



2019



ANNUAL REPORT

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Foreword

Traffic growth in Africa has been consistently increasing since 2011. The demand for air passenger services remained strong in 2018 with a 6.9% year on year growth. Those good results were supported by the good global economic environment particularly in the first half of the year. Unlike passenger traffic, air freight demand recorded a very weak performance in 2018 compared to 2017. This was attributed to a number of threats including slowdown in world trade during the second part of the year.

Africa's travel and tourism industry has continued to record impressive growth since 2016. UNWTO reported a 7% increase in international arrivals in Africa for the year 2018, reaching an estimated number of 67 million. This represents 4.8% of the world total number of international tourists. These results were driven by the continued recovery in North Africa and the solid growth in many destinations. While travel and tourism competitiveness has improved it generally lags behind the global average.

In terms of capacity, the average Passenger Load Factor recorded in Africa for 2018 was 71.5%, an increase from the 70.4% recorded in 2017. This is 10% less than the 81.9% realised worldwide. This low performance in terms of load factor in Africa may be explained by the mismatch between capacity and demand, the limited commercial cooperation between local carriers, the limited connectivity and uncoordinated intra-African networks with other African operators.

Air transport in Africa supports 6.2 million jobs and \$55.8 billion of GDP and is expected to grow at a rate of 4.6% annually for the next 20 years. This growth in traffic is being matched by route expansion by African airlines. AFRAA airlines in 2018 expanded their networks on both intra-Africa and intercontinental routes. A total of 23 new routes were launched by 6 AFRAA member airlines to domestic, intra-Africa and intercontinental destinations. Of these, 14 destinations were inter-continental while 9 new routes were within the continent.

Africa's remarkable growth opportunity will be greatly unlocked through regional integration in the continent. The Single Africa Air Transport Market (SAATM), the African Continental Free Trade Agreement (ACFTA) and the Free Movement Protocol for people and goods are the African Union's flagship projects which are expected to enhance intra-Africa connectivity, thereby facilitating travel, trade, tourism, business and socio-economic development across the continent.

The industry has seen an upward trend in capital productivity over the past few years and for the third consecutive year, the industry's return on capital exceeded its cost of capital. The industry's profit represented US\$ 6.85 average profit per passenger in 2018 while Africa was the weakest region with an estimated US\$ 1.09 loss per passenger in 2018.

On safety, the global safety performance of the commercial airline industry shows progressive safety improvements; however, 2018 recorded an increase in accidents compared to 2017. For 2016 and 2017, African airlines experienced zero jet hull losses and zero fatalities in jet operations. For 2018 however, Africa recorded a fatal accident rate of 1.08 (per million departures). The all-accident rate for the continent in 2018 was 2.71, a significant improvement over the



rate of 6.80 for the previous five years. Africa was the only region to see an improvement in the all-accident rate compared to 2017.

World-class safety standards are a prerequisite for African aviation industry to thrive. Africa has seen remarkable improvements in safety in the recent years which need to be kept up to avoid complacency. AFRAA encompasses initiatives to support more African airlines to get the IATA Operational Safety Audit (IOSA) and the IATA Standard Safety Assessment (ISSA). AFRAA is also dedicated to work with African governments to accelerate the implementation of ICAO's safety-related standards and recommended practices (SARPS).

Among AFRAA's priorities highlighted in section nine of this report are initiatives to enhance cooperation among African airlines, address airline cost drivers, particularly taxes and user charges, raise safety and security levels to the global average, ensure there is sufficient infrastructure and skilled staff to support the traffic growth in the continent. AFRAA is also working with other stakeholders in the pursuit of a cost effective operating environment for sustainable aviation in Africa, the enhancement of intra-Africa connectivity and a more business friendly harmonised regulatory framework.

This report provides a comprehensive review of the state of the African air transport industry, the prospects for the future and provides a snapshot of AFRAA's activities for the development of aviation in Africa. The report also provides databases of aviation training institutions, maintenance, repair and overhaul (MRO) centres as well as summaries of AFRAA partners. The airlines' profiles section provides facts and figures on all AFRAA member airlines.

I hope this Annual Report will be a good reference for you on African airlines performance. As such, I wish you a good reading.

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

Mr. Abdérahmane Berthé
AFRAA Secretary General



Vision

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

Mission

“To promote, serve African airlines and champion Africa’s aviation industry.”

Values

AFRAA believes in:

- Professionalism
- Integrity
- Leadership
- Communication
- Commitment to serve
- Partnerships
- Transparency
- Result orientation

Objectives

AFRAA as an association has the following strategic objectives:

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

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Appreciation

AFRAA wishes 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 Amadeus 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.

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Section One: Economic performance

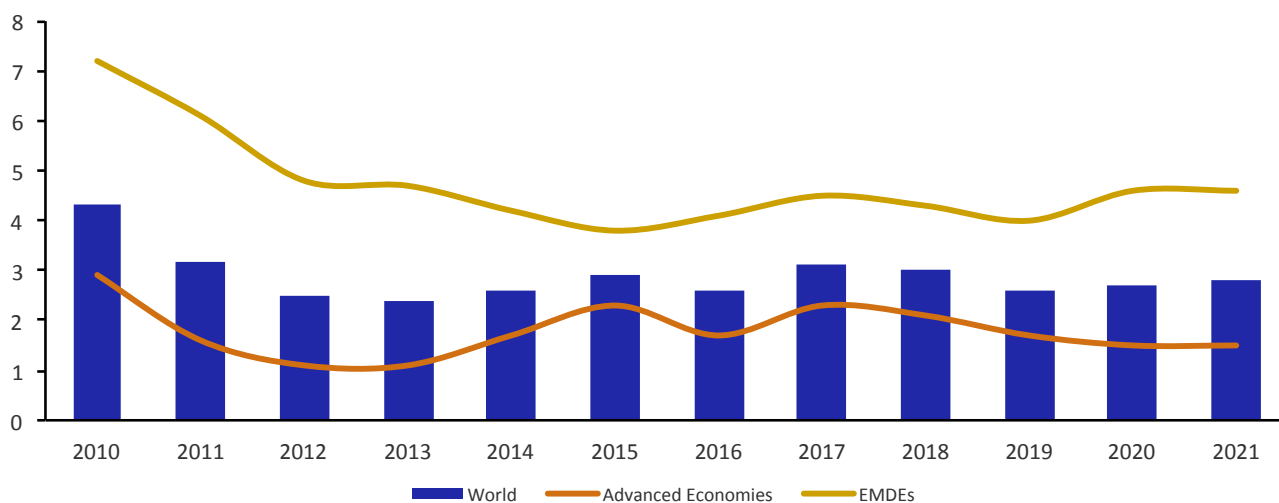
1.1 Global economic performance

In 2018, the Global economic growth moderated, from 3.1% in 2017 to 3%. The economic gains were unbalanced between countries and regions according to the World Bank.

Developing economies remain the main drivers of global growth while growth in advanced economies is estimated to have slightly decelerated to 2.1%.

East and South Asia remain the world's most dynamic regions. Growth in the United States remained solid, bolstered by fiscal stimulus. In contrast, activity in the Euro Area was somewhat weaker than previously expected, owing to slowing net exports.

Figure 1.1: Global economic growth



Source: World Bank

Emerging Markets and Developing Economies (EMDEs) growth declined to an estimated 4.5% in 2018, which represent a drop of 0.3% compared to 2017. The recovery observed since 2015 slowed down, suffering financial market pressures. Many of these economies faced currency depreciation, equity market declines, or foreign reserve losses.

Commodity exporters are still facing challenges, as economies relying on a small number of natural resources are particularly sensitive to economic cycles.

Oil prices averaged \$68 per barrel (bbl) in 2018, compared to \$53 in 2017, an increase of 28.3%, according to the World Bank. The global oil consumption, the decline in production and the concerns about the impact of U.S. sanctions on Iran contributed to this increase. The price fluctuations observed during this year were due to the supply-side factors.

Non-oil commodity prices also globally weakened. Agricultural prices were globally stable in 2018 as a whole, but declined significantly in second half, according to the World Bank.

Metal prices rose 6%, on average, in 2018, less than previously expected, and are expected to stabilise in 2019 and 2020.

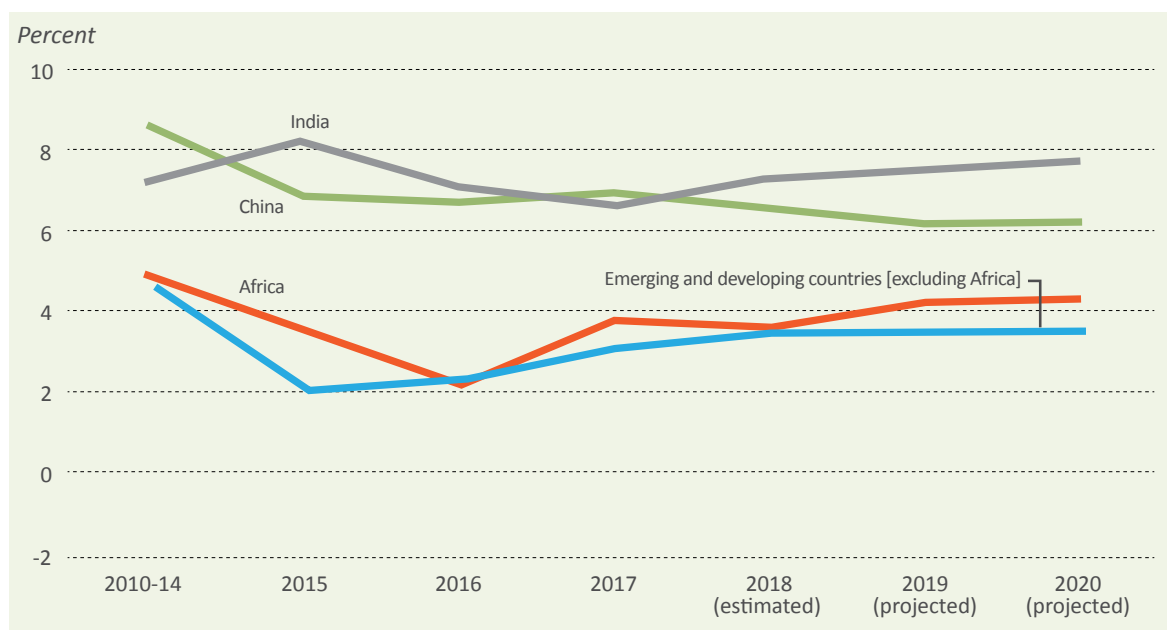
1.2 Africa's economic performance

After the drop down of 2016, the African economy recovered with a growth of 3.6% in 2017 and 3.5% in 2018, according to the African Development Bank (AfDB). This trend is expected to continue in 2019 and 2020, with respective forecasts of 4% and 4.1%.

Economic fundamentals in most African countries have improved and inflation declined in countries with stable exchange rates. The average current account deficit is projected to rise from 5.4 % in 2016 to 3 % in 2020, showing a slight improvement in trade transactions.

Despite the good recovery, the projected growth of 4% remains insufficient to reduce unemployment and poverty. The ratio between population growth (more than 2%) and the GDP growth implies a low GDP per capita, meaning that the growth trajectory is insufficient compared to the growing labour force, reported the AfDB.

Figure 1.2: Real GDP growth in Africa, 2010-20



Source: AfDB

Commodity prices increased globally over the past two years. The price of Brent crude oil increased by approximately 177% (from \$27.45 in February 2016 to \$74.34 in October 2018). This helped oil exporters recover but also contributed to higher inflation in oil-importing countries.

Non-resource-rich countries are growing faster and the impact of commodity price volatility on GDP is low.

1.3 Regional prospects for Africa

Economic performance varied across African countries and regions. These are the main trends reported by the AfDB:

North Africa is expected to contribute to 40% of the forecasted growth in Africa in 2019. However, this average is strongly influenced by Libya, whose growth is estimated at 15% because of its strong but fragile recovery. After falling for three years, Libya's GDP jumped since 2017, due to oil production. But the political and humanitarian situations remain critical. Tunisia, Egypt and Morocco are on good economic trend due to tourism, industry and good fiscal policy. Algeria's growth is expected to weaken in 2019 and 2020.

East Africa is the fastest growing region with 5.7% of GDP growth in 2019. Djibouti, Ethiopia, Rwanda, and Tanzania are the drivers of this growth while other countries like Burundi and Comoros are facing difficulties due to political uncertainty. The military conflict in South Sudan is preventing the economic growth in this country.

West Africa faced an economic slowdown after 2014 due to falling prices of commodities and the Ebola crisis. However, many countries recorded economic growth of more than 5% especially Ghana and Côte d'Ivoire which are above 8%. Nigeria, Africa's largest economy is recovering after 2016 recession.

Regional growth for 2019, is expected to be stable.

Central Africa is on a recovery trend, supported by recovering commodity prices, higher agricultural production and improved public spending policy. However, the regional growth remains below the continental average.

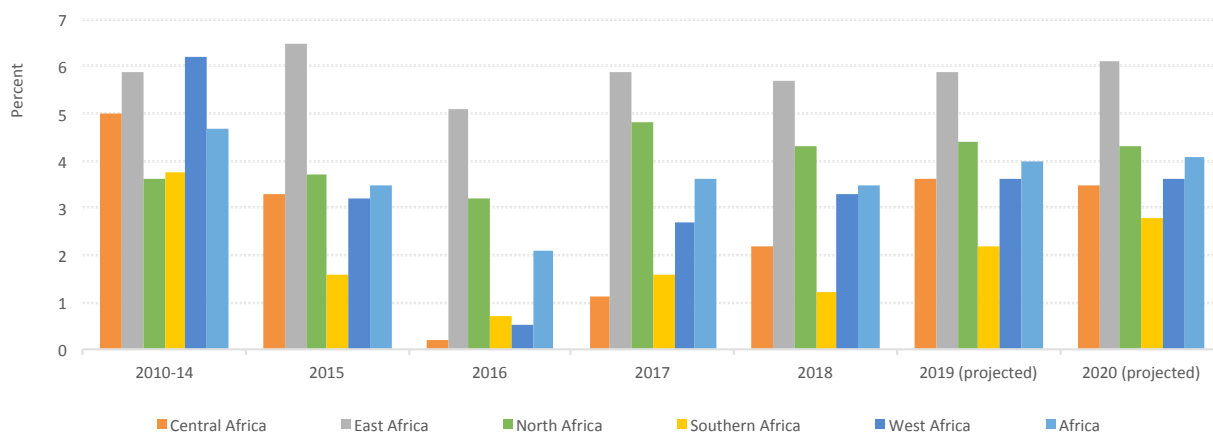
In **Southern Africa** the growth is moderate due mainly to South Africa's weak performance which affects neighbouring countries, and low public and private investment. Botswana and Mauritius are performing well due to good public policies.

1.4 Tourism

1.4.1 International tourism

According to UNWTO, international tourist arrivals reached 1.4 billion worldwide in 2018, representing an increased 5.6%. This is lower than the particularly high rate of 7% reached in 2017. This growth exceeded the forecasts (5%) and was supported by the favourable economic environment resulting in a strong outbound demand, the recovery in destinations previously affected by crises like Egypt, the enhanced connectivity and finally, the increased visa facilitation in many countries.

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



Source: AfDB

UNWTO reported that almost all regions recorded an increase on international arrivals in 2018, and only a few 16% of destinations posted a decrease. The growth was led by Middle East and Africa with 10.3% and 7.3% respectively.

Revenues from international tourism generated 1.7 trillion USD in 2018, representing an increase of 4% over the previous year, making it the third economic sector in the world, behind chemical manufacturing and the fuel industry. This performance was driven by a strong demand for international travel in the context of a robust global economy.

Tourism receipts increased 4% in real terms to reach USD 1,448 billion in 2018, about USD 100 billion more than the previous year.

In terms of expenditures, China is the world's top spender with 277 billion USD in international tourism expenditure in 2018, representing an increase of 5%, followed by USA who reached 144 billion USD. Among the world's top 10 source markets, France and the Russian Federation both recorded 11%

growth in outbound spending in 2018, while Australia saw a 10% increase.

