Airways
South African Airways
LAM Mozambique
Rwanda Air
EgyptAir
Air Tanzania
Silverstone Air
SAC (K) Limited

DESTINATIONS SERVED

Intra-Africa	12
Intercontinental	2
Charters to over 50 destinations in Africa	

EMPLOYEES

N/A

FLEET

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



Eng. Ahmed Osman Mohamed
Ahmed Abu Shaira
Chief Executive Officer

ADDRESS

PO Box 6899
Arkweet Block 65, Bldg #393
Mamoun Bahaire Strt.
Khartoum, Sudan
Tel: +249912327000
www.badrairlines.com

IATA Code: J4

ICAO Code: BDR

AFRAA MEMBERSHIP

Became member in April 2016

OWNERSHIP STRUCTURE

Mr. Ahmedosman Abushaera 50%
Mr. Hashim Yousif EIDigair 50%

COMMERCIAL PARTNERSHIP

Sudan Airways

DESTINATIONS SERVED

Domestic	7
Regional	6
International	4

EMPLOYEES

FLEET

B737-300	1
B737-500	5
B737-800	1

M. Ella Nguema Jean Christophe
Chief Executive Officer

ADDRESS

Immeuble La Rotonde-
Boulevard de la liberté
BP 4852 Douala-Cameroun
Tel: (+237) 33 42 20 10 /
33 42 20 13
Fax: 33 42 20 30 / 33 42 30 15 /
33 42 29 80 / 33 42 29 85
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	6
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FLEET

Bombardier Q400	2
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Mr. Cruz Ela Nguema
Chief Executive Officer

ADDRESS

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

IATA CODE: C2

ICAO CODE: CEL

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

100% by the State of
Equatorial Guinea

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	3
Intra-Africa	3

FLEET

ATR 42	2
ATR 72	2
B737-800	3
B767-300	1
B777-200	1



Capt. Pascal Kasongo Mwema
Chief Executive Officer

ADDRESS

130 Boulevard du 30 juin
Immeuble Elembo
Kinshasa, R D Congo
www.congoairways.com

IATA CODE: 8Z

ICAO CODE: ZGA

AFRAA MEMBERSHIP

Became member in November 2016
Established in 2014

OWNERSHIP STRUCTURE

100% the Government

COMMERCIAL PARTNERSHIP

Air France

DESTINATIONS SERVED

Domestic	11
Intra-African	1

EMPLOYEES

FLEET

AIRBUS A320-200	1
Bombardier Q400	2
Embraer ERJ-190	1

Mr. Andreas Kaiafas
Chief Executive Officer

ADDRESS

C/ Enrique NVO
S/N Amanda Building N°89 - Malabo
Bioko Norte - Equatorial Guinea
Tél: (+240) 333 09 04 71
Email: info@cronosair.com
www.cronosair.com

IATA CODE: C8

ICAO CODE: CRA

AFRAA MEMBERSHIP

Established in 2007
Became member in 2015

DESTINATIONS SERVED

Domestic	3
Intra-Africa	3

EMPLOYEES

FLEET

EMBRAER 145	4
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Capt. Amr Abuelenein
Chairman & CEO EgyptAir Holding Co.

ADDRESS

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

IATA CODE: MS

ICAO CODE: MSR

AFRAA MEMBERSHIP

Established in 1932
Became member in 1968

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Star Alliance

DESTINATIONS SERVED

Domestic	9
Intra-Africa	21
Intercontinental	58

EMPLOYEES

27562

FLEET

B737 -800	29
A330 – 300	4
B777 – 300	6
B787 - 9	6
A320 – NEO	8
A220 – 300	12
A330-200F	3



Mr. Tewolde GebreMariam
Chief Executive Officer

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

IATA CODE: ET
ICAO CODE: ETH

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

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
ASKY Airlines
Star Alliance

DESTINATIONS SERVED	
Domestic	21
Intra-Africa	58
Intercontinental	61

EMPLOYEES
14845

FLEET	
A350-900	16
B737-700	10
B737-800	18
B787-800	19
B787-900	8
B777-300	4
B777-200	6
B767-300	6
DHC8-400	29
B777 Freighter	9
B737-800 Freighter	2

Mr. Anis Riahi
Chief Executive Officer

ADDRESS
21 Rue des Entrepreneurs
Charguia 2 –
2035 Tunis - Tunisie
Tel: +216 71941111
www.express-aircargo.com

IATA CODE: 7A
ICAO CODE: XRC

AFRAA MEMBERSHIP
Became member in 2016
Established in 2015

OWNERSHIP STRUCTURE
Privately owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Intra-Africa

FLEET	
B737-300	2

Mr. Abdullahi Diria Warsame
Chief Executive Officer

ADDRESS
Panari Sky Center, Mombasa Road
Nairobi, Republic of Kenya
Tel: +254202325573
Fax: +254202325467
Email: info@jubbaairways.com

IATA CODE: 3J
ICAO CODE: JUB

AFRAA MEMBERSHIP
Became a member in 2017
Established in 2008

OWNERSHIP STRUCTURE
Private owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED	
Domestic	9
Intra-Africa	2
Intercontinental	2

EMPLOYEES

FLEET	
Fokker 50	3



Mr. Allan Kilavuka
Group Managing Director & CEO

ADDRESS

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

AFRAA MEMBERSHIP

Became member in 1977
Established in 1997

OWNERSHIP STRUCTURE

Individual Kenyan shareholders – 43.34%
KLM – 7.76%
Government – 48.9%

COMMERCIAL PARTNERSHIP

KLM
Air France
Aeroflot
Jet Airways
Saudia
Etihad Airways
Oman Air
China Southern
China Eastern
Hongkong Airlines
Korean Air
Vietnam Airlines
Garuda Indonesia
Royal Air Maroc
Egypt Air
Air Burkina
Jambo Jet
Precision Air
LAM Mozambique
TAAG Angola
Air Mauritius
Air Namibia
Comair - Kulula

DESTINATIONS SERVED

Domestic	3
Intra-Africa	31
Intercontinental	8

EMPLOYEES

3816

FLEET

Boeing 787-8	8
Boeing 737 - 300	2
Boeing 737 - 700	4
Boeing 737 - 800	8
Embraer 190	15

Eng. Joao Carlos Po Jorge
Chief Executive Officer

ADDRESS

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

IATA CODE: TM

ICAO CODE: LAM

AFRAA MEMBERSHIP

Became member in 1976
Established in 1936

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Ethiopian Airlines
Kenya Airways
South African Airways
TAAG Angola Airlines

DESTINATIONS SERVED

Domestic	11
Intra-Africa	3

EMPLOYEES

831

FLEET

Boeing 737-700	2
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Captain Jalal Esharda
Chairman

ADDRESS

Libyan Airlines
PO Box 2555
Omar Mukhtar Street, Tripoli
State of Libya
Tel: +218-21 3614102
Fax: +218-21 361 48 15

IATA CODE: LN

ICAO CODE: LAA

AFRAA MEMBERSHIP

Established in 1965
Became member in 1968
OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	3
Regional	4
International	1

FLEET

Airbus 320	1
Airbus 330	2
Bombardier CRJ900	1



Mr. Mohamed EL Khalifa Biyah
Chief Executive Officer

ADDRESS

PO Box 7991
Nouakchott Airport
Mauritania
Tel: +222 45241253
www.mauritaniaairlines.mr

