



ANNUAL REPORT 2018



Your Passport to Paradise



*“Mauritius was made first, and then heaven;
and that heaven was copied after Mauritius.”*

Mark Twain



Indian Ocean's
Leading Airline



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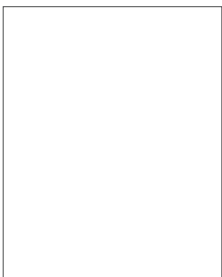
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Foreword



The airline industry has seen capital productivity trend upward over the past few years and for the third consecutive year, the industry's return on capital exceeded its cost of capital. Airlines globally posted US\$38 billion after-tax profit in 2017 from US\$34.2 billion made in 2016, representing US\$9.27 average profit per passenger. The strongest financial performance is being delivered by airlines in North America.

The African region improved in terms of profitability in 2017. However, the region still made a net after tax loss US\$100 million. Passenger load factors for African airlines improved from 68.8% in 2016 to 70.4% in 2017. However, this still remains low as the world average passenger load factors are at an average of 81.5%. Breakeven load factors for African airlines are also relatively low. The weak performance by African airlines is mainly attributed to various challenges facing

African airlines such as high taxes and charges, market access restrictions, high cost of fuel and blocked funds in some African States.

Significant progress has been made on safety. Globally in 2017, there were zero fatalities on passenger flights operated by jet aircraft. For Africa, the region recorded zero jet hull losses and zero fatal accidents involving jets or turboprops for the second consecutive year in 2017. The low number of accidents in Africa is a continuation of a trend of improving safety standards in the continent due to the efforts by AFRAA and various stakeholders including governments, civil aviation authorities, airlines, airports, ground handlers, ICAO, IATA, AFCAC, ACI among others. These efforts need to continue to be enhanced.

States' complementary support is an impetus for aviation to thrive. Governments play a major role in developing infrastructure, crafting legislation, regulating the industry and generally creating a conducive environment for air transport development. The issues of safety and security need commitment from governments to address. Lower taxes coupled with cost-effective service delivery will reduce fares and make air travel more affordable to the majority of the people. In terms of market liberalization, the implementation of the Single African Air Transport Market (SAATM) which was launched in January 2018 will help spur the development of African aviation.

This report provides a comprehensive review of the state of the African air transport industry in 2017 and takes a look at the prospects for the future. It gives a snapshot of what every executive, investor and supplier needs to know about the African airline industry. Also contained in the report are list and contacts of aviation training institutions, maintenance, repair and overhaul (MRO) centres as well as summaries of AFRAA partners. The airlines biography section will help readers get important facts about all AFRAA member airlines.

A handwritten signature in black ink, appearing to read 'A. Berthé', written over a horizontal line.

Mr. Abdérahmane Berthé
AFRAA Secretary General



Vision

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

Mission

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

Values

AFRAA believes in:

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

Key Strategic Objectives

AFRAA's key strategic objectives shall be:

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

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Appreciation

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

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

Maureen Kahonge, Deputy Director Business Development, AFRAA



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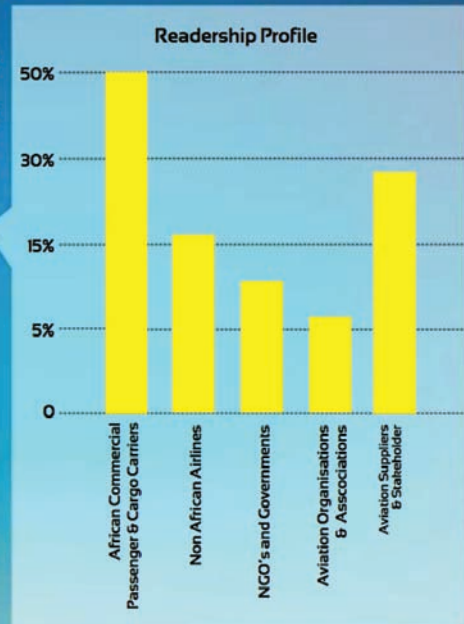
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Who reads Africa Wings?

CEO/COO/Presidents | **CIOs** | General Managers | Vice Presidents
Technical/Maintenance Directors | **Flight Operations Directors**
Chief Pilots | Chief Flight Attendants | Procurement/Contract Officers
Passenger Service Directors | Marketing Offices | Cargo Directors
Non-African Airlines | Regional Directors | Alliance/Partnership Directors
Airports Directors | **Marketing Directors** | Facility Managers | Government
Ministries and Agencies | **Ministers** | Agency/Department Staff | Leaders
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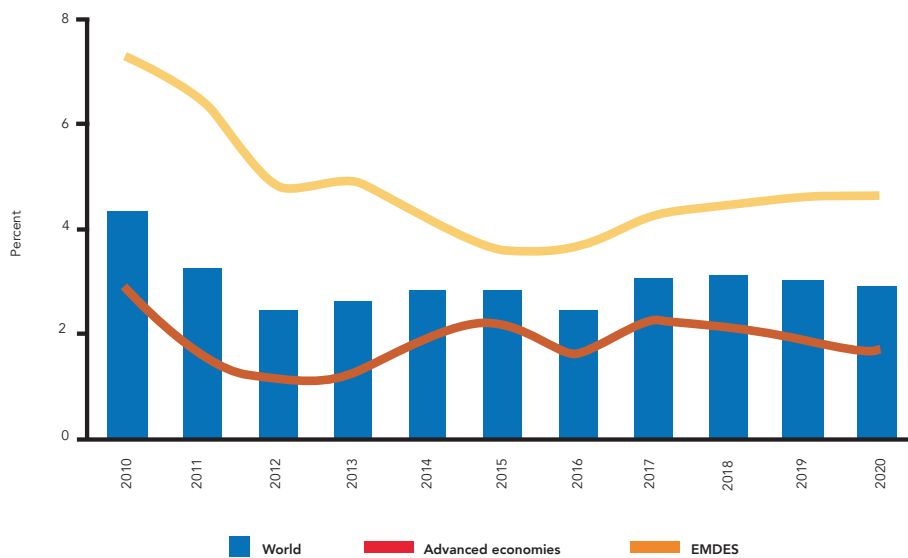
Section One

1.1 Global Economic Performance

According to the World Bank, global economic growth was estimated to have reached 3.1% in 2017, up from a post-crisis low of 2.4% in 2016. This improvement reflected an investment-led pickup in advanced economies and a growth acceleration in EMDEs (emerging markets and developing

economies), where activity in commodity exporters rebounded. Currently, all major developed economies are experiencing a synchronized upturn in growth. Compared to the previous year, growth strengthened in almost two thirds of countries worldwide in 2017.

Figure 1.1: Global Economic Growth



Source: Worldbank

Commodity prices increased in 2017 and are expected to stabilize in 2018 and 2019. Crude oil prices averaged US\$53 per barrel (bbl) in 2017, a 23.3% increase over their 2016 levels, and remained above US\$60/bbl in early 2018, according to World Bank. An agreement between most Organization of the Petroleum Exporting Countries (OPEC) and some non-OPEC oil producers to extend production cuts to the end of 2018 helped boost prices. Oil demand has also been robust. However, U.S. oil production has continued to rise, which has led to a moderation in prices.

Non-oil commodity prices increased by 5.6% in 2017 following a 2.6% decline in 2016, according to World Bank. This improvement reflected strong gains for metals prices, which rose 22% in 2017 due to strong demand from China. Metals prices have been stable in early 2018 and are expected to decline marginally in 2018 and 2019, as Chinese demand gradually slows. Agricultural prices rose moderately in the first quarter of 2018, following three years of price stability.

1.2 Africa's Economic Performance

Global and domestic shocks in 2016 slowed the pace of growth in Africa, but signs of recovery were manifested in 2017. AfDB estimated that the real output growth increased to 3.6% in 2017, up from 2.2% in 2016, and forecasts it to accelerate to 4.1% in 2018 and 2019. Overall, the recovery in growth has been faster than envisaged, especially among non-resource-intensive economies, underscoring Africa's resilience.

Global conditions eased slightly since mid-2016, improving the outlook for Africa, but countries in the region still face major macroeconomic challenges. Commodity prices have recovered but not to pre-crisis levels, and demand for traditional and non-traditional exports from Africa remains modest. Although current account positions have improved, they are not sufficiently robust; dollar interest rates are expected to edge up, bidding up the cost of capital; and external debt ratios have begun to rise across the region.

Figure 1.2: Real GDP growth in Africa, 2009–19

Source: AfDB

1.3 Commodity prices in Africa

The prices of many commodities fell to local lows at the start of 2016. The value of many of Africa's exports, including oil, gold, and coffee, declined between 2014 and 2016. The prices of oil and metals recovered significantly in 2016 and 2017, if well below the highs of 2010–14. The rise in prices boosts demand for (and in many cases production of) African commodity exports.

1.4 Regional prospects for Africa

Growth performance varied widely across countries and sub-regions. Economic growth varied widely across countries and across Africa's five sub-regions. The following are the sub-regional growth trends and future prospects reported by AfDB:

East Africa: East Africa remains the fastest-growing sub-region in Africa, with estimated growth of 5.6% in 2017, up from 4.9% in 2016. Growth is expected to remain buoyant, reaching 5.9% in 2018 and 6.1% in 2019. Strong growth is widespread in the sub-region, with many countries (Djibouti, Ethiopia, Kenya, Rwanda, Tanzania and Uganda) growing 5% or more.

North Africa: North Africa recorded the second-highest growth rate in Africa, at 5.0% in 2017, up from 3.3% in 2016. The sub-region's growth is projected to accelerate to 5.1% in 2018, slowing to 4.5% in 2019. Recovery of Libya's oil production underpinned this growth. Its GDP increased 55.1% in

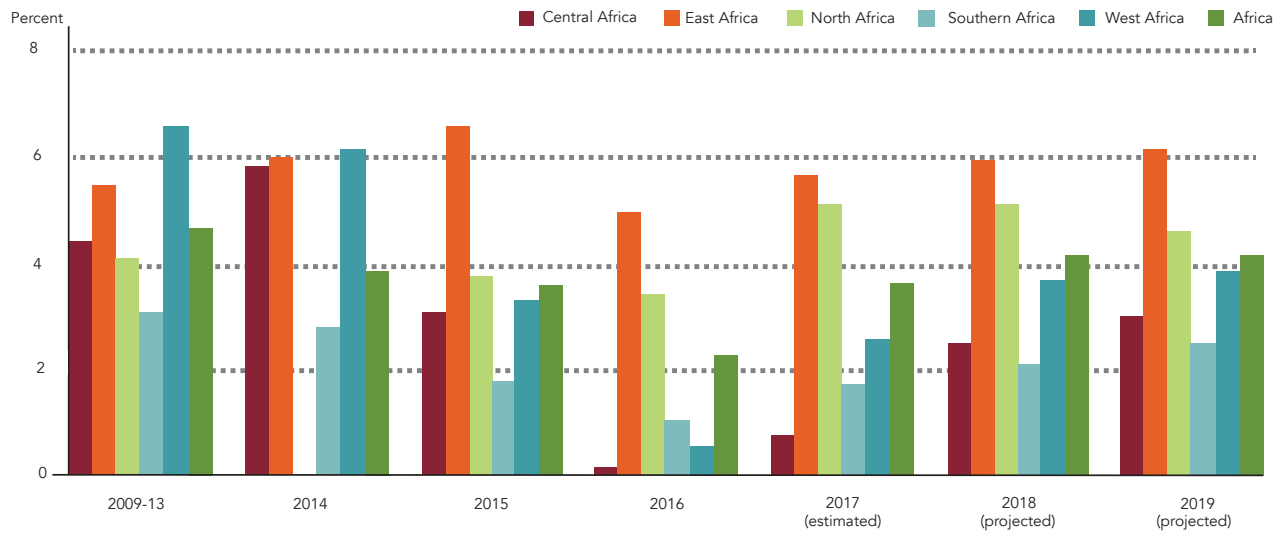
2017, after declines in previous years but output still remained about a third lower than before the 2011 Arab revolution.

Southern Africa: Growth nearly doubled in 2017, to 1.1%, up from 0.9% in 2016. The improvement reflects better performance of the three main commodity exporters: South Africa, Angola, and Zambia. The three countries accounted for about 1 percentage point of Africa's growth rate. Growth is forecast to increase to 2.0% in 2018 and 2.4% in 2019, underpinned by expansion in agriculture, mining, and services.

West Africa: Supported by increased oil production and output growth in agriculture, Nigeria is expected to consolidate the gains made in 2017. As a result, growth in West Africa is projected to accelerate to 3.6% in 2018 and 3.8% in 2019. Other large countries accounting for the expansion include Côte d'Ivoire, Ghana, and Senegal; smaller countries (Benin, Burkina Faso, Sierra Leone, and Togo) are also expected to grow at 5% or more.

Central Africa: The region has continued to underperform, even with the recovery in oil prices. Output contracted sharply in the Republic of Congo and Equatorial Guinea, weighing down the region's overall growth to 0.9% in 2017. Moderate recovery in the Republic of Congo will bolster growth in the region, which is expected to pick up to 2.6% in 2018 and 3.4% in 2019, respectively.

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



Source: AfDB

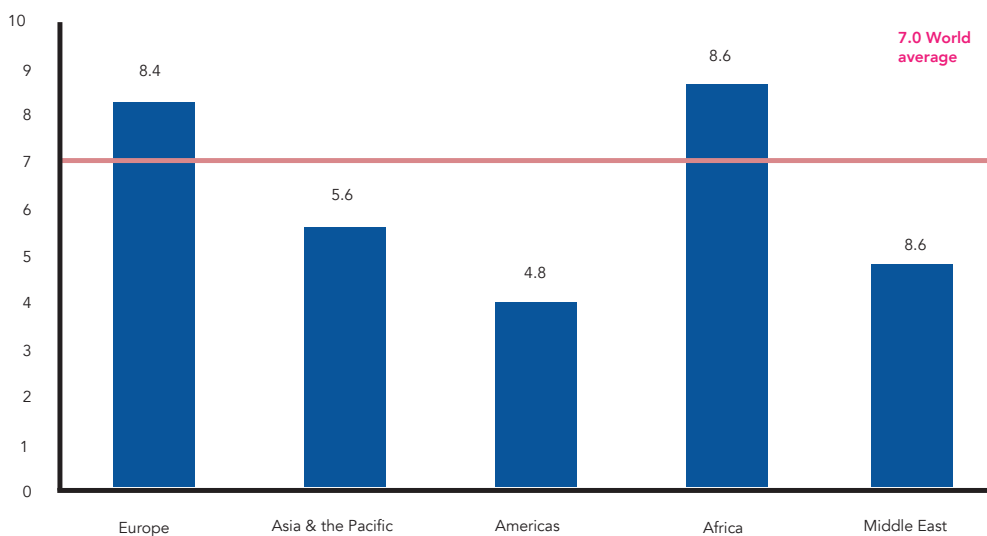
1.5 Tourism

1.5.1 Strong growth in International tourist arrivals

UNWTO reported that international tourist arrivals grew 7.0% in 2017, the highest increase since the 2009 global economic crisis and well above UNWTO’s long-term forecast of 3.8% per year for

the period 2010 to 2020. The growth was attributed to the global economic upswing, resulting in strong outbound demand from virtually all source markets. By region, Africa and Europe grew above average.

Figure 1.4: International tourist arrivals, change by region, 2017 (%)

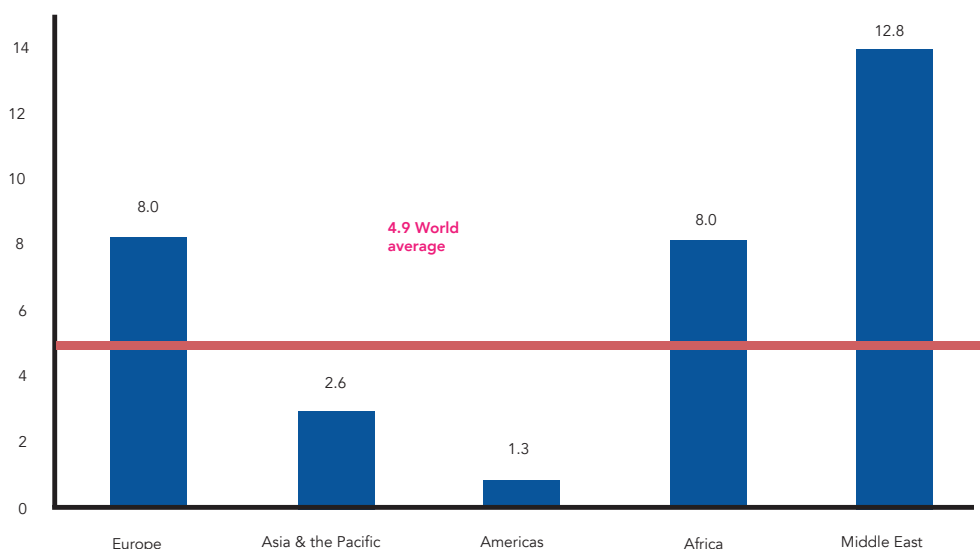


Source: UNWTO

International tourism receipts increased 4.9% in real terms (adjusted for exchange rate fluctuations and inflation) to reach US\$ 1,340 billion in 2017. UNWTO attributed this to strong outbound demand from both traditional and emerging markets fuelled growth in global receipts, which

follows the positive trend recorded in international tourist arrivals (+7%).

As a worldwide export category, tourism was ranked third after chemicals and fuels and ahead of automotive products. In many developing countries, tourism is the top export category.

Figure 1.5: International tourism receipts, change by region, 2017 (real terms, %)

Source: UNWTO

1.5.2 Africa – A year of immense growth in tourism

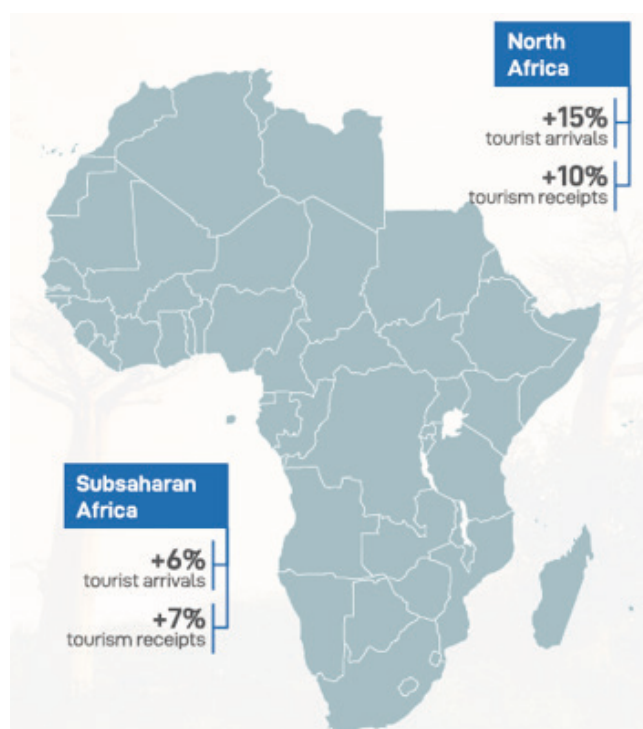
The AfDB reported that 2017 was a year of immense growth for African tourism. International tourist arrivals were up around 8% on 2016, as around 62 million people crossed borders for tourism purposes, making the sector more important than ever for African economies and societies.

Governments across the continent are prioritizing tourism in their overarching development agendas, improving the business climate for tourism, and encouraging investment in infrastructure and hospitality. Africa is embracing nature and wildlife tourism, international brands and technological change, with social media and online booking on the rise. Crucially, the continent is also fostering cooperation in the name of sustainable tourism, especially through public-private partnerships.

International tourist arrivals in Africa are estimated to have increased by 9% and receipts at the same level (+8%). Results were driven by the continued recovery in North Africa and the solid growth in most destinations that reported data. Tunisia continued to rebound strongly in 2017 with a 23% growth in arrivals, while Morocco also enjoyed better results after weaker demand in the previous year. Growing demand from European source markets and a more stable environment contributed to the sub-region's positive results.