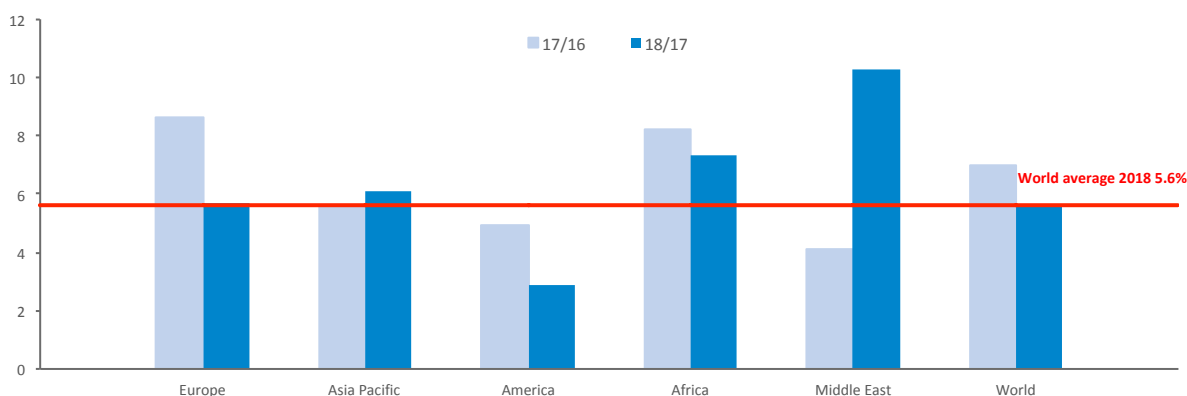
1.4.2 Tourism in Africa

Africa's travel and tourism industry has continued to record impressive growth since 2016. UNWTO reported a 7% increase in international arrivals in Africa for the year 2018, reaching an estimated number of 67 million. This represents 4.8% of the world total number of international tourists. These results were driven by the continued recovery in North Africa and the solid growth in many destinations.

Tunisia consolidates its double digit growth rate as it still benefits from favourable travel advice. Morocco which is the preferred destination in the region also experienced significant growth during the year.

In Sub-Saharan, Africa the data available was limited. However, Islands such as Reunion, Mauritius and Cabo Verde enjoyed strong growth. Kenya is also on a positive growth trend.

Figure 1.4: International tourist arrival



Source: UNWTO

Section Two: Airline performance

2.1 Global performance

The demand for air passenger services remained strong in 2018, with 4.38 billion passengers carried on scheduled services in 2018, according to IATA, representing a 6.9% year on year growth. These

good results were supported by the good global economic environment particularly in the first half of the year, as well as the affordable fares resulting from the high competition among airlines.

Figure 2.1: Worldwide RPK growth and GDP growth

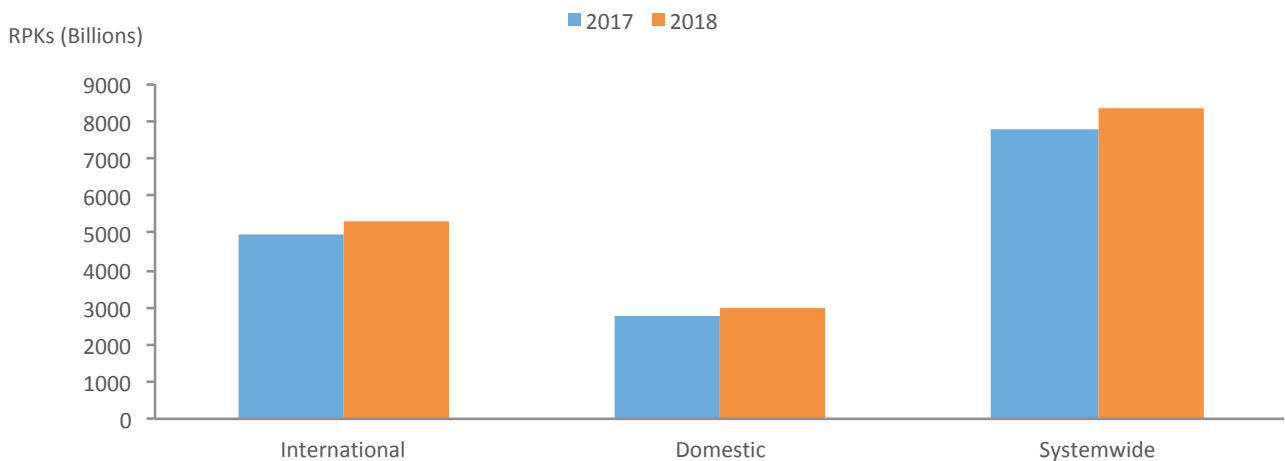


Source: IATA, IMF

The global RPK increased by 7.4% over the year as a whole, which is less than the previous year level

of 8%. RPK for international markets rose by 7.2% while domestic markets improved by 7.6%.

Figure 2.2: World scheduled RPKs 2017-2018 (billion)



Source: IATA WATS/AFRAA

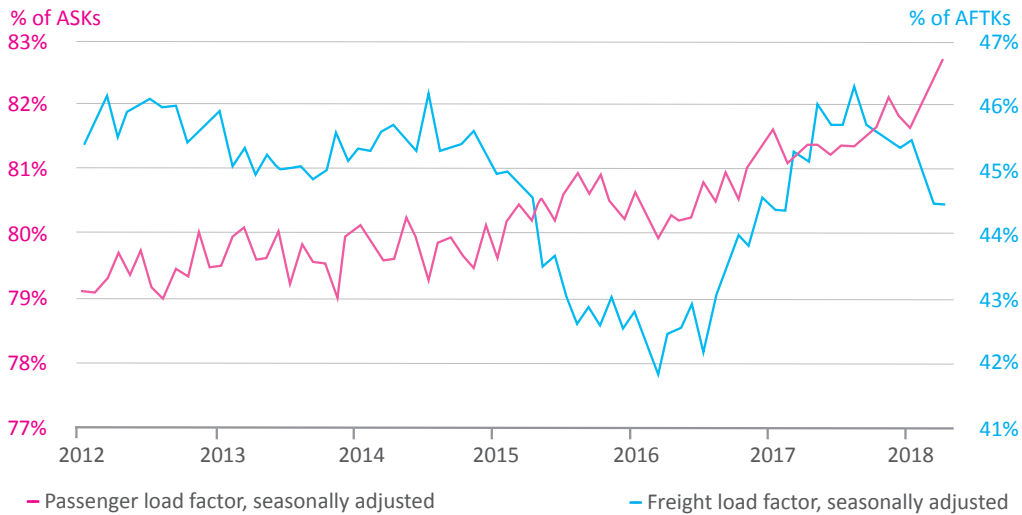
The system-wide capacity (ASK) increased by 6.9% in 2018, representing 6.7% on international routes and 7.2 on domestic routes.

which is a small increase compared to the 81.5% realised in 2017.

The global average load factor for 2018 was 81.9%,

North America is the only region where the domestic market is dominant compared to international.

Figure 2.3: Industry passenger and freight load factors

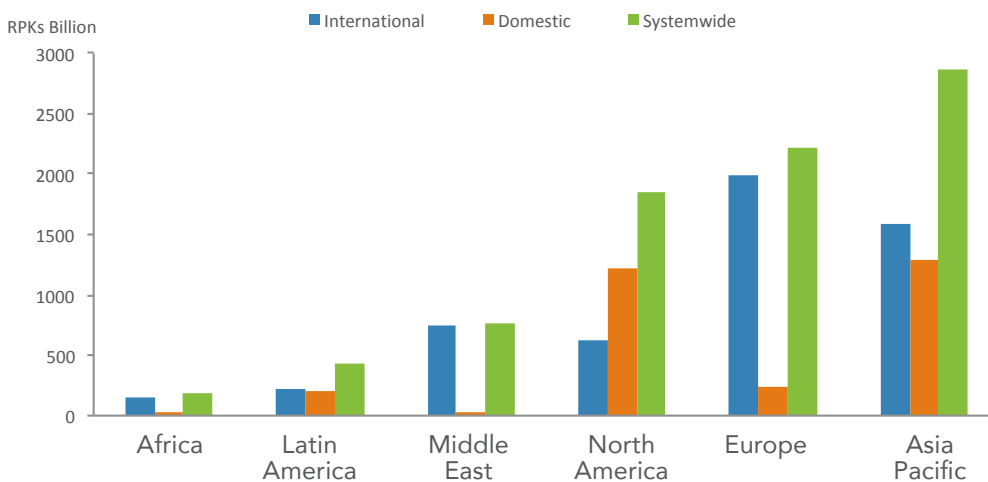


Source: IATA

Unlike passengers, air freight demand recorded a very weak performance in 2018 compared to 2017: FTKs growth rate dropped from a very good

9.7% to a modest 3.4%, facing a number of threats including slowdown in world trade during the second part of the year.

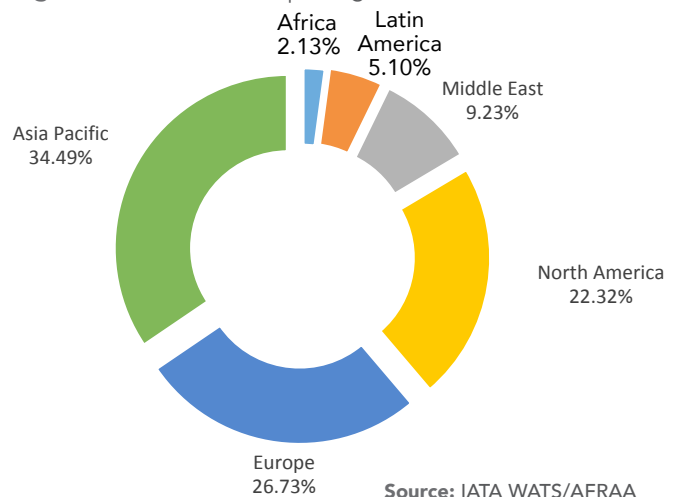
Figure 2.4: RPK per region – scheduled services



Source: IATA WATS / AFRAA

Asia Pacific was the leading market in 2018, with 34.5% of global RPKs and 34.3% of global RTKs, followed by Europe and North America. Africa, despite its high growth rate, still had the smallest contribution to the global traffic (2.1%).

Figure 2.5: Share of RPK per region – scheduled services



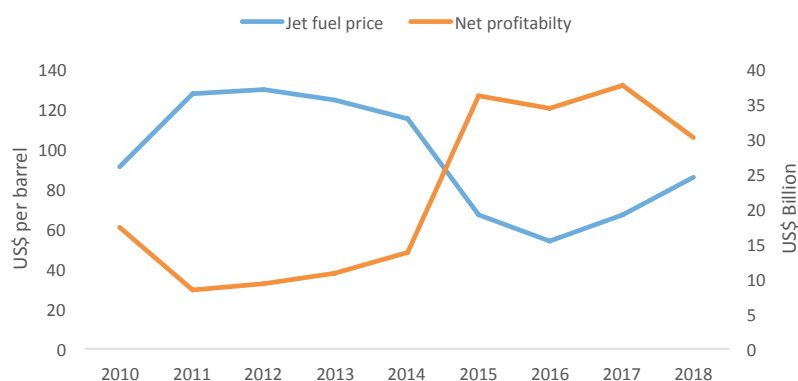
Source: IATA WATS/AFRAA

Jet fuel price

According to the IATA, the average jet fuel price rose by 29% in 2018 compared to 2017 to reach the value of 86.1 US\$ per barrel. This increase was driven by the increase of crude oil prices.

Globally, fuel cost represented in average 23.5% of the operating airline costs. The graph below shows that fuel price have a direct impact on profitability. This is the reason why AFRAA is pushing for the reduction of fuel price in Africa.

Figure 2.5b Evolution of Jet fuel price vs Net profitability



Source: IATA

CORSIA

The Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) were adopted in 2016 by 192 UN countries through the ICAO to address the issue of CO₂, as international aviation is responsible for around 1.3% of global CO₂ emissions. Its aim is to stabilise the level of CO₂ emitted by international aviation at the level of 2020.

Aviation industry is committed to develop technology and infrastructures to reduce carbon emissions. However, if the target CO₂ level is exceeded, the CORSIA offer airlines to compensate by the system of offsetting.

Practically, airlines will have to purchase offsets from other sectors to compensate for any increase in their own emissions. Alternatively, they have the

possibility to use lower carbon "CORSIA eligible" fuels.

Since 1st January 2019, operators that produce more than 10,000 tonnes of CO₂ per year on international flights, are committed to report their emissions.

From 2021 to 2026, the pilot and first phase will take place, applying offsetting requirements to flights between voluntary states.

Finally, from 2027, the offsetting scheme will apply to all international flights with some few exemptions (e.g, least developed countries)

As for now, ICAO is running advocacy and training in several countries in order to get the maximum number of volunteer. AFRAA supports ICAO in this project by organising training and workshops.

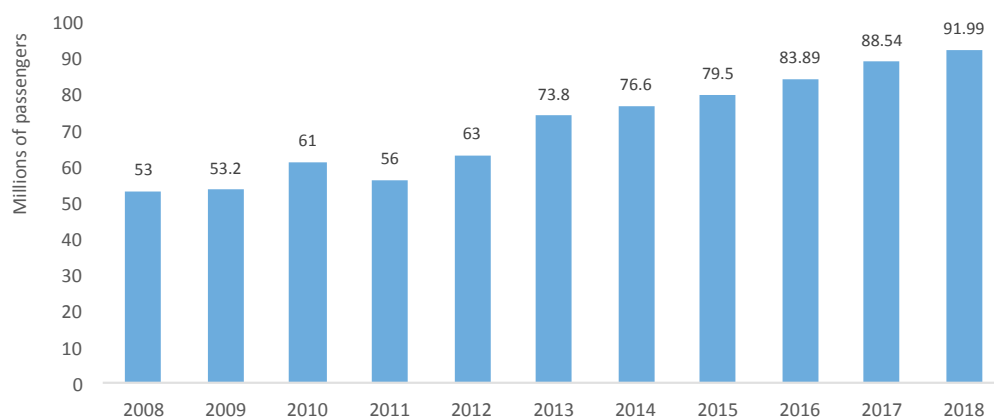
2.2 African airlines performance

Passengers carried

The year 2018, saw a growth of passenger traffic in all regions of the world. Asia pacific region led the growth, with one third of the global RPKs according to IATA. African airlines scheduled operations

carried 91.99 million passengers, representing a market share of 2.1% and an increase of 5.5% over the previous year. The traffic growth in Africa is consistently increasing since 2011.

Figure 2.6: Passengers carried by African airlines scheduled operations



Source: IATA

International traffic in 2018 represented 61.4% of the total traffic of African carriers, with an estimated number of 56.52 million passengers. On domestic routes, 35.47 million passengers were carried,

representing 38.6%, according to IATA. The 23 AFRAA airlines that reported their statistics carried 57.6 million passengers, a percentage of 62.62 of total passengers carried by all African airlines.

The top 5 passenger countries in Africa in 2018, are as follows in table 2.1.