IATA CODE: L6
ICAO CODE: MAI

AFRAA MEMBERSHIP
Established in 2010
Became member in 2015

DESTINATIONS SERVED

Domestic	3
Intra Africa	9
International	1

FLEET

B737-800	1
B737-700	1
B737-Max	1
ERJ170	2
ERJ145	1

**Mr. Hassan Abdullah
Mohammed Abdulaziz**
Chief Executive Officer

ADDRESS

Cairo International Airport,
Terminal 1
4 Obour Buildings
Salah Salem St., Cairo
7 Aswan Square7
Behind Atlas Hotel
Mohandseen - Giza - Egypt

Contact Info:

Inside Egypt 19415
Outside Egypt (+20) 2 26968000
www.nileair.com

IATA CODE: NP
ICAO CODE: NIA

AFRAA MEMBERSHIP
Established in 2012
Became member in April 2016

DESTINATIONS SERVED

Domestic	4
International	9

EMPLOYEES
682

FLEET

A320-200	4
A321-200	2

Mr. Chokri Zarrad
Chief Executive Officer

ADDRESS

Zone Touristique
Dkhila 5065 Monastir
Tunis, Tunisia
Tel: (+216) 70 020 920

IATA CODE: BJ
ICAO CODE: LBT

AFRAA MEMBERSHIP
Established in 1989
Became member in 2017

OWNERSHIP STRUCTURE
Privately Owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Domestic 3

Intra-Africa	0
International	18

EMPLOYEES
552

FLEET

A320-200	10
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Capt. Edward Boyo
Chief Executive Officer

ADDRESS
Overland Airways Limited
17, Simbiat Abiola Road,
Ikeja Lagos
www.overlandairways.com

IATA CODE: OJ
ICAO CODE: OLA

AFRAA MEMBERSHIP
Became member in 2019
Established in 1998

OWNERSHIP STRUCTURE
Privately owned

DESTINATIONS SERVED
Domestic 6
Intra-Africa 5

EMPLOYEES
258

FLEET
ATR 72 1
ATR 42 3
B1900D 2



Mr. Patrick Mwanri
Chief Executive Officer

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

IATA CODE: PW
ICAO CODE: PRF

AFRAA MEMBERSHIP
Became member in 2006
Established in 1991

OWNERSHIP STRUCTURE
Kenya Airways – 41.23%
Michael Ngaleku Shirima – 42.91%
PW employees – 1.10%
Others – 14.76%

COMMERCIAL PARTNERSHIP
Kenya Airways

DESTINATIONS SERVED
Domestic 10
Intra-Africa 1

EMPLOYEES
386

FLEET
ATR 72 3
ATR 42 1



Mr. Abdelhamid Addou
Chief Executive Officer

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

IATA CODE: AT
ICAO CODE: RAM

AFRAA MEMBERSHIP
Became member in 1977
Established in 1957

OWNERSHIP STRUCTURE
Moroccan State: 53.94%
Hassan II Fund: 44.1%
Air France: 1.25%
Iberia: 0.42%
Private Investors: 0.29%

COMMERCIAL PARTNERSHIP
Iberia
Etihad Airways
Jet Blue
Qatar Airways
SN Brussels
Saudi Airlines
TAAG Angola Airlines
Kenya Airways
Turkish Airlines
Royal Jordanian
EgyptAir
American Airlines
S7 Airlines
British Airways
Alitalia

DESTINATIONS SERVED
Domestic 19
Intra-Africa 46
International 58

EMPLOYEES
1966

FLEET
ATR 72 6
Boeing 737-800 30
Boeing 737-MAX 2
Boeing 787 9
Embraer E190 4
Boeing 767-Freighter 1



Ms. Yvonne Makolo
Chief Executive Officer

ADDRESS

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

IATA CODE: WB
ICAO CODE: RWD

AFRAA MEMBERSHIP
Became member in 2009
Established in 2002

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Ethiopian Airlines (ET)
Turkish Airlines (TK)

DESTINATIONS SERVED	
Domestic	1
Intra-Africa	18
International	5

EMPLOYEES
1608

FLEET	
A330-300	1
A330-200	1
Boeing 737-700	2
Boeing 737-800	4
Bombardier CRJ900 Next Gen	2
Bombardier Dash 8-Q400	2

Mr. Alex Avedi
Chief Executive Officer

ADDRESS

Safarilink Aviation
Phoenix House , Wilson Airport
PO Box 5616 – 00506 Nairobi,
Kenya www.flysafarilink.com

IATA CODE: F2
ICAO CODE: XLK

AFRAA MEMBERSHIP
Became member in 2019
Established in 2004

OWNERSHIP STRUCTURE
Privately owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED	
Domestic	21
Intra-Africa	3

EMPLOYEES

FLEET	
Cessna 208	11
Bombardier Dash 8-106	1
Bombardier Dash 8-202	1
Bombardier Dash 8-315	1

Mr. Mohamed Aden Noor
Chief Executive Officer

ADDRESS

AIS Building, Wilson Airport,
Nairobi, Kenya

IATA CODE: K3
ICAO CODE: SAQ

AFRAA MEMBERSHIP
Became member in 2016
Established in 2007



Mr. Thomas Kgokolo
Interim Chief Executive Officer

ADDRESS

Floor.1, Block A, Airways Park,
OR Tambo International-
Johannesburg, South Africa
Tel: +27 11 978 6553
www.flysaa.com

IATA CODE: SA
ICAO CODE: SAA

AFRAA MEMBERSHIP
Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE

DESTINATIONS SERVED

Domestic	4
Intra-Africa	15
International	5

EMPLOYEES
3524

FLEET

Ms. Thuli Mpshe
Chief Executive Officer

ADDRESS

Mezzanine Floor, Terminal J
Johannesburg Int. Airport
P O Box 101 1627, South Africa
Tel: +2711-978 9900
DL: +27 11 978-5553/7
Fax 2711-978 9456

IATA CODE: XZ
ICAO CODE: EXY

AFRAA MEMBERSHIP
Became member in 2003
Established in 1994

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

EMPLOYEES

FLEET

Mr. Yasir Timo Saows
Managing Director

ADDRESS

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

IATA CODE: SD
ICAO CODE: SUD

AFRAA MEMBERSHIP
Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

FLEET



Mr. Lotfi Frikha
Chief Executive Officer

ADDRESS

Immeuble Maghreb,ia,
Tour B, 10, rue de l'Artisanat,
Z.I. Charguia 2,
2035 Tunis - Tunisia
Tel: +216 31 310 500
Fax: +216 31 310 503

IATA CODE: FS

ICAO CODE: SYA

AFRAA MEMBERSHIP

Became member in 2011
Established in 2020

OWNERSHIP STRUCTURE

Mr Mohamed Frikha 43,72%
(Founder)
Telnat honding 9.09%
Public 47.19%

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

EMPLOYEES

Mr. Rui Carreira
Chairman & CEO

ADDRESS

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

IATA CODE: DT

ICAO CODE: DTA

AFRAA MEMBERSHIP

Became member in 1978
Established in 1938

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	13
Intra-Africa	14
Intercontinental	9