In Sub-Saharan Africa, strong performance continued in large destinations Kenya, Côte d'Ivoire, Mauritius and Zimbabwe. The sub-region's top

destination South Africa reported slower growth in arrivals though a strong increase in receipts. Island destinations Seychelles, Cabo Verde and Reunion; all reported double-digit growth in arrivals, benefiting from increased air connectivity.

Figure 1.6: Africa's growth in tourism

Source: UNWTO

1.6 Airline performance

1.6.1 Strong demand growth

IATA reported that passenger demand saw another strong year in 2017, with industry-wide revenue passenger kilometres (RPSk) increasing by 8.0% - the fastest growth in more than a decade. The growth increase was led by the domestic china market. With regards to freight, freight tonne kilometres (FTKs) rose to 10% in 2017, representing more than double the growth of global trade volumes.

1.6.2 Third consecutive year of airline profitability

On financial performance, the airline industry generated an estimated net-tax profit of US\$38 billion in 2017 with the operating margin of revenues easing to 7.5% in 2017 as reported by IATA. The financial performance was supported by strong demand and positive economic backdrop.

Figure 1.7: Industry return on capital for investors



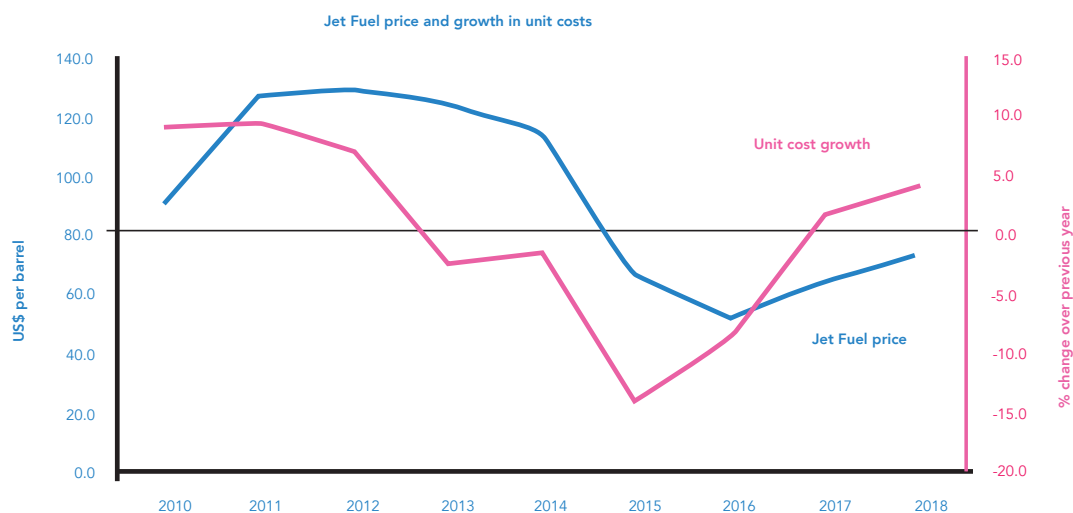
Source: IATA WATS

1.6.3 Jet fuel

Jet fuel prices continued to rise in 2017, with the average price per barrel estimated at 66.7US\$ for the year. This represented an increase of 28% from 2016. According to IATA, the impact on the industry's fuel

bill was dampened in 2017 year by the continuing impacts of fuel hedging in some regions, with some of 2016 spot price decline offsetting the increase in 2017.

Figure 1.8: Rising jet fuel price and unit costs



Source: IATA

Section Two

Global Performance

According to IATA, 4.1 billion passengers travelled by air globally on scheduled services in 2017, representing a growth of 7.3% from 2016. Global passenger air traffic for scheduled operations measured in RPKs improved by 8% in 2017 from 2016. This has

been the fastest growth since 2005. International markets increased by 8.6% while domestic markets grew by 7.1%. The improvement of economic conditions supported passenger growth in 2017.

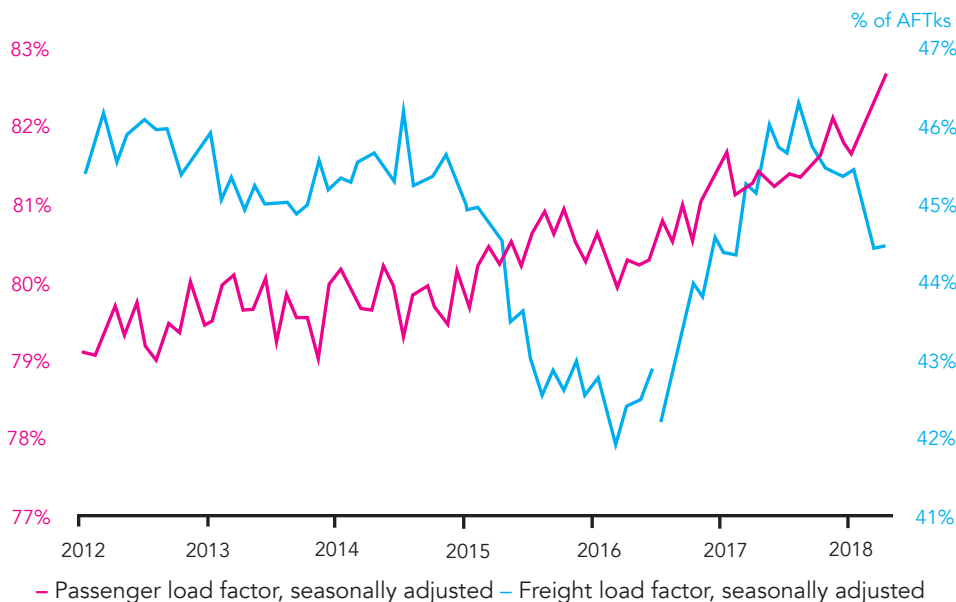
Figure 2.1: Worldwide RPK growth and GDP growth



Source: IATA

Systemwide, seat capacity in ASKs increased by 6.7%, represented by 6.9% on international routes and 6.2% on domestic routes. The global average load factor increased to 81.5% in 2017 from 80.4% in 2016.

Figure 2.2: Industry passenger and freight load factors

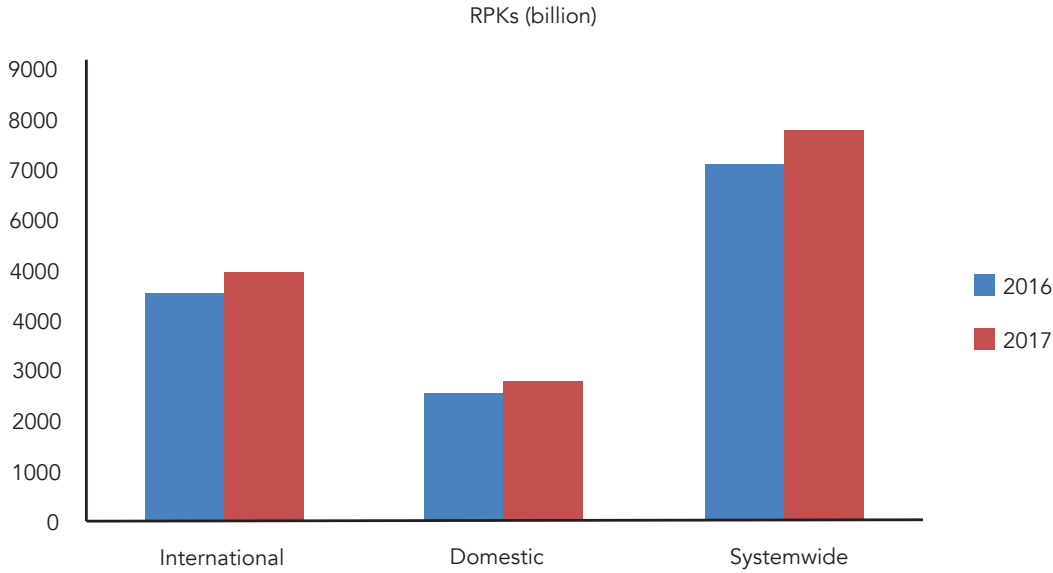


Source: IATA

Scheduled global freight traffic (FTKs) increased by 9.7% in 2017 from 3.6% in 2016 while Available Freight Tonne Kilometres increased by 5.3% in 2017 compared to 4.9% 2016. The increased growth in freight volumes was partly attributed to buoyant

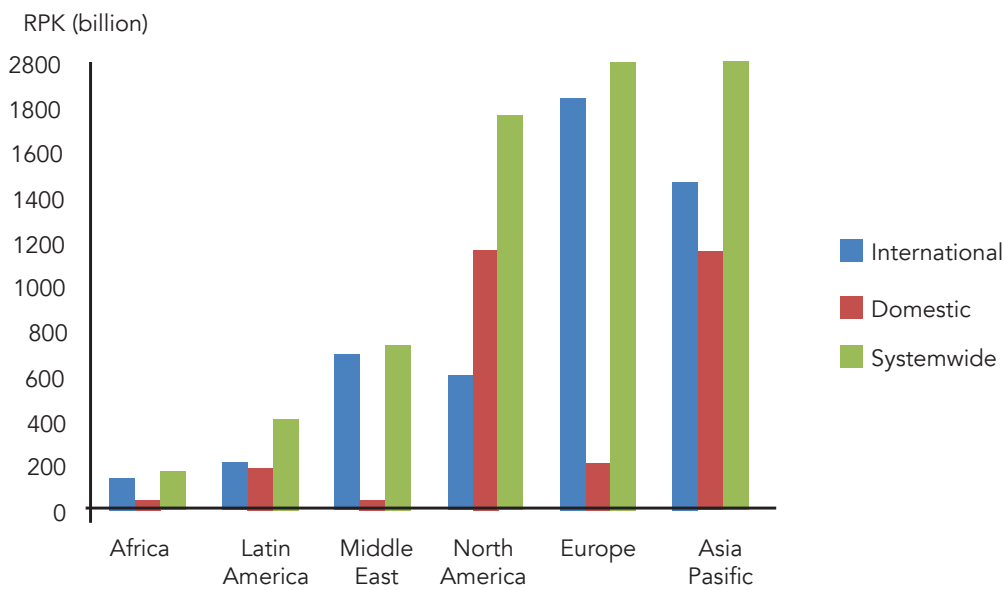
demand for manufactured exports in 2017. The cumulative freight load factor for all freight and mixed operations was 49.6% in 2017, which was an increase from 46.9% annual average reported in 2016.

Figure 2.3: World Scheduled Passenger Kilometres (RPKs) 2016-2017 (Billions)



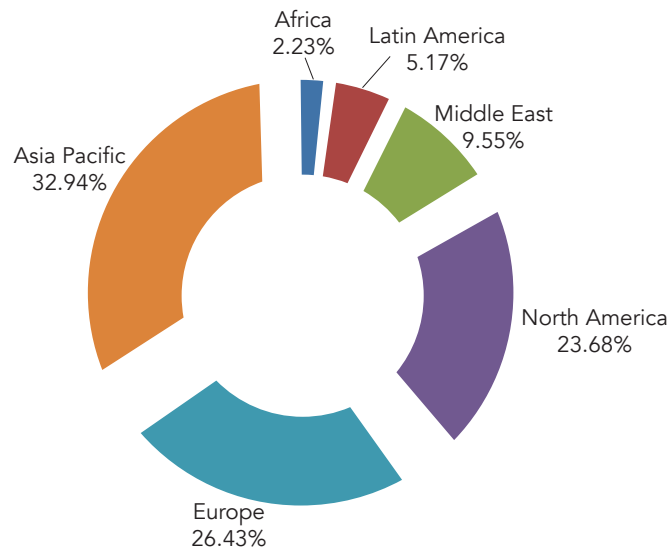
Source: IATA WATS/AFRAA

Figure 2.4: Revenue Passenger-Kilometres per Region - IATA Schedule Services 2017



Source: IATA WATS/AFRAA

In terms of RPKs performed, Asia Pacific region was the world’s biggest air transport market in 2017 at 33.84% of the market share, followed by Europe (26.55%), North America (22.75), Middle East (9.44%), Latin America (5.13%) and Africa (2.19%).

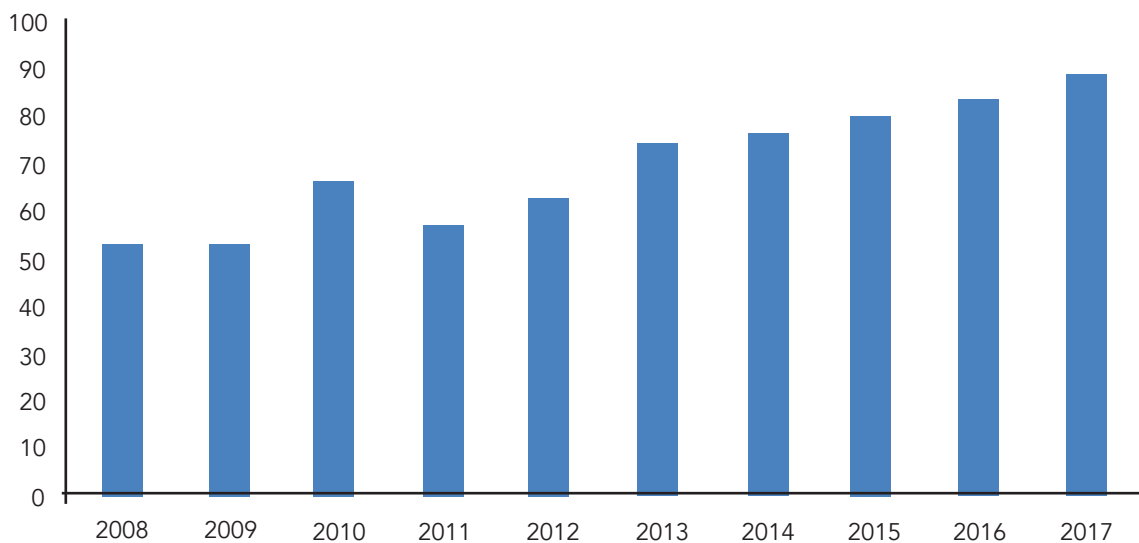
Figure 2.5: % share of Passenger-Kilometres Performed per Region - IATA Scheduled Services 2017

Source: IATA WATS/AFRAA

African Airlines Performance

Passengers Carried

All regions experienced positive traffic growth in 2017. African airlines scheduled traffic accounted for 2.19% of the market share carrying 88.54 million passengers in 2017. The increase in passenger numbers was up by 6.6% year on year.

Figure 2.6: Total Passengers Carried by African airlines scheduled operations: 2008 – 2017 (millions)

Source: IATA

54.62 million scheduled passengers were carried on international routes, while 23.78 million were carried on domestic routes by African carriers in 2017 as reported by IATA. The 22 AFRAA airlines that reported their passenger numbers carried a total of 55.79

million passengers in 2017, representing 63% of total passengers carried by all African airlines. The top 5 passenger countries in Africa in 2016 are: South Africa, Egypt, Morocco, Nigeria and Algeria.

Table 2.1: Top 5 passenger countries in Africa in 2017

	2017 Passenger numbers	% growth from 2016
South Africa	24,578,776	4.0
Egypt	21,762,727	10.4
Morocco	16,557,792	15.1
Algeria	11,327,315	14.8
Nigeria	7,051,374	-12.2

Source: IATA WATS

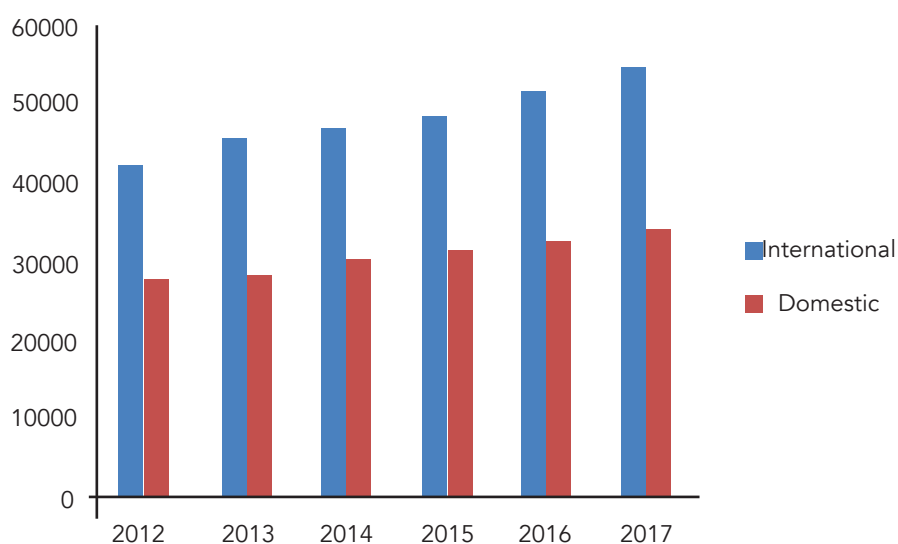
In terms of route area, the top 10 passenger airport pairs between Africa and other regions are as follows:

Rank	Airport pair	2017 Passenger numbers	% growth from 2016
1	Cairo-Jeddah	1,775,681	-6.3
2	Cairo Riyadh	945,759	4.6
3	Cairo-Kuwait	849,794	7.7
4	Algiers-Paris Orly	788,264	1.0
5	Cairo-Dubai	711,147	7.6
6	Algiers-Paris-De Gaulle	703,231	11.7
7	St Denis de la REunion – Paris Orly	637,012	20.7
8	Tunis- Paris Orly	567,850	11.8
9	Paris Orly-Marrakech	527,308	22.7
10	Johannesburg OR Tambo –London Heathrow	521,015	0.8

Domestic and Intra-Africa Passengers

Scheduled domestic passenger numbers carried by all African airlines scheduled operations in 2017 increased by 1.5% to 33.92 million. The rising middle class, high rate of urbanisation in the

continent and the aggressive route expansion by some African airlines to enhance intra African connectivity continue to stimulate demand.

Figure 2.7: Percentage Share of Passengers Carried by African airlines: 2012 – 2017

Source: AFRAA

For the 22 AFRAA members that reported their data, the domestic and intra-Africa passenger numbers stood at 50.5% of the total number of passengers carried in 2017.

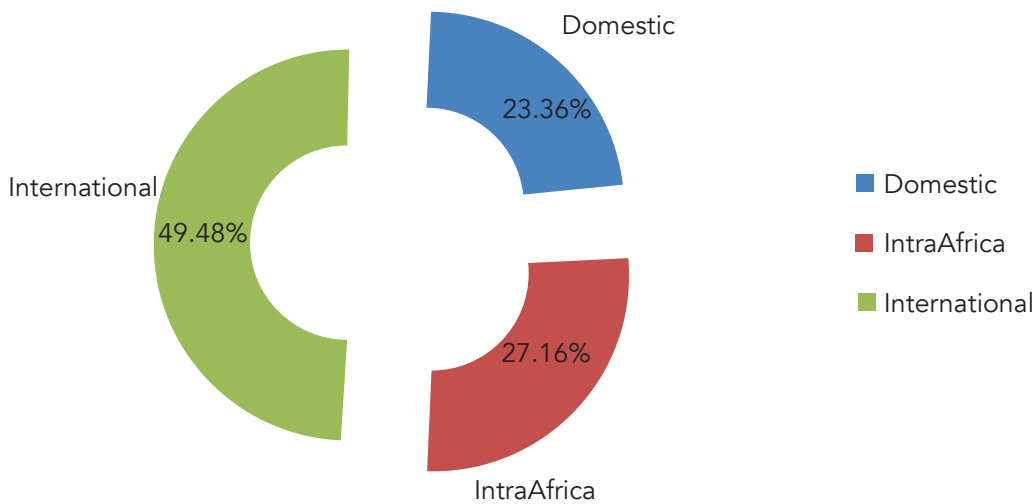
There is huge potential for aviation in Africa. One of the major milestones for African aviation is the historic launch of the Single African Air Transport Market (SAATM) in January 2018. With operationalization of the SAATM, intra-African connectivity will develop and in turn, aviation’s role as an economic driver will grow significantly. The SAATM will further spur more opportunities to promote intra-African trade, cross-border investments in the production and service industries, including tourism resulting in the creation of additional jobs.