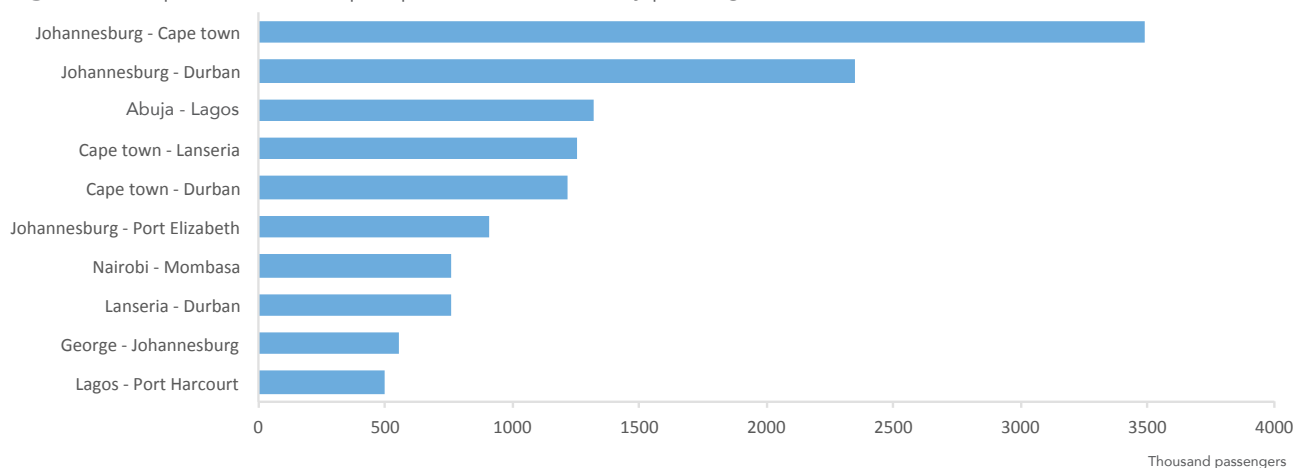
Table 2.1: Top 5 passenger countries in Africa in 2018

	2018 Passengers	% growth over 2017
South Africa	25,253,334	4.0
Egypt	23,996,516	15.3
Morocco	18,785,269	13.5
Algeria	9,998,802	-11.6
Tunisia	8,216,465	22.3

Source: IATA WATS

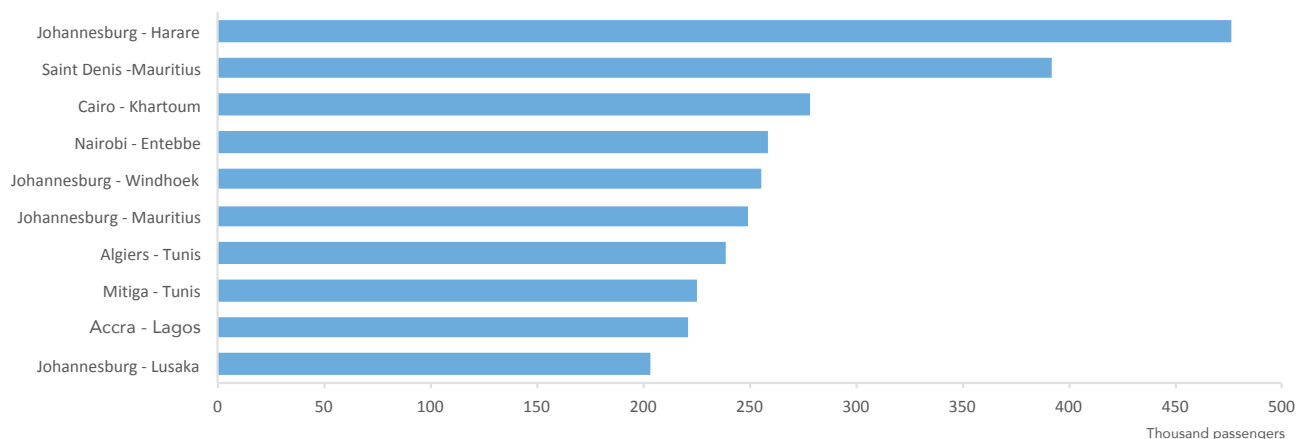
In terms of routes, the top 10 airport pairs for domestic, regional and intercontinental routes are as follows:

Figure 2.7: Top 10 domestic airport pairs in Africa 2018, by passengers carried



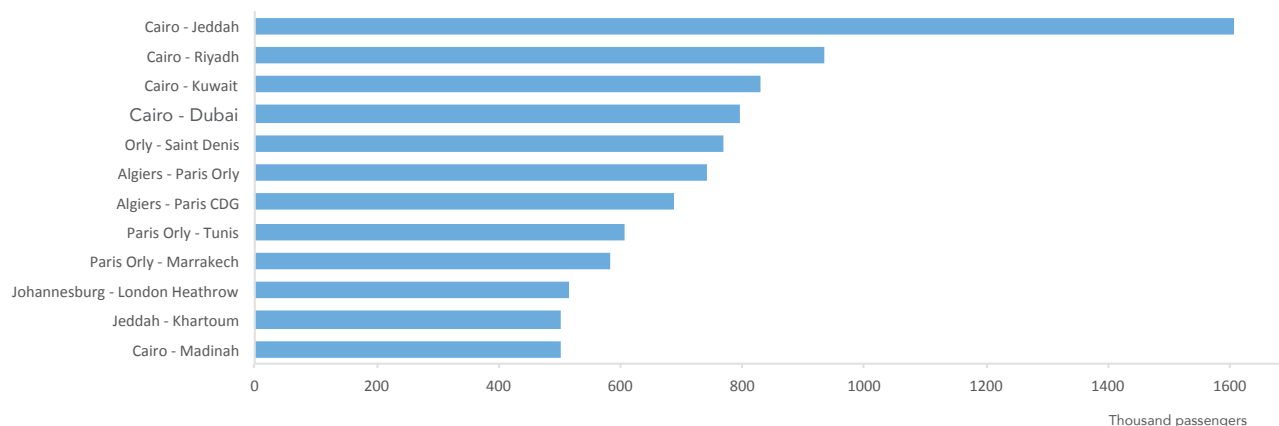
Source: AFRAA / IATA WATS

Figure 2.8: Top 10 regional airport pairs in Africa 2018, by passengers carried



Source: AFRAA / IATA WATS

Figure 2.9: Top 10 international airport pairs to/from Africa 2018 by passengers carried



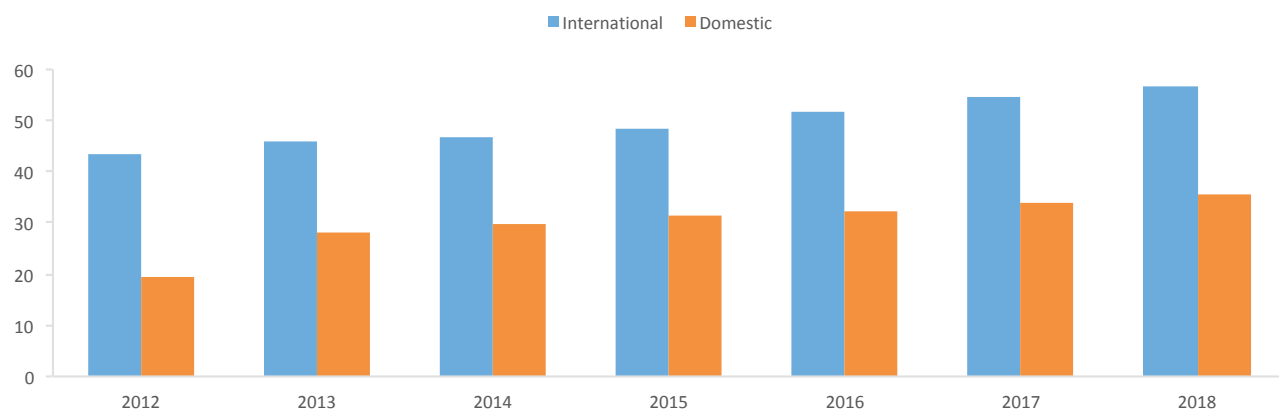
Source: AFRAA / IATA WATS

Domestic and intra-African traffic

Intra-African international traffic remains relatively weak, representing 26.7% against 34.7% for the intercontinental traffic according to IATA.

Domestic traffic has the highest part with 38.6% with an estimated number of 35.47 million passengers.

Figure 2.10: African airlines passenger split 2012-2018



Source: IATA WATS

For the 23 AFRAA members that reported their data, the domestic and intra-african passengers stood at 50.03% of the total number of passengers carried.

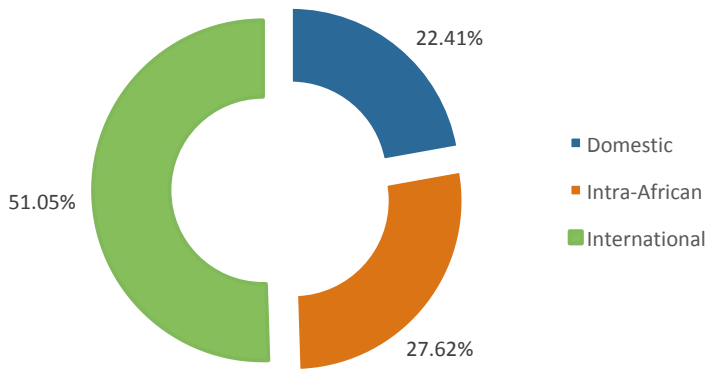
The potential of traffic growth is significant. The launch of the Single African Air Transport Market (SAATM) in January 2018, is a major asset of this growth. Its implementation is expected to improve intra-African connectivity. Ultimately, SAATM is aimed at promoting intra-African trade, tourism and cross-border investments. The airline industry is a key in economic development and creation of additional jobs.

Removal of other non-physical barriers for the movement of people, goods and trade is a vital step forward towards a more integrated Africa.

Passenger distribution

For AFRAA member airlines that reported their data in 2018, intercontinental market segment remains the biggest with 51.05% of all passengers travelling between Africa and other regions of the world. The domestic market segment represented 22.41% while the intra-Africa market represented 27.62%.

Figure 2.11: AFRAA member airlines passenger distribution 2018



Source: AFRAA

Passenger traffic and capacity

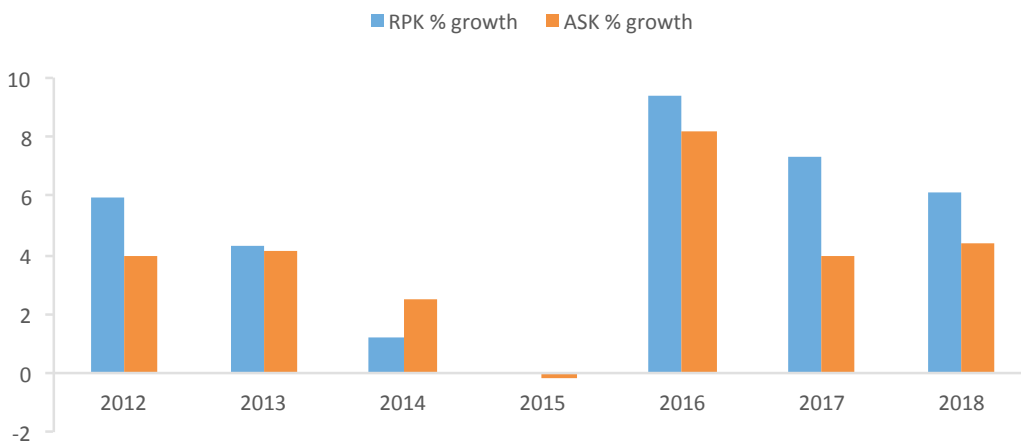
The region that achieved the highest ASK growth in 2018, for scheduled passenger is Asia Pacific with an increase of 8.8% according to IATA. This was followed by Latin America with a growth rate of 7.3%, Europe 6.6%, Middle East 5.9%, North America 4.9% and finally Africa at 4.4%.

The highest RTK growth in 2018, was realised by

Asia Pacific at 7.1% followed by Latin America at 7%. Middle-East realised the weakest RTK growth with a rate of 4.5%. Africa performed at 5.7%.

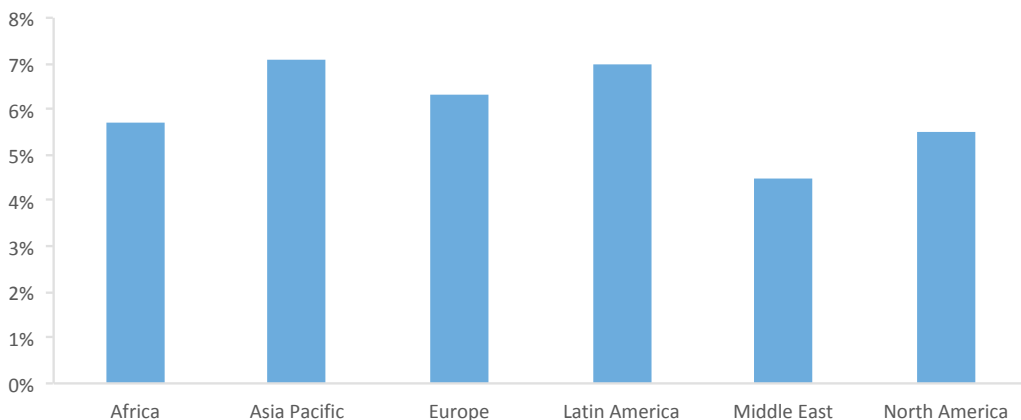
Industry-wide, the RPK grew by 7.4% in 2018 which is less than the 8% realised in 2017. Asia Pacific is also the leading region in terms of RPK growth at 9.5%, followed by Europe at 7.5%. Africa saw a growth rate of 6.1% in terms of RPKs.

Figure 2.12: Africa’s passenger traffic and capacity annual growth 2012-2018



Source: IATA WATS

Figure 2.13: RTK growth per region – 2018



Source: IATA WATS

Passenger Load Factor

The world region which realised the highest Passenger Load Factor in 2018 was Europe with 84.6%, followed by North America (83.9%), Latin

America (81.6%), Asia Pacific (81.5%) and Middle East (74.5%) and Africa (71.5%).

Table 2.2: Top 5 passenger countries in Africa in 2018

	Passenger LF	% Change	Weight LF	% Change
Africa	71.5%	1.2	60.7%	0.7
Asia Pacific	81.5%	0.5	72.5%	0.1
Europe	84.6%	0.7	74.8%	0.5
Latin America	81.6%	-0.2	67.9%	-0.2
Middle East	74.5%	-0.6	65.2%	-0.7
North America	83.9%	0.3	64.9%	-0.1
Industry Average	81.9%	0.4	69.9%	0.1

Source: IATA WATS

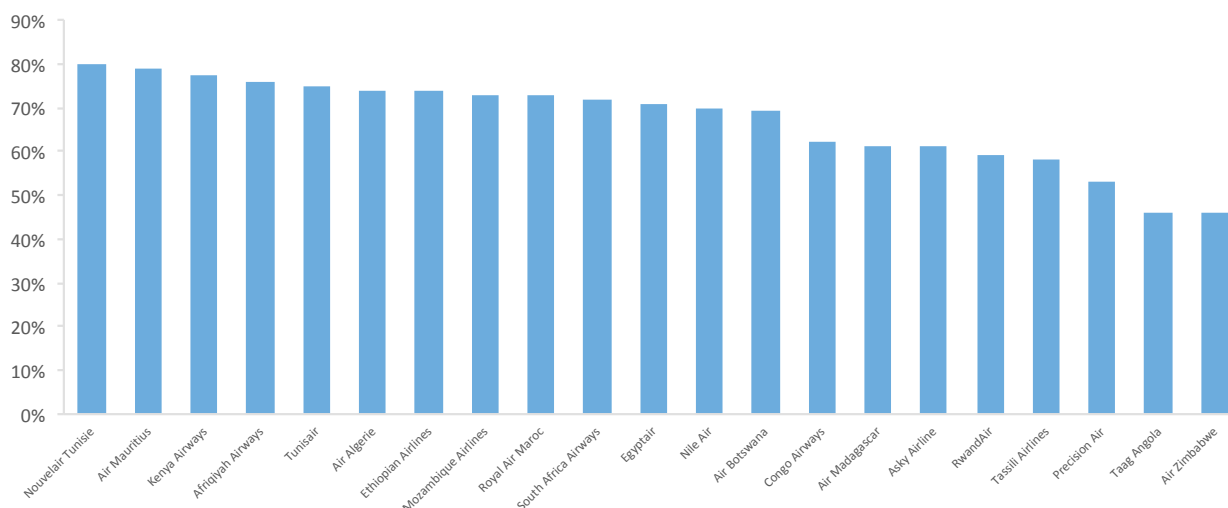
The average Passenger Load Factor recorded in Africa for scheduled flights in 2018, is 71.5% as reported by IATA. This is an increase from the 70.4% reported in 2017. This is 10% lower than the industry average. The load factor on domestic flights for African airlines was higher (76.5%) than the one recorded for international flights (70.7%).

This low performance in terms of load factors in Africa may be explained by the mismatch between capacity and demand, the limited commercial

cooperation between local carriers, the limited connectivity and uncoordinated intra-African networks with other African operators.

Among the AFRAA member airlines that reported their statistics, the highest average passenger load factors in 2018, were achieved by: Nouvelair Tunisie with 79.7%, Air Mauritius with 79%, Kenya Airways with 77.5%, Afriqiyah Airways with 76%, Tunisair with 74.5%, Ethiopian Airlines and Air Algérie with 74%, and Royal Air Maroc with 73%.

Figure 2.14: Passenger Load Factor for some AFRAA member airlines – 2018



Source: AFRAA

AFRAA member airlines passenger traffic

The 23 AFRAA airlines that reported their statistics for 2018 carried a total of 57.60 million passengers. The top 5 AFRAA airlines in terms of passengers carried include Ethiopian Airlines (11.516 million),

EgyptAir (8.736 million), Royal Air Maroc (7.342 million), Air Algérie (6.595 million) and South Africa Airways (4.755 million).