EMPLOYEES

2743

FLEET

B737-700	4
B777-300ER	2
Bombardier Dash 8-Q400	3

Mr. Erlendur Svavarsson
President & Chief Executive Officer

ADDRESS

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

IATA CODE: VR

ICAO CODE: TCV

AFRAA MEMBERSHIP

Became member in 2014
Established in 1958

OWNERSHIP STRUCTURE

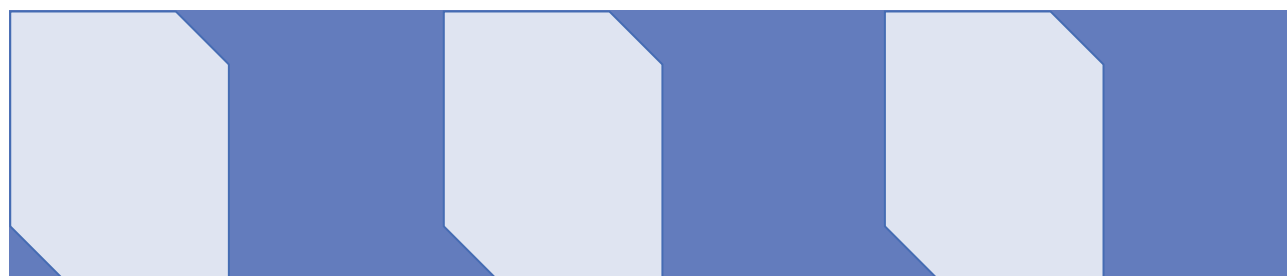
Government: 100%

DESTINATIONS SERVED

Domestic	3
Intercontinental	3

FLEET

Boeing 757-200	1
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Mr. Adil Cherouati
Chief Executive Officer

ADDRESS

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

IATA CODE: SF
ICAO CODE: DTH

AFRAA MEMBERSHIP
Became member in 2014
Founded in 1997
Commenced operations
in 1998

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

FLEET

Boeing 737-800	7
Bombardier Dash 8-Q200	4
Bombardier Dash 8-Q400	4

Mr. Khaled Chelly
Chairman & CEO

ADDRESS

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

IATA CODE: TU
ICAO CODE: TAR

AFRAA MEMBERSHIP
Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE
State of Tunisia 64.90%
Air France 5.60%
CNSS 4.00%
CNRP 3.90%
CNAM 1.70%
Floatting 20.00%

COMMERCIAL PARTNERSHIP
Royal Jordanian
Middle East Airlines

DESTINATIONS SERVED
Domestic 0
Intra-Africa 27
Intercontinental 129

EMPLOYEES
3,781

FLEET
A319 – 100 4
A320-200 15
A320 NEO 2
A330-200 2
B737-600 7

Ms. Jenifer Bamuturaki
Acting Chief Executive Officer

ADDRESS

EagleAir Hangar Complex,
Entebbe International Airport -
Old Airport
PO Box 431, Entebbe, Uganda
Tel: (+256) 754 355 860

IATA CODE: UR
ICAO CODE: UGD

AFRAA MEMBERSHIP
Became member in 2019
Established in 2018

OWNERSHIP STRUCTURE
Government: 100%
COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Intra-Africa 9

FLEET
Bombardier CRJ 900 4

Section Twelve: AFRAA Partners – Profiles and Contacts



Founded in 2002, ACC Aviation delivers market-leading solutions across aircraft leasing, air charter, aviation asset management and strategic consultancy services.

Through our international office network spanning Europe, the Middle East, Africa, North America and Asia, we provide bespoke aviation solutions to clients across the globe.

Key contacts:

Andrew Harreiter

Marketing Manager

ACC AVIATION GROUP

Tel: +44 (0)1737 232 237

DDI: +44 (0)1737 237 709

Email: Andrew.Harreiter@ACCaviation.com

Our success is built on the strength and depth of our relationships within the aviation industry and, through continued investment in developing and maintaining these partnerships with a persistent focus on innovation, we deliver superior solutions to a diverse and growing client base.

[Click here to visit the ACC Website](#)



Since 1988 AEG FUELS has established single-supplier convenience through a network of strategic relationships with national and multinational oil companies, local fuel providers, and airport handling agents. Beyond fuel services, AEG also provides a suite of ancillary solutions such as fuel management, international trip planning, tax recovery services, carnet card benefits and more.

AEG Fuels have established a broad range of customers including passenger and cargo airlines, the US and foreign militaries, heads of state, royal flight departments, corporate and charter operators, fixed base operators and fuel resellers. AEG serves these customers through a network of longstanding direct relationships with multinational oil companies, national suppliers, local refiners, and into wing agents around the world. Our customers are afforded the benefits of negotiated fuel and throughput pricing based on AEG's aggregate volume. The AEG Network consists of 2000+ suppliers and agents

in 212 countries, providing coverage at over 3000 airports and growing.

AEG executive aviation team of professionals brings almost three decades of experience in delivering world class service with worldwide coverage. When partnering with AEG FUELS, operators are ensured specifically-tailored ground support and refueling packages, flexible credit facilities, and affordable pricing structures for every mission and every trip. With offices in Miami, Houston, Tahoe, Toluca, London, Dubai, Singapore and Shanghai, our team is able to liaise locally in markets with customers and suppliers to provide the highest degree of service.

AEG FUELS has the industry expertise to meet our customers' fuel requirements and credit needs 24 hours a day, 365 days per year. AEG's well-established position in the marketplace offers our customers greater purchasing power, which allows cost-effective and reliable fuel supply worldwide.

accelya

Accelya is a leading global provider of technology products and services to the travel and transport industry. Headquartered in Barcelona, Spain, Accelya has been working with the airline industry since 1976.

Accelya partnered with IATA right from the introduction of BSP processing in the UK and, based on the success, it was introduced in other countries in Europe and across the world. Along the years Accelya has become leader in IATA's BSP Processing operations, currently being the data processing centre in more than 114 out of 180 BSP countries. Accelya was also the first to introduce the Sales Audit (Revenue Assurance) and Credit Card Processing and Settlement to the airline industry, becoming a leader in these areas.

With over 40 years of proven innovation, Accelya delivers financial, commercial, cargo and analytics solutions designed for a world on the move. Accelya provides critical solutions for the airline industry that

account for and manage more than 5 billion financial transactions and 75 million tonnes of cargo annually, serving as a strategic partner for more than 400 airlines, travel agents and shippers.

In recent years, Accelya has been recognised as 'Service Provider of the Year 2017' by Air Transport News (ATN), also featured in the International Association of Outsourcing Professionals (IAOP) Global Outsourcing 100 List 2017, a list of the leading outsourcing firms in the world. In March 2017, Accelya received the award for 'Best Airline Revenue Accounting Specialists' at the 2017 Accounting, Audit & Tax Awards by Acquisition International (AI) Magazine. Moreover, Accelya's Revenue Accounting Solution's Strategic Product Group (SPG) program was recognised for taking customer collaboration to the next level at ITSMA 2016 Marketing Excellence Awards.

For more information please visit www.accelya.com

Key contacts:

Roger Page-Morris

Regional Director - Sales & Account Management
Email: roger.page-morris@accelya.com

Mr. Marcus Carotti

Director, Regional Marketing
Email: marcus.carotti@accelya.com

AIRBUS

Airbus helps shape the future of air transportation and drive sustainable growth around the world. Based on a deep understanding of ever-changing market needs, Airbus pioneers incremental innovative technological solutions and seeks the most efficient sourcing and manufacturing possible – so airlines can grow and people can connect. Airbus, headquartered in Toulouse, France, today consistently captures about half of all commercial airliner orders.

Airbus' comprehensive product line comprises highly successful families of aircraft ranging from 100 to more than 600 seats: the single-aisle A320 Family (including A320neo, the best-selling aircraft in aviation history); the wide-body long-range A330 Family (including the A330-200 Freighter, the A330-based MRTT, and the recently launched A330-800 and -900); the all-new next generation A350 XWB Family; and the flagship A380. Across all its aircraft families Airbus' unique approach ensures that aircraft share the highest commonality in airframes, on-board systems, cockpits and handling characteristics. This reduces significantly operating costs for airlines.