The liberalisation of African skies is expected to usher a new era in African aviation and these positive developments have been complemented by more States removing non-physical barriers to travel such as visa requirements. Removal of non-physical barriers to travel is a vital step forward towards a more integrated Africa.

Passenger Distribution

For AFRAA member airlines, intercontinental passenger market segment remains the biggest with 49.5% of all passengers travelling between Africa and other regions of the world. The domestic market segment represented 23.4% while the intra-Africa market represented 27%.

Figure 2.8: African Airlines Passenger Distribution 2017



Source: AFRAA

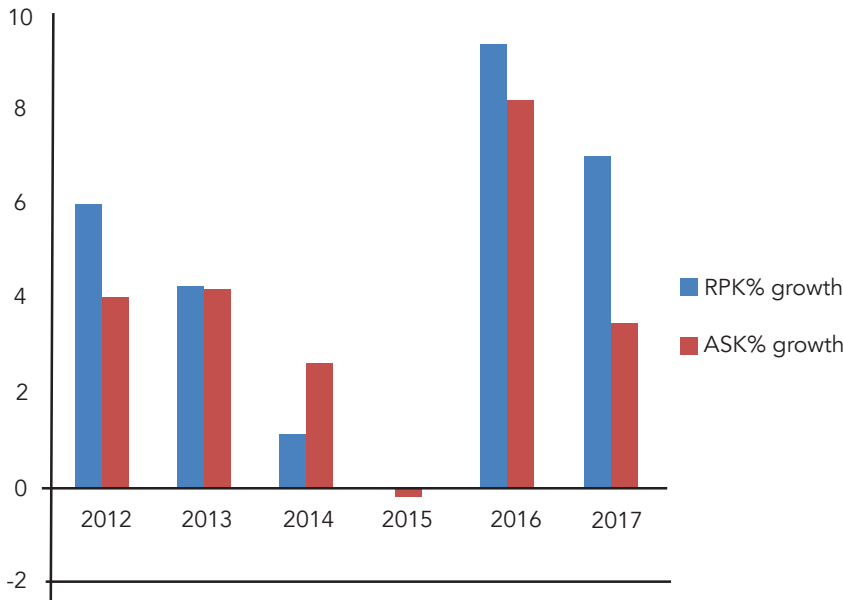
Passenger Traffic and Capacity

Asia Pacific was the region that realised the highest ASK growth worldwide for scheduled passenger traffic in 2017 compared with 2016 at 9.1%. This was followed by Middle East region at 6.7%, Europe at 6.6%, Latin America at 5.5%, Africa at 4% and North America at 3.8%. North American carriers saw the lowest market growth in terms of ASKs for scheduled operations in 2017 at 3.8%. In terms of RTKs, Africa realised the highest RTK growth in 2017 at 10.5% followed by Asia Pacific at 10.3%, Europe at 9.4%, Mid-

dle East at 7.4%, Latin America at 6.6% and North America at 5.5%.

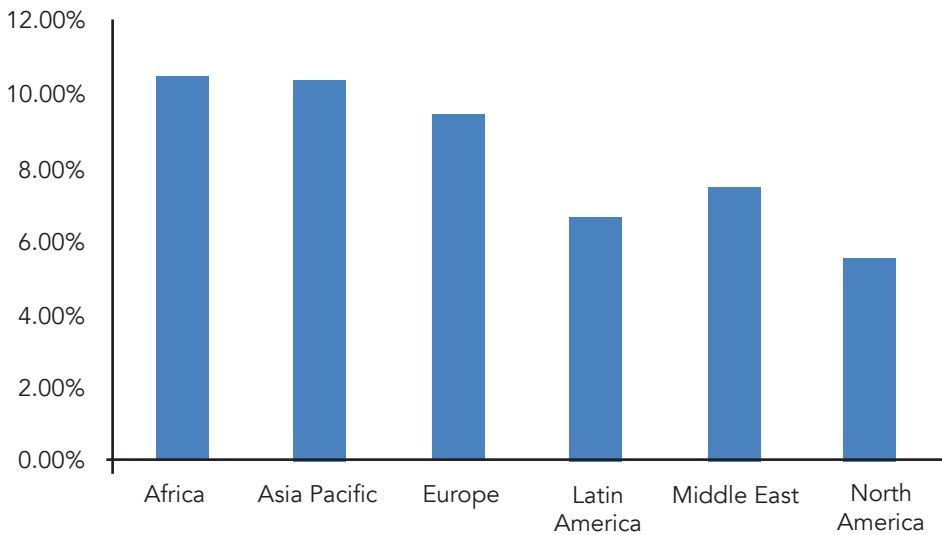
IATA reported that the industry-wide RPKs grew by 8% in 2017, an increment from 7.4% reported in the previous year. The last three consecutive years have seen then greatest growth since the rebound from the depth of the global financial crisis in 2010 and well above the long-run average of 5.5%. Africa saw a 7.3% market growth in terms of RPKs in 2017.

Figure 2.9: Africa's Passenger Traffic and Capacity Annual Percentage Growth: 201-2017



Source: IATA WATS

Figure 2.10: 2017 RTK growth per region



Source: AFRAA/IATA

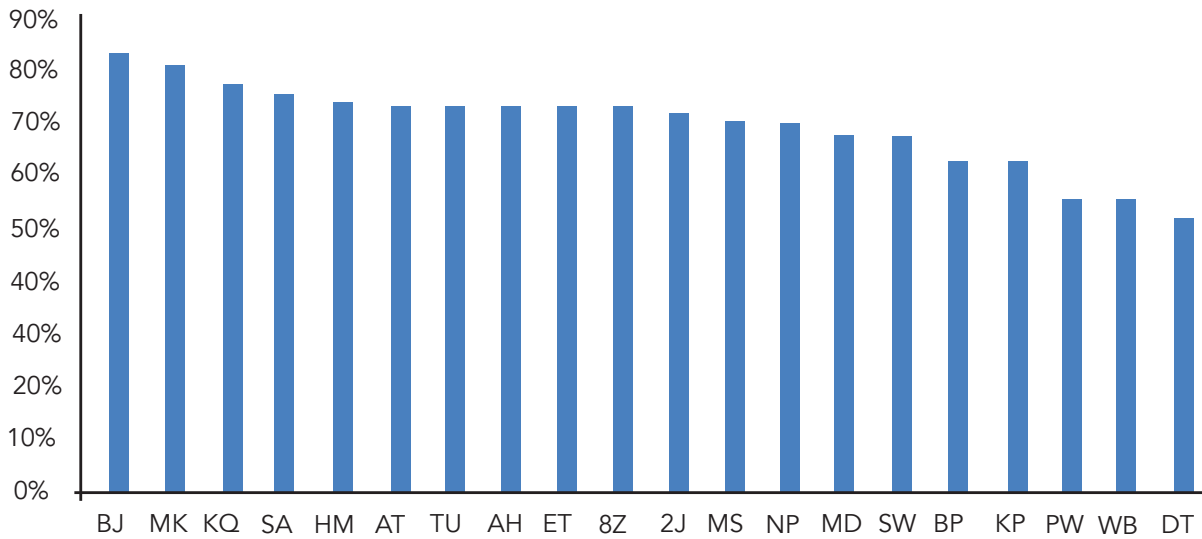
Passenger Load Factor

Many African airlines continue to record low load factors due the imbalance of capacity and demand, limited commercial cooperation, limited connectivity and uncoordinated intra-African networks with other African operators and this has seen the average load factors for African airlines being the lowest globally. Some airlines were able to achieve adequate load factors in 2017.

Average passenger load factors (PLF) for African carriers scheduled passenger traffic in 2017 increased to 70.4% from 68.2% recorded in 2016. In spite of the

increase recorded, the load factors for African airlines still compares unfavourably to the global average load factors which stood at 81.5% in 2017. Passenger load factor for African carriers in domestic routes was 76.7% while international routes recorded 69.5%.

The top 7 AFRAA member airlines with the highest average passenger load factors in 2017 were: Nouvelair Tunisie (81.3%), Air Mauritius (79%), Kenya Airways (75%), South African Airways (74%), Air Seychelles (72%), Royal Air Maroc (72%) and Tunisair (72%).

Figure 2.11: Passenger Load Factors of some AFRAA Airlines in 2017 (%)

Source: AFRAA

Europe was the world's region with the highest passenger load factor of 83.9% in 2017 followed by North America at 83.6%.

Table 2.2: Passenger and Weight Load Factor for all Regions – 2017

	Passenger LF	% Change	Weight LF	% change
Africa	70.4%	2.1	60.0%	3.1
Asia Pacific	81.0%	1.3	72.4%	1.6
Europe	83.9%	1.8	74.2%	1.8
Latin America	81.8%	1.4	66.2%	0.8
Middle East	75.1%	0.1	64.0%	0.9
North America	83.6%	0	63.7 %	0.8
Industry Average	81.5%	1.0	69.1%	1.4

Source: AFRAA/IATA WATS

AFRAA Airlines Passenger Traffic

AFRAA airlines that reported performance for 2017 carried a total of 57.79 million passengers. The top 5 AFRAA airlines by number of passengers carried in 2017 are: was Ethiopian Airlines (9.59 million passengers), EgyptAir (8.46 million passengers),

South African Airways (6.4 million passengers), Royal Air Maroc (7.38 million passengers, South African Airways (6.41 million passengers) and Air Algerie (6.25 million passengers).

Table 2.3: Total Passengers Carried by some AFRAA Airlines in 2017 (000)

	Domestic Passengers	Regional Passengers – within Africa	Intercontinental Passengers	Total Passengers Carried
Ethiopian Airlines	1,616	3,934	4,041	9,591
EgyptAir	1,491	933	6,033	8,457
Royal Air Maroc	1,017	1,608	4,753	7,378
South African Airways	3,001	1,980	1,424	6,405
Air Algerie	1,978	402	3,874	6,253
Kenya Airways	641	2,201	1,075	3,917
Tunisair	-	500	2,644	3,144
Air Mauritius	185	620	869	1,674
TAAG Angola	576	307	478	1,361
Nile Air	301	22	1,036	1,359
Nouvelair Tunisie	-	25	896	922
RwandAir	19	740	126	885
Tassili Airlines	751	-	86	837
Air Seychelles	248	386		634
Air Namibia	104	358	122	585
ASKY	-	488	-	488
Air Madagascar	337	83	68	488
Precisionair	258	210	-	468
Congo Airways	358	-	-	358
Jubba Airways	68	86	81	235
Air Botswana	72	151	-	224
Air Burkina	9	119	-	128

Source: AFRAA

The 22 reporting AFRAA airlines for 2017 performance put a total capacity of 176.1 billion ASKs in 2017. The overall average passenger load factor reported for the 22 airlines in 2017 was 68.4%.

In terms of ASKs and RPKs the largest African carrier in 2017 is Ethiopian Airlines.

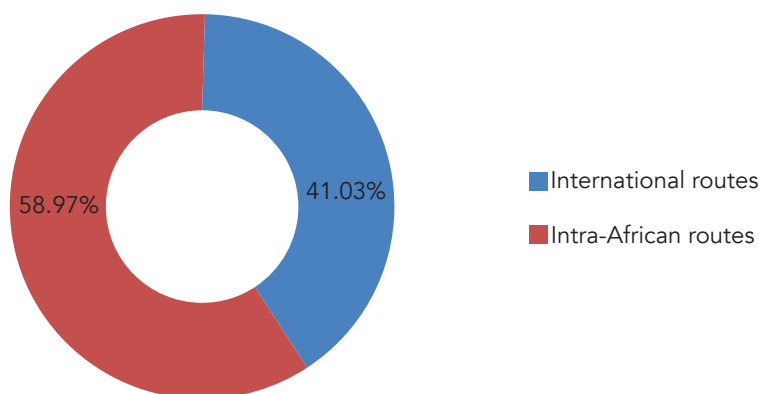
Table 2.4: Top 5 AFRAA airlines in ASKs and RPKs - 2017

	ASKs (000)	RPKs (000)
Ethiopian Airlines	48,940,871	34,883,720
South African Airways	26,961,261	19,837,280
EgyptAir	26,780,426	18,477,973
Royal Air Maroc	23,805,538	17,031,569
Kenya Airways	13,721,998	10,350,953

New Routes

AFRAA airlines in 2017 expanded their networks on both intra-Africa and intercontinental routes. A total of 39 new routes were launched by 11 AFRAA

member airlines to domestic, intra-Africa and intercontinental destinations. Of these, 16 destinations were intercontinental while 23 new routes were within the continent.

Figure 2.12: New Destinations by AFRAA Airlines in 2017

Source: AFRAA

Table 2.5: New Destinations by 11 AFRAA Airlines in 2017

	Origin	Destination		Origin	Destination
1	Mauritius	Amsterdam	21	Dar es Salaam	Seronera
2	Mauritius	Geneva	22	Dar es Salaam	Kahama
3	Lome	Accra - Monrovia	23	Dar es Salaam	Entebbe
4	Lome	Accra - Banjul	24	Casablanca	Al Hoceima
5	Lome	Accra - Freetown - Banjul	25	Casablanca	Manchester
6	Kinshasa	Isiro	26	Casablanca	Naples
7	Kinshasa	Bunia	27	Casablanca	Porto
8	Kinshasa	Kalemie	28	Casablanca	Diass Senegal
9	Kisangani	Isiro	29	Casablanca	London Heathrow
10	Kisangani	Bunia	30	Casablanca	Ndjamena
11	Goma	Bunia	31	Kigali	Mumbai
12	Cairo	Narita	32	Kigali	Lusaka - Harare
13	Cairo	Al Kharj	33	Kigali	Brussels-Gatwick
14	Cairo	Bourgas	34	Cotonou	Abidjan-Diass
15	Cairo	Mumbai - Abu Dhabi	35	Cotonou	Libreville-Brazzaville
16	Cairo	Bulgaria- Abu Dhabi	36	Luanda	Dundo
17	Cairo	Belgrade-Abu Dhabi	37	Tunis	Cotonou
18	Addis Ababa	Kaduna	38	Tunis	Constantine
19	Addis Ababa	Manama	39	Tunis	Conakry
20	Cairo	Ha'il (Saudi Arabia)			

Source: AFRAA

Passenger Traffic Forecast

According to the IATA and Tourism Economics forecasting service, the number of global air passenger journeys is expected to grow at an annual average rate of 3.5% over the 2017-2037 period. ICAO

forecasts an annual increase in RPKs of 4.6% over 2013-2013 period. Airbus, Boeing and Embraer made further downward revisions on their long-term forecasts for annual passenger demand growth in terms of RPKs to 4.1%, 4.7% and 4.5% respectively.

Section Three

Freight Carried and Traffic

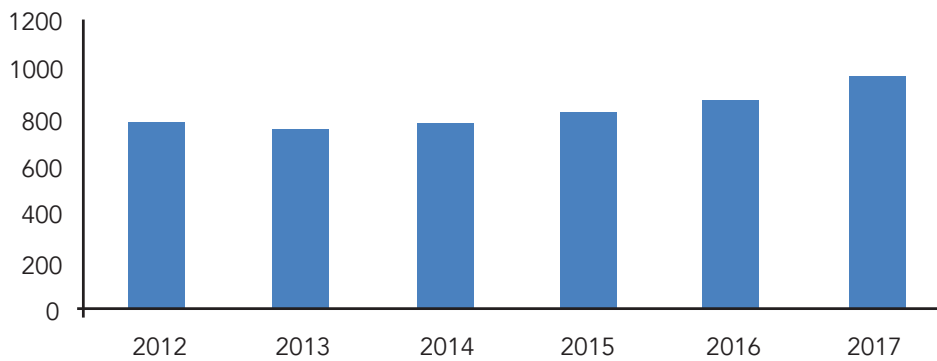
In 2017, air freight recorded the strongest calendar year of growth since the rebound in 2010 from the global financial crisis. Industry-wide freight tonnes as reported by IATA rose to 10.0% in 2017 from 3.6% in 2016 with Africa recording the highest FTK growth in 2017.

The freight global average freight load factor remained low at 49.6% while capacity measured in Available Freight Tonne Kilometres increased by 5.3% in 2017.

Air freight carried by African airlines scheduled operations increased by 16% in 2017, with a total of 968,000 tonnes. Scheduled freight operations by African airlines in 2017 represented 1.6% of total global freight carried.

In terms of FTKs recorded by IATA, performance by African airlines increased by 22.9% year on year in 2017 the highest year-on-year growth in air freight carried in 2017.

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

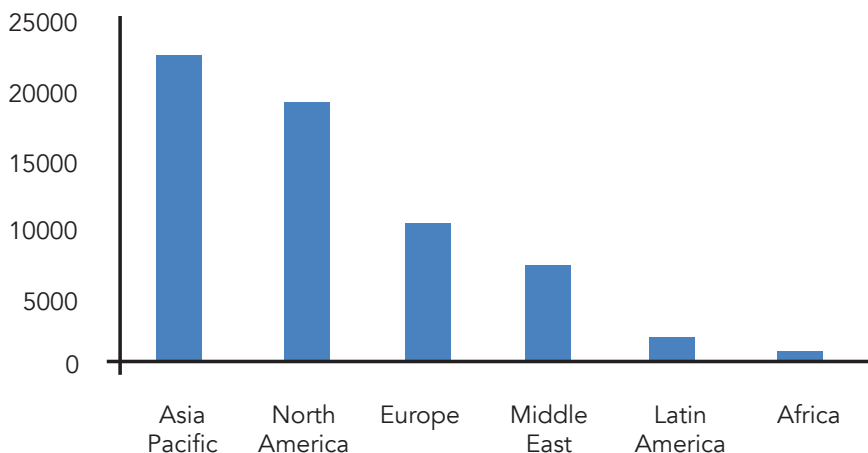


Source: AFRAA/IATA WATS

Air cargo in Africa still faces many headwinds such as weak global trade and competition from other modes of transport. This is expected to change with the implementation of the SAATM as well as the African Continental Free Trade Area (CFTA). Intra-

African trade currently stands at 12-15% of total trade, compared to 60 % for Europe, 40% for N. America, and 30% for ASEAN, according to the World Trade Organisation. Enhancing trade can contribute significantly to sustainable economic growth.

Figure 3.2: Freight Carried by Region (tonnes) – 2017



Source: AFRAA/IATA WATS

16 AFRAA airlines that reported on freight performance together moved 806,504 tonnes in 2017, representing 83% of the scheduled freight by African carriers. 78.8% of the freight traffic was car-

ried on intercontinental routes, while 16.8% of the freight traffic was carried on routes within Africa. Ethiopian Airlines carried the largest volumes of freight at 386,071 tonnes.

Table 3.1: Top 5 AFRAA Airlines freight carried in 2017

	Domestic Freight Carried (000)	Regional Freight Carried (000)	Intercontinental Freight Carried (000)	Total Freight Carried (000)
Ethiopian Airlines	395	54,319	331,357	386,071
EgyptAir	577	6,975	135,302	142,854
South African Airways	26,763	26,104	60,577	113,443
Royal Air Maroc	1,061	5,015	18,756	24,832
Kenya Airways	1,360	16,292	38,590	56,242

Source: AFRAA

Freight Traffic Forecast

Growth forecasts for freight were revised in view of the record strong freight volumes recorded in 2017. IATA's 5-year forecast indicates that international air freight tonnes are expected to increase by 4.9%.