Table 2.3: Total passengers carried by some AFRAA member airlines in 2018

Airline Name	Domestic Passengers (000)	Regional Passengers (000)	Intercontinental Passengers (000)	Total (000)
Ethiopian Airlines	1,814	4,736	4,965	11,515
EgyptAir	1,584	995	6,157	8,736
Royal Air Maroc	1,107	1,582	4,653	7,342
Air Algérie	2,030	437	4,128	6,595
South Africa Airways	1,722	1,757	1,276	4,755
Kenya Airways	703	2,311	1,103	4,117
Tunisair	-	524	3,292	3,816
Tassili Airlines	852	852	91	1,795
Air Mauritius	186	298	1,211	1,695
Taag Angola	636	363	529	1,528
Rwandair	19	929	187	1,135
Nile Air	326	-	717	1,043
Nouvelair Tunisie	-	-	648	648
Asky Airline	-	559	-	559
Mozambique Airlines	435	104	-	539
Precision Air	226	244	-	470
Air Madagascar	384	-	-	384
Camair Co	244	107	-	351
Congo Airways	344	-	-	344
Air Zimbabwe	101	98	-	198
Air Botswana	75	-	-	75
AB Aviation	52	14	-	66

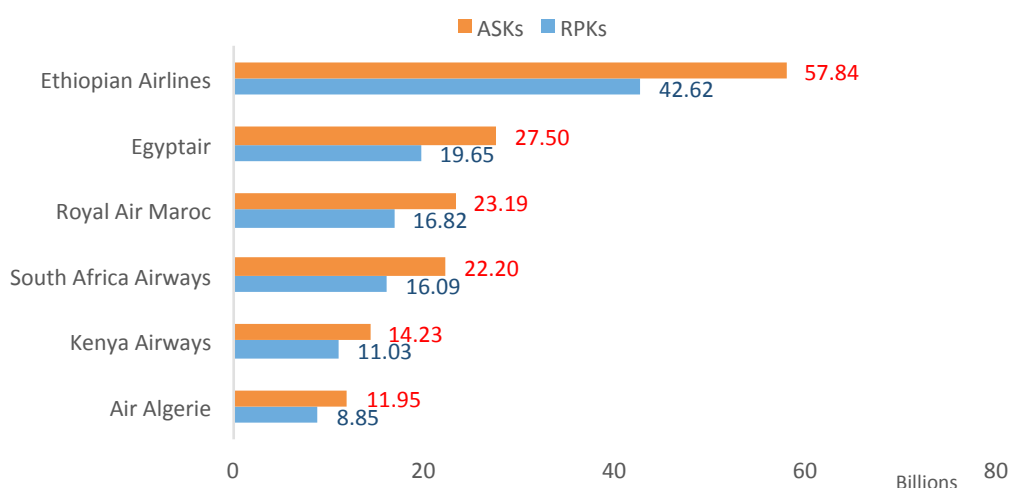
Source: AFRAA

The 23 reporting AFRAA airlines for 2018 put a total capacity of 197.41 billion ASKs in 2018. The overall average passenger load factor reported for the

23 airlines in 2018 was 71.3%.

In terms of ASKs and RPKs the top 5 AFRAA carriers in 2018 are as follows:

Figure 2.15: ASKs and RPKs of some AFRAA member airlines – 2018



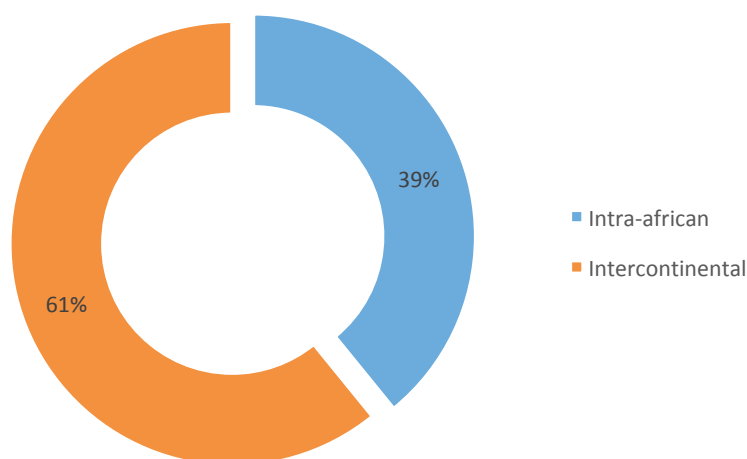
Source: AFRAA

New routes

AFRAA member airlines in 2018, expanded their networks on both intra-Africa and intercontinental routes. A total of 23 new routes were launched by 6 AFRAA member airlines to domestic, intra-Africa

and intercontinental destinations. Of these, 14 destinations were intercontinental while 9 new routes were within the continent.

Figure 2.16: New destinations by AFRAA member airlines – 2018



Source: AFRAA

Table 2.4: New routes by 6 AFRAA member airlines in 2018

	Origin	Destination		Origin	Destination
1	Addis Ababa	Kisangani	13	Cairo	Abu Dhabi
2	Addis Ababa	Mbuji-mayi	14	Cairo	Athens - Bucharest
3	Addis Ababa	Nosy be	15	Cairo	Athens - Yerevan
4	Addis Ababa	Geneva	16	Cairo	Ostend - Ostrava
5	Addis Ababa	Chicago	17	Kigali	Harare - Capetown
6	Addis Ababa	Bangkok - Jakarta	18	Kigali	Abuja - Capetown
7	Addis Ababa	Francfort - Barcelona	19	Mauritius	Amsterdam
8	Algiers	Antalya	20	Nairobi	Mogadishu
9	Algiers	Valence	21	Nairobi	New-york
10	Algiers	Charleroi	22	Nairobi	Mauritius
11	Algiers	Tamanrasset - In Guezzam	23	Nairobi	Yaounde - Libreville
12	Cairo	Bangkok - Amsterdam			

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 3.9% over the 2018-2038 period. ICAO forecasts an annual increase in RPKs of 4.3% over 2015-2035

period. Airbus, Boeing and Embraer maintained their long-term forecasts for annual passenger demand growth in terms of RPKs at 4.4%, 4.7% and 4.5% respectively.

Section Three: Freight

Freight carried

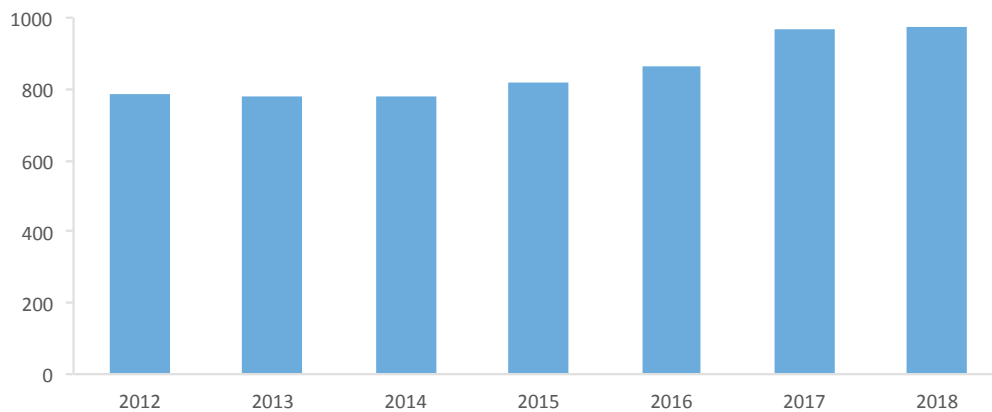
Compared to 2017, where air freight recorded a very strong growth since the rebound in 2010 (9.7%), the performance realised in 2018, was relatively weak. Industry-wide, freight tonnes as reported by IATA rose by 3.4%.

The global average Freight Load Factor for scheduled operations remained low at 49.4% while capacity measured in Available Freight Tonne Kilometres increased by 5.2% in 2018.

Air freight carried by African airlines scheduled operations increased by only 0.3% in 2018, with a total of 972,000 tonnes. Scheduled freight operations by African airlines in 2018, represented 1.55% of total global freight carried.

In terms of FTKs recorded by IATA, performance by African airlines increased by 0.5% year on year in 2018, which is very weak in comparison with the exceptionally high growth of 22.9% recorded in 2017.

Figure 3.1: African airlines year-on-year freight carried (thousand tonnes) – 2018



Source: AFRAA/IATA WATS

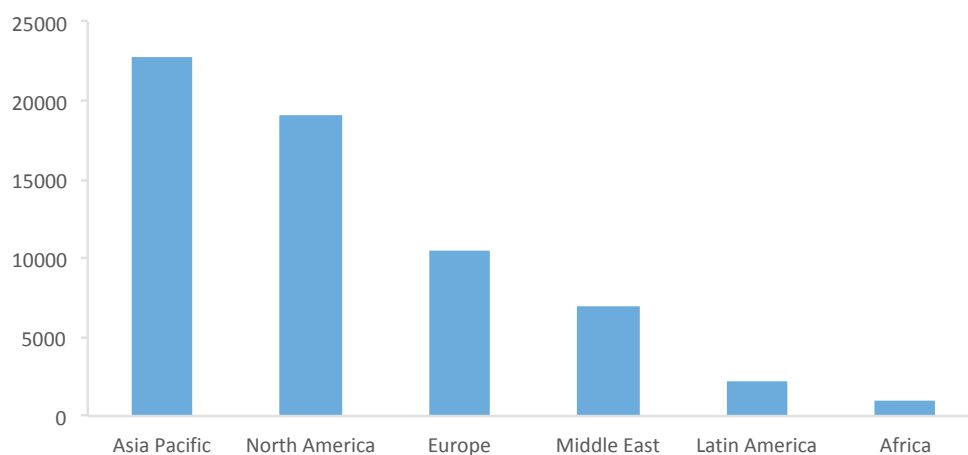
In 2018, air cargo faced many challenges, particularly the weak global trade and competition from other modes of transport. This is expected to change as global trade improves.

On July 2019, the operational phase of the African Continental Free Trade Area (AfCFTA) were officially launched. As for now, 54 out of the 55 member states of the African Union signed the agreement (except Eritrea), and 27 have complied with all

the domestic requirements for the ratification. The objective is a 90% tariff liberalisation and the deadline of the application is 1 July 2020. In order to prevent trans-shipment, the concerned goods are expected to have at least 35% of African added value.

The free trade area in Africa is expected to increase intra-African trade by 15% to 25%, which is real opportunity for air freight.

Figure 3.2: Freight carried by region (thousand tonnes) – 2018



Source: IATA WATS

The 20 AFRAA airlines that reported on freight performance together moved 798,885 tonnes in 2018, representing 82.19% of the scheduled freight

by African carriers. 78.96% of the freight traffic was carried on intercontinental routes, while 21.04% of the freight traffic was carried on routes within Africa.

Table 3.1: Total freight carried by some AFRAA member airlines in 2018

Airline name	Domestic freight carried	Regional freight carried	Inter-continental freight carried	Total freight carried
Ethiopian Airlines	355	58,712	343,652	402,719
Egyptair	619	7,463	123,429	131,511
South Africa Airways	17,505	24,476	53,614	95,595
Kenya Airways	934	18,054	38,534	57,522
Air Mauritius	122	16,220	23,865	40,207
Royal Air Maroc	997	5,231	21,585	27,813
Air Algerie	652	369	19,090	20,112
Tunisair	-	855	6,680	7,535
Taag Angola	4,343	45	67	4,860
Mozambique Airlines	3,480	548	0	3,852
RwandAir	19	867	187	1,073
AB Aviation	610	263	-	873
Congo Airways	866	-	-	866
Air Zimbabwe	207	155	0	362
Camair Co	107	7	0	114
Nile Air	0	0	90	90

Source: AFRAA

Freight traffic forecast

After the rebound in 2017, Air freight volume growth slowed at 3.6% in 2018 following the global trade growth. As a result of modest economic growth forecasts, IATA's 5-year forecast indicates that international

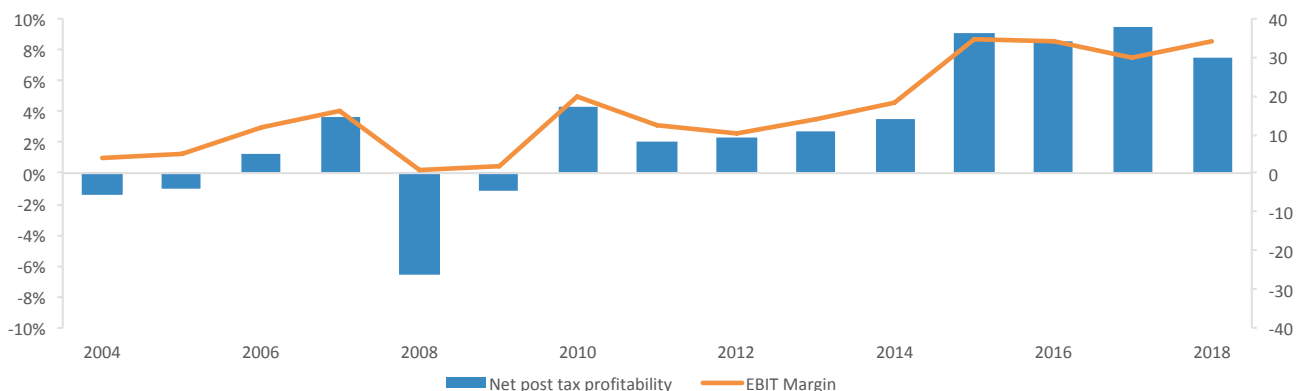
air freight tonnes are expected to increase by 4.4%. Airbus and Boeing forecast air freight to grow at an annual rate of 3.4% and 4.2% respectively for the period 2017-2037.

Section Four: Financial performance

Globally, airlines posted US\$30 billion after-tax profit in 2018, from US\$37.6 billion made in 2017 according

to IATA. The operating profits in 2018 decreased to US\$ 47 billion from 56.6 billion reported in 2017.

Figure 4.1: Global commercial airlines profitability – 2018



Source: IATA

The industry has seen an upward trend in capital productivity 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 7.9%, which rewarded equity owners.

The ROIC forecast for 2019 is 7.4%, which is only marginally above the cost of capital.

The industry's profit however only represented US\$ 6.85 average profit per passenger. The strongest financial performance is being delivered by airlines in North America at US\$ 14.66 per passenger in 2018.