Dedicated to assisting airlines enhance the profitability

of their fleets, Airbus also delivers a wide range of customer services in all areas of support, tailored to the needs of individual operators all over the world.

Employing around 55,000 staff world-wide, Airbus is a truly global enterprise with fully-owned subsidiaries in the United States, China, Japan, India and in the Middle East, and spare parts centres in Hamburg, Frankfurt, Washington, Beijing, Dubai and Singapore. Airbus also has engineering and training centres in Toulouse, Miami, Mexico, Wichita, Hamburg, Bangalore, Beijing and Singapore, as well as an engineering centre in Russia. There are also 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 7,700 suppliers all around the world.

Airbus is the first aeronautics company in the world to have earned the ISO 14001 environmental certification for all production sites and products for the entire life cycle. Airbus seeks to ensure that air transport continues to be an eco-efficient means of transport, delivering economic value while minimising its environmental impact.

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

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

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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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Alton Aviation Consultancy is a specialist advisory firm dedicated to serving the aviation and aerospace industries. Alton was founded by seasoned aviation industry executives who are globally recognised for their thought leadership, quantitative analytics, and innovative solution development. Clients trust the Alton team to deliver the objective, data-driven guidance and insight required to inform their business strategies, allocate capital, prioritize resources, and manage risk.

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With offices in New York, Dublin, Singapore, Hong Kong, Beijing, and Tokyo, Alton's engagements span the aviation and aerospace value chain to include commercial, financial and technical aspects. Typical projects include strategy and business plan development, operational performance improvement, and transaction support. Clients include airlines, manufacturers, MRO and aftermarket service providers, lessors, and the broader financial and investment community. To learn more, please visit www.altonaviation.com

amadeus

Travel powers progress. Amadeus powers travel. Amadeus' solutions connect travellers to the journeys they want through travel agents, search engines, tour operators, airlines, airports, hotels, cars and railways.

We have developed our technology in partnership with the travel industry for over 30 years. We combine a deep understanding of how people travel with the ability to design and deliver the most complex, trusted, critical systems our customers need. We help connect over 1.6 billion people a year to local travel providers in over 190 countries.

Key contact:

Maher Koubaa
Executive Vice President

We are one company, with 17,000 employees across 70 offices. We have a global mind-set and a local presence wherever our customers need us.

Our purpose is to shape the future of travel. We are passionate in our pursuit of better technology that makes better journeys.

Amadeus is an IBEX 35 company, listed on the Spanish Stock Exchange under AMS.MC.

To find out more about Amadeus, visit www.amadeus.com

Follow us on:      

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APG Network is the world's largest network for commercial and distribution services for airlines, providing its 200+ airline clients with a range of services aimed at increasing incremental revenue. With its headquarters in Paris, APG has a network of +110 worldwide offices, covering 176 countries across all continents. The organization is headed by Richard Burgess, as President of the network, and Sandrine de Saint Sauveur, as President of APG's commercial operations. In addition to the Board and Regional Vice Presidents, each product and region also has its own commercial head.

The organization'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 maximise an airline's distribution network with a comprehensive approach based on a tailored portfolio of solutions. APG has been a market leader in developing new distribution solutions for airlines, building on its roots as a GSA airline representation company, a service which still remains at the heart of its operation.

In developing such products, APG works closely with key industry organizations such as IATA with whom

APG developed the highly successful IBCS product, which gave many more airlines viable access to BSP participation in most of the world's BSPs. APG also operates an e-ticket interline hub, APG IET, now with almost 100 participating airlines, and for which APG offers a travel agent online booking portal which APG believes will be particularly beneficial in African countries where there is no BSP. APG IET operates with airline code, GP, which belongs to APG Airlines, APG's own scheduled airline. APG has also developed its revolutionary NDC platform which allows airlines to distribute to travel agents using latest NDC standards and which also facilitates the distribution of rich content and airline ancillaries.

In line with its commitment to play a strong role in the aviation industry, APG is also looking at ways to support the industry. As part of this, APG has developed the APG Academy which offers online training to aviation personnel at all levels. APG continues to invest in new products for the future all with the aim of assisting airlines improve their distribution worldwide.

APG already partners with many airlines from Africa is proud to be an AFRAA Member.

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ATPCO is the world leader in the distribution of fare and ancillary data for the airline industry. Our purpose and passion is to help airlines lower costs and increase revenues by efficiently getting their fare products to the marketplace.

Our solutions make it easy for an airline to seamlessly reach the entire marketplace, transmitting consistent data to global distribution systems, pricing systems, governments, and related travel organizations. We give airlines choice and control over how they distribute their content.

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We are the industry source for fare data, including rules, routings, ancillary services, baggage, taxes, and branded fares. Our dependable industry standards ensure that content is processed as it was intended, helping the whole industry run more smoothly.

ATPCO currently works with more than 400 airlines and systems worldwide. We hold over 160 million fares with an average of 3.5 million fare changes a day and handle more than 99 percent of the industry's intermediated fare data.

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European turboprop manufacturer ATR is the world leader in the regional aviation market. ATR designs, manufactures and delivers aircraft, with its fleet encompassing some 200 airlines in nearly 100 countries. In Africa and the Middle East, some 125 ATR aircraft are operated by 35 carriers. The

ATR 42 and the ATR 72 are the best-selling aircraft in the below 90-seat category. With continuous improvement as a driving force, ATR is an equal partnership between leading aerospace firms Airbus and Leonardo. For more information, please visit <http://www.atr-aircraft.com>

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Aurora Aviation S.A. based in Dubai, U.A.E., it is a leading international flight management service provider. With offices located in strategic locations around the world, Dubai and Fujairah in the United Arab Emirates, London United Kingdom, Chengdu China and Bamako Mali, Aurora deals with commercial airlines, cargo carriers, business private jet companies (Presidential flights, Air Forces, Royal families, high-profile businessmen, air medic flights, etc.)

With a 24 * 7 multilingual experienced team, the company offers a wide range of services that ensure its clients a smooth flight experience.

The company has dedicated departments to support all kinds of flights on different requirements basis; the main offered services list includes: Ground Handling services, Station Management, Fuelling, Permits, FBOs Services, Catering, Crew Services and Concierge. Aurora Aviation has all the resources, no matter the purpose of Flight.

Always prioritizing the satisfaction of clients, the company offers a dedicated Supervision Service to make sure that each flight, from landing to the take-off, goes without any inconveniences, checking each movement and procedure on the ground.

Currently working with African operators like Ethiopian Airlines, 748 Air Services, Saf Air, etc.; Aurora Aviation S.A. shows its strength in the aviation market, not only on the quality of services but also on the diversity and efficiency.

In addition to the extensive list of services, it is important to highlight Aurora Aviation S.A FBOs, one of them located in Fujairah International Airport, U.A.E. The FBOs offer luxurious passenger lounges, crew rest facilities, business centres with WIFI access and printing services, duty free, smoking and children dedicated areas.

All in all, Aurora Aviation S.A.'s mission is to exceed client's expectations and earn their loyalty. Valuing long standing business relationships with customers, colleagues, suppliers and partners.



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 is organised into three business units: Commercial Airplanes; Defense, Space & Security; and Boeing Global Services, which began operations July 1, 2017. Supporting these units is Boeing Capital Corporation, a global provider of financing solutions.

Boeing has been the premier manufacturer of commercial jetliners for decades. Today, the company manufactures the 737, 747, 767, 777 and 787 families of airplanes and the Boeing Business Jet range. New product development efforts include the Boeing 787-10 Dreamliner, the 737 MAX, and the 777X. More than 10,000 Boeing-built commercial jetliners are in service worldwide, which is almost half 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.