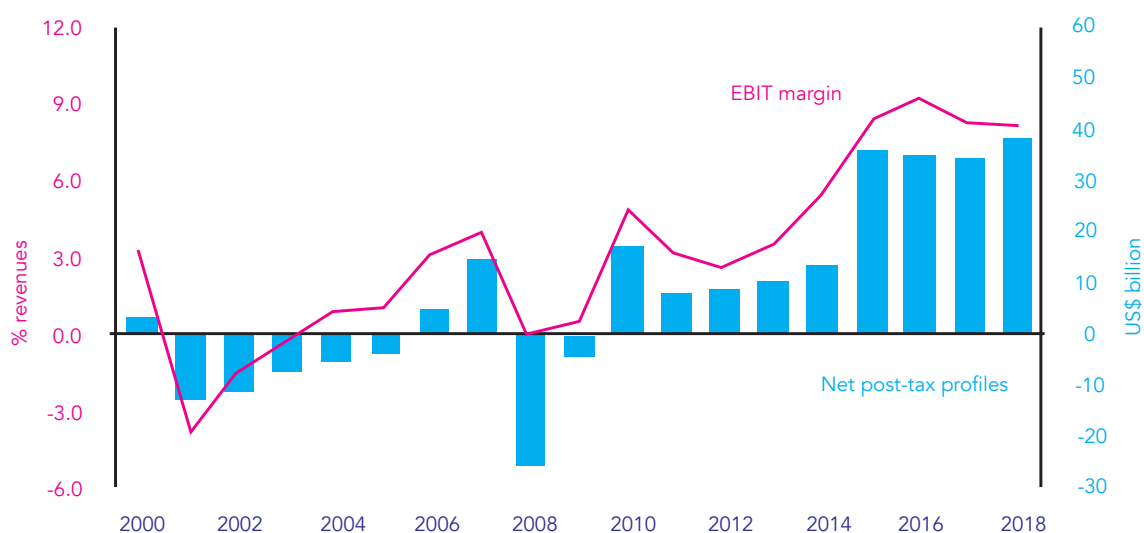
Airbus and Boeing forecast air freight to grow at an annual rate of 3.8% and 4.2% respectively for the period 2017-2037.

Section Four

Financial performance

Globally, airlines posted US\$38 billion after-tax profit in 2017 from US\$34.2 billion made in 2016. Although the operating profits in 2017 were slightly down at US\$ 56.27 billion from 60.14 billion reported in 2016, there was a rise at the net post-tax level.

Figure 4.1: Global commercial airline profitability



Source: IATA WATS

The industry has seen capital productivity trend upward over the past few years and for the third consecutive year, the industry's return on capital exceeded its cost of capital. The industry generated a return on invested capital (ROIC) of 9.0%, which adequately rewarded equity owners. The indus-

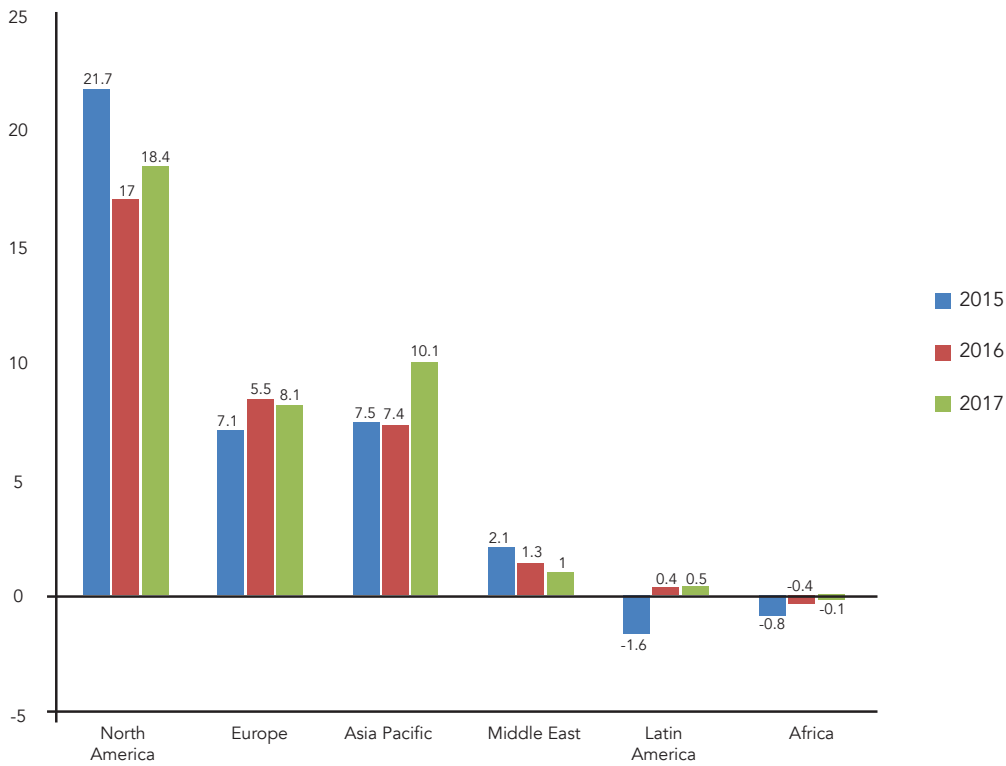
try's profit however only represented US\$9.27 average profit per passenger. The strongest financial performance is being delivered by airlines in North America at US\$16.32 per passenger in 2017 while the weakest region is Africa with an estimated US\$0.83 loss per passenger in 2017.

Table 4.1: Airline profits per passenger by region

Region	Profit per passenger 2016 (US\$)	Profit per passenger 2017 (US\$)
North America	18.10	16.32
Europe	8.86	9.03
Asia-Pacific	6.07	5.51
Middle East	6.47	1.15
Latin America	2.42	2.40
Africa	-1.61	-0.83

Source: IATA

Figure 4.2: Net profit in US\$ billions by region for 2015 - 2017

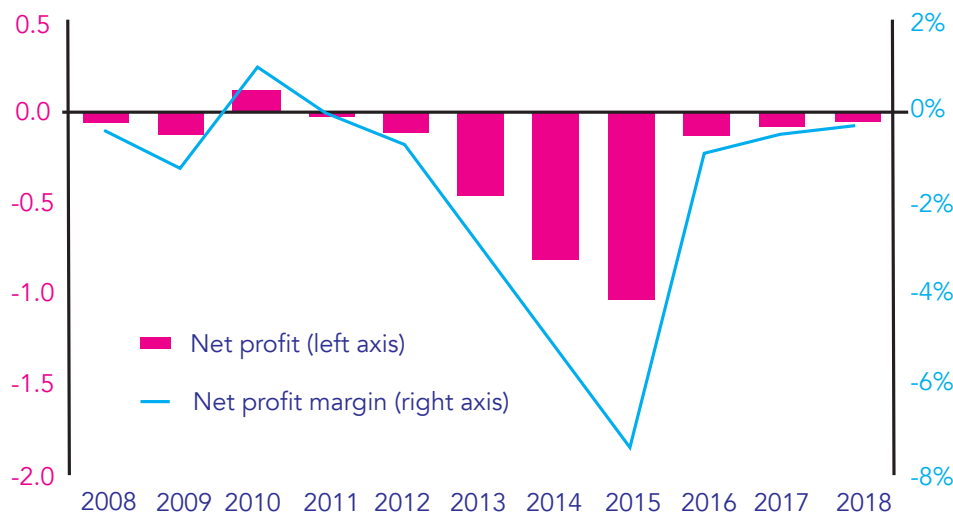


Source: IATA

The strongest financial performance was delivered by airlines in North America which generated a net profit of US\$18.4 billion in 2017. European, Asia-Pacific, Middle East and Latin American airlines generated net profits of US\$8.1 billion, US\$10.1

billion, US\$1.1 billion and US\$0.5 billion respectively in 2017. African airlines posted net after-tax losses of US\$0.1 billion in 2017 due to challenging economic conditions in the region.

Figure 4.3: Regional net profitability for Africa



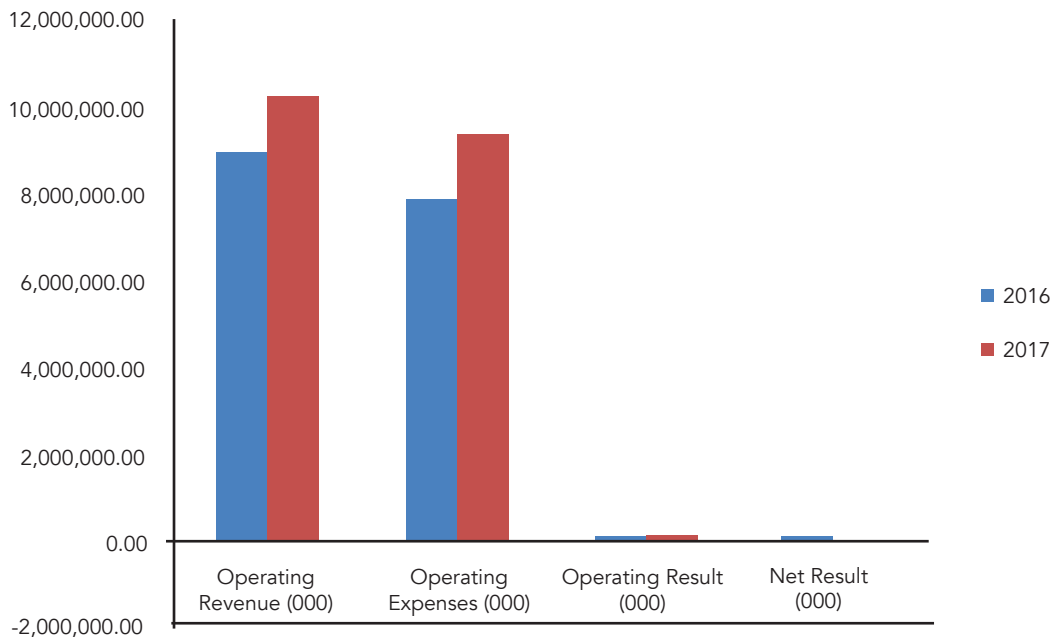
Source: IATA

Operating revenue and expenses for african carriers

This analysis is limited to 15 AFRAA airlines that reported their financial results for 2017 and 2016. The 15 AFRAA carriers’ total operating revenue was US\$10.1 billion in 2017 compared to US\$8.9 billion in 2016. Operating expenses for 2017 were US\$9.3 billion resulting to a net loss of US\$62.14 million.

Of the 16 participating airlines, 5 reported net profit for the year 2017. Ethiopian airlines was the largest African carrier in 2017 in terms of profits with operating revenue at US\$2.98 billion and net profit at US\$286.3 million.

Figure 4.4: Financial results of some AFRAA airlines (US\$ millions)



Source: AFRAA

African airlines’ financial performance improved in 2016 but the region still generated losses. African airlines are expected to post a net loss of US\$100 million in 2017 according to IATA. Breakeven load factors are relatively low, as yields are a little higher than average and costs are lower. The weak performance by African airlines is mainly attributed to various challenges facing african airlines such as regional conflict, the impact of low commodity prices, blocked funds in some african States, currency fluctuation particularly for oil exporters which will limit the benefits of lower fuel prices.

In 2016, the difficulty of repatriation of funds from some African States was a major challenge faced by several airlines in Africa. One of the main reasons behind the blocked funds was the unavailability of

foreign exchange, especially in countries largely reliant on oil exports for their foreign currency earnings. These States were significantly affected by the steep fall in oil prices from 2014 when the average price per barrel was \$116.6 with oil prices currently hovering around \$50.00 per barrel and at one time went as low as \$30.00 per barrel.

The inaccessibility of funds coupled by the lack of foreign currency led to rapid currency depreciation and foreign exchange losses for airlines operating in the affected States. In Africa, the countries seriously affected are Angola, Algeria, Nigeria and Sudan. Having large amounts of blocked funds is adversely affecting the cash flows of airlines that fly to the affected countries.

Section Five

African Airports Statistics

African airports carried 194.7 million passengers in 2018, according to ACI Africa airport data. Of these, 63.5% were international passengers, having slightly reduced from 62.5% in 2016.

The biggest air transport markets in Africa are Johannesburg (South Africa), Cairo (Egypt), Cape Town (South Africa), Addis Ababa (Ethiopia) and Casablanca (Morocco). In terms of total passenger numbers carried in 2017, O.R. Tambo International

Airport is the busiest airport in Africa with 21.23 million passengers followed by Cairo International Airport in Egypt (15.96 million passengers), Cape Town International Airport in South Africa (10.6 million passengers), Addis Ababa Bole International Airport in Ethiopia (10.19 million passengers and Aéroport Mohammed V in Morocco (9.36 million passengers).

Figure 5.1: Top African Airports by Passengers Carried in 2016 and 2017

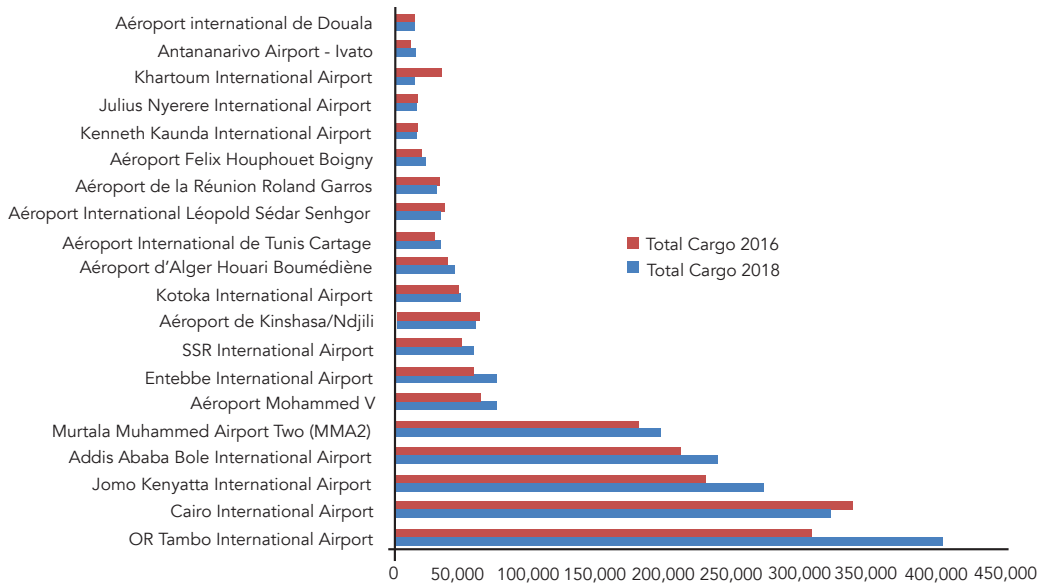
	City	Country	Airport Name	Total Passengers	Total Passengers
				2016	2017
1	Johannesburg	South Africa	OR Tambo International Airport	20,803,950	21,237,208
2	Cairo	Egypt	Cairo International Airport	16,467,844	15,959,046
3	Cape Town	South Africa	Cape Town International Airport	10,090,418	10,693,063
4	Addis Ababa	Ethiopia	Addis Ababa Bole International Airport	8,730,600	10,189,351
5	Casablanca	Morocco	Aéroport Mohammed V	8,616,981	9,357,427
6	Algiers	Algeria	Aéroport d'Alger Houari Boumédiène	7,572,758	7,823,634
7	Nairobi	Kenya	Jomo Kenyatta International Airport	7,111,501	7,270,842
8	Lagos	Nigeria	Murtala Muhammed Airport Two (MMA2)	6,324,847	6,235,266
9	Tunis	Tunisia	Aéroport International de Tunis Carthage	4,927,974	5,801,324
10	Durban	South Africa	King Shaka International Airport	5,192,703	5,527,890
11	Hurghada	Egypt	Hurghada International Airport	2,886,541	4,720,356
12	Marrakech	Morocco	Aéroport Marrakech Ménara	3,895,647	4,359,865
13	Plaine Magnien	Mauritius	SSR International Airport	3,535,693	3,728,700
14	Khartoum	Sudan	Khartoum International Airport	3,501,512	3,492,097
15	Abuja	Nigeria	Nnamdi Azikiwe International Airport	4,191,251	3,433,173
16	Sharm El Sheikh	Egypt	Sharm El Sheikh International Airport	1,752,944	2,982,297
17	Accra	Ghana	Kotoka International Airport	2,381,917	2,504,804
18	Dar Es Salaam	Tanzania, United Republic Of	Julius Nyerere International Airport	2,469,356	2,385,456
19	Saint-Denis	Réunion	Aéroport de la Réunion Roland Garros	2,107,510	2,293,042
20	Borg El Arab	Egypt	Borg El Arab Airport	2,640,844	2,205,957

Source: AFRAA/ACI-Africa

Cargo traffic at African airports increased by 1.09% to 2.24 million tonnes in 2017, compared to 2.06 million tonnes in 2016. OR Tambo International Airport in South Africa was the major cargo airport in 2017 accounting for 404,774 tons. The other cargo hubs among the top 5 in the continent include:

Cairo International Airport (323,253 tonnes), Jomo Kenyatta International Airport (273,622 tonnes), Addis Ababa Bole International Airport (239,093 tonnes) and Murtala Muhammed International Airport (197,588 tonnes).

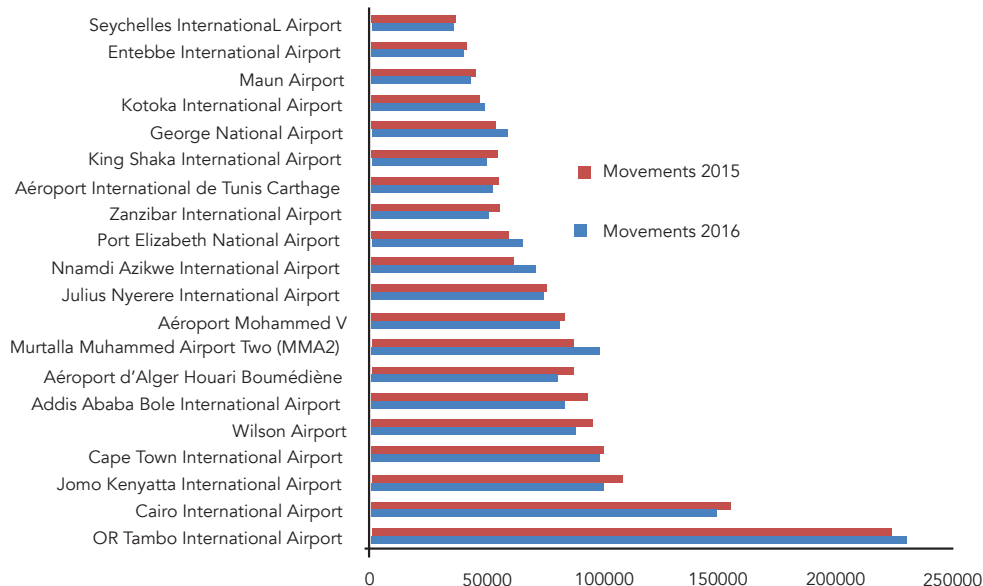
Figure 5.2: Top 20 African Airports by Total Cargo Handled in 2017



Source: AFRAA/ACI-AFRICA

Aircraft movements at African airports increased slightly by 1.01% in 2017 to 3.06 million movements. The top 5 African airports ranked by aircraft movements in 2016 are: OR Tambo International Airport (223,424), Cairo International Airport (154,760), Jomo Kenyatta International Airport (108,563), Cape Town International Airport (99,981), and Wilson Airport (95,981).

Figure 5.3: Top 20 African Airports by Total Cargo Handled in 2017



Source: AFRAA/ACI-AFRICA

Section Six

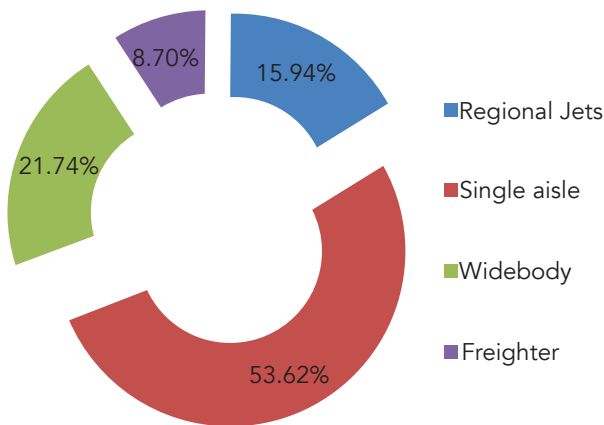
Fleet Composition and Development

Worldwide aircraft deliveries in 2017 were estimated at 1,683 new aircraft, representing a 5.1% increase in the number of in-service fleet to 28,992 aircraft in 2017 according to IATA. The trend improvement in average returns in the industry has given the confidence to invest on this scale. IATA further reported that about a half of the deliveries in 2017 replaced existing fleet,

making a significant contribution to increasing fleet fuel efficiency.