Table 4.1: Worldwide profitability and return on capital

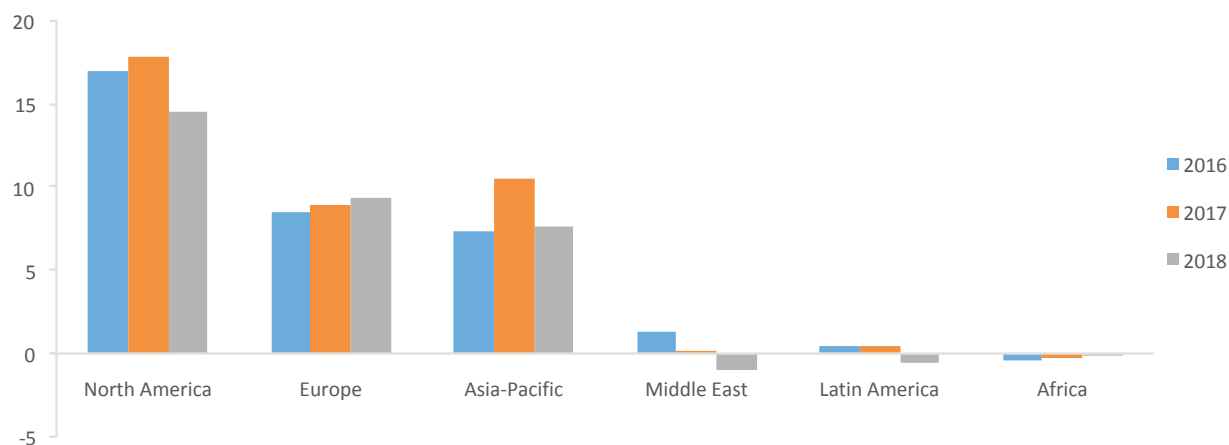
Worldwide industry	2017	2018
ROIC, % invested Capital	9.2%	7.9%
Net post-tax profits, \$ billion	37.6	30.0
\$ per passenger	9.12	6.85

Table 4.2: Airline profits per passenger by region

Region	Profit per passengers 2017 (US\$)	Profit per passengers 2018 (US\$)	Profit per passengers 2019 (US\$)
North America	18.86	14.66	14.77
Europe	8.27	8.2	6.75
Asia-Pacific	7.06	4.74	3.51
Middle East	0.46	-4.46	-4.46
Latin America	1.75	-1.65	0.5
Africa	-2.29	-1.09	-1.54
World Average	9.2	6.9	6.1

Source: IATA

Figure 4.2: Net profit in US\$ billions by region for 2016-2018

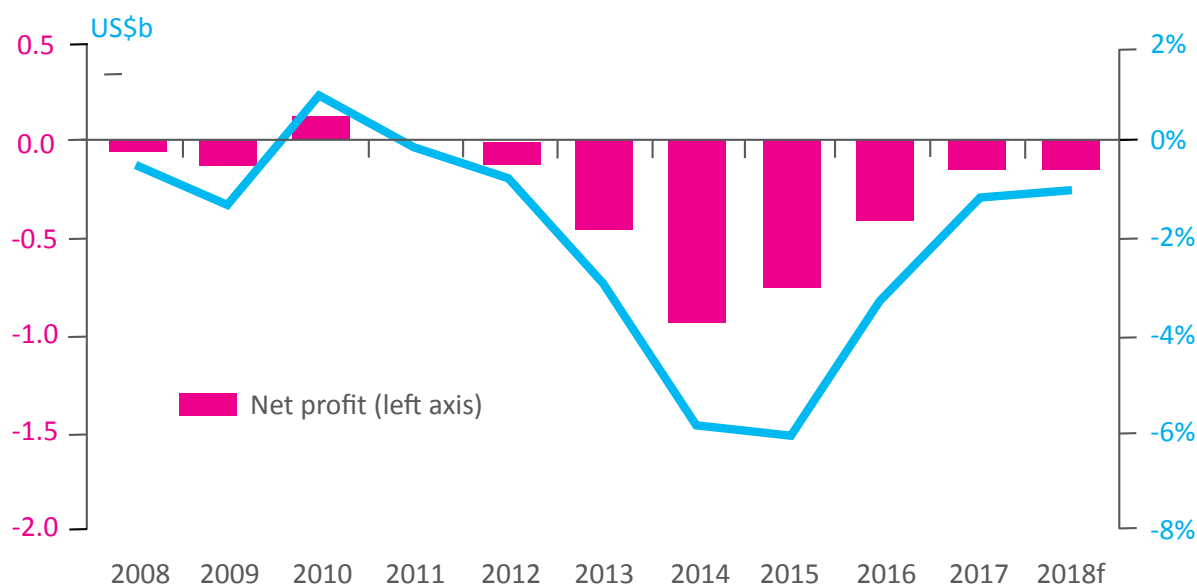


Source: IATA

The strongest financial performance was delivered by airlines in North America which generated a net profit of US\$14.5 billion in 2018. Europe and Asia-Pacific generated net profits of US\$9.4 billion, US\$7.7 billion respectively while Middle East, Latin

American and African airlines posted net losses of US\$1.0 billion, US\$0.5 billion and US\$0.1 billion respectively in 2018 while the weakest region is Africa with an estimated US\$ 1.09 loss per passenger in 2018.

Figure 4.3: Regional net profitability for Africa in US\$ billions 2008-2018



Source: IATA

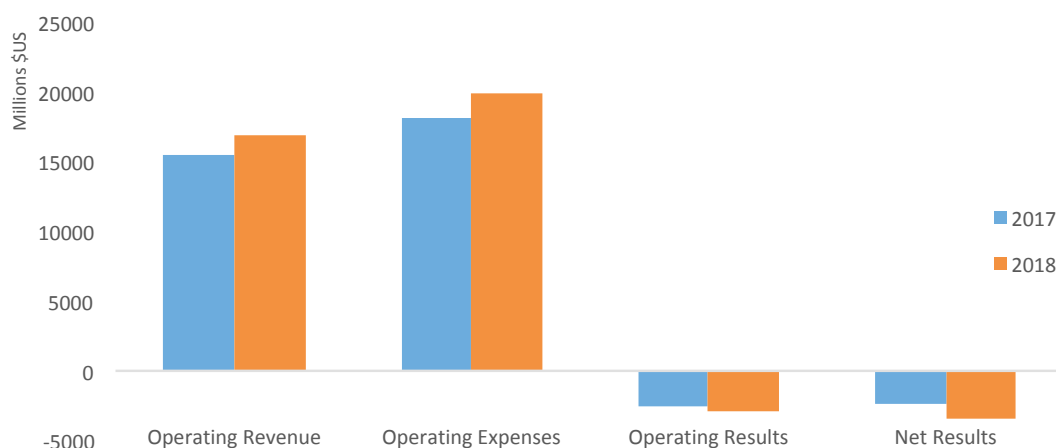
Operating revenue and expenses for African carriers

This analysis is limited to 15 AFRAA airlines that reported their financial results for 2018.

The 15 AFRAA carriers' total operating revenue was US\$16.94 billion in 2018 compared to US\$15.3 billion in 2017. Operating expenses for 2018 were US\$19.90 billion resulting to a net loss of US\$3.99

billion. Of the 15 participating airlines, 3 reported net profit for the year 2018. Ethiopian Airlines was the largest African carrier in 2018 in terms of profits with operating revenue at US\$3.73 billion and net profit at US\$177 million. Royal Air Maroc realised a net profit of 51.9 million and Air Mauritius 5.3 million.

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



Source: AFRAA

African airlines' financial performance depreciated in 2018. They have posted a net loss of US\$100 million in 2018 according to IATA. Breakeven load factors are relatively low (59.8%). The weak performance by African airlines is mainly attributed to various challenges facing African airlines such as high fuel cost, blocked funds in some African States, currency fluctuation and high taxes and charges.

"African airlines suffer from higher taxes and charges, compared to other regions in the world. Following tables show the passenger related charges in significant airports in Africa and Europe.

As for the selected airports below, Passenger departing from African airports pay around 36% more than those departing from European airports."

Table 4.3: Top 15 significant African airports with highest passenger charges

	Airport	Passenger charges (USD)
1	Accra	100
2	Monrovia	85
3	Brazzaville	55.04
4	Pointe Noire	55.04
5	N'djamena	50.04
6	Lagos	50
7	Windhoek	50
8	Nairobi	50
9	Mahe Island	50
10	Ouagadougou	45.03
11	Dar es Salaam	40
12	Entebbe	40
13	Libreville	35.03
14	Maputo	35
15	Harare	35

Table 4.4: Top 15 significant European airports with highest passenger charges

	Airport	Passenger charges (USD)
1	London	153.86
2	Erevan	43.19
3	Vienne	38.23
4	Francfort	36.72
5	Achgabat	35
6	Dushanbe	32
7	Sarajevo	30.63
8	Rome	30.18
9	Budapest	27.24
10	Bishkek	26
11	Paris	25.9
12	Tachkent	25.51
13	Prague	24.09
14	Tbilissi	24
15	Brussels	23.29

The high level of taxes and charges in Africa affects the final ticket price, making it inaccessible to a significant portion of the population. This contribute to reduce demand.

A common effort of all stakeholders in the airline industry in Africa to lower taxes and charges is an opportunity to stimulate traffic and generate more revenue for airlines.

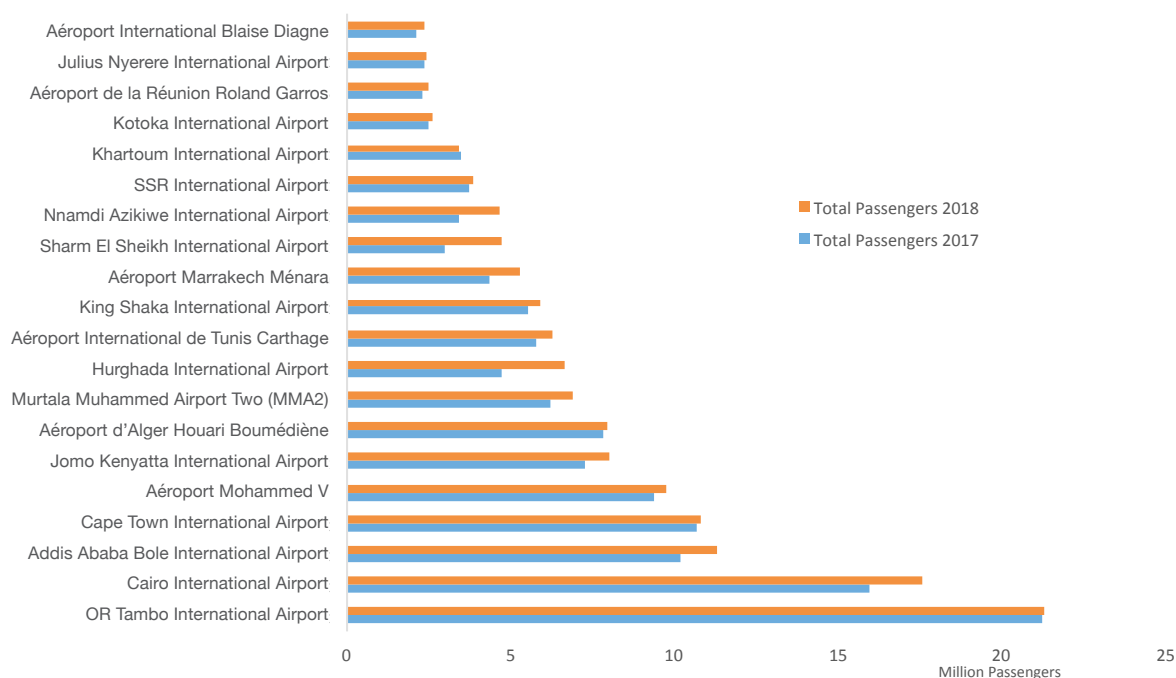
Section Five: Airports statistics

According to ACI Africa airport data, African airports carried 213.7 million passengers in 2018. Of these, the percentage of international passengers, 64.3% were international passengers, having slightly increased from 62.5% in 2017.

The biggest air transport markets in Africa is South Africa, followed by Egypt, Ethiopia and Morocco. In terms of total passenger numbers carried in 2018,

the busiest airports are OR Tambo International Airport with 21.29 million passengers, Cairo International Airport in Egypt (17.55 million passengers), Addis Ababa Bole International Airport in Ethiopia (11.27 million passengers), Cape Town International Airport in South Africa (10.78 million passengers), and Aéroport Mohammed V in Morocco (9.73 million passengers).

Figure 5.1: Top 20 African airports by total passengers carried 2017-2018

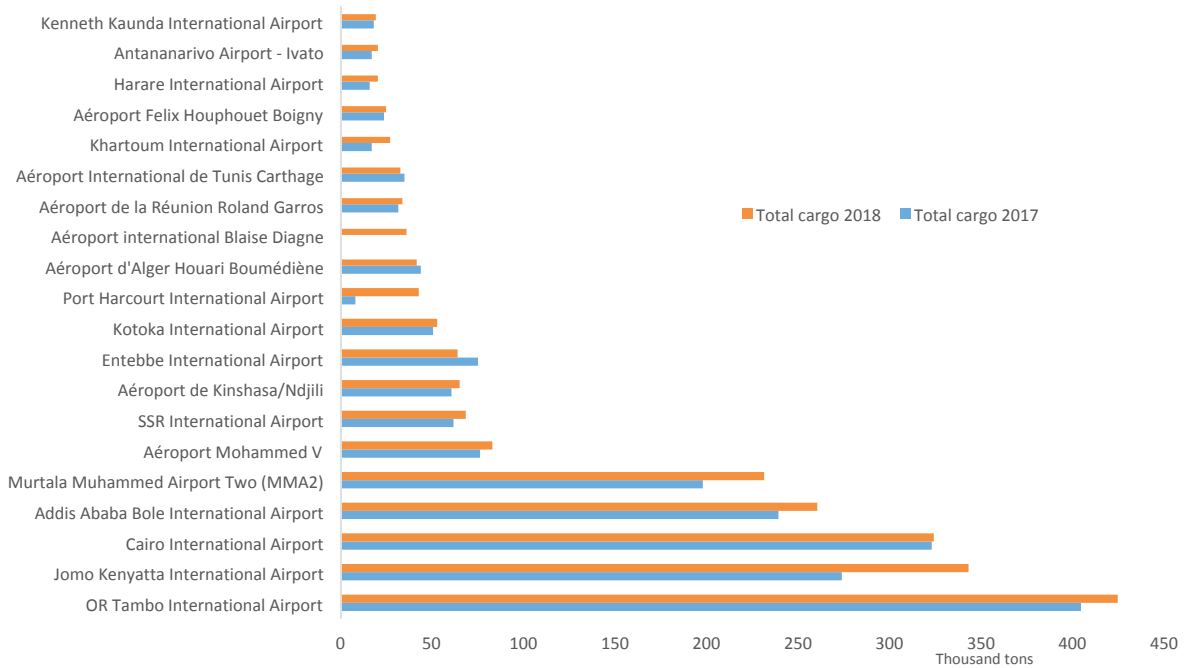


Source: AFRAA / ACI AFRICA

Cargo traffic at African airports reached 2.47 million tonnes in 2018, compared to 2.24 million tonnes in 2017, increasing by 10.2%. OR Tambo International Airport in South Africa was the major cargo airport in 2018 with 424,676 tonnes of cargo handled. The other cargo hubs among the top 5 in

the continent include: Jomo Kenyatta International Airport (342,579 tonnes), Cairo International Airport (323,713 tonnes), Addis Ababa Bole International Airport (260,213 tonnes) and Murtala Muhammed International Airport (231,740 tonnes).

Figure 5.2: Top 20 African airports by total cargo carried 2017-2018

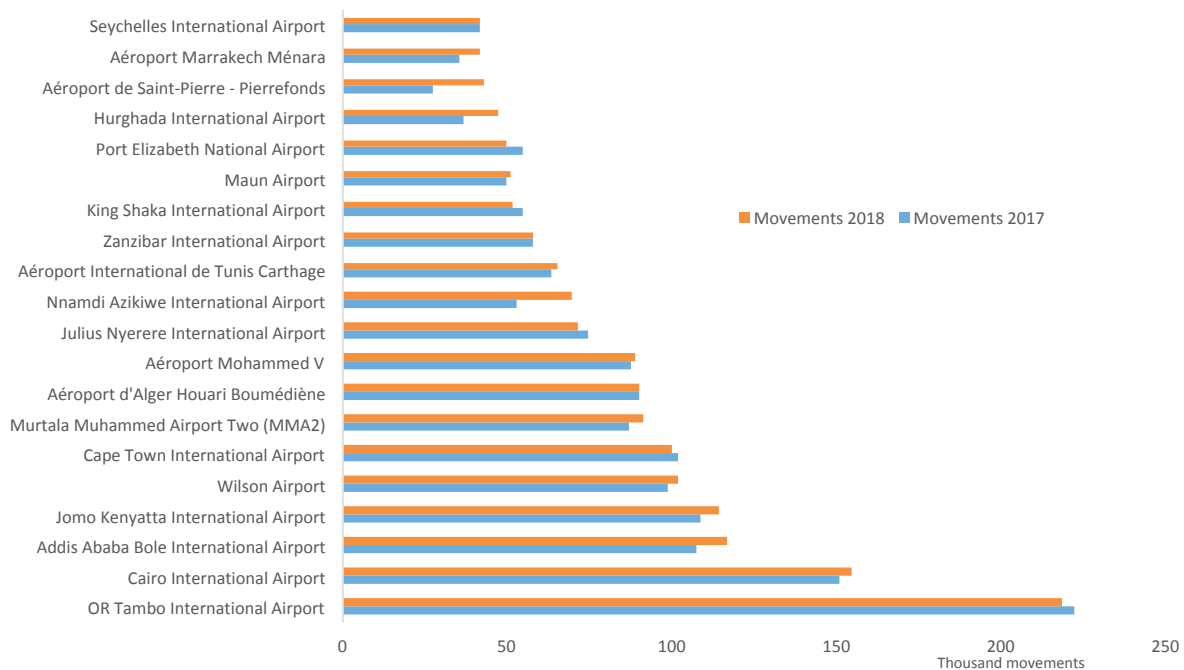


Source: AFRAA / ACI-AFRICA

Aircraft movements at African airports increased by 4.39% in 2018 to 3.2 million movements. The top 5 African airports ranked by aircraft movements in

2016 are: OR Tambo International, Cairo International Airport, Addis Ababa Bole International Airport, Jomo Kenyatta International Airport, and Wilson Airport.