Boeing Global Services delivers innovative, comprehensive and cost-competitive service solutions for commercial, defense and space customers, regardless of the equipment's original manufacturer. With engineering, digital analytics, supply chain and training support spanning across both the government and commercial service offerings, Boeing Global Services' unsurpassed, around-the-clock support keeps our customers' commercial aircraft operating at high efficiency, and provides mission assurance for nations around the world.

Boeing Capital Corporation (BCC) is a global provider of financing solutions for Boeing customers. Working closely with Commercial Airplanes and Defense, Space & Security, BCC ensures customers have the financing needed to buy and take delivery of their Boeing products. With a year-end 2016 portfolio value at approximately \$4.1 billion, BCC combines Boeing's financial strength and global reach, detailed knowledge of Boeing customers and equipment and the expertise of a seasoned group of financial professionals.

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CHAMP Cargosystems provides the most comprehensive range of integrated IT solutions and distribution services for the air cargo transport chain. The portfolio spans cargo management systems, messaging services, and eCargo solutions. These include applications to meet customs and security requirements, quality optimization as well as e-freight and mobility needs. The products and services are well known under the Cargospot, Traxon and Logitude brands.

The company serves over 200 airlines and GSAs, and links these with some 3,000 forwarders and

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GHAs worldwide. CHAMP's solutions help its customers and their clients adapt to critical and continuous changes in air transport logistics to meet global trade demands.

CHAMP Cargosystems is headquartered in Luxembourg and operates offices in London, Zurich, Frankfurt / Main, Atlanta, Singapore and Manila. CHAMP is an Industry Partner and member of AFRAA Cargo Task Force.

For further information see: www.champ.aero

CHAMP Cargosystems – Connected thinking for the air cargo community.



Civic Petroleum was incorporated in Nigeria on the 3rd of January 2014, as a private liability company. Our company is a privately owned oil and gas company trading in refined petroleum products in the downstream and midstream sector of the oil and gas industry.

Civic Aviation is a supplier of bulk Jet A-1 fuel and recently ventured to into aircraft fueling. We are positioned to be one of the fastest growing indigenous companies in the sector.

The primary goal is the procurement of quality on-spec Aviation Turbine Kerosene also known as Jet A1 with parameters meeting current ASTM standards and IATA guidelines for Joint Fueling System Checklist for Jet A1 ensuring optimum customer service delivery by efficient supply chain management processes, considering the tight schedule of airlines. We apply best practices in execution of operations in-line with JIG (Joint Inspection Group) established and enhanced standards for safe handling and quality

control of Jet Fuel (JET A1). These core values have established the company reputation as a reliable and customer-focused marketer in the industry.

We are currently operating in Murtala Mohammed Airport Lagos as well as Port-Harcourt international airport Omagwa, and we are on course to commence operations in Nnamdi Azikiwe International Airport, Abuja by the third quarter of 2018, upon completion of our ultra-modern facilities.

Our array of equipments include 10x 40,000ltrs dedicated epoxy-coated bulk haulage bridging road vehicles for transportation of JET Fuel between aviation facilities, 2x 41,000ltrs, 2x 20,000ltrs, 1x 63,000ltrs aviation refuelers for into aircraft fueling.

As a growing marketer of aviation fuel, the company has an increasing client base with both domestic and international airlines.

In line with the company's vision is our plan to expand our operations across sub sahara and the whole of Africa.



Collins Aerospace, a unit of United Technologies Corp. (NYSE: UTX), is a leader in technologically advanced and intelligent solutions for the global aerospace and defense industry. Created in 2018 by bringing together UTC Aerospace Systems

and Rockwell Collins, Collins Aerospace has the capabilities, comprehensive portfolio and expertise to solve customers' toughest challenges and to meet the demands of a rapidly evolving global market.



For more than 20 years, DERICHEBOURG Atis aéronautique has been recognised as one of the leading aeronautics subcontractors in Europe and constantly developing on the international scale (Canada, China, United States of America...). Much more than just a service provider, DERICHEBOURG Atis aéronautique is considered as the ideal partner for aeronautics professionals for its know-how and experience, whose watchwords are Expertise, Proactivity, and Continuous Improvement.

With its highly competent and specialised staff, DERICHEBOURG Atis aéronautique provides a wide range of skills covering the complete aircraft life-cycle aimed at major players in the aeronautical industry: manufacturers, airlines, leasing companies or financial institutions that own aeronautical assets.

Industrial Processes

Industrialization (referenced Airbus ME3S) - Methods
Technical support
Product Quality Management & monitoring
Coordination and representation of industrial partner
Industrial transfer

Assembly / Manufacturing

Integration of the mechanical and electrical systems
Cabin layout
Finishing / conversion & special projects
Support for static and flight testing
Maintenance, paint finishing & removal

Ground Handling Support

Aircraft technical cleaning
Washing, towing & repositioning
Removal of temporary paint

Supply Chain Consolidation / Logistics

Supply Chain Monitoring
Coordination of industrial partners
Flow Management, repair circuit management
Management & replacement of parts

After-Sales Support (Part M agreement – FR MG.0236)

Customer representation & Delivery assistance
Continuing Airworthiness
Aircraft transition

Training & Knowledge transfer

For further information please visit

<http://derichebourg-atis.com/en/home.html>

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A global aerospace company headquartered in Brazil, Embraer celebrates its 50th anniversary with businesses in Commercial and Executive aviation, Defense & Security and Agricultural Aviation. Since it was founded in 1969, Embraer has delivered more than 8,000 aircraft and is the world's leading manufacturer of commercial aircraft up to 150 seats

with more than 100 customers from all over the world.

For the E-Jets program alone, Embraer has logged more than 1,800 orders and 1,500 aircraft have been delivered. Today, E-Jets are flying in the fleet of 80 customers in 50 countries. The versatile 70 to 150-seat family is flying with low-cost airlines as well as with regional and mainline carriers.

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GE Aviation is a world leading provider of jet engines, components and integrated systems to airframers and operators of commercial and military aircraft, including comprehensive, global services and support for the powerplants and integrated systems we manufacture.

We are committed to providing customers with cost-effective approaches to service, developing innovative technologies and creating advancements

that increase the lifecycle and fuel efficiency of engines while minimising disruptions – ultimately keeping customers' fleets flying and generating revenue. Backed by our global support network, our TrueChoice™ services suite includes overhaul, on-wing support, new/used parts, repair, technology upgrades, digital services, engine leasing and diagnostics.

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Hahn Air is a German scheduled and executive charter airline. Since 1999 it offers indirect distribution services to other airlines and thus provides ticketing solutions to 100,000 travel agencies in 190 markets. With 20 years of experience, the company has established itself as the market leader. Today, Hahn Air's partner network encompasses more than 350 partner airlines.

Hahn Air offers its distribution services exclusively to transportation companies and ticketing solutions to travel agents only. However, travellers benefit as well as they are able to choose from more carriers, more routes and more destinations. Every year millions of passengers travel between 4,000 locations using Hahn Air's HR-169 tickets. It is the first and only

airline worldwide that offers free and comprehensive reimbursement in case of insolvency of the operating carrier. Hahn Air is a member of the International Air Transport Association (IATA) and a globally connected stakeholder playing a leading role in the airline industry.

Hahn Air is 100% owned by the Hahn Air Group, an international corporation based in Dreieich near Frankfurt, Germany. The fleet of Hahn Air Lines operates out of the airports Dusseldorf and Frankfurt Egelsbach. The Group, which has offices around the world, including Minneapolis, Montevideo, Casablanca, New Delhi, Manila and Johannesburg, achieves an annual global turnover of approximately 1 billion USD for its clients.