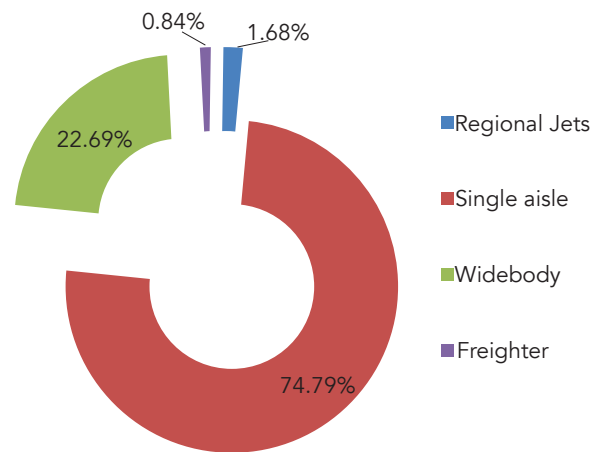
For scheduled airline operations, the number of seats available in the fleet rose to 4.2 million in 2017, adding 6.8% capacity to the market globally and it is estimated that by the end of 2018 there will be 4.4 million available seats.

Figure 6.1: Africa fleet composition – 2017



Source: Boeing Market Outlook

Figure 6.2: Africa's 2037 fleet deliveries forecast



Source: Boeing Market Outlook

Africa currently has 690 aircraft which makes up 4.4% of the total global fleet. AFRAA airlines in 2017 operated a total of 685 aircraft or 95% of total African commercial fleet (details in annex 2).

Table 6.1: Global aircraft in service in 2017 and additional demand by 2037

	2017	2037	Deliveries	Value (2017 \$B catalog prices)
Regional jets	2,540	2,550	2,320	110
Single aisle	15,700	33,550	31,360	3,480
Wide body	4,290	9,180	8,070	2,480
Freighters	1,870	3,260	980	280
Total	24,400	48,540	42,730	6,350

Source: Boeing Market Outlook

Currently, 370 (53.6%) aircraft in operation in Africa are made up of single aisle type. The other aircraft sizes are represented by: freighters (8.7%), widebody aircraft (21.7%), and regional jets (15.9%). The top 10 AFRAA airlines with the largest fleet size in 2018 are shown in the table below.

Table 6.2: Top 10 AFRAA airlines on Fleet in 2018

Airline	No. of aircraft in service
Ethiopian Airlines	108
EgyptAir	65
Air Algerie	59
Royal Air Maroc	56
South African Airways	45
Kenya Airways	37
Tunisair	27
Air Mauritius	14
TAAG Angola Airlines	13
RwandAir	12

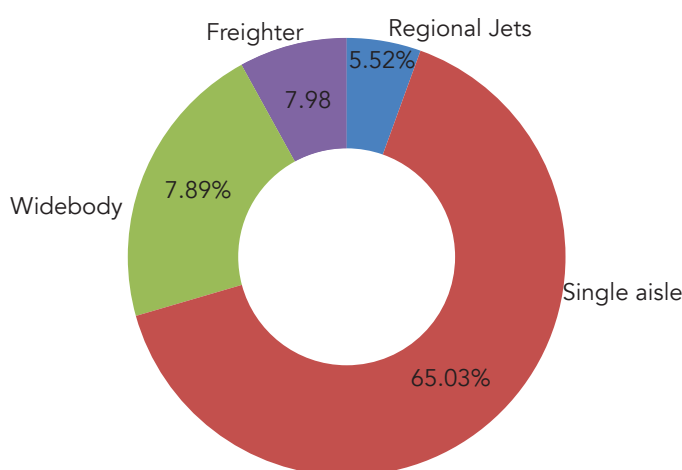
Source: AFRAA

Fleet Forecast

Over the next 20 years, the number of in-service aircraft worldwide according to Boeing is expected to grow at an average annual growth rate of 3.5% to reach 48,540 aircraft in 2037. Consistent with the demand forecasts in commercial aviation, Boeing forecasts that 42,730 new aircraft will be added to

or replace some existing fleet in operation between 2017 and 2037. The total cost of the additional fleet is estimated at over US\$6.35 trillion. According to the Boeing Market Outlook, by 2037, it is estimated that approximately 2.8% of the new airplanes will be delivered to airlines based in Africa.

Figure 6.3: Africa's 20 year fleet composition forecast



Source: Boeing Market Outlook

According to Boeing, African airlines will need 1,190 new airplanes over the next 20 years to accommodate the traffic growth forecasts. Of this aircraft demand forecast, 54.6% of the deliveries to African airlines will

be single-aisle airplanes, 16.56% will be widebody airplanes while regional jet deliveries will total less than 2%. In dollar terms, Africa will invest almost \$170 billion in new airplanes.

Section Seven

Employee Productivity

IATA estimated that total employment by airlines reached 2.79 million in 2017, a gain of 3.3% compared to 2016 and it is estimated to increase by 3.4% to reach 2.89 million in 2018. Productivity measured in ATKs generated per employees was 506,406 in 2017 compared to 492,887 in 2016 and is expected

to increase to 519,001 in 2018. Unit labour costs are rising significantly and IATA forecasts an average rise of 2.2% in 2018. Along with rising fuel costs, employee costs are one of the major contributions to the upward pressure on unit costs.

Table 7.1: Worldwide airline industry employment and employee productivity

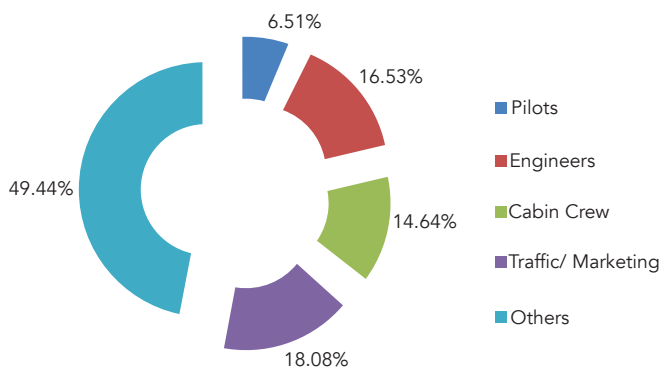
	2016	2017
Labour costs, US\$ billion	159	171
Employment (million)	2.70	2.79
productivity (ATK/employee)	492,887	506,406
Unit labour cost: \$/ATK	0.119	0.121

Source: IATA, ICAO, ATAG, Oxford Economics

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

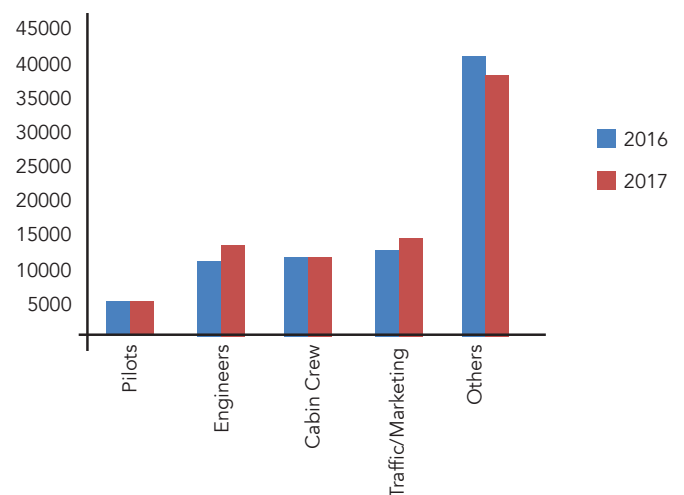
The total number of people employed directly by the 22 AFRAA member airlines that reported their data in 2017 increased by 1.04% from 78,301 in 2016 to 81,096 in 2017.

Figure 7.1: 2017 AFRAA Airlines Employees by Job Type



Source: AFRAA – Reported AFRAA airlines only

Figure 7.2: AFRAA Airlines Employment by Job Type (2017)



Source: AFRAA

Table 7.2: Employee Performance Indicators for some AFRAA airlines

	2016	2017
ATK/employee	412,281	357,779
RTK/employee	231,551	223,264
Number of passengers/employee	625	687
Employee/aircraft	151	163.8

Source: AFRAA – Reported AFRAA airlines only

The figures show that employee productivity of AFRAA member airlines in terms of ATK/employee is at 357,779. This is lower than the worldwide

average at 506,406 in 2017 and this may be an indication of overmanning in African airlines.

Section Eight

Safety

According to airline accident statistics from the Aviation Safety Network, in commercial aviation there was a total of 10 fatal airline accidents, resulting in 79

fatalities. This makes 2017 the safest year ever, both by the number of fatal accidents as well as in terms of fatalities.

Five accidents involved cargo flights and five were passenger flights.

Figure 8.1: 2017 AFRAA Airlines Employees by Job Type

#	Date	Type	Operator	Fatalities	Flight type	Location
1	1/16/2017	Boeing 747-412F	THY Turkish Airlines, opb MyCargo	4 + 35	Cargo	1 km W of Bishkek-Manas International Airport (FRU), Kyrgyzstan
2	04/12/2017	Cessna 208 Caravan I	Spirit Avia Sentosa	1	Cargo	13 km N of Oksibil Airport (OKL), Indonesia
3	05/01/2017	Cessna 208B Grand Caravan	Grant Aviation	1	Domestic Scheduled Passenger	Chignik, AK, United States of America
4	05/05/2017	Shorts 330-200	Air Cargo Carriers	2	Cargo	Charleston-Yeager Airport, WV (CRW), United States of America
5	5/27/2017	Let L-410UVP-E20	Summit Air	2	Cargo	Lukla-Tenzing-Hillary Airport (LUA), Nepal
6	10/14/2017	Antonov An-26-100	Valan International Cargo Charter	4	Cargo	off Abidjan-Felix Houphouet Boigny Airport (ABJ), Cote d'Ivoire
7	11/15/2017	Let L-410UVP-E20	Khabarovsk Avia	6	Domestic Scheduled Passenger	1,2 km SSW of Nelkan Airport, Russia
8	11/15/2017	Cessna 208B Grand Caravan	Coastal Aviation	11	Passenger	Empakaai area, Tanzania
9	12/13/2017	ATR 42-320	West Wind Aviation	1	Domestic Scheduled Passenger	near Fond-du-Lac Airport, SK, Canada
10	12/31/2017	Cessna 208B Grand Caravan	Nature Air	12	Domestic Non-Scheduled Passenger	near Punta Islita, Costa Rica
			TOTAL	79		

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

The low number of accidents in Africa is a continuation of a trend of improving 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, ACI and others. These efforts need to continue to be enhanced. We would like to see all eligible African airlines obtain IOSA certification and ground handlers ISAGO registration to assure the

customers that African aviation adheres to industry best practices in safety, security and operations.

IOSA

As of November 2018, Africa had 46 airlines on the IOSA registry comprising almost all the major carriers on the continent. In the past year between, five more airlines acquired IOSA registration whilst three were not able to renew their IOSA registration.

Below is the list of African airlines on the IOSA registry (46):

	Airline	Country
1	Africa World Airlines	Ghana
2	Air Algérie	Algeria
3	Air Austral et Ewa Air	Réunion
4	Air Botswana	Botswana
5	Air Burkina S.A.	Burkina Faso
6	Air Cairo	Egypt
7	Air Cote d'Ivoire	Côte d'Ivoire
8	Air Madagascar	Madagascar
9	Air Mauritius Ltd.	Mauritius
10	Air Namibia (Pty) Ltd.	Namibia
11	Air Peace Limited	Nigeria
12	Air Seychelles Ltd.	Seychelles
13	Allied Air Ltd.	Nigeria
14	Almasria Universal Airlines	Egypt
15	ARIK AIR LIMITED	Nigeria
16	Cameroon Airlines Corporation	Cameroon
17	CemAir (Pty) Ltd	South Africa
18	Comair Ltd.	South Africa
19	Compagnie Aérienne ASKY	Togo
20	Congo Airways	Congo, Democratic Republic of the
21	EgyptAir	Egypt
22	ETHIOPIAN AIRLINES GROUP	Ethiopia
23	FlyEgypt	Egypt
24	Global Africa Aviation (Pvt) Ltd	Zimbabwe
25	Kenya Airways Limited	Kenya
26	LAM - Linhas Aéreas de Moçambique	Mozambique
27	Mango Airlines	South Africa
28	Mauritania Airlines International	Mauritania
29	Med-View Airline	Nigeria
30	Nesma Airlines	Egypt
31	Nile Air	Egypt
32	Nouvelair	Tunisia
33	Nova Airways	Sudan
34	Overland Airways Limited	Nigeria
35	PETROLEUM AIR SERVICES, PAS.	Egypt
36	Precision Air Services Plc	Tanzania, United Republic of
37	Royal Air Maroc	Morocco
38	RwandAir	Rwanda
39	S.A. Airlink (Pty) Limited	South Africa
40	SAFAIR Operations (Pty) Ltd.	South Africa
41	South African Airways	South Africa
42	South African Express Airways (Pty) Ltd.	South Africa
43	TAAG Angola Airlines	Angola
44	TACV Cabo Verde Airlines	Cape Verde
45	Tassili Airlines	Algeria
46	Tunisair	Tunisia

ISAGO

AFRAA urges all ground handling companies to adopt the IATA Safety Audit for Ground Operations (ISAGO) as a vehicle to ensure quality and safety. The basis for this is that AFRAA member airlines are required to be IOSA certified and therefore the ground handlers are also expected to adopt similar quality and safety standards. The implementation of the IATA Safety Audit for Ground Operations (ISAGO) aims to improve safety and cut airline costs by drastically reducing ground incidents, accidents and injuries.

AFRAA also urges airlines in Africa to implement the IATA Ground Operational Manual (IGOM

IGOM is an integral strategy for the reduction of aircraft ground damage. It is a good industry practice and is a significant step forward in helping improve the safety and efficiency of ground handling activities. IGOM has been embedded in the ISAGO and IOSA programs. Implementing IGOM will go a long way to enhance oversight and improve safety.

ISAGO Registry

The ISAGO registry lists all ground handling companies that have undergone an ISAGO audit and have cleared all findings. The following are the organisations in Africa on the ISAGO registry as at November 2018.

1	Aero Services Egypt
2	Air Mauritius Limited
3	ASAM S.A. Assistance Aéroportuaire du Mali
4	Aviance Ghana
5	Aviation Handling Services
6	BIDAir Services (Pty) Ltd
7	Cabo Verde Handling S.A.
8	Cairo Airport Cargo Company (CACC)
9	Congo Handling S.A
10	DAS Handling Ltd
11	Egyptair
12	Egyptian Aviation Services
13	Entebbe Handling Services Limited
14	GHASSIST- S.A (Ground Handling Assistance)
15	Global Load Control
16	Ground2Air (Equity Aviation Indian Ocean Ltd.)
17	Handling Partner Gabon
18	International Aviation Business
19	Kenya Aerotech Limited
20	Kenya Airways Limited

21	Lilongwe Handling Company
22	MAKS Aviation Services Co. Ltd
23	Menzies Aviation
24	National Aviation Services
25	National Handling Services Private Limited
26	New Star Aviation Services – NSAS
27	Nigerian Aviation Handling Company PLC
28	RACGAE
29	RAM Handling
30	Réunion Air Assistance
31	RwandAir Ltd.
32	Senegal Handling Services
33	Siginon Aviation
34	Sky Handling Partner Sierra Leone Ltd
35	Skyway Aviation Handling Company Limited
36	SOCIETE TOGOLAISE DE HANDLING
37	SS Air Aviation Ground Services & Logistics
38	Swissport International Ltd.
39	Tradewinds Aviation Services Ltd
40	ZEGA Limited

Section Nine: AFRAA Secretariat Value Adding Activities

9.1 Safety

9.1.1 IOSA Registered Airlines

Safety standards in Africa have increased significantly in the past few years. Airlines in Africa had zero jet hull losses and zero fatal accidents involving jets or turboprops for a second consecutive year in 2017.

The sharply improved safety standards in Africa shows that the various efforts by AFRAA, IATA, AFCAC, ICAO, civil aviation authorities, airports, governments and other stakeholders to enhance a safety culture is yielding positive results. These efforts need to continue to be enhanced.

As of November 2018, Africa had 46 airlines on the IOSA registry comprising almost all the major carriers on the continent. Five more airlines acquired IOSA registration in the past year (between October 2016 and November 2018), whilst three were not able to renew their IOSA registration. The airlines that were added to the IOSA registry include: Air Cote d'Ivoire (Côte d'Ivoire), Congo Airways (Democratic Republic of Congo), Global Africa Aviation (Pvt) Ltd (Zimbabwe), Petroleum Air Services, PAS. (Egypt) and S.A. Airlink (Pty) Limited (South Africa).

9.1.2 ISAGO (IATA Safety Audit for Ground Operations)

The IATA Safety Audit for Ground Operations (ISAGO) is an important programme for assessing the operational management and control systems of an organisation that provides ground handling services for airlines. The implementation of ISAGO aims to improve safety and cut airline costs by drastically reducing ground accidents and injuries. Among other benefits, ISAGO registration scheme seeks to offer ground handling and airport businesses improved

safety oversight, improved quality standards, safer ground operations, fewer accidents and injuries, harmonised standards, uniform audit process, harmonised auditor training and qualifications, elimination of redundant audits from airlines and reduced costs arising from less damage and less audits.

The number of ground handling service providers with ISAGO registration in Africa was 40 as at November 2018.

AFRAA also urges airlines in Africa to implement the IATA Ground Operational Manual (IGOM)

IGOM is an integral strategy for the reduction of aircraft ground damage. It is a good industry practice and is a significant step forward in helping improve the safety and efficiency of ground handling activities. IGOM has been embedded in the ISAGO and IOSA programs. Implementing IGOM will go a long way to enhance oversight and improve safety.

9.2 Training and Human Capital Development

In 2018, AFRAA highlighted the importance of the safety and security within the African aviation industry by giving a various number of courses, workshops and seminars to enhance the level of safety and security in our continent. Over 300 participants attended the trainings as tabled below.

9.3 Seeking to Fully Open African Skies

9.3.1 Launch and Implementation of the SAATM

The launch of the Single African Air Transport Market (SAATM) which took place in January 2018 is a historic and a vital milestone towards the continental effort to start the implementation of the 1999

No	Course Name	Dates	Number of Participants
1	Flight Operations Inspections	15 - 19 Jan	20
2	Accidents & Incidents Investigations	29 Jan - 2 Feb	19
3	Weight & Balance Refresher (2 sessions)	12 - 14, 15 - 17 March	13+9
4	Weight & Balance Initial	19 - 23 March	13
5	Weight & Balance Initial	08-12 Oct	14
6	Weight & Balance Refresher	15 - 19 OctT	12
7	Dangerous goods regulations refresher CAT 10,12,9,8	13-20-22-23 -24 -27 October	21
8	Safety Management Systems for Executives	25 OCT	6

Workshops and Seminars

No	Seminar/Workshop	Dates	Number of Participants
1	IATA Dangerous Goods Regulations Workshop	29-Jan	29
2	Bombardier Seminar	28-Feb	48
3	IATA Resolution 753 (Baggage Handling)	7-Mar	85
4	CORSIA Workshop	14-16 August	46
5	AFRAA-IATA Security Seminar	17 – 18 October	40
6	AFRAA-ICAO Aviation Data & Analysis Seminar	6 – 7 December	To be advised

Yamoussoukro Decision (YD). The YD provides for the full liberalisation of intra-African air transport services in terms of market access, the free exercise of first, second, third, fourth and fifth freedom traffic rights for passenger and freight air services by eligible airlines.

Initially championed by twenty-three African States at the launch, the number of States that have signed the solemn commitment has reached twenty six as at July 2018. The SAATM, a flagship project of the African Union Agenda 2063, is an initiative of the African Union to create a single unified air transport market in Africa. The liberalisation of air transport in Africa is an impetus to the Continent's economic integration agenda.

With operationalization of the SAATM, intra-African connectivity will develop and in turn, aviation's role as an economic driver will grow significantly. The SAATM will further spur more opportunities to promote intra-African trade, cross-border investments in the production and service industries, including tourism resulting in the creation of additional jobs.