Figure 5.3: Top 20 African airports by aircraft movement 2017-2018



Source: AFRAA / ACI AFRICA

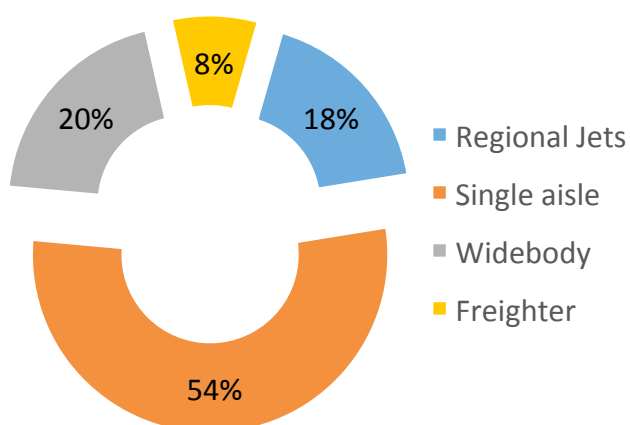
Section Six: Fleet

For the year 2018, the aircraft deliveries were estimated at 1,780 new aircraft, representing a 4.7% increase in the number of in-service. The 2018 fleet is estimated at 29,633 by IATA. The improvement or Returns on investments has given the industry the confidence to invest. According to IATA, half of 2018, was aimed at replacing existing fleet, making

a significant contribution to increasing fleet efficiency.

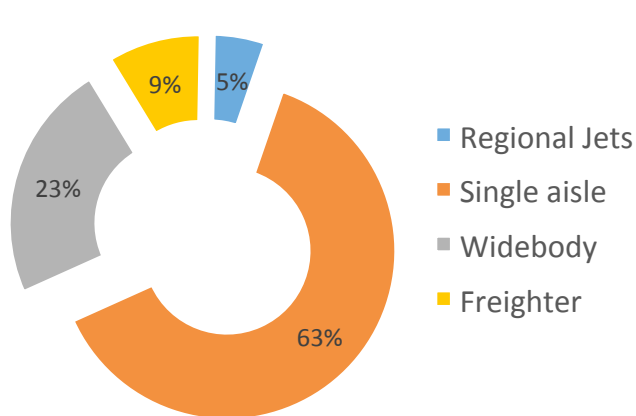
For scheduled airline operations, the number of seats available in the fleet rose to 4.5 million in 2018, adding 6.3% capacity to the market globally and it is estimated that by the end of 2019, there will be 4.6 million available seats.

Figure 6.1: Africa fleet composition – 2018



Source: Boeing Market Outlook

Figure 6.2: Africa fleet composition forecast – 2038



Source: Boeing Market Outlook

According to Boeing, Africa's fleet is estimated to grow by 4% in a 20 years period.

Table 6.1: Global aircraft in service in 2018 and additional demand by 2038

	2018	2038	Deliveries	Value \$B (2018)
Regional Jets	2,710	2,500	2,240	105
Single aisle	16,630	35,200	32,420	3,775
Wide body	4,520	9,560	8,340	2,630
Freighter	1,970	3,400	1,040	300
Total	25,830	50,660	44,040	6,810

Source: AFRAA / Boeing

Currently, (54%) aircraft in operation in Africa are made up of single aisle type. The other aircraft sizes are represented by: freighters (8%), wide body

aircraft (20%), and regional jets (18%). The top 10 AFRAA member airlines with the largest fleet size in 2018 are shown in the table below.

Table 6.2: Top 10 AFRAA member airlines in terms of fleet in 2018

Airline	No of aircraft in service
Ethiopian Airlines	114
EgyptAir	64
Royal Air Maroc	62
Air Algérie	59
South Africa Airways	49
Kenya Airways	36
Tunisair	28
Air Mauritius	15
Tassili Airlines	15
Taag Angola	13

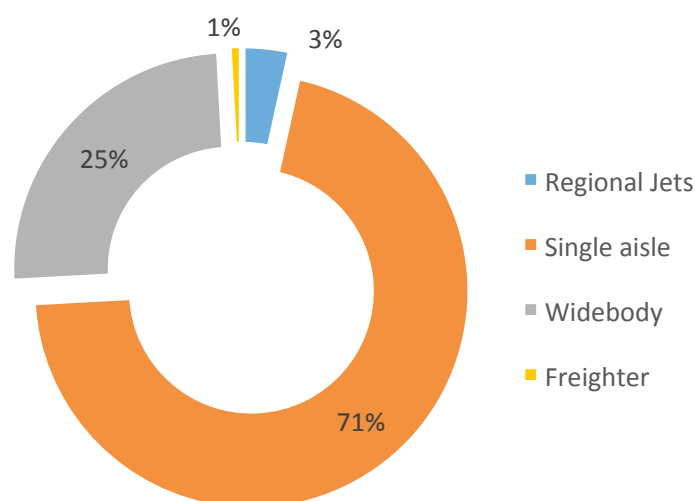
Source: AFRAA

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 3.4% to reach 50,660 aircraft in 2038. Consistent with the demand forecasts in commercial aviation, Boeing forecasts that 44,040 new aircraft will be added to or replace some existing fleet in operation between

2018 and 2038. The total cost of the additional fleet is estimated at over US\$6.8 trillion. According to the Boeing Market Outlook, by 2038, it is estimated that approximately 3% of the new airplanes will be delivered to airlines based in Africa, while Asia Pacific will receive 42% of new deliveries.

Figure 6.3: Africa's 20 year fleet acquisition forecast



Source: AFRAA / Boeing

According to Boeing, African airlines will need 1,160 new airplanes over the next 20 years to accommodate the traffic growth forecasts. Of this aircraft demand forecast, 71% of the deliveries to African airlines

will be single-aisle airplanes, 25% will be wide body airplanes, regional jet 3% and freighters 1%. In dollar terms, Africa will invest almost \$175 billion in new airplanes.

Section Seven: Employee productivity

IATA estimated that total employment by airlines reached 2.88 million in 2018, a gain of 3.1% compared to 2017, and it is estimated to increase by 2.2% to reach 2.94 million in 2019. Productivity measured in ATKs generated per employees was 518,782 in 2018, compared to 504,216 in 2017, and is expected

to increase to 529,407 in 2018. Unit labour costs are rising significantly and IATA forecasts an average rise of 1% in 2019. 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

	2017	2018
Labour costs, US\$ billion	170	181
Employment (million)	2.79	2.88
productivity (ATK/employee)	504,216	518,782
Unit labour cost: \$/ATK	0.121	0.121

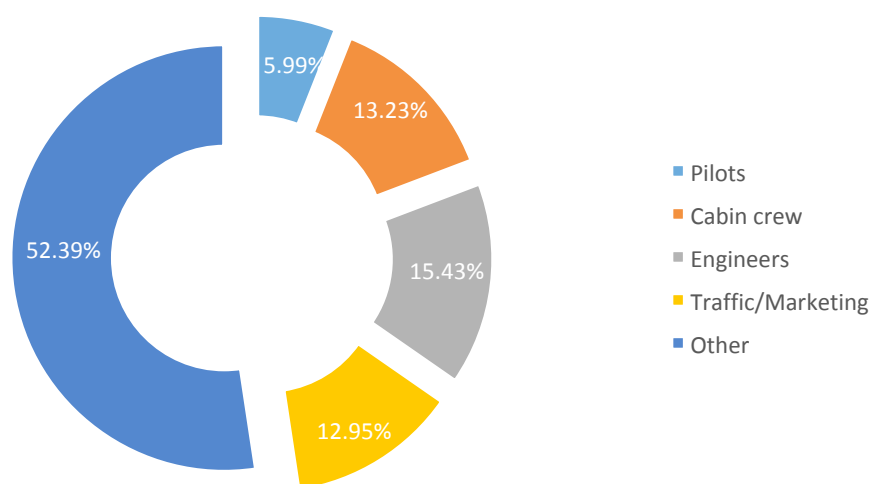
Source: IATA, ICAO, ATAG, Oxford Economics

The analysis below is based on the reported data by 21 AFRAA member airlines.

The total number of people employed directly by

the 21 AFRAA member airlines that reported their data in 2018 increased by 9.18% from 77,597 in 2017 to 84,721 in 2018.

Figure 7.1: AFRAA member airlines employees by job type



Source: AFRAA – Reported AFRAA member airlines only

Figure 7.2: AFRAA member airlines employment by job type

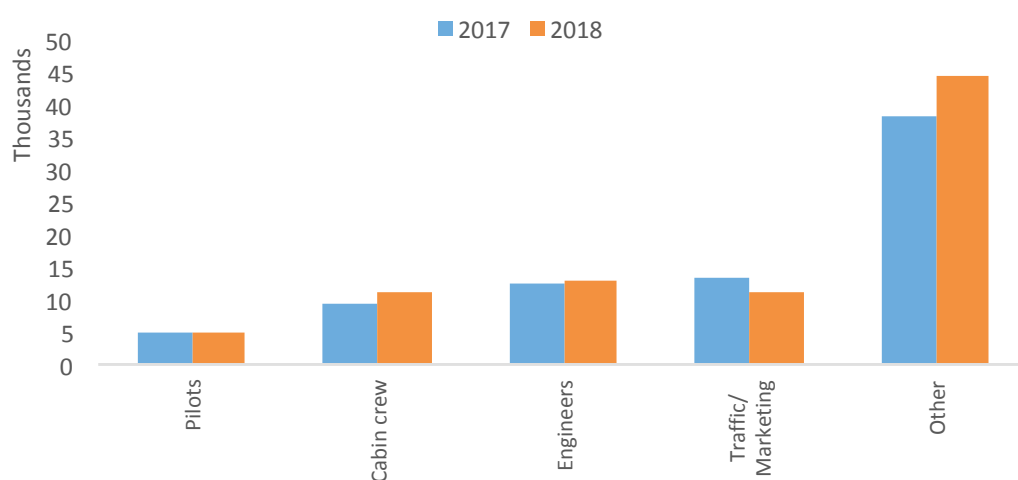


Table 7.2: Employee performance indicators for some AFRAA member airlines

	2017	2018
ATK/employee	326,459	332,081
RTK/employee	206,197	204,179
Number of passengers/employee	718	742
Employee/aircraft	158.7	163.9

Source: AFRAA – Reported AFRAA member airlines only

The figures show that employee productivity of AFRAA member airlines in terms of ATK/employee is at 332,081. This is lower than the worldwide

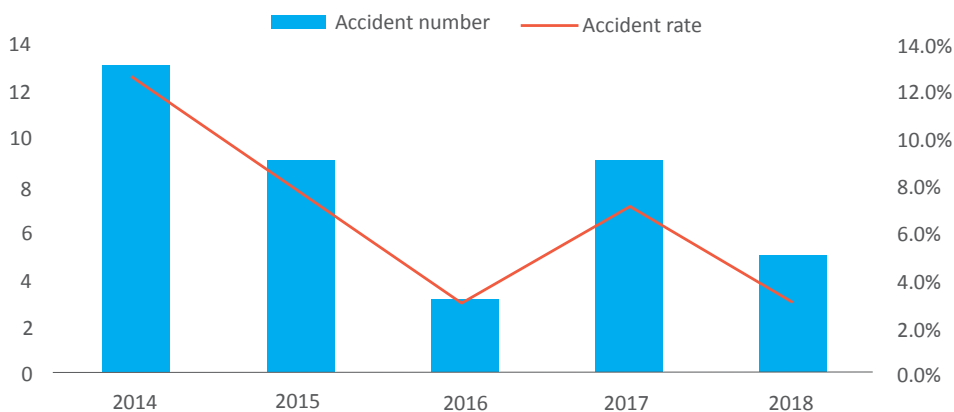
average at 518,782 in 2018 according to IATA and this may be an indication of overmanning in African airlines.

Section Eight: Safety

According to the Aviation Safety Network, the 2018 airline accident statistics shows a total of 10 fatal accidents involving commercial airlines, resulting in 519 fatalities. This is a poor performance compared

to 2017, where the fatalities number was lower. The number of accidents in Africa dropped in 2018, from 9 to 5 which represents a decrease of 4% compared to the year 2017.

Figure 8.1: Accident rate in Africa (2014-2018)



Source: IATA Safety report

There were two fatal accidents in Africa, both involving turboprops.

Figure 8.2: World airline fatal accidents in 2018

	Date	Type	Operator	Fatalities	Flight type	Location
1	2/11/2018	Antonov An-148-100B	Saratov Airlines	71	Domestic Scheduled Passenger	Near Stepanovskoye, Ramenskoye district
2	2/18/2018	ATR 72-212	Iran Aseman Airlines	66	Domestic Scheduled Passenger	Near Yasuj Airport
3	3/12/2018	DHC-8-402Q Dash 8	US-Bangla Airlines	51	International Scheduled Passenger	Kathmandu-Tribhuvan Airport
4	4/17/2018	Boeing 737-7H4	Southwest Airlines	1	Domestic Scheduled Passenger	Near Philadelphia airport
5	5/18/2018	Boeing 737-201	Global Air	112	Domestic Scheduled Passenger	Near Havana-José Martí International Airport
6	9/9/2018	Let L-410	Slaver Kompani	20	Non Scheduled Passengers	Near Yirol Airport
7	9/28/2018	Boeing 737-8BK	Air Niugini	1	Domestic Scheduled Passenger	Near Chuuk/Weno International Airport
8	10/29/2018	Boeing 737 MAX 8	Lion Air	189	Domestic Scheduled Passenger	15 km off Tanjung Bungin
9	11/9/2018	Boeing 757-23N	Fly Jamaica Airways	1	International Scheduled Passenger	Georgetown-Cheddi Jagan International Airport
10	12/20/2018	Antonov An-26B	Gomair	7	Cargo	Kinshasa-N'Djili Airport
Total				519		

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, AFRAA, 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 September 2019, Africa had 46 airlines on the IOSA registry comprising almost all the major carriers on the continent.

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

- Africa World Airlines (Ghana)
- Air Algérie (Algeria)
- Air Austral et Ewa Air (Réunion)
- Air Botswana (Botswana)
- Air Burkina (Burkina Faso)
- Air Cairo (Egypt)
- Air Cote d'Ivoire (Côte d'Ivoire)
- Air Madagascar (Madagascar)
- Air Mauritius (Mauritius)
- Air Namibia (Namibia)
- Air Peace Limited (Nigeria)
- Air Seychelles (Seychelles)
- Air Tanzania (Tanzania)
- Allied Air (Nigeria)
- Almasria Universal Airlines (Egypt)
- Arik Air (Nigeria)
- Cameroon Airlines (Cameroon)
- CemAir (South Africa)
- Comair (South Africa)
- ASKY (Togo)
- Congo Airways (Congo, Democratic)
- EgyptAir (Egypt)
- Ethiopian Airlines (Ethiopia)
- FlyEgypt (Egypt)
- Jambojet Limited (Kenya)
- Kenya Airways Limited (Kenya)
- LAM – Moçambique (Mozambique)
- Mango Airlines (South Africa)
- Mauritania Airlines International (Mauritania)
- Med-View Airline (Nigeria)
- Nesma Airlines (Egypt)
- Nile Air (Egypt)
- Nouvelair (Tunisia)
- Overland Airways Limited (Nigeria)
- Petroleum Air Services (Egypt)
- Precision Air Services Plc (Tanzania)
- Royal Air Maroc (Morocco)
- RwandAir (Rwanda)
- S.A. Airlink (Pty) Limited (South Africa)
- SAFAIR Operations (Pty) Ltd (South Africa)
- South African Airways (South Africa)
- South African Express Airways (Pty) Ltd (South Africa)
- TAAG Angola Airlines (Angola)
- TACV Cabo Verde Airlines (Cape Verde)
- Tassili Airlines (Algeria)
- Tunisair (Tunisia)

ISAGO

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

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

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

ISSA

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

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

The conditions to participate in ISSA are as follows:

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

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

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

In the AFI region, the only operator participating in ISSA is Safarilink Aviation, an AFRAA member airline.

Section Nine: AFRAA Secretariat Value Adding Activities

9.1.1 The Single African Air Transport Market (SAATM)

The Single African Air Transport Market is a flagship project of the African Union Agenda 2063 designed to create a single unified market for air transport in Africa. When SAATM is fully implemented, the single market aims to allow significant freedom and access to air transport in Africa. It places the implementation of the Yamoussoukro Decision on the Liberalisation of Air Transport Market in Africa in relation to the achievement of the AU's Agenda 2063 objectives.