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Established in 1994 by two visionary airline executives, Hitit has since become one of the world's leading airline and travel IT solutions and business services providers.

Hitit is the main company behind Crane FF, which has grown to be the most widely used airline loyalty system across the world in 2012. Currently Hitit's Crane family of solutions and services covers all aspects of air travel from reservation and passenger service systems to planning, accounting, travel merchandising and cargo. The reservation and ticketing solution system Crane PAX fully integrates with Crane IBE for online and mobile booking, as well as Crane DCS for departure control to create a fully functional passenger service system (PSS). The most recent versions of Crane PSS solutions are designed with the latest web technologies, using Service Oriented Architecture (SOA), New Distribution

Capability (NDC) and Software as a Service (SaaS) models, which make Hitit the industry leader in system implementation time to market performance. The Crane solution family contains additional solutions for any possible need of an airline, such as charter inventory distribution, schedule and crew planning, operations control, revenue and cost accounting, cargo operations, and loyalty and customer care solutions.

Hitit currently serves 50 airline companies and travel customers with over 65 million yearly passengers across Europe, Africa and Asia. Hitit has been consistently ranked among the top 500 fastest-growing technology companies in the EMEA region by Deloitte. Hitit holds ISO 27001 and ISO 9001 certificates, and is a long-time strategic partner of IATA.

For more information, please contact: marketing@hititcs.com



Lufthansa Consulting is an aviation and management consulting company, which is dedicated to assist international clients from the aviation sector and related industries to meet the challenges of the future successfully. Since 1988 the company has provided services and solutions to the air transportation industry in more than 3000 projects worldwide and is a subsidiary of the Lufthansa Aviation Group.

Lufthansa Consulting is in the unique position of offering comprehensive consultancy and expertise to aviation specific client groups: air carriers, airport authorities, civil aviation authorities, governments, investors, financial institutions, manufacturers and aviation related entities. Our clients benefit from customised business solutions designed by consultants with a global understanding of the industry and in-depth knowledge of factors which are critical for success.

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Lufthansa Consulting is well-known as both a strategic and pragmatic business partner, especially in the African market. We have experience in airline restructuring, concession support or cost management, on time-performance measures, safety issues, Air Service Development and network planning and digital transformation projects. Lufthansa Consulting's service portfolio addresses a wide range of business activities to boost the success of African airlines and airports.

Lufthansa Consulting offers comprehensive advisory services and develops business solutions for all sectors of the African aviation industry. We know the aviation business and we take pride in implementing our solutions.

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Lufthansa Systems 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 350 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.

Innovation and progress

Digitization, Mobility and Big Data represent fundamental changes in both business processes and IT. In this context, IT is a driver for new markets, products and revenue – and the airline industry is no exception. Lufthansa Systems helps shaping these changes with innovative IT solutions while advising airlines on how to maximise the benefits from their use.

Solutions for all airline business processes

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 customised to their respective needs.

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Since the individual applications connect with one another, they can be aggregated into an end-to-end solution capable of presenting information in the context of a particular business process, thus enabling an integrated perspective. A standard user interface and a high level of standardization enhance usability and productivity. Since the applications are also modular, airlines can modify the feature set to suit their own needs.

The products from Lufthansa Systems are highly cost-efficient and will usually pay for themselves within a short period of time.

The portfolio is divided into different categories:

Airline Consulting
Commercial Solutions
Finance Solutions
Flight Operations Solutions
Ground Operations Solutions
In-flight entertainment
Services

Lufthansa Systems GmbH & Co. KG at a glance

Company headquarters Raunheim near Frankfurt/Main, Germany

Executive management: Olivier Krueger and Dr. Thomas Wittmann

Employees: Around 2,200 worldwide

Locations: Berlin, Frankfurt/Main (Raunheim), Hamburg, Bangkok,

Budapest, Buenos Aires, Copenhagen, Dallas, Delhi, Gdansk, Hong Kong, Mexico City, Miami, Moscow, New York, Peking/Beijing, Princeton, Sao Paulo, Singapore, Tokyo, Toronto, Warriewood (Australia), Zurich.



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.



At MTU Maintenance, we understand that operators increasingly require services tailored to their specific needs in order to control and optimize cost. Additionally, we know that residual value is key to lessors and asset managers.

We are the global market leader in customised service solutions for aero engines and specialised in meeting these needs. As engine experts, we offer a wide range of individually-tailored solutions encompassing innovative MRO services, integrated leasing and asset management.

It is our people who make the difference: We are passionate about engines and dedicated to supporting our customers. We marry world-class engineering with intelligent creativity and never give up unless an optimal solution has been found.

This is demonstrated by our track record of great customer relationships. MTU Maintenance and its 5,000-strong workforce currently perform over 1,000 shop visits a year for more than 200 airline customers. We have around 30 engines in our portfolio and locations in the Americas, Europe and Asia.

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Portfolio

Turboprops:
Turboprops:
PT6A, PW100/150¹
Helicopters:
PT6B/C/T¹, PW200

Business jets

JT15D¹, PW300, PW500, PW600¹, PW800³
Regional jets:
CF34-8/-10E

Narrowbodies

CFM56-2/-3/-5B/-7, LEAP-1B, PW1100G-JM⁵,
PW2000, PW6000, V2500, PW1500G3, PW1900G³

Widebodies

CF6-50/-80C2, GEnx^{2/5}, GE90-110/-115B, GE9X^{2/3/5},
GP7200^{4/5}

- 1) 1) P&WC Customer Service Center Europe,
- 2) Turbine Center Frame
- 3) Planned,
- 4) Low Pressure Turbine,
- 5) on behalf of OEM

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OAG is a leading global travel data provider which has been powering the growth and innovation of the air travel ecosystem since 1929.

Every day, we support millions of journeys across the globe, enabling a simpler, seamless and more enjoyable travel experience.

With the world's largest network of schedules and status data, and leading-edge analytics tools, we enable our customers to make smarter decisions,

better adapt to change, and create exceptional customer experiences.

We partner with some of the biggest global brands, airports, airlines, travel operators, and fast-growing start-ups to design the best services available today, and the finest innovations of tomorrow.

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Palma Holding

Palma Holding Limited is a diversified Financial Services Holding Company focused on Aircraft Leasing, Real Estate and Financial services.

Palma Holding's major affiliates are:

- An Investment Advisory firm based in the Dubai international Financial Center (DIFC) and regulated by the Dubai Financial Services Authority (DFSA).
- A regional and international advisor of airlines operators registered & licensed as a Freezone Company under the Rules & Regulations of Dubai Multi Commodity Center Authority DMCCA.
- A Joint Venture between Palma Holding Limited and Ibdar Bank BSC(C)(Bahrain), specialised in Aircraft Leasing.

In 2015, Palma Capital was one of the lead arrangers of USD 400 million Sharia Compliant Financing used to acquire 5 new Airbus A330-200 for Kuwait Airways through International Air finance Corporation (IAFC). The structure was awarded as the Best Syndicated Murabaha Facility at the 2015 Achievement Awards by emea finance.

Palma Capital continues to be one of the lead arrangers of the Sharia Compliant Financing that would be required to acquire 20 new Airbus A330-300 and 30 new Airbus A320-200 for Saudi Arabian Airlines (Saudia) through International Air finance Corporation (IAFC).