The benefits of the SAATM will be realised through its effective implementation by the States that have committed and by the remaining States to sign up. As of July 2018, Fourteen Member States of the SAATM had signed the Memorandum of Implementation (MoI) as an outcome of the Ministerial Working Group meeting in May 2018 in Lomé which took place under the Patronage of the SAATM champion, His Excellency the President of Togo.

AFRAA urges the States that have signed up to go a step further to ensure they create an enabling operating environment for airlines so that they may realise maximum potential of the SAATM and take advantage of the benefits that aviation brings.

AFRAA, in collaboration with other stakeholders issued an SAATM handbook which will be a reference point to the industry to better explain what is SAATM and its implementation plan.

9.3.2 Removal of non-physical Barriers to Movement of People and Goods

Linked to the liberalization of Africa skies is the need to facilitate the movement of goods and people across our borders. Visa restrictions will not make sense in a fully liberalised operating environment.

AFRAA continues to advocate for the removal of visa requirements among African States and where they are required, for visas to be able to be obtained at the port of entry into a country. Likewise, customs clearance procedures and processes need to be much streamlined and faster to facilitate intra-Africa trade and development.

The establishment of the African Continental Free Trade Area (CFTA) is another component that ties neatly into the thrust towards a Single African Aviation Market as air transport is a critical facilitator to the movement of people and goods in the vast continent. Intra-African trade currently stands at 12-15% of total trade, compared to 60 % for Europe, 40% for N. America, and 30% for ASEAN, according to the World Trade Organisation. Enhancing trade can contribute significantly to sustainable economic growth.

In addition to measures to implement the above, AFRAA urges States to ensure that they create an enabling operating environment for airlines so that they may take advantage of the benefits that aviation brings.

9.4 AFRAA Projects

9.4.1 AFRAA Fuel Project

AFRAA Fuel Tender 2019

The AFRAA Fuel Project conducted its annual fuel tender for fuel purchase in 2019. The project is now in its eight year and brings together participating member airlines to procure fuel jointly. This year saw inclusion of one new member airline-Congo Airways, who are participating in the project for the first time. The members have expressed delight and satisfaction

with the project this year as the final bids received have indicated significant savings compared to the previous tender in most of the locations.

Over the years the project has yielded not only significant savings for the participating airlines but also capacity building to airline personnel handling fuel through workshops and training sessions held annually through the facilitation of AFRAA.

9.4.2 Campaigns against high fuel charges and taxes

AFRAA and IATA continue to work closely together to campaign against high fuel taxes and charges. Through the newly formed IATA–Africa Fuel Working Group (AFWG) where AFRAA has representation, the locations with major challenges with regards to high fuel taxes and charges, supply disruptions and lack of foreign currency have been identified and prioritised. The locations include Lagos, Abuja, Casablanca, Gaborone, Lusaka, Bujumbura and Dar es Salaam.

During the AFWG meeting at the IATA Fuel Forum in St Petersburg in 2017, it was agreed that the IATA Fuel Team embarks on the development of a communications and data repository tool that gives airlines prompt and convenient access to current and historical information on IATA commercial fuel activities in various locations - the same type of information that is made available through the Quarterly Updates. With the tool, airlines will be able to receive updates on individual IATA commercial fuel activities promptly (instead of waiting for the Quarterly Update to be issued) and be able to access historical information on each activity to understand its background or track its progress. The members of the AFWG will then be given access rights to access the tool. This will largely boost monitoring of the progress of lobbying efforts at each of the target locations.

9.4.3 Route Network Coordination Project

Following the relaunch of the AFRAA Route Network Coordination Project in 2014, significant progress on commercial cooperation amongst the participating airlines has been achieved up to 2018.

AFRAA is working with Milanamos as the data partner for the Project. Milanamos' tool, PlanetOptim. Future, is being used to provide scenarios on viable routes for schedule realignment, network rationalization, codeshares and other commercial and tactical partnerships among airlines. The tool is also useful for conducting demand and costs/benefits analysis on selected city-pairs therefore maximizing traffic and revenues for airlines. Milanamos also works with AFRAA to avail reports on request for interested airlines on market analysis.

Since its inception the committee has jointly achieved 20 Interline Electronic Ticketing Agreements, 19 Special Pro-rate Agreements and 11 Codeshares: 11 among several airline pairs. The RNC committee meetings have the support of partners like Bombardier, Sabre, Milanamos and Clarity who have requested either to hold their seminars back to back with RNC meetings or to give a presentation during the meeting. More partners are interested in joining the project. The Route Network Committee has the responsibility of striving to alleviate the challenge of fully connecting cities within Africa and recapture market share hence resuming with profitability.

9.4.4 AFRAA Ground Handling Project

Now in its fifth year, the AFRAA Ground Handling Project was launched with the objective of facilitating beneficial ground handling cooperation among airlines with the view to adopt and implement cost-effective common solutions that will address some of the handling challenges being faced by airlines.

In 2018, the Project intensified its lobbying efforts for the reduction of high charges and taxes and for the opening up of markets to competition. The Secretariat engaged stakeholders in Dakar and Abidjan on the reduction of high ground handling charges. In view of the importance of involvement of AFRAA in aviation matters and active engagement in issues being spearheaded by the local BARs in countries away from the AFRAA headquarters, AFRAA is nominating some of its members as spokespersons in countries located far away from the Secretariat to strengthen the collective lobbying efforts.

AFRAA in conjunction with IATA Airline Training Fund (IATF) conducted training on Aircraft Turnaround Coordination and Loading Supervision Course from 16 – 19 July 2018 at the Camair-co headquarters, Douala – Cameroon. Other courses targeted include: Station/Ground Handling

Management and SGHA-SLA & Effective Negotiation Behaviors Workshop.

9.4.5 AFRAA Cargo Project

The AFRAA Cargo Task Force was formed in 2015, with the main objective to identify areas where African airlines could cooperate to reduce costs and enhance revenues in collaboration with other relevant stakeholders.

The duty of the committee is to identify areas where African airlines could cooperate to reduce costs and enhance revenues in collaboration with other relevant stakeholders. It further identifies areas to lobby authorities to facilitate smarter regulations, reduction in industry costs, facilitate development of e-freight and the improvement of

cargo infrastructure. Moreover the committee seeks collaboration in human capital development to facilitate the development of air cargo.

9.5 Blocked Funds

A major challenge facing airlines is that of blocked funds in some states. Blocked funds are monies generated by an airline in foreign operations that cannot be moved from that country to another for any reason. Some governments – notably those which were largely reliant on oil exports for their foreign currency earnings were greatly affected by the steep fall in oil prices from 2014 when the average price per barrel was \$116.6 with oil prices having remaining below \$55.00 per barrel since then and at one time went as low as \$30.00 per barrel.

The States seriously affected are Angola, Zimbabwe, Sudan, Algeria and Ethiopia. AFRAA is working closely with the governments of Nigeria, Angola and Sudan. In this regard, AFRAA is collaborating closely with various stakeholders including IATA, AUC, airlines,) and the relevant authorities so that our combined lobbying can have much more impact. AFRAA also supported the Blocked Funds Forums organised by IATA in Morocco in May 2018.

Due to these sustained collaborative efforts, we have managed to reduce the amount of blocked funds in Angola. The lobbying efforts are however continuing where we are highlighting the positive economic and social contributions of air transport realised through better connectivity, trade and tourism and thus urging the affected states to give airlines priority in the allocation of foreign exchange.

It is in everybody's interest to ensure that airlines are paid on-time, at fair exchange rates and in full. Air connectivity is vital to African economies. The affected African airlines cannot afford not to receive the funds they generate from their operations. So the efficient and timely repatriation of revenues is critical for airlines to be able to play their role as a catalyst for economic activity.

9.6 Development of AFRAA Land

AFRAA is developing a parcel of land at its headquarters in Nairobi. The project entails an express room concept for accommodation. A Hotel Consultant (THCS) was contracted in May 2018, and a Business Plan for the hotel was proposed and approved by the Executive Committee. The block of 62 rooms at AFRAA headquarters in Nairobi when completed will be another major source of revenues to help finance the expansion of Secretariat activities to benefit member airlines. Development of the land will generate additional revenue for the Association for the benefit of its members.

9.7 AFRAA Aviation Stakeholders Convention

AFRAA in partnership with Air Tanzania, held the 7th Aviation Stakeholders Convention from 08-10

April 2018 at the Zanzibar Beach Resort in Zanzibar. The Convention's aim is to foster dialogue between stakeholders in order to build sustainable networks in supply chain management and create a competitive environment for aviation business in the continent. The three-day conference which was convened under the high patronage of the Government of the Revolutionary Republic of Zanzibar, was held under the theme: "Harnessing Aviation Opportunities in Africa". The event was graced by His Excellency Seif Ali Iddi, 2nd Vice President of the Revolutionary Government of Zanzibar, who was the event Guest of Honour.

Air Mauritius kindly offered to host the next Convention scheduled to take place from in May 2019 in Mauritius. Both teams have kicked off preparations for the 2019 edition of the event.

9.8 New Members and Partners

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

We warmly welcome the member airline and five partners that joined AFRAA in 2018. The new member airline is: Allied Air. The new partners are: Aurora Aviation S.A, Clairity PTE, Star Oil Group, Innova Conseil Group and EML Energy.

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

9.9 ISO 9001: 2015 Certification for AFRAA

AFRAA completed the documentation of its quality manual as per the requirements of the new ISO standard 9001:2015. Bureau VERITAS was invited to conduct the transition and second surveillance audits on the AFRAA Quality Management System, on the 6th of November, 2017.

AFRAA transited to the new ISO Standard 9001: 2015 in 2018. Attainment of the new standard 9001:2015 will greatly improve the internal systems within AFRAA and therefore boost the effectiveness of the organization in achieving its objectives on behalf of the member airlines

9.10 Working with other Organisations

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

Section Ten: FAA or EASA Certified African MROs



Aerotechnic Industries (ATI)

Contact:
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Fax: +212 52 2539733
Email: doleplat@airfrance.fr



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EgyptAir Maintenance & Engineering

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General Manager
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Sneema Engine Services

BP 87
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Shannon Industrial Estate
Nouasser Casablanca Maroc
Tel: +212 522 536 900
Email: sneema.morocco@sneema.ma



Tunisair Technics

Complexe technique aéroport Tunis
Carthage
2035 Tunis
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Email: Contact@TunisairTechnics.com

Section Eleven: FAA or EASA Certified Training Centres



EgyptAir Training Centre

Contact:
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Ethiopian Aviation Academy

Contact: Tigist Terefe
Manager Sales & Business Development
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Kenya Airways Pride Centre

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Head of Learning and Development
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RAM Academy

Contact:
Campus Royal Air Maroc
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Tel: +212 522 420700/02
Fax: +212 22 91 25 81
Email: azamrane@royalairmaroc.com/mroudani@royalairmaroc.com



South African Airways Learning & Development

Contact: Ms. Nivy Moodley
Head of SAA Learning & Development
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Tunisair Training Centre

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Think before you print.

Section Twelve: Airlines with Aircraft Simulators



Aviation Training Center of Tunisia (ATCT)

2 A320 aircraft simulators

Contact: Mr. Mohammed Mzah

Chief Executive Officer

or

Capt. Akram Sellami

Head of Training

Tel: +216 71911811

Fax: +216 71911606

Email: atct@atct.com.tn



EgyptAir Training Centre

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

Tel: +202 22651440

Fax: +202 2265 6240

Email: a_sowedan@egyptair.com



Eng. Tarek El Shahawy

Market Research Manager

EGYPTAIR Holding Company – Training Academy

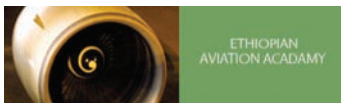
Cellular: +2 0100 783 1260

Office: +2 02 22 65 1471

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Email: tarek.elshahawy@egyptair.com

URL: <http://training.egyptair.com>



Ethiopian Aviation Academy

B737NG and B757/B767 full flight simulator trainings

Contact: Tigest Terefe

Manager Sales & Business Development

Tel: +251 115 174013

Email: Tigestte@ethiopianairlines.com



Kenya Airways Pride Centre

B737 NG full flight simulator

Contact: Dr. Mbithe Anzaya

Head of Learning and Development – Pride Centre

Tel: +254 20 264 22846/64.

Email: learning.development@kenya-airways.com



CasaAero S.A.S.

B737-400/500C and B737-700/800NG full flight simulators

Direction de la Formation Technique

Tel: +212 5 22 91 25 38

Fax: +212 5 22 91 28 94

Email: dft@royalairmaroc.com

Section Thirteen: AFRAA Airlines – Individual Summary Facts



MR. AYAD BOURHANE
Chief Executive Officer

ADDRESS

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Moroni, Malouzini Union des
Comoros
Tel: +2697739570
www.flyabaviation.com

IATA CODE: Y6
ICAO CODE: CIK

AFRAA MEMBERSHIP
Became member in 2017
Established in 2010

OWNERSHIP STRUCTURE
Privately Owned

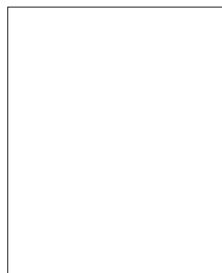
COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED

Domestic	2
Regional	3
International	1

EMPLOYEES

FLEET	
EMB 120	3



**MR. ABDULHAKIM EFITURI
FARES**
General Manager

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Fax: +218 21 444 9128
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	2
Intra-Africa	5
International	3

EMPLOYEES

FLEET	
Airbus 319-100	2
Airbus 320-200	3
Airbus 330-300	1



CAPT. BAKHOUCHE ALLECHE
General Manager

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Alger, Algeria
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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
Turkish Airlines

DESTINATIONS SERVED

Domestic	29
Intra-Africa	9
International	35

EMPLOYEES

FLEET	
Airbus A330-200	8
Boeing B767-300	3
Boeing B737-800	25
Boeing B737-600	5
ATR72-500	12
LC-100-30	1
B737-700C	2



MS. AGNES KHUNWANA
General Manager

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

IATA CODE: BP
ICAO CODE: BOT

AFRAA MEMBERSHIP
Became member in 1991
Established in 1947

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Qatar Airways

DESTINATIONS SERVED
Domestic 4
Intra-Africa 2

EMPLOYEES
385

FLEET
ATR42-500 3
ATR72-500 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
AKFED/IPS consortium (part of
the Aga Khan Development
Network): 88%
Government: 5%
Other: 7%

COMMERCIAL PARTNERSHIP
Air France
Kenya Airways
ASKY Airlines

DESTINATIONS SERVED
Domestic 1
Intra-Africa 7

EMPLOYEES
229

FLEET
E170 2



**MR. ROLLAND BESOA
RAZAFIMAHARO**
President & Chief Executive Officer

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

IATA CODE: MD
ICAO CODE: MDG

AFRAA MEMBERSHIP
Became member in 1975
Established in 1962

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

COMMERCIAL PARTNERSHIP
Air Austral
Air Mauritius
Air Seychelles

DESTINATIONS SERVED
Domestic 11
Intra-Africa 4
International 3

EMPLOYEES
928

FLEET
A340-313 1
B737-800 1
ATR72-212A 3
DHC6 – 300 1

**MR. SOMAS APPAVOU**

Chief Executive Officer

ADDRESS

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

IATA CODE: MK

ICAO CODE: MAU

AFRAA MEMBERSHIP

Became member in 1985
Established in 1967

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED

Domestic	1
Intra-Africa	8
Intercontinental	15

EMPLOYEES

2884

FLEET

A350-900	2
A340-300	6
A330-200	2
A319-100	2
ATR72 – 500	3

**ADVOCATE MANDI E. SAMSON**

Ag. Managing Director

ADDRESS

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

IATA CODE: SW

ICAO CODE: NMB

AFRAA MEMBERSHIP

Became member in 2000
Established in 1946

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Ethiopian Airlines
Kenya Airways
Condor Flugdienst GmbH
Turkish Airlines

DESTINATIONS SERVED

Domestic	8
Regional	6
Intercontinental	1

EMPLOYEES

744

FLEET

Airbus A319	4
Airbus A330	2
Embraer ERJ 135	4

**ENG. LADISLAUS EVERIST
MATINDI**

Chief Executive Officer

ADDRESS

Air Tanzania,
PO 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

NIL

DESTINATIONS SERVED

Domestic	10
Regional	1

EMPLOYEES

282

FLEET

Bombardier Q300	1
Bombardier Q400	3
B787-800	1



MR. JOSEPH MAKONISE
Chief Executive Officer

ADDRESS

Air Zimbabwe Corporation,
PO Box AP 1 Harare, Zimbabwe
Tel: +263 4 58202300
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
Air Botswana
Air Mauritius

DESTINATIONS SERVED
Domestic 3
Intra-Africa 2

EMPLOYEES
232

FLEET
Boeing B767 2
Boeing B737 3
MA 60 3



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 1998

OWNERSHIP STRUCTURE
Privately Owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Domestic 2
Regional 7
International 4

EMPLOYEES
120

FLEET
Boeing 737-400F – 3



MR. AHADU SIMACHEV
Chief Executive Officer

ADDRESS

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

IATA CODE: KP
ICAO CODE: SKK

AFRAA MEMBERSHIP
Became member in 2010
Established in 2009

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

COMMERCIAL PARTNERSHIP
Ethiopian Airlines
Air Burkina

DESTINATIONS SERVED
Domestic
Intra-Africa 22
International

EMPLOYEES
458

FLEET
Boeing 737-700 3
Boeing 737-800 1
Q400-DH8 3



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 2006

OWNERSHIP STRUCTURE
Fully owned by Kenyans

COMMERCIAL PARTNERSHIP
Kenya Airways
Ethiopian Airlines
South African Airways Cargo
LAM Mozambique
Rwandair
Egyptair
Air Tanzania
Silverstone Air
SAC (K) Limited

DESTINATIONS SERVED
Domestic 4
Intra-Africa 8
Intercontinental 2
Charters to over 50 destinations
in Africa

EMPLOYEES

FLEET
Boeing 747-400F 1
DC-9-34F 1
Boeing 727-200F 2
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
Established in 2004

OWNERSHIP STRUCTURE
100% Private
Mr. Ahmedosman Abushaera 50%
Mr. Hashim Yousif ElDigair 50%

COMMERCIAL PARTNERSHIP
Sudan Airways

DESTINATIONS SERVED
Domestic 7
Regional 5
International 3

EMPLOYEES

FLEET
B737-300 2
B737-500 5
IL-76TD 2



MR. ERNEST DIKOU
Chief Executive Officer

ADDRESS

Immeuble La Rotonde-Boulevard
de la liberté
BP 4852 Douala-Cameroun
Tel: +237 33 422010 / 33 422013
Fax: +237 33 422030 / 33 423015 /
33 422980 / 33 422985
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
Government: 100%

COMMERCIAL PARTNERSHIP
Air France

DESTINATIONS SERVED
Domestic 6
Intra-Africa 2
Intercontinental

EMPLOYEES

FLEET
Boeing 737-700 2
Boeing 767-300 1
MA60 2

**MR. BIENVENIDO ESONO**

Chief Executive Officer

ADDRESS

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

IATA CODE: C2

ICAO CODE: CEL

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

100% by The State of Equatorial
Guinea

COMMERCIAL PARTNERSHIP

Air France

DESTINATIONS SERVED

Domestic	4
Intra-Africa	10
Intercontinental	1

FLEET

ATR 42-300F	1
ATR42-500	1
ATR 72-500	2
B737-800	2
B767-300ER	1
B777-200LR	1

**MR. DESIRE BALAZIRE BANTU**

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

Government Owned: 100%

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	25
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EMPLOYEES

326

FLEET

A320	2
DH8-Q400	2
B737	1
A319	1

**MR. ANDREAS KAIASFAS**

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	4

EMPLOYEES

157

FLEET

BAE 146-200	1
BAE 146-300	1
EMBRAER 135 – 3	
EMBRAER 145 – 1	

**CAPT. AHMED ADEL**

Chairman & CEO EgyptAir Holding Co.