Palma Holding Limited serves as an International Sharia compliant aviation platform. The group enjoys solid relations with major stakeholders in the aviation industry. It maintains a remarkable track record with total transaction value of circa USD250million of aircraft placed with flag carriers and renowned operators.

The flagship transaction with Ethiopian Airlines received industry accolades for its innovative structure:

- Africa Deal of Year 2014 by Airfinance Journal Awards;
- Aircraft Finance Deal of the Year 2014 by African Aviation Awards.



Poulina was created in 1967, the year it all started with poultry. The Group then embarked on a strategy to integrate all the activities of this industry: from the import of breeding to processed products distribution. Successively, a diversification of its activities was initiated by investing in various sectors with high added value. Established 48 years ago, the Group owned at the end of the year 2014, 108 subsidiaries.

In 2010, Poulina Group Holding has launched a restructuring action that gave rise to the

recentralization of the group around 9 businesses to facilitate the management and performance monitoring.

The 9 businesses are Poultry, Mass Consumption Goods, Steel Work, Packaging, Real Estate, Public Works & Infrastructure, Wood & Household Appliances, Building Materials and Trade & Services.

On an international scale, the Group has 24 subsidiaries abroad, mainly in Morocco (4), Algeria (4) Libya (10), France (2), Senegal (1) and China (3).

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Pratt & Whitney

A United Technologies Company

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.

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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.

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Predictive Mobility. Our suite AIR.PM provides an integrated network, fleet, schedule planning, and revenue management solution for airlines and airports. Our clients trust our years of experience and passion to deliver actionable results. The most fruitful and rewarding client relationships we have, develop when we are positioned as a trusted part of the team and more than just a vendor. With trust comes responsibility, and our goal is always to treat our clients' needs as paramount, while repaying that

trust with strategic support and impactful results. Our aim is to provide you with the system and experience to expand your World, through marketing intelligence, route development, network optimization and revenue management. Our suite AIR.PM allows you to implement coordinated commercial decisions on your network, manage your price, and to grow your revenue and passenger traffic – Expand your world by gaining market share and opening new routes worldwide!

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Rolls-Royce pioneers cutting-edge technologies that deliver the cleanest, safest and most competitive solutions to meet our planet's vital power needs. Rolls-Royce has customers in more than 150 countries, comprising more than 400 airlines and leasing customers, 160 armed forces, 4,000 marine customers including 70 navies, and more than 5,000 power and nuclear customers.

We also support a global network of 31 University Technology Centres, which position Rolls-Royce

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engineers at the forefront of scientific research. Rolls-Royce employs 50,000 people in 50 countries. More than 18,200 of these are engineers.

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Sabre's consistent innovations provide the airline industry with future-focused IT solutions — from powerful applications and SaaS delivery to high-performance environments that support airlines around the world. We continually strive to develop and bring to market new, cutting-edge innovations. We were the first to introduce passenger-reservations and revenue-management systems, consumer travel, a corporate booking tool, low-fare search capabilities. And we aren't stopping there.

We continually invest in our technology to see airlines well into the future. Our unique solutions are open, flexible, intelligent and scalable, ensuring that they adapt as business needs change and airlines grow.

Our technology is designed to help airlines thrive. Our solutions portfolio is extensive, covering end-to-end operations, and spans every area of aviation across the globe with:

- More than 225 airline partners around the world,
- Nearly 790 million passengers boarded each year,
- More than 1,500 airports using our departure-control technology,
- More than 35 million flights tracked per year.

Our data-rich software helps airlines make smarter operational decisions, personalize and retail their products and services to travelers, distribute their product offerings through direct and indirect channels and fulfill them to ensure customers receive a superior experience.

Sabre also serves approximately 700 other customers including airports, cargo and charter airlines, corporate fleets, governments and tourism boards.

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Safran is an international high-technology group, operating in the aviation (propulsion, equipment and interiors), defense and space markets. Safran has a global presence, with more than 92,000 employees and sales of 21 billion euros in 2018. Working alone or in partnership, Safran holds world or European leadership positions in its core markets. Safran undertakes Research & Development programs to meet fast-changing market requirements, with total R&D expenditures of around 1.5 billion euros in 2018.

Aviation: Safran develops, produces and sells engines and propulsion systems as well as aircraft equipment for civil and military fixed and rotary-wing aircraft. Safran also offers a wide range of aircraft interiors.

No.1 worldwide: single-aisle commercial jet engines in partnership with GE, helicopter turbine engines, landing gear, wheels and carbon brakes (mainline commercial jets with over 100 seats), aircraft wiring systems, mechanical power transmissions (mainline commercial jets with over 100 seats), engine control units (in partnership with BAE systems), seats for commercial aircraft (economy class seats for twin-aisle jets), cabin interiors for regional and business

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aircraft, cabin liners, galleys, trolleys, containers, nacelle systems for business jets, evacuation slides.

Defense: Operating in the optronic, inertial guidance, electronics and critical software markets, Safran offers today's armed forces a complete range of optronic, navigation and optical systems and equipment for use in the air, on land and at sea.

No.1 in Europe: optronic systems, inertial navigation systems, tactical drones.

No.3 worldwide: inertial navigation systems.

Space: Safran is a world leader in the space industry. It offers systems and equipment for launch vehicles and satellites, while ArianeGroup* designs and produces the European launchers Ariane 5 and Ariane 6, marketed by its subsidiary Arianespace. Safran is also producing high-performance optics.

No.1 worldwide: provider of commercial launches into geostationary orbit within ArianeGroup*, high-performance space optics.

No.1 in Europe: plasma propulsion for satellites.

*ArianeGroup is a 50/50 joint company between Airbus and Safran.



Seabury Consulting, now part of Accenture, offers a unique range of expertise specific to the aviation industry that complements Accenture's global capabilities, solutions and services to help propel airlines into the future. Earlier this year, Accenture completed its acquisition of the corporate advisory and aviation consulting businesses of Seabury Group, strengthening Accenture's ability to help the world's leading airlines achieve transformational change.

Accenture (NYSE:ACN) is a leading global professional services company, providing a broad range of

services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialised skills across more than 40 industries and all business functions – underpinned by the world's largest delivery network – Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With more than 394,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives.

www.accenture.com/seaburyconsulting

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Headquartered in Geneva, Switzerland, SITA is the IT provider for the air transport industry. Today, SITA does business with nearly every airline and airport in the world. It also provides border management solutions to more than 40 governments. It is 100% owned by the industry and driven by its needs. Working with all the stakeholders, SITA drives collaborative development and innovation across the air transport community. It helps the industry achieve operational efficiencies and deliver a seamless passenger journey.

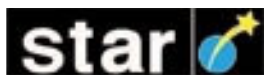
Since 1955, when Ethiopian Airlines became the first SITA member in Africa, SITA's presence on the continent has grown across 27 African countries. SITA's main hubs are in Johannesburg and Cairo, with smaller satellite offices in Ethiopia, Kenya, Nigeria, Ghana and Angola. SITA aims to be the technology partner for the African air transport community that drives industry collaboration, operational excellence, a seamless passenger journey, and profitable growth.

SITA's corporate social responsibility (CSR) initiatives are aligned with the United Nations Sustainable Development Goals (UN SDGs). SITA's Air Transport Community Foundation has positively impacted the lives of 83,000 students and teachers in Africa – 51% of whom are female – by providing access to IT and education.

SITA is one of the most internationally diverse companies and serves over 200 countries and territories. With a strong local presence and offices spanning the globe, SITA's service staff are on the ground at more than 1,000 airports providing support.