ADDRESS

EGYPTAIR Admin. Complex,
Middle Bldg, 3rd Floor
PO Box 11776 Airport Road,
Cairo, Egypt
Tel: +202 2267 6542/2267 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

South African Airways Air Canada
United Airlines LOT Polish
Scandinavian Airlines Air China
Aegean Airlines Turkish Airlines
Ethiopian Airlines Air India
Singapore Airlines Lufthansa
Austrian Airlines Shenzhen Airlines
Thai Airways TAP Portugal
Kenya Airways Etihad Airways
Gulf Air Swiss International
Brussels Airlines Royal Air Maroc

DESTINATIONS SERVED

Domestic	9
Intra-Africa	16
Intercontinental	44

EMPLOYEES

28940

FLEET

A320	3
A321	4
B737-800	25
A330-200	6
A330-300	4
B777-300	6
B777-200	1
A300-600	2
A300-B4	1

**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 21 December 1945
Started operation in 1946
Became member in 1968

OWNERSHIP STRUCTURE

Government: 100%

COMMERCIAL PARTNERSHIP

Air Namibia
Air Europa
Azul

DESTINATIONS SERVED

Domestic	20
Intra-Africa	55
Intercontinental	45

EMPLOYEES

11,299

FLEET

A350-900	5
B777-300ER	4
B777-200LR	6
B787-8	19
B767-300ER	6
B737-800	15
B737-700	5
Q400	18
B77F	6
B757F	2

FLEET ON ORDER

A350-900	9
B777-200F	6
DHC-8 Q400	12
B737-8MAX	32

**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**

Domestic	1
Intra-Africa	18

FLEET

B737-300 QC	1
B737-300F	1



MR. ABDULLAHI DIRIA WARSAME

Chief Executive Officer

ADDRESS

Panari Sky Centre, Mombasa Rd
Nairobi – Kenya

IATA CODE: 3J

ICAO CODE: JUB

AFRAA MEMBERSHIP

Became a member in 2017
Established in 2008

OWNERSHIP STRUCTURE

Private Company Limited

COMMERCIAL PARTNERSHIP

Daallo Airlines

DESTINATIONS SERVED

Domestic	8
Intra-Africa	4
Intercontinental	3

EMPLOYEES

244

FLEET

A321	2
B733	1
F-50	3

FLEET ON ORDER

A320-214	1
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MR. SEBASTIEN MIKOSZ

Group Managing Director &
Chief Executive Officer

ADDRESS

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

IATA CODE: KQ

ICAO CODE: KQA

AFRAA MEMBERSHIP

Became member in 1977
Established in 1997

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED

Domestic	3
Intra-Africa	36
Intercontinental	10

EMPLOYEES

3463

FLEET

Boeing 787-700	7
Boeing 737-800	8
Boeing 737-700	2
Boeing 737-300	2
Embraer 190	15
B737-300F	2
Boeing 777-200	2



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: 91%
LAM Employees: 9%

COMMERCIAL PARTNERSHIP

TAAG Angola
South African Airways
Ethiopian Airlines
Kenya Airways

DESTINATIONS SERVED

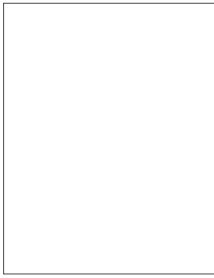
Domestic	10
Intra-Africa	4

EMPLOYEES

695

FLEET

Boeing 737-500	1
Bombardier Q400	3
Embraer 190	2



MR. ABDULATI EL MESHKI
Chief Executive Officer &
Member of Board of Directors

ADDRESS

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

IATA CODE: LN
ICAO CODE: LAA

AFRAA MEMBERSHIP
Became member in 1968
Established in 1965

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	2
Regional	
International	1

FLEET

CRJ900	2
A330	3
A320	3



**MR. MOHAMED RADHY
OULD BENNAHI**
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	2
Intra Africa	9
International	1

FLEET

B737-500	2
B737-700	1
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

OWNERSHIP STRUCTURE
Privately Owned

DESTINATIONS SERVED

Domestic	4
Intra-Africa	1
International	15

EMPLOYEES
762

FLEET

A320-200	5
A321-200	2

FLEET ON ORDER
A321 – 200



MR. CHOKRI ZARRAD
Chief Executive Officer

ADDRESS

One Touristique Dkhila 5065
Monastir
Tunis, Tunisia
www.nouvelairtunisie.com

IATA CODE: BJ

ICAO CODE: LBT

AFRAA MEMBERSHIP

Became member in 2017
Established in

OWNERSHIP STRUCTURE

Privately Owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	0
Intra-Africa	7
Intercontinental	15

EMPLOYEES

520

FLEET

A320 – 214 8

FLEET ON ORDER

A320 – 214 2



MS. SAUDA SAID RAJAB
Chief Executive Officer

ADDRESS

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

IATA CODE: PW

ICAO CODE: PRF

AFRAA MEMBERSHIP

Became member in 2006
Established in 1991

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Kenya Airways
Etihad

DESTINATIONS SERVED

Domestic	12
Intra-Africa	3

EMPLOYEES

436

FLEET

ATR 72-500 5

ATR 42-500 2



MR. ABDELHAMID ADDOU
Chairman & Chief Executive Officer

ADDRESS

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

IATA CODE: AT

ICAO CODE: RAM

AFRAA MEMBERSHIP

Became member in 1977
Established in 1957

OWNERSHIP STRUCTURE

Moroccan Government: 96.80%
Private Investors: 3.20%

COMMERCIAL PARTNERSHIP

Iberia
Jet Blue
SN Brussels
TAAG Angola
Turkish Airines
Qatar Airways
Saudi Airlines
Kenya Airways
Aeroflot
Etihad
Egyptair

DESTINATIONS SERVED

Domestic	19
Intra-Africa	33
International	50

EMPLOYEES

2273

FLEET

ATR 72-600	5
Boeing 737-300F	1
Boeing 737-800	31
Boeing 767-300ER	4
Boeing 737-700	6
Boeing 787-8	5
Embraer E190	4
Boeing 747-400	1

FLEET ON ORDER

Boeing 787-9	4
Boeing 737-800MAX4	



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: 99%
Bayigamba Robert:1%

COMMERCIAL PARTNERSHIP
Ethiopian Airlines
Brussels Airlines
Turkish Airlines
South African Airways

DESTINATIONS SERVED

Domestic	1
Intra-Africa	19
International	4

EMPLOYEES
1360

FLEET

Boeing 737-700	2
Boeing 737-800	4
Bombardier CRJ900 Next Gen2	
Bombardier Dash 8-Q400	2
A330-200	1
A300-300	1

FLEET ON ORDER

A330	2
B737Max	1



MR. MOHAMED ADEN NOOR
Chief Executive Officer

ADDRESS

PO Box 59200-00200
Nairobi, Kenya

IATA CODE: K3
ICAO CODE: SAQ

AFRAA MEMBERSHIP
Became member in 2016
Established in 2007

DESTINATIONS SERVED

Intra-Africa	32
Intercontinental	1

FLEET
Fokker 50
Fokker 70
B727-200F
B747-400F
A300-600F



MR. VUYANI JARANA
Chief Executive Officer

ADDRESS

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

IATA CODE: SA
ICAO CODE: SAA

AFRAA MEMBERSHIP
Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Air Canada
Air China
Air Mauritius
Air New Zealand
Air Seychelles
All Nippon Airways
Asiana Airlines
Avianca Brazil
Egyptair
Emirates
Ethiopian Airlines
Jet Blue
LAM Mozambique
Lufthansa
Mango
Scandinavian Airlines
Singapore Airlines
Swiss Airlines
TAP Portugal
Rwandair
TAM
Virgin Australia
United Airlines

DESTINATIONS SERVED

Domestic	13
Intra-Africa	18
International	9

EMPLOYEES
5267

FLEET

Airbus A319	7
Airbus A320	10
Airbus A330-200	6
Airbus A330-300	5
Airbus A340-300	7
Airbus A340-600	7
Boeing B737-300F	3



MS. SIZA MZIMELA
Chief Executive Officer

ADDRESS

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

IATA CODE: XZ
ICAO CODE: EXY

AFRAA MEMBERSHIP
Became member in 2003
Established in 1994

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
LAM Mozambique Airlines
SA Airlink

DESTINATIONS SERVED

Domestic	9
Intra-Africa	3

EMPLOYEES
1015

FLEET

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



MR. ABDEL MAHMOUD SULEIMAN
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
Government: 51%
Private: 49%

COMMERCIAL PARTNERSHIP
Nasair

DESTINATIONS SERVED

FLEET

Airbus A320-200	1
Fokker 50	3



MR. RUI CARREIRA
Chairman & Chief Executive Officer

ADDRESS

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

IATA CODE: DT
ICAO CODE: DTA

AFRAA MEMBERSHIP
Became member in 1978
Established in 1938

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Air France
British Airways
Brussels Airlines
KLM
Lufthansa
Royal Air Maroc
Kenya Airways
LAM
South African Airways

DESTINATIONS SERVED

Domestic	12
Intra-Africa	14
Intercontinental	12

EMPLOYEES
3112

FLEET

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



MR. JOSE LUIS SA NOGUEIRA
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
Intra-Africa
Intercontinental 7

EMPLOYEES
444

FLEET
ATR 72-500 2
Boeing 757-200 1
Boeing 767-200ER 1



M. BELKACEM HARCHAOU
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)

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Domestic 80
International 5

EMPLOYEES
1403

FLEET
Boeing 737-800 4
Bombardier Dash 8-Q2004
Bombardier Dash 8-Q4004

FLEET ON ORDER 3



CAPT. RABEE IBRAHIM
Chief Executive Officer

ADDRESS
25 Trio Estate –
Off Limuru Road
PO Box 19264 – 00501
Nairobi, Kenya
Tel: +254 538010651
Fax: +254 538010652

IATA CODE: 2T
ICAO CODE:

AFRAA MEMBERSHIP
Became member in 2017
Established in 2009

OWNERSHIP STRUCTURE
Privately Owned

FLEET
AN-12F 2
AN-26F 1
CRJ100/200 2
IL-76TD 2
MD-82F 1



MR. ILYES MNAKBI
Chairman &
Chief Executive Officer

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

IATA CODE: TU
ICAO CODE: TAR

AFRAA MEMBERSHIP
Became member in 1968
Established in 1948

OWNERSHIP STRUCTURE
Government: 74%
Others: 26%

COMMERCIAL PARTNERSHIP
Middle East Airlines

DESTINATIONS SERVED
Intra-Africa 9
Intercontinental 34

EMPLOYEES
3,712

FLEET
A319-100 4
A320-200 16
B737-600 7
A330-200 2

Section Fourteen: AFRAA Partners – Profiles And Contacts

accelya

Accelya is a leading global provider of technology products and services to the travel and transport industry. Founded in 1976, Accelya delivers financial, commercial, cargo and analytics solutions designed for a world on the move. Formed through the merger of Accelya and Mercator, Accelya provides the mission critical solutions that account for and

manage more than 5 billion financial transactions and 75 million tonnes of cargo annually. Accelya is headquartered in Barcelona, with offices around the world, and serves as a strategic partner for more than 400 airlines, travel agents and shippers. For more information please visit www.accelya.com



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 profitabil-

ity 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.

Key contact:

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

AIRBUS

1 Rond-Point Maurice Bellonte
31707 Blagnac Cedex, France
Tel: +33 5 61 93 31 39
Fax: +33 5 67 19 15 31
Email: hadi.akoum@airbus.com



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

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

Key contacts:

Mohammed Mahmoud
President

Aero Industrial Sales Company, (AIS)

Tel: +718 949-3300

Fax: +718 949-9898

Email: mohammed@aeroindustrialsales.com

URL: www.aeroindustrialsales.com

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 100 latest technology GSE. Talk about GSE: AIS was honoured 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 colourful booth, you might have noticed our theme which emphasises 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.

Dahir Mohammed
V.P. Sales & Marketing

Aero Industrial Sales Company, (AIS)

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Fax: +718 949-9898

Email: dahir@aeroindustrialsales.com

AMADEUS

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.

Technology has always been critical to developing global travel, increasing scale and access. Mobile devices, artificial intelligence and data analytics are continuing that evolution, giving people ever more ideas, options and control over their journey.

We develop technology every day, harnessing intelligent use of data, integrating new devices and architectures to deliver personalised and integrated journeys. Our technology ensures transparency, choice and simplicity for travellers.

We are one company with a global mindset and a local presence wherever our customers need us. We help connect over 1.6 billion people a year to local travel providers in over 190 countries. We are open in how we work, innovating and collaborating with

customers and partners to move fast, deliver on new possibilities and solve problems.

Our purpose is to shape the future of travel. We are committed to using technology to help global travel have a positive impact on communities and grow sustainably around the world.

Amadeus' presence in Africa and our investment to build cultural proximity and local presence is helping to better cater for African carriers' needs. We've been leading the way in the continent since 1992 and today Amadeus is present in 100% of the territory across 48 countries. As such, Amadeus is proud to be working very closely with the airlines in the region, listening to their experience and supporting them in their strategy. Our technology is present in areas that are relevant for growth – from meeting distribution needs, to embracing digital commerce, building solutions to help with the management of passenger services, and developing the new airport infrastructure to enable the full potential of the region.

Key contact:

Mr. Maher Koubaa
Executive Vice President Airlines
Middle East, Turkey and Africa
Amadeus IT Group SA Dubai BR
Dubai Festival City

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Mobile: +971 50 450 9446
Email: maher.koubaa@amadeus.com
Find out more at: www.amadeus.com/airlines



American General Supplies, Inc. (AGS) is an after-market commercial aviation spare parts and services supplier, founded in Chicago in 1982. Now based in Gaithersburg, Maryland, AGS has over the past 36+ years, diversified and constantly grown to become a well-known, respected and reliable full-service commercial aviation supplier. We are a proud partner of AFRAA.

We represent Honeywell Aerospace, Textron GSE inclusive of the TUG and Douglas brands, Trepel Airport Equipment Company GmbH, SWITLIK, the Stinar Corporation, Clyde Machines, TAM DURABUS and our MRO/Repairs Alliance partner, Summit Aerospace of Miami Florida, in Africa.

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

- Commercial aircraft spare parts supply including all related materials and equipment such as shop and ground support equipment, aircraft tires, etc.

Key contact:

Teddy Kassa
Chief Executive Officer
American General Supplies, Inc.
7840 Airpark Road

- Aircraft repairs, C-checks, engine work and other component maintenance through marketing and maintenance alliances with respected MRO shops, such as Summit Aerospace, etc.
- Technical assistance and training for customer airlines through the AGS TRAINING CENTER at our world headquarters in Washington, D.C. in the USA.
- Surplus material consignment handling for customer airlines.
- Supporting customer airlines as their Purchasing Agents.
- Providing long-term financing services to customer airlines with flexible payment terms.

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

Gaithersburg, Maryland 20879
USA
Tel: 1-301-590-9200
Fax: 1-301-590-3069



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 organisation 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 organisation's key goals are to help airlines exploit small and medium-sized markets on a "variable cost" basis, to generate more revenue for less cost, and to maximize an airline's distribution network with a comprehensive approach based on a tailored portfolio of 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.

Key contacts:

Mrs. Sandrine de Saint Sauveur
President & CEO
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www.worldconnect.apg-ga.com
Email: s.de-saint-sauveur@apg-ga.com
www.apg-ga.com

In developing such products, APG works closely with key industry organisations 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 over 100 participating airlines, which is marketed and supported through its global network. APG IET operates with airline code, GP, which belongs to APG Airlines, APG's own scheduled airline. APG will also base its new NDC product on its GP code.

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 is developing an 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.

Mr. Ibra Wane
Business Development Director
Middle East & Africa
APG
Email: i.wane@apg-ga.com



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.

Key contact:

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Regional Director EMEA
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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.

United Kingdom TW3 1HY
Tel: +44 208 538 0811
Email: malsina@atpco.net
www.atpco.net



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>

Key contact:

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Sales Director - Africa
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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 organized 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.

Key contact:

Boeing Corporate Offices
100 North Riverside
Chicago, Illinois 60606

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.

Main switchboard: 312-544-2000
Investor Relations: 312-544-2140

BOMBARDIER

the evolution of mobility

Bombardier Commercial Aircraft offers a complete range of commercial aircraft optimized for the 60- to 100-seat market segment, with best-in-class efficiency, modern passenger comfort and the highest level of customer service. Its product portfolio includes the Q Series turboprops and the CRJ Series family of regional jets. The high-performing Q400 turboprop can accommodate up to 90 passengers, and is the greenest, quietest and largest turboprop in its class. The CRJ Series family of aircraft is the third most successful

aircraft program in commercial aviation history with close to 2,000 aircraft sold to date.

Today, Bombardier commercial aircraft has the largest installed base of regional aircraft worldwide, with well over 2,000 aircraft in service with approximately 250 operators in 90 countries.

For news and more information about Bombardier Commercial Aircraft, please follow us on

Twitter [@BBD_Aircraft](#) or visit our website at: <http://news.commercialaircraft.bombardier.com>

Key contact:

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Jean-Paul.Boutibou@aero.bombardier.com
www.bombardier.com | www.cseries.com |
www.crjnextgen.com | www.q400nextgen.com



CellPoint Mobile has been a proud AFRAA member since 2017 and provides airlines, passenger transportation operators, hospitality firms and travel companies with the financial, payments and travel technology solutions they need to get to market quickly. These solutions include enabling mobile and web bookings, alternative payment methods, mobile marketing, campaign management, mobile payments, generating ancillary sales, enabling loyalty transactions, customer communications, stored payment capabilities, real-time reporting, reconciliation, connections to payment service providers (PSPs) and acquirers, and more.

Built for the mobile era and to accommodate evolving airline and passenger needs, our range of airline solutions include:

Velocity

Velocity is a mobile-first and highly scalable, universal payment platform that enables airlines and travel merchants to increase conversions in their direct channel by creating a seamless payment experience for customers. Velocity creates a complete, revenue-optimized framework for managing payment transactions – without the complexities or lengthy deployment times.

Key contact:

Ciaran Wilson
Senior Sales and Account Director (Middle East and Africa)
CellPoint Mobile
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Voyage

Voyage is a full-featured, high performance and front-end agnostic booking solution. Voyage integrates seamlessly with CellPoint Mobile's Velocity payment platform as well as the Vantage campaign management platform, to power virtually all of an airline's sales, marketing and payment needs in the mobile channel. Voyage is the next generation of booking engine and unlike many existing solutions from legacy providers, it is mobile-first and works across all devices, including web and native app for iOS and Android.

Vantage

Vantage is a campaign management platform that makes it easy for airlines to increase revenue in the mobile channel and reach passengers in more targeted ways, including geotargeting and usage of data for more personalised offers, all managed from a single user-friendly interface. Vantage is designed to optimise customer interactions, communications and promotions across all touchpoints.

To learn more about how our solutions are helping airlines across the African continent, please contact:

Mobile: +971 (0)55 288 7363
Email: ciaran@cellpointmobile.com
Or visit www.cellpointmobile.com



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 GHAs world-

wide. 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.

Regional CHAMP Representative:

Muhammad Cassim
Sales and Account Manager Africa
CHAMP Cargosystems
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DERICHEBOURG

For more than 20 years, DERICHEBOURG Atis aéronautique has been recognised as one of the leading aeronautics subcontractors in Europe. 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 offers complete all-inclusive solutions.

Industrial Processes

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

Assembly / Manufacturing

Integration of the mechanical and electrical systems
Final assembly of structures, systems & cabin layout
Outstanding works / Retrofit / Refurbishing
Support for static and flight testing
Delivery support
Maintenance, paint finish & mediaplastic blasting

Delivery Assistance

Client support, Coordination & Customer representation
Delivery support & client acceptance

Ground Handling Support

Aircraft washing & technical cleaning
Removal of temporary paint
Towing & repositioning

For further information please visit

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



Embraer is a global company headquartered in Brazil with businesses in commercial and executive aviation, defense & security. The company designs, develops, manufactures and markets aircraft and systems, providing customer support and services.