In 2018, SITA had consolidated revenues of US\$1.7 billion. SITA's subsidiaries and joint ventures include SITAONAIR, CHAMP Cargosystems and Aviareto.

For further information, go to www.sita.aero or kindly contact us at info.meia@sitaaero



An African Petroleum company wholly owned by private African capital. Star Oil is currently present in Mauritania, Mali, Guinea, Senegal, Sierra Leone. It has a development project in Ivory Coast and Gambia with a 50% market share in Mauritania.

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Star Oil is the leader in aviation activity and bitumen in Mauritania, Mali and Guinea. Partner of BP Group (British Petroleum): Aviation and Lubricants, Expertise, Technical Assistance and BP Group Guarantee.

Star Oil has a group turnover: USD 400 Millions USD.

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V1 is a dedicated and highly experienced company which is working in aviation & consultancy services with extensive knowledge in the field of aviation services. We seek to unceasingly improve the services we deliver to ensure that we achieve the highest possible level of client satisfaction. V1 consultancy services has auxiliary offices covering 200 destinations around the world.

Our vast experience in aviation services gives us the necessary understanding of all requirements and keeps us up to date with new regulatory developments in aviation industry, we secure all the following services in the fastest and most efficient way: Jet Fuel, Ground Handling, Fixed Base Operator, Clearance, Flight Planning, Consultancy, In-flight catering amongst others.



Wirecard is one of the world's fastest-growing digital platforms in the area of financial commerce. We provide both business customers and consumers with a constantly expanding ecosystem of real-time, value-added services built around innovative digital payments by using an integrated B2B2C approach. This ecosystem concentrates on the areas of payment and risk, retail and transaction banking, loyalty and couponing, data analytics and conversion rate enhancement in all sales channels (online, mobile, ePOS). Wirecard operates regulated financial institutions in several key markets and holds issuing and acquiring licenses from all major payment and card networks.

At present, we provide financial technology to more than 300,000 customers around the world, including more than 95 international airlines. Wirecard also has effective connections and partnerships with all key industry-specific providers in the travel segment. Wirecard is furthermore 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 e-commerce, BSP, ATO/CTO, Call Center and

POS. We currently accept more than 100 different transaction currencies and facilitate direct settlement in all major currencies. In addition to our Principal Membership with Visa and Mastercard, acquiring license agreements are also in place with JCB, Discover/Diners and UnionPay, allowing us to offer global acquiring services to our airline customers. We also offer PSP services for AMEX 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 many airline booking and reconciliation systems such as Amadeus, Sabre, Navitaire, SITA and AeroCRS etc. 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 and fully digitize their processes.

More on www.wirecard.com

Wirecard AG

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ANNEX 1: AFRAA member airlines performance

	Air Djibouti	Air Madagascar	Air Mauritius	EgyptAir	Ethiopian Airlines	Nile Air	Nouvelair Tunisie	Overland Airways Limited	Precision Air Services	Royal Air Maroc	RwandAir	South African Airlines	TAAG Angola	Tunisair	Uganda Airlines
TRAFFIC DATA															
Domestic Passengers (000)	0	0	90	16,117	997	92		74	190	434	6	770	134	0	0
Regional Passengers - Within Africa (000)	42	13	147	1,402	1,988	0		0	55	457	340	54	84	121	61
Intercontinental Passengers (000)	6	16	171	356,249	1,956	235	319	0		1,360		114	141	853	0
Total Passengers (000)	48	29	407	373,768	4,940	327	319	74	245	2,250	346	938	359	974	61
Domestic Freight (000)	0	0	37	1	1,467	0		0	0	280	0	2	1	0	0
Regional Freight - Within Africa (000)	72	16	5,378	60	130,820	0		0	0	3,588	6,049	4	1	258	0
Intercontinental Freight (000)	16	440	6,384	2,592	427,256	80	105	0	0	9,991		7	4	2,326	0
Total Freight (000)	88	456	11,799	2,653	559,544	80	105	0	0	13,859	6,050	12	6	2,584	0
Revenue Passenger Kilometre - RPK (000)	26,954	155,924	1,488,029	535,013	16,407,323	327,923	453,807	21,595	121,600	4,830,471	806,513	2,574,015	1,131,413	1,581,458	
Available seat Kilometre - ASK (000)	53,794	263,637	2,131,241	1,441,322	31,036,556	534,903	677,117	31,863	247,561	7,214,017	1,466,346	3,980,010	2,492,187	23,374,802	
Passenger Load Factor - PLF (%)	50%	59%	70%	37%	53%	61%	67%	68%	49%	67%	55%	63%	45%	67%	40%
Freight and mail Tonne Kilometre - FTK (000)	12	3,813	63,254	6,627	2,897,134	96				48,626			30	6,408,864	
Revenue Tonne Kilometre - RTK (000)	88	20,898	197,283	60,565	4,872,456	28,561	39,891	2,527	12,160	531,673		56,928	131	174,517,555	
Available Tonne Kilometre - ATK (000)		31,944	310,219	163,655	10,117,731	62,981	61,395	4,590	24,756	1,005,369		117,788	349	281,730,918	
Weight Load Factor - PLF (%)		65%	64%	37%	4816%	45%	65%	55%	49%	53%		48%	38%	62%	
EMPLOYEE DATA															
Pilots	7	45	208	904	1,364	56	85	13	49	415	65	377	140	270	34
Cabin crew	14	211	487	2,239	3,292	115	194	11	50	167	383	469	464	853	30
Engineers	3	139	135	4,107	2,663	99	8	23	91	233	61	2,183	386	30	18
Traffic/Marketing	19	78	418	1,434	4,047	59	67	23	54	402	76	233	196	599	22
Other	360	267	1,661	18,878	3,479	353	198	188	142	749	1,023	262	1,556	1953	70
Total Employees	403	740	2,909	27,562	14,845	682	552	258	386	1,966	1,608	3,524	2,743	3,705	174
DESTINATIONS SERVED															
Domestic	0	0	1	9	21	4	3	6	10	19	1		13	0	0
Regional - Within Africa	5	6	8	21	58	0	0	5	1	46	18		14	27	9
Intercontinental	2	3	14	58	61	9	18	0	0	58	5		9	129	0
FLEET IN OPERATION	2	9	10	68	129	6	10	6	4	52	12		9	30	4

[illegible]

ANNEX 3: AFRAA member airlines commercial partnerships – 2021

[illegible]

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AFRAA member airlines two-letter codes

AB Aviation	Y6	Jubba airways	3J
Afriqiyah Airways	8U	Kenya Airways	KQ
Air Algérie	AH	Lybian Airlines	LN
Air Botswana	BP	Mauritania Airlines	L6
Air Burkina	2J	Mozambique Airlines	TM
Air Djibouti	DJ	Nile Air	NP
Air Madagascar	MD	Nouvelair Tunisie	BJ
Air Mauritius	MK	Overland Airways	OJ
Air Peace	P4	Precision Air	PW
Air Senegal	HC	Royal Air Maroc	AT
Air Tanzania	TC	Rwandair	WB
Air Zimbabwe	UM	Safarilink	F2
Allied Air	4W	SAC Ltd	K3
Asky Airline	KP	South Africa Airways	SA
Astral Aviation	8V	SA express	XZ
Badr Airline	J4	Sudan Airways	SD
Camair Co.	QC	Syphax Airlines	FS
Ceiba	C2	TAAG Angola	DT
Congo Airways	8Z	TACV	VR
Cronos Airlines	C8	Tassili Airlines	SF
EgyptAir	MS	Tunisair	TU
Ethiopian Airlines	ET	Uganda Airlines	UR
Express cargo	7A		

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