Since it was founded in 1969, Embraer has delivered more than 8,000 aircraft. About every 10 seconds an aircraft manufactured by Embraer takes off somewhere

in the world, transporting over 145 million passengers a year.

Embraer is the leading manufacturer of commercial jets up to 150 seats. The company maintains industrial units, offices, service and parts distribution centres, among other activities, across the Americas, Africa, Asia and Europe.

Key contact:

Raul Villaron
VP Sales & Marketing Africa and Middle East
Raul.villaron@nl.embraer.com
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GE Aviation is a world-leading provider of jet engines, components and integrated systems for commercial and military aircraft. GE Aviation has a global service network to support these offerings.

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

Key contacts:

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Mr. Thanagren (Terence) Naicker
Sales Director
Southern Africa
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Email: thanagren.naicker@ge.com



Since 1999 Hahn Air has specialised in distribution services for other airlines and has established itself as the market leader in indirect ticket distribution. Today, Hahn Air covers 190 markets and cooperates with more than 350 air, rail and shuttle partners as well as over 100,000 travel agencies. Every year millions of passengers travel between 4,000 locations using Hahn Air's HR-169 tickets.

Hahn Air is your expert for global, secure sales and

optimised revenue. Our distribution services benefit airlines across all alliances and business models by:

- taking the complexity out of your global indirect sales while increasing your revenue.
- managing your distribution niches worldwide - risk-free and cost-efficient.
- connecting your airline to a global network of 100,000 travel agencies.

Key contact:

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Germany

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www.hahnair.com



JLTSL is one of the world's leading aviation insurance brokers with a proven reputation for innovation, client-focused service and performance. We have a wealth of experience in this challenging, highly specialist market.

In line with our continued growth we have won more than 200 new aviation clients since 2009. While our client portfolio is expanding, importantly we continue to maintain high retention rates and retain our existing and long-term clients resulting in JLTSL currently representing 40% of the world's airlines

Our success is down to our ability to deliver outstanding levels of performance to the satisfaction of our clients.

We are committed to building our aviation capabilities and continue to invest in recruiting specialist aviation staff, expanding our expertise in all sectors of the business. Our strength lies in our people with JLT Group employing over 260 aviation insurance specialists located throughout the world.

Key contacts:

Martin Trumper, Partner
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Our culture allows our specialists to solve complex risk issues with creativity and collaboration. We are 'client-first' and put our clients at the centre of everything we do. We understand that success requires focus and when specialty and expertise are aligned we achieve exceptional results for our clients.

Noted for our innovation, negotiating skills and integrity we are well placed to achieve market leading combinations of price and coverage. Our philosophy is to create long-term partnerships with our clients and deliver insurance solutions based on a thorough understanding of their strategies and business objectives.

Our on-going success and development has been recognised within the insurance industry and has seen us win a number of prestigious industry awards, most recently JLT won the "Best Lloyd's Insurance Broker 2017" award.

Andy Swan, Partner
JLT Specialty Limited, Aerospace
Tel: +44 20 7466 6746
Email: andy_swan@jltgroup.com

Lufthansa Consulting

Lufthansa Consulting is an aviation and management consulting company dedicated to globally assist aviation industry clients to successfully meet the challenges that lie ahead. With more than 25 years of experience in providing consultancy services to airlines, airports, cargo operators and civil aviation authorities, Lufthansa Consulting has effectively built on its own expertise and can still tap into the extensive Lufthansa network offering their clients solutions that have an immediate impact and are designed to last.

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

Lufthansa Consulting is well-known as both a strategic and pragmatic business partner, especially in the

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

Drones can potentially benefit strategic sectors such as agriculture, energy and transportation profit. Lufthansa Consulting is already helping customers, corporations as well as authorities to understand the role of UAVs and how they can be integrated not only into their business or the countries' economical activities but also in harmony with other airspace users.

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

Key contacts:

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Germany
Tel: +49 151 589 40 540
Fax: +49 69 696 20830
Email: Mail@LHConsulting.com

Mr. Bruno Boucher
Associate Partner Africa
Lufthansa Consulting GmbH
MAC / Main Airport Center
Unterschweinstiege 14
Gebädeteil A, 1.OG
D-60549 Frankfurt am Main
Germany
Bruno.Boucher@lhconsulting.com



Lufthansa Systems GmbH & Co. KG is one of the world's leading providers of IT services in the airline industry. It draws its unique strengths from an ability to combine profound industry know-how with technological expertise and many years of project experience.

The company offers its about 350 airline customers an extensive range of successful and in many cases market-leading products for the aviation industry. The innovative IT products and services in this portfolio offer customers a wide range of economic benefits while also contributing to improving efficiency and competitiveness. In addition, Lufthansa Systems also supports its customers both within and outside the Lufthansa Group with consulting services and the experience it has gained in projects for airlines of every size and business model.

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

Key contact:

Michael Weghorst
VP Account Management
Middle East & Africa
Lufthansa Systems GmbH & Co. KG
FRA A/SE-M
Am Messeplatz 1

solutions that are customized to their respective needs.

The portfolio is divided into different categories:

- Airline Consulting
- Commercial Solutions
- Finance Solutions & Products
- Flight & Navigation Solutions
- In-flight entertainment
- Mobile Solutions
- Operations Solutions
- Services

As a full-service provider, Lufthansa Systems offers the development, implementation, maintenance and operation of these products and customized software, as well as consulting and IT-related services.

Lufthansa Systems GmbH & Co. KG at a glance

Company headquarters: Raunheim near Frankfurt/Main, Germany

Executive management: Stefan Auerbach and Olivier Krueger

Employees: Around 2,100 worldwide

Locations: Berlin, Frankfurt/Main (Raunheim), Hamburg, Bangkok, Budapest, Buenos Aires, Copenhagen, Dallas, Delhi, Gdansk, Hong Kong, Kuala Lumpur, Mexico City, Miami, Moscow, New York, Peking, Princeton, Sao Paulo, Singapore, Sydney, Tokyo, Toronto, Zurich.

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Big Data Insight for the Travel Industry

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

Contact Milanamos to create your own market

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

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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

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Motor Corporation, Sumitomo Corporation and Mitsui & Co. Ltd.

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

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Unrivaled engine solutions

MTU Maintenance is the world's largest independent provider of engine services and a trusted OEM network partner. In short, we are engine experts. And our business is minimising costs and maximise engine value for our customers – across the entire lifecycle.

As a division of MTU Aero Engines, we look back on more than 36 years of MRO experience, 17,000 shop visits, and over 80 years of cooperation with engine OEMs. This multi-faceted history gives us priceless insight into aero engines of all ages. Add our lessor and asset manager experience to the mix, and MTU Maintenance is in a unique position to deliver great alternative solutions for operators and asset owners.

The entire package

MRO is both our root and our core. And we're exceptional at it. Our global network serves more than 30 engine types and we are continually expanding it. We have extensive in-house repair capabilities and also develop alternative repairs. Furthermore, we offer a comprehensive range of services to keep your operations hassle free, such as on-site and on-wing services, engine trend monitoring, and accessory and LRU management. But we do so much more than just MRO. We also have financial experts, whose skills range from leasing and

engine pooling to asset management. So whichever stage of life your engine is in, we find the right combination of services for you.

We listen to our customers, understand their needs, and develop solutions with them – that is what being a true alternative means to us.

www.mtu.de/maintenance/

Portfolio

Turboprops:
PT6A, PW100/150¹
Helicopters:
PT6B/C/T¹, PW200
Business jets:
CF34-1/-3, JT15D¹, PW300, PW500, PW600¹
Regional jets: CF34-3/-8/-10E
Narrowbodies:
CFM56-2/-3/-5B/-7, PW1100G-JM, PW2000, PW6000, V2500

Widebodies:

CF6-50/-80C2, GEnx², GE90-110/-115B, GE9X^{2/3}, GP72004

- 1) P&WC Customer Service Centre Europe,
- 2) Turbine Center Frame,
- 3) Planned,
- 4) Low Pressure Turbine

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We are the leading provider of digital flight information and our customers span the entire global travel ecosystem from airlines, airports, government agencies and aircraft manufacturers to travel technology leaders and service providers.

At the forefront of the travel market for years, we have the world's largest network of air travel data including the definitive schedules database of more than 980 airlines and the most extensive flight status information database in the market, tracking 96% of commercial flights.

We help our customers solve strategic, commercial and operational problems through wide variety of

solutions from data APIs, dynamic multi-frequency data feeds to delivery of high value business insight through our analytics platform.

Today, OAG's customer network includes the world's largest airlines and airports, online travel agents (OTAs), the largest booking engine in Europe and the top travel, technology and ecommerce leaders across China, India, Indonesia, Latin America and North America.

Headquartered in the UK, OAG has global operations in the USA, Singapore, Japan, Lithuania and China.

www.oag.com

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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 USD 250 million 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 recentraliza-

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

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

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

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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

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

In the Civil Aerospace market, we power more than 35 types of commercial aircraft and have over 13,000 engines in service around the world. Our engines power the latest modern widebody aircraft such as the Airbus A330neo, Airbus A350 and Boeing 787 as well as the world's fastest and largest business jets.

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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, personalise 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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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 specialized 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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SITA is the communications and IT solution provider that transforms air travel through technology for airlines, at airports and on aircraft. The company's portfolio covers everything from managed global communications and infrastructure services, to eAircraft, passenger management, baggage, self-service, airport and border management solutions. Owned 100% by more than 400 air transport industry members, SITA has a unique understanding of its needs and places a strong emphasis on technology innovation.

Nearly every airline and airport in the world does business with SITA and its border management solutions are used by more than 30 governments. With a presence at more than 1,000 airports around the world and

a customer service team of 2,000+ staff, SITA delivers unmatched service to more than 2,800 customers in more than 200 countries.

SITA has been awarded two times Aviation IT Service Provider of the Year by AFRAA. The award recognises SITA for its broad portfolio of solutions for the ATI, its collaboration with customers to pilot emerging technologies, and its investment in R&D in innovative solutions for the industry.

In 2016, SITA had consolidated revenues of US\$1.5 billion. SITA's subsidiaries and joint ventures include [SITAONAIR](#), [CHAMP Cargosystems](#) and [Aviareto](#).

For further information, go to www.sita.aero or kindly contact our representative Mr. Sam Munda at the following email address: Sam.Munda@sitaaero.com



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. 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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V 1 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

Wirecard AG is a global technology group that supports companies in accepting electronic payments across all sales channels. Our Multi-Channel Payment Gateway, which is linked to more than 200 international payment networks (banks, payment solutions, card networks), provides payment and acquiring acceptance via the Wirecard Bank and global banking partners. This comprises integrated risk, fraud management systems and tokenization services as well. At present, we provide financial technology to more than 250,000 customers around the world, including many airlines. Wirecard also has effective connections and partnerships with all key industry-specific providers in the travel segment. For example, Wirecard is a strategic partner of both IATA and AFRAA.

Wirecard is unique in offering a portfolio featuring a flexible combination of technology, services and banking solutions, while also operating our own acquiring service for airline customers, including eCommerce, BSP acquiring and POS acquiring. We currently accept more than 140 different currencies and

facilitate direct settlement in more than 26 currencies. In addition to our Principal Membership with Visa and Mastercard, acquiring licence agreements are also in place with JCB, American Express, Discover/Diners, UnionPay and UATP. Banking services such as foreign exchange management supplement the outsourcing of financial processes.

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

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

More on www.wirecard.com

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US Aviation Services represents many aviation operations and seeks on behalf of our customers the best possible offer, when it comes to the quality, prices, service and warranties. We have the necessary experience to take the guess, the risks and surprises out of any aviation's business transaction. Our team is composed of experienced professionals

in the aviation field. Including: Military, Civilian, JAA, FAA, Airplanes and Helicopters.

Other members are experienced Academia and aviation legal consultants. We strive to always offer the best and most complete services to our valued customers.

More on <http://www.usaviationservices.com>

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ANNEX 1: AFRAA Member Airline Performance

	Air Algerie	Air Burkina	Air Botswana	Air Madagascar	Air Mauritius	Air Namibia	Air Seychelles	Asky	Congo Airways	Egyptair	Ethiopian Airlines	Kenya Airways	Jubba Airways	Nile Air	Nouvelair	Precision air	Rwandair	Royal Air Maroc	South African Airways	Taag Angola	Tassili Airlines	Tunis Air	Total
TRAFFIC DATA																							
Domestic Passengers (000)	1,978	9	72	337	185	104	248		358	1,491	1,616	641	68	301	0	258	19	1,017	3,001	576	751	-	13,030.36
Regional Passengers – within Africa (000)	402	119	151	83	620	358	386	488	0	933	3,934	2,201	86	22	25	210	740	1,608	1,980	307	0	500	15,154.41
Intercontinental Passengers (000)	3,874		0	68	869	122		0	6,033	4,041	1,036	81		1,036	896	126	126	4,753	1,424	478	86	2,644	27,605.35
Total Passengers Carried (000)	6,253	128	224	488	1,674	585	634	488	358	8,457	9,591	3,917	235	1,359	922	468	885	7,378	6,405	1,361	837	3,144	55,790.11
Domestic Freight Carried (000)	793		60	1,105	83	33	22		843	577	395	1,360		0				1,061	26,763	1,525		-	34,721.88
Regional Freight Carried (000)	1,150		395	176	14,948	460	5,924		0	6,975	54,319	16,292	102	13				5,015	26,104	3,900		-	135,670.89
Intercontinental Freight Carried (000)	15,724		0	1,649	21,053	2,585			0	135,302	331,357	38,590		363				18,756	60,577	9,406		8	635,369.16
Total Freight Carried (000)	17,667		455	2,930	36,084	3,078	5,946	0	843	142,854	386,071	56,242		0	0	0	0	24,833	113,443,489	14,830	0	8	114,135,329.80
Revenue Passenger-Kilometres - RPK (000)	8,311,854		103,261	721,722	7,280,891	1,575,168	1,510,696	534,560	431,215	18,477,973	34,883,720	10,350,953			1,358,923	1,631,182	256,060	17,031,569	19,837,280	3,959		4,827,865	130,843,759.19
Available Seat-Kilometres - ASK (000)	11,595,236	182,700	161,790	1,088,188	9,253,105	2,429,505	2,090,300	868,629	608,382	26,780,426	48,940,871	13,721,998			1,984,464	2,006,207	389,068	3,181,864	26,961,261	9,450		6,673,650	182,738,631.82
Passenger Load Factor - PLF (%)	71.68%	70%	62%	66.32%	79.00%	66%	72%	61.5%	71%	69%	71.28,00%	75.00%			68.50%	81.3%	54.00%	72%	74%	50%		72%	
Passenger Tonne-Kilometres - PTK (000)	748,067	120,300.401	9,975,815	74,377	656,050	125,017	158,502		135,314	1,803,605	4,364,888	961,620			159,393	150,538		1,748,507	356			546,405	21,728,754.35
Freight & Mail Tonne-Kilometres - FTK (000)	7,184		145,571	15,025	199,515	23,651	29,345		843	418,537	2,143,655	272,060			782			834,408	68			13,475	4,104,118.72
Revenue Tonne-Kilometres - RTK (000)	7,55,251		2,294,437	89,402	855,565	148,668	188,016		312,070	2,222,143	6,508,420	912,554			160,175	150,538		2,582,915	423,897			501,806	18,105,856.67
Available Tonne-Kilometres - ATK (000)	10,647,19		2,793,228	149,197	1,362,201	323,274	282,960		909,990	4,005,679	9,874,873	1,247,011			212,613	181,864		4,511,530	1,353,541			741,835	29,014,514.67
Weight Load Factor - WLF (%)	70.93%		82.00%	59.92%	63%	48%	66%		34%	55%	65.91%	73.00%			75.30%	83%		59%	31%			67.60%	
EMPLOYEES DATA																							
Pilots	529	11	28	54	196	97	101	48	17	718	674	444	18	68	76	44	153	512	713	128	100	286	5,015.00
Engineers	1,367	37	40	141	132	16	166	5	18	4,646	2,272	462	12	102	8	69	55	290	2,283	404	218	-	12,743.00
Cabin Crew	1,275	25	33	150	525	166	82	98	37	2,237	2,267	544	56	137	201	35	184	214	1,636	463	124	799	11,288.00
Traffic/Marketing	3,921	107	35	92	434	165	62	173	75	3,604	1,685	44		31	67	55	148	91	444	878	701	1,128	13,940.00
Others	1,676	49	249	491	1,597	300	455	134	179	17,735	4,401	2,146	114	424	168	233	820	1,166	2,722	1,239	260	1,552	38,110.00
Total No. of Employees	8,768	229	385	928	2,884	744	866	458	326	28,940	11,299	3,596	244	762	520	436	1,360	2,273	7,798	3,112	1,403	3,765	81,096.00
DESTINATIONS SERVED																							
Domestic – within the country	29	1	4	11	1	8			25	9	20	3	5	0	0	12	1	19			12	80	-
Intra-Africa - within Africa	9	7	2	4	14	6	22			16	55	36	3	7	7	3	19	33			14	0	13
Intercontinental - Africa to other Regions	35		0	3	32	1				44	45	10	3	15	15	0	4	50			12	5	31
New Destinations (all markets)																							
FLEET IN OPERATION	59	2	4	8	14	10		8	6	65	108	37	5	7	8	4	12	56	45	13	12	27	

ANNEX 3: AFRAA Member Airlines Commercial Partnerships

	AH	AT	BP	ET	KQ	MD	MK	MS	PW	SA	SW	TC	TM	TU	UM	WB	2J	8U	KP	8V	QC	C2	LN	XZ	S9	SD	DT	VR	SF	J4	8Z	NP	3J	BJ	L6			
Air Algérie	I			I	I			I						I				I								C		IS								IS		
Royal Air Maroc	I		I	IS	C			ISC	I	I	I			I				I																				
Air Botswana				IS	IS		IS																															
Ethiopian Air	I	IS							I					I					S																			
Kenya Airways	I	C	I	I				I/C	I	I	I	I	I	I	I	I	C																					
Air Madagascar																																						
Air Mauritius																																						
EgyptAir	I	ISC																																				
Precision Air																																						
South African Airways																																						
Air Namibia																																						
Air Tanzania																																						
Air Tanzania																																						
LAM Mozambique																																						
Tunisair	I																									S												
Air Zimbabwe	I																																					
Air Zimbabwe																																						
RwandAir																																						
Air Burkina	I			IS	C					IS				IS																								
Africajyah	I																																					
Asky Airlines	I			S																																		
Astral Aviation																																						
Camair - Co																																						
Celiba Intercontinental																																						
Libyan Airways																																						
South African Express																																						
Starbow Airlines																																						
Sudan Airways																																						
TAAG ANGOLA		C																																				
TACV Airlines		IS																																				
Tassili Airlines																																						
Badr Airlines																																						
Congo Airways																																						
Nile Air																																						
Jubba Airways																																						
Nouvelair																																						
Mauritania Airlines		IS																																				

I AFRAA members cooperating on IET basis

S AFRAA members cooperating on SPA basis

C AFRAA members cooperating on Codeshare basis

AFRAA Member Airline Two-Letter Codes

AB Aviation	Y6	Express Air Cargo	7A
Afriqiyah	8U	Jubba Airways	3J
Air Algérie	AH	Kenya Airways	KQ
Air Botswana	BP	LAM Mozambique	TM
Air Burkina	2J	Libyan Airlines	LN
Air Madagascar	MD	Mauritania Airlines	L6
Air Mauritius	MK	Nile Air	NP
Air Namibia	SW	Nouvelair Tunisie	BJ
Air Tanzania	TC	PrecisionAir	PW
Air Zimbabwe	UM	Royal Air Maroc	AT
Allied Air Ltd	4W	RwandAir	WB
ASKY	KP	Safe Air Company	K3
Astral Aviation	8V	South African Airways	SA
Badr	J4	South African Express	XZ
Camair-co	QC	Sudan Airways	SD
Ceiba Intercontinental	C2	TAAG Angola Airlines	DT
Congo Airways	8Z	TACV	VR
Cronos	C8	Tassili Airlines	SF
EgyptAir	MS	Timbisair	2T
Ethiopian Airlines	ET	Tunisair	TU

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