AFRAA has been actively engaged with the capacitation of states and pertinent stakeholders in conjunction with its stakeholders. These efforts are bearing fruit as more states are signing up for SAATM. AFRAA member airlines continue to be appraised of the benefits of liberalization in various forums and engagements. Encouragement is provided to the airlines and their non-signatory states to elaborate their concerns so that mutually satisfactory solutions are sought.

The YD established the Monitoring Body whose membership comprises of the African Union Commission (AUC), the United Nations Economic Commission for Africa (UNECA), the African Civil Aviation Commission (AFCAC) and the African Airlines Association (AFRAA). The Regional Economic Communities (RECs) can also assist the monitoring body in its duties as required. The responsibilities of the monitoring body include ensuring the full implementation of the YD and realisation of the SAATM. AFRAA as a member of the Monitoring Body carries the voice of all African Airlines. The Monitoring Body is essential for the oversight role that it carries, and it has advisory responsibilities over the functioning of SAATM. Importantly, the Monitoring Body facilitates the smooth operation of the market at a strategic level as part of its contribution in supporting the Executing Agency.

The number of countries that have signed their Solemn Commitment stands at 30, out of which 18 have submitted their Memorandum of Implementation. In 2019, AFRAA participated in various Industry forums and capacity building workshops on SAATM advocacy. The opportunity was taken in conjunction with AFCAC, AUC and IATA at the same forums to encourage the signatory states to progress to the full YD implementation stage.

A comprehensive advocacy plan has been developed with the objective of increasing the up-take for

SAATM and for the implementation by the states that have achieved the full YD implementation stage. AFRAA will bring to the attention of AFCAC and the Monitoring Body the concerns of its members.

9.1.2 Fees, Taxes and Charges

The Fees, Taxes and Charges in Africa remain among the highest in the world, at times reaching as much as 45% higher than in other regions. These costs are onerous to the airlines and place them in a situation where their fares become prohibitive to the stimulation of traffic. Various studies have shown that a reduction in these charges leads to an increase in traffic which has a stimulus effect across the entire industry.

The AFRAA Secretariat hosted a workshop on Fees, Taxes and Charges. The concerns of member airlines were raised with the respective stakeholders such as ANSPs, Airports (ACI), and CAAs who were represented at the workshop. AFRAA continues to lobby the relevant stakeholders through its participation in industry meetings where these charges are a subject for discussion. AFRAA will continue to engage respective regulatory authorities to address excessive charges as a parallel process to enable close coordination for the mutual benefit of all parties.

9.1.3 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.

The countries with the highest inaccessible funds in Africa as of September 2019, among others, are: Zimbabwe, Sudan, Algeria, Eritrea, Ethiopia and Libya. The situation is very volatile as the levels of inaccessible funds vary from month to month based on the interventions of the custodians of fiscal policy in the respective countries and to a greater extent the impact of world economic trends. The AFRAA Secretariat focused on the highest impact country and made plans to engage with the respective authorities in order for the two parties to address the debilitating impact of the blocked funds on AFRAA member airlines. Advocacy plan is in place to engage with the authorities in the countries with the highest amount of inaccessible funds.

9.1.4 Environment

CORSIA has been adopted as the global standard for emissions reporting and mitigation.

The ICAO Assembly 40 encouraged all member states to focus on the roll out of the reporting and offset programmes for their jurisdictions in order to comply with the ICAO CORSIA commitments. AFRAA hosted the CORSIA on 23 June, 2019 in conjunction with IATA and ICAO. A total of 52 delegates attended the 2-day workshop. Member airlines and regulatory authorities were updated on their obligations in line with their commitment to the ICAO resolutions. AFRAA is working in conjunction with ICAO and

IATA to facilitate capacity building for member states and airlines.

9.2 Training and Human Capital Development

In 2019, AFRAA offered various courses, workshops/seminars for purposes of capacity building within African aviation industry to promote safety and security within the continent. Over 283 participants were trained from January to the end of October as tabled below:

Table 9.1 Courses conducted during 2019

	Course	Number of participants	Date
1	Dangerous Goods Regulations Cat 6	13	25-29 March 2019
2	Conversion course	14	26 April 2019
3	Conversion course	14	27 April 2019
4	Conversion course	12	28 April 2019
5	Conversion course	10	2 May 2019
6	Weight and balance refresher	15	29 Apr-1 May 2019
7	Weight and Balance initial	15	20-24 May 2019
8	Security Audit and Quality Control	13	13-17 June 2019
9	Cargo Business strategy and planning Management	13	6-9 June 2019
10	Cargo claims and complaint handling	5	10-11 june2019
11	Load control conversion for E170	16	12-14 July 2019
12	Dangerous Goods Regulations Category 8-9-10-11-12	40	22 July2019 23 July 2019
13	Load Control ATR 42/72	13	24-26 July 2019
14	Instructional techniques	18	14-18 August 2019
15	Instructional design	18	19-23 August 2019
16	Cargo sales and key account Management	7	16-19 August 2019
17	Weight and balance	6	12-16September2019
18	Conversion from kilo to pound	5	17 September 2019
19	Instructional techniques	18	4-8 October 2019
20	Instructional design	18	9-13 October 2019

AFRAA training Committee conducted a needs survey in February 2019. The objective of the survey was to collect member airlines needs in terms of training in order to better orient the training program. The survey results guided the coordination with IATF (IATA training Fund) for long term sponsorship cooperation to increase the number of IATA instructors in Africa for the benefit of both AFRAA Training Unit and IATA Training Institute.

AFRAA embarked on a project of Instructor Development Program for AFRAA Member Airlines

(IDPA), to develop 100 highly qualified instructors in the next five years (20 per year) with the tuition sponsored by IATF. The Committee also planned to establish a Leadership Development Program for AFRAA Member Airlines (LDPA) with the objective of addressing leadership gaps in the member airline workforce.

To address the challenging personnel demands to support airline operations in Africa, AFRAA Training Committee recommended the establishment of an African Air Transport Fund (AATF).

9. AFRAA Projects

9.4.1 AFRAA Fuel Project

AFRAA conducted its Fuel Tender for 2020 with a total of 15 participating airlines. The aggregated volumes stand at 1.6 billion litres up from 1.3 billion litres tendered in 2018. The project has been growing each year and the Secretariat is optimistic of increased cost savings to its members. The tender will be concluded in November 2019 with issuance of award letters to winning suppliers at each of the locations.

9.4.2 AFRAA/IATA campaigns against high fuel charges and taxes

AFRAA is actively involved in lobbying activities so as to foster better pricing for jet in various African destinations. These activities are being undertaken by the Africa Fuel Working Group (AFWG) in which AFRAA is a member. The main locations of focus so far include Accra, Abidjan and Lusaka. AFRAA, IATA and airline representatives met with SIR Refinery in Abidjan as well as the National Petroleum Authority (NPA) Ghana from 12th - 13th March 2019. These are among the most critical aviation markets in Western Africa. The main objective of the meetings was to encourage the two markets to align the jet fuel reporting indices to Platt's formulae pricing which will drive jet fuel pricing lower compared to the EX refinery pricing models currently being used. During the meetings, the AFWG members were informed that discussions with the relevant ministries and stakeholders will review our proposals and give recommendations. The authorities committed that revised price mechanisms will be given a consideration after the market study and evaluations are finalised.

Similar efforts have also been pursued in Lusaka Zambia with the Energy Regulation Board (ERB) giving a strong indication that a formula based pricing model will be implemented in the location soon. AFRAA will continue to target more locations with the aim of driving down base prices, removal or reduction of high/unfair taxes, charges and fees so as to make African aviation more competitive.

On training for the Fuel Project, AFRAA aims to organise at least one workshop annually focused on fuel management - Negotiation skills, fuel data analysis, Fuel qu

9.4.3 AFRAA Route Network Coordination Project

AFRAA has been working with its member airlines

on the matter of enhancement of commercial agreements under the auspices of the AFRAA Route Network Coordination Committee through interline agreements, codeshare, Special Pro-rate Agreements (SPAs) and other forms of commercial arrangements. Since the launch of this committee 11 codeshares, 15 Special Prorate agreements and 20 interline agreements have been signed to date among the participating airlines. Over and above the SPA's, Interline Electronic Ticketing, Code-Share agreements, and network harmonization successes that have been achieved with the Route Network Coordination Committee, there is an increasing desire by the member airlines to formalise their relationships with a view to expanded collaboration beyond the commercial aspects. The AFRAA Secretariat continues to engage with its members in order to enhance collaboration among them.

9.4.5 AFRAA Cargo Project

The AFRAA Cargo Committee held a meeting from 7-8 October 2019, hosted by EgyptAir in Cairo. The Committee recommended enhanced cooperation amongst African airlines in order to grow the cargo revenue for the airlines. This is more than required at this point in time with the African Continental Free Trade Agreement being implemented and the whole continent focusing on intra- African trade.

9.4 Distribution Task Force

AFRAA Distribution Project was launched on 29 January 2019. The Project is aimed at creating a platform that will play a major role in travel distribution in Africa. Through the Project, AFRAA is seeking proactively to create a settlement solution that is flexible to accommodate a wide range of distribution needs. The platform will be a foundation to create more efficient, reliable and scalable opportunities for the future. This Project will be instrumental, not just for AFRAA, but for all concerned industry players in Africa. The Project is aimed at creating a platform that will play a major financial role in travel distribution in Africa, providing the industry with a world-class settlement system that is custom-made for the continent.

9.5 AFRAA Aeropolitical Committee

AFRAA Aeropolitical Committee was launched in July 2019. The Committee shall act as advisor to the Executive Committee and the Secretary General on all legal, industry affairs and aero-political matters affecting AFRAA member airlines.

The Committee shall provide a forum where member airlines can discuss emergent issues that can affect their business, identify opportunities for AFRAA to act as an advocate for the African air transport, industry, identify future trends that could have a significant impact on the African air transport and recommend the establishment of necessary work programs for AFRAA. The Committee will also advise on legal and regulatory issues of interest to the air transport industry and establish guidelines for African airlines to follow. The subject matters to be addressed include: safety, security, airports services, facilitation and infrastructure, air navigation facilities, services and procedures, regulations, taxation, charges and fees, market access (SAATM), environment, governmental, intergovernmental and other air transport policies and the impact of global developments on African airlines operations.

9.6 AFRAA Technical and Operations Committee

The AFRAA Technical and Operations Committee was launched in July 2019. The Committee provided a forum for the implementation of cost-reduction initiatives while efficiently enhancing safety. The main focus areas include: AFRAA line maintenance pools, sharing of maintenance and overhaul tasks and keeping abreast with regional priorities relating to operations, safety, and security.

On line Maintenance Pools, the pooling program will engage and encourage participating air carriers to smartly support their line maintenance operations while reducing the cost of operations. The second cooperative approach in engineering and maintenance targets enhancement of productivity improvement through the collaboration of like-minded Base Maintenance Organizations.

The Committee will also keep abreast with regional priorities relating to operations, safety, and security and update member airlines on regional priorities relating to operations, safety, and security coordinated by stakeholders such as IATA, AFCAC, and ICAO. Members will be able to develop common positions, in African airline perspectives, so that the AFRAA Secretariat will be able to articulate the same stances at regional and or international forums such as the Africa and Indian Ocean (AFI) Air Traffic Service (ATS) Incident Analysis Group AIAG, the Regional Aviation Safety Group for AFI RASG-

AFI, the IATA Regional Co-ordination Group for AFI RCG, and the AFI Planning and Implementation Regional Group APIRG.

9.7 AFRAA Aviation Stakeholders Convention

AFRAA in partnership with Mauritius hosted the 8th Aviation Stakeholders Convention in Mauritius on 12-14 May 2019 under the theme: "Winning Together". The Convention attracted over 300 delegates from over 40 countries across the world. The event was staged under the high patronage of the Deputy Prime Minister, Minister of Energy and Public Utilities, of the Republic of Mauritius. 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.

9.8 New Members and Partners

The Association continues to recruit new members and partners with the objective of providing support to airlines. This year AFRAA welcomed four new member airlines namely: Safarilink aviation operating from Kenya; Air Djibouti - the flag carrier of Djibouti, Air Senegal - the flag carrier of Senegal and Uganda National Airlines Company Ltd. - the flag carrier of Uganda. Six aviation-related companies have also joined our Partnership Programme this year, namely: Alton Aviation Consultancy, Associated Energy Group (AEG FUELS), Civic Petroleum Limited, Collins Aerospace, Hitit Computer Services and Safran.

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.

9.10 Working with other Organisations

AFRAA cooperates with the African Union Commission, NEPAD, AfDB; other major industry organisations including IATA, AASA, AACO, ICAO, AFCAC, ACI-Africa; governmental and non-governmental bodies, Regional Economic Communities (RECs) – ECOWAS, EAC, COMESA, SADC, , PAPU, 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:
Tel France: +33 (0) 6 60183080
Tel Morocco: +212 66 16 85 344
Fax: +212 52 25 39 733
Email: doleplat@airfrance.fr



Air Algérie Technics

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



Atlantic Air Industries Maroc

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



EgyptAir Maintenance and Engineering

Contact: Eng. Soua Farg
Advertising & Communication Directorate
Cellular: +201222152757
Office: +202 22656855/202-22657445
Fax: +202 22656873/202-22685749
Email: advertising_me@egyptair.com
contactus_me@egyptair.com



Ethiopian Airlines

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



Kenya Airways Engineering & Maintenance

Contact: Mr. Cornelius Mayende
Manager Technical Sales & Marketing
Tel: +254 738006458
Email: technical.sales@kenya-airways.com
www.kqmro.com



Sabena Technics

Contact: Chedly Damergi
Sabena technics MIR
General Manager
Tel: +216 73520750
Mobile: +216 29993010
Fax: +216 73520746
Email: chedly.damergi@sabenatechnics.com.tn



South African Airways Technical

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



Snecma Engine Services

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



Tunisair Technics

Contact: Mr. Naceur Bouraoui
Director, TunisAir Technics
Tel: +216 70 837000 Ext. 3111
Email: ali.saidane@tunisair.com.tn

Section Eleven: FAA or EASA Certified Training Centres



Adawlya for Training and Aviation Science

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



EgyptAir Training Centre

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



Ethiopian Aviation Academy

Contact: Tewodros Balcha (Mr.)
Manager Sales & Business Development
Tel: +251 115 174013
Fax: +251 116 51200
Email: TewodrosB@ethiopianairlines.com



Kenya Airways Pride Centre

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



Royal Air Maroc Academy

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



Tunisair Training Centre

Contact: Boutheina Klass
Directrice du Centre de Formation Tunisair
Tel: +216 70 837 000 Ext. 2958
Mobile: +216 97 652 690 / +216 29 552 690
Email: boutheina.khlass@tunisair.com.tn

Section Twelve: Airlines with Aircraft Simulators



Aviation Training Center of Tunisia (ATCT)

2 A320 aircraft simulators
Contact: Thouraya Ayadi
General Director
Tel: +216 71911811
Fax: +216 71911606
Email: atct@atct.com.tn



EgyptAir Training Centre

A320, A330, A340, B737NG and B777 full flight simulators
Tel: +202 22651440
Fax: +202 2265 6240
Email: a_sowedan@egyptair.com



Ethiopian Aviation Academy

B737NG and B757/B767 full flight simulator trainings
Contact: Tewodros Balcha (Mr.)
Managers Sales & Business Development
Tel: +251 116 651191 / 251 116 651192
Fax: +251 116 651200
Email: TewodrosB@ethiopianairlines.com



Kenya Airways Pride Centre

B737 NG full flight simulator
Contact: Dr. Mbithe Anzaya
Head of Learning and Development – Pride Centre
Tel: +254 020 264 22846/64.
Email: learning.development@kenya-airways.com



CasaAero S.A.S

B737 NG full flight simulator
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 member airlines – Individual Summary Facts



Mr. Ayad Bourhane
Chief Executive Officer

ADDRESS

Avenue Ali Soilihi,
Moroni, Malouzi Union des
Comoros
Tel: +2693286969
Cel: +2693391705
www.flyabaviation.com

IATA CODE: Y6
ICAO CODE: CIK

AFRAA MEMBERSHIP
Became member in 2017
Established in 2010

OWNERSHIP STRUCTURE
Privately Owned

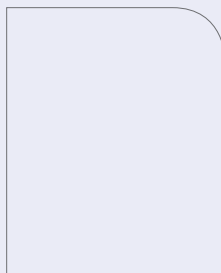
COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED

Domestic	3
Regional	3
International	0

EMPLOYEES
45

FLEET
EMB 120 3



Capt. Mustafa Matuug
Chairman

ADDRESS

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

IATA CODE: 8U
ICAO CODE: AAW

AFRAA MEMBERSHIP
Became member in 2002
Established in 2001

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED

Domestic	6
Intra-Africa	0
International	9

EMPLOYEES
N/A

FLEET
Airbus 319-100 2
Airbus 320-200 8
Airbus 330-200 3
Airbus 330-300 1
Airbus 300-600 1



Capt. Bakhouche Alleche
General Manager

ADDRESS

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

IATA CODE: AH
ICAO CODE: DAH

AFRAA MEMBERSHIP
Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Turkish Airlines

DESTINATIONS SERVED

Domestic	30
Intra-Africa	9
International	34

EMPLOYEES
8,670

FLEET
Airbus A330-200 11
Boeing B737-800 25
Boeing B737-700 2
Boeing B737-600 5
ATR72-500 15
LC-100-30 1



Ms. Agnes Khunwana
General Manager

ADDRESS
PO Box 92
Gaborone, Botswana
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

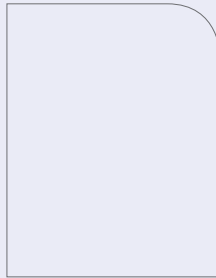
OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Qatar Airways

DESTINATIONS SERVED
Domestic 4
Intra-Africa 4

EMPLOYEES
454

FLEET
ATR72-600 2
Embraer E170 1



Capt. Blaise Sanou
Chief Executive Officer

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

IATA CODE: 2J
ICAO CODE: VBW

AFRAA MEMBERSHIP
Became member in 2002
Established in 1967

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

COMMERCIAL PARTNERSHIP
Air France
ASKY Airlines
Kenya Airways

DESTINATIONS SERVED
Domestic 1
Intra-Africa 7

EMPLOYEES
229

FLEET
EMB 170 2



Mr. Abdourahman Ali Abdillahi
Chief Executive Officer

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

IATA CODE: DJ
ICAO CODE: JIB

AFRAA MEMBERSHIP
Became member in 2018
Established in 1963

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED
Intra-Africa 4
International 1

EMPLOYEES
N/A

FLEET
EMB 145 1
Boeing 737-500 1



Mr. Rolland B. 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 Mauritius
Air France
Air Austral

DESTINATIONS SERVED

Domestic	11
Intra-Africa	6
International	4

EMPLOYEES

1,452

FLEET

A340-313	2
B737-800	1
ATR72	4
DHC6 – 300	3



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

Air Mauritius Holding Ltd: 51%
Government of Mauritius: 8.4%
State Investment Corporation: 4.5%
Rogers & Company Ltd: 4.3%
Compagnie Nationale Air France: 2.8%
Other Shareholders: 29%

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED

Domestic	1
Intra-Africa	7
Intercontinental	16

EMPLOYEES

2,948

FLEET

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



Mr. Xavier Masule
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
Turkish Airlines

DESTINATIONS SERVED

Domestic	6
Regional	9
Intercontinental	1

EMPLOYEES

748

FLEET

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



Mr. Ibrahima Kane
 Chief Executive Officer

ADDRESS

Immeuble la Rotonde Rue
 Amadou Assane Ndoye
 Tel: +221 30 115 15 15
<https://flyairsenegal.com>

IATA CODE: HC
 ICAO CODE: SZN

AFRAA MEMBERSHIP
 Became member in 2019
 Established in 2016

OWNERSHIP STRUCTURE
 Government: 100%

COMMERCIAL PARTNERSHIP
 N/A

DESTINATIONS SERVED

Domestic	1
Regional	10
Intercontinental	1

EMPLOYEES
 N/A

FLEET

Airbus A319-100	1
Airbus A330-900	2
ATR 72 – 600	2



Eng. Ladislaus E. 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
 N/A

DESTINATIONS SERVED

Domestic	11
Regional	5
Intercontinental	1

EMPLOYEES
 196

FLEET

Airbus220-300	1
Bombardier Dash 8- Q300	3
Boeing 787-8	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.aer

IATA CODE: UM
 ICAO CODE: AZW

AFRAA MEMBERSHIP
 Became member in 1981
 Established in 1946

OWNERSHIP STRUCTURE
 Government: 100%

COMMERCIAL PARTNERSHIP
 N/A

DESTINATIONS SERVED

Domestic	3
Intra-Africa	2

EMPLOYEES
 232

FLEET

Boeing B767-200ER	2
Boeing B737-200	2
Airbus A320-200	2
MA-60	1



Mr. Valentine Tongo
Chief Executive Officer

ADDRESS

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

IATA CODE: 4W
ICAO CODE: AJK

AFRAA MEMBERSHIP
Became member in 2018
Established in 1988

OWNERSHIP STRUCTURE
Privately Owned

COMMERCIAL PARTNERSHIP
N/A

DESTINATIONS SERVED
Domestic 2
Regional 7
Intercontinental 4

EMPLOYEES
Over 120

FLEET
Boeing 737-400F – 3



Mr. Amadu Simachew
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 0
Intra-Africa 22

EMPLOYEES
N/A

FLEET
Boeing 737-700 5
Boeing 737-800 1
Q400-DH8 2



Mr. Sanjeev Gadhia
Chief Executive Officer

ADDRESS

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

IATA CODE: 8V
ICAO CODE: ACP

AFRAA MEMBERSHIP
Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE
Fully owned by Kenyans

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

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

EMPLOYEES
N/A

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



**Eng. Ahmed Osman Mohamed
Ahmed Abu Shaira**

Chief Executive Officer

ADDRESS

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

IATA Code: J4

ICAO Code: BDR

AFRAA MEMBERSHIP

Became member in April 2016

OWNERSHIP STRUCTURE

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

COMMERCIAL PARTNERSHIP

Sudan Airways

DESTINATIONS SERVED

Domestic	8
Regional	5
International	3

EMPLOYEES

N/A

FLEET

B737-300	1
B737-500	3
B737-800	1
EMB ERJ 145	1



**Mr. Louis Georges
Njipendi Kuotu**

Chief Executive Officer

ADDRESS

Immeuble La Rotonde-
Boulevard de la liberte
BP 4852 Douala-Cameroun
Tel: +237 33 42 2010 /
33 42 2013
Fax: +33 42 2030 / 42 3015 /
42 2980 / 42 2985
<http://www.camair-co.cm/>

IATA CODE: QC

ICAO CODE: CRC

AFRAA MEMBERSHIP

Became member in 2012
Established in 2008
Commenced operations in 2011

OWNERSHIP STRUCTURE

100% by the Government
of Cameroon

COMMERCIAL PARTNERSHIP

Air France

DESTINATIONS SERVED

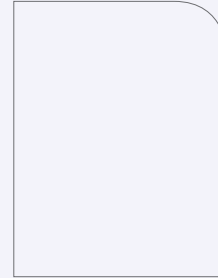
Domestic	7
Intra-Africa	3

EMPLOYEES

N/A

FLEET

Boeing 737-700	2
Boeing 767-300	1
MA60	2
Bombardier Q400	1



Mr. Mesfin Biru

Chief Executive Officer

ADDRESS

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

IATA CODE: C2

ICAO CODE: CEL

AFRAA MEMBERSHIP

Became member in 2011
Established in 2007

OWNERSHIP STRUCTURE

100% by the State of
Equatorial Guinea

COMMERCIAL PARTNERSHIP

Air France

DESTINATIONS SERVED

Domestic	4
Intra-Africa	11
Intercontinental	1

FLEET

ATR 42-320	1
ATR 42-500	1
ATR 72-500	2
B737-800	3
B767-300	1
B777-200	2



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: 100%

COMMERCIAL PARTNERSHIP
Air France

DESTINATIONS SERVED
Domestic 25

EMPLOYEES
365

FLEET
AIRBUS A320-200 2
Bombardier Q400 2



Mr. Andreas Kaiafas
Chief Executive Officer

ADDRESS

C/ENRIQUE NVO
S/N Amanda Building N°89 –
Malabo
Bioko Norte - Equatorial Guinea
Tel: +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 6

EMPLOYEES
N/A

FLEET
EMBRAER 135 3
EMBRAER 145 3



A STAR ALLIANCE MEMBER



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
Star Alliance

DESTINATIONS SERVED
Domestic 11
Intra-Africa 16
Intercontinental 52

EMPLOYEES
28,300

FLEET
A330-200 6
A330-300 4
A320 4
B737-800 29
B777-300 6
B787 6
EMBRAER 170 10



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
ASKY Airlines
Star Alliance

DESTINATIONS SERVED

Domestic	20
Intra-Africa	55
Intercontinental	45

EMPLOYEES
13,215

FLEET

A350	12
B787-9	4
B787-8	20
B777-300	4
B777-200	15
B767-300	6
B737-800	16
B737-700	10
B737-Max	4
Bombardier Q400	23



Mr. Anis Riahi
Chief Executive Officer

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

IATA CODE: 7A
ICAO CODE: XRC

AFRAA MEMBERSHIP
Became member in 2016
Established in 2015

OWNERSHIP STRUCTURE
Privately owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Intra-Africa

FLEET

B737-300	2
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Mr. Abdullahi Diria Warsame
Chief Executive Officer

ADDRESS
Panari Sky Centre
Mombasa Road
Nairobi, Republic of Kenya
Tel: +254 20 2325573
Fax: +254 20 2325467
Email: info@jubbaairways.com

IATA CODE: 3J
ICAO CODE: JUB

AFRAA MEMBERSHIP
Became a member in 2017
Established in 2008

OWNERSHIP STRUCTURE
Private owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	9
Intra-Africa	2
Intercontinental	2

EMPLOYEES
N/A

FLEET

Fokker 50	3
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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: 43.34%
KLM: 7.76%
Government: 48.9%

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED

Domestic	4
Intra-Africa	43
Intercontinental	10

EMPLOYEES
3,738

FLEET

Boeing 787-8	8
Boeing 737 - 300	3
Boeing 737 - 700	2
Boeing 737 - 800	8
Embraer 190	15



Eng. Joao Carlos Po Jorge
Chief Executive Officer

ADDRESS
PO Box 2060, Maputo,
Mozambique
Tel: +258 21 468710
Fax: +258 21 465134
www.lam.co.mz/en

IATA CODE: TM
ICAO CODE: LAM

AFRAA MEMBERSHIP
Became member in 1976
Established in 1936

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP

Ethiopian Airlines
Kenya Airways
South African Airways
TAAG Angola Airlines

DESTINATIONS SERVED

Domestic	11
Intra-Africa	4

EMPLOYEES
865

FLEET

Boeing 737-500	1
Bombardier Q400	3
Embraer 190	2



Mr. Abdulati El Meshki
Chairman

ADDRESS
Libyan Airlines
PO Box 2555
Omar Mukhtar Street, Tripoli
State of Libya
Tel: +218 21 361 4102
Fax: +218 21 361 4815

IATA CODE: LN
ICAO CODE: LAA

AFRAA MEMBERSHIP
Established in 1965
Became member in 1968

OWNERSHIP STRUCTURE
Government: 100%

DESTINATIONS SERVED

Domestic	10
Regional	4
International	9

FLEET

Airbus 320	3
Airbus 33	3
Bombardier CRJ900	4



Mrs. Amal Mint Maoulod
Chief Executive Officer

ADDRESS

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

IATA CODE: L6
ICAO CODE: MAI

AFRAA MEMBERSHIP
Established in 2010
Became member in 2015

DESTINATIONS SERVED

Domestic	3
Intra Africa	9
International	1

FLEET

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



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

ADDRESS

Cairo International Airport,
Terminal 1
4 Obour Buildings
Salah Salem St., Cairo
7 Aswan Square 7
Behind Atlas Hotel
Mohandseen – Giza – Egypt
Contact Info:
Inside Egypt 19415
Outside Egypt (+20) 2 26968000
www.nileair.com

IATA CODE: NP
ICAO CODE: NIA

AFRAA MEMBERSHIP
Established in 2012
Became member in April 2016

DESTINATIONS SERVED

Domestic	4
Intra-Africa	1
International	15

FLEET

A320-200	5
A321-200	2



Mr. Chokri Zarrad
Chief Executive Officer

ADDRESS

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

IATA CODE: BJ
ICAO CODE: LBT

AFRAA MEMBERSHIP
Established in 1989
Became member in 2017

OWNERSHIP STRUCTURE
Privately owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED

Domestic	6
Intra-Africa	1
International	14

EMPLOYEES
568

FLEET

A320-200	10
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Mr. Patrick Mwanri
Chief Executive Officer

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

IATA CODE: PW
ICAO CODE: PRF

AFRAA MEMBERSHIP
Became member in 2006
Established in 1991

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

COMMERCIAL PARTNERSHIP
Kenya Airways

DESTINATIONS SERVED
Domestic 12
Intra-Africa 3

EMPLOYEES
407

FLEET
ATR 72 5
ATR 42 2



Mr. Abdelhamid Addou
Chief Executive Officer

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

IATA CODE: AT
ICAO CODE: RAM

AFRAA MEMBERSHIP
Became member in 1977
Established in 1957

OWNERSHIP STRUCTURE
Moroccan State: 53.94%
Hassan II Fund: 44.1%
Private Investors: 3.20%

COMMERCIAL PARTNERSHIP
Iberia
Etihad Airways
Jet Blue
Qatar Airways
SN Brussels
Saudi Airlines

TAAG Angola Airlines
Kenya Airways
Turkish Airlines
Aeroflot
EgyptAir

DESTINATIONS SERVED
Domestic 18
Intra-Africa 29
International 54

EMPLOYEES
2,282

FLEET
ATR 72 6
Boeing 737-800 31
Boeing 737-700 6
Boeing 737-MAX 2
Boeing 747-400 1
Boeing 767-300 3
Boeing 787 9
Embraer E190 4



Ms. Yvonne Makolo
Chief Executive Officer

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

IATA CODE: WB
ICAO CODE: RWD

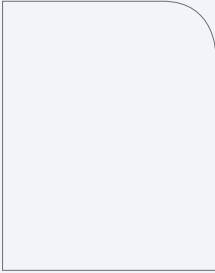
AFRAA MEMBERSHIP
Became member in 2009
Established in 2002

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Domestic 1
Intra-Africa 20
International 4

EMPLOYEES
1,367

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



Mr. Alex Avedi
Chief Executive Officer

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

IATA CODE: F2
ICAO CODE: XLK

AFRAA MEMBERSHIP
Became member in 2019
Established in 2004

OWNERSHIP STRUCTURE
Privately owned

COMMERCIAL PARTNERSHIP

DESTINATIONS SERVED
Domestic 16
Intra-Africa 2

EMPLOYEES
N/A

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

FLEET ON ORDER



Mr. Mohamed Aden Noor
Chief Executive Officer

ADDRESS
AIS Building, Wilson Airport
Nairobi, Kenya

IATA CODE: K3
ICAO CODE: SAQ

AFRAA MEMBERSHIP
Became member in 2016
Established in 2007

DESTINATIONS SERVED
Intra-Africa
Intercontinental

FLEET
Fokker 50
Fokker 100
B727-200
B747-400
A300



Mrs. Zukisa Ramasia
Ag. Chief Executive Officer

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

IATA CODE: SA
ICAO CODE: SAA

AFRAA MEMBERSHIP
Became member in 1994
Established in 1934

OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
Air Canada
Air Mauritius
Air New Zealand
Air Seychelles
Air India
All Nippon Airways
Asiana Airlines
Egypt Air
Ethiopian Airways
Etihad
Africa World Airlines

DESTINATIONS SERVED
Domestic 5
Intra-Africa 19
International 8

EMPLOYEES
4,889

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

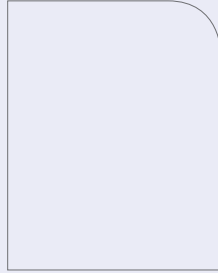
OWNERSHIP STRUCTURE
Government: 100%

COMMERCIAL PARTNERSHIP
LAM Mozambique Airlines
SA Airlink
Congo Express

DESTINATIONS SERVED
Domestic 12
Intra-Africa 5

EMPLOYEES
1,015

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



Mr. Yasir Timo Saows
Managing Director

ADDRESS

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

IATA CODE: SD
ICAO CODE: SUD

AFRAA MEMBERSHIP
Became member in 1968
Established in 1947

OWNERSHIP STRUCTURE
Government: 99%
Private: 1%

COMMERCIAL PARTNERSHIP

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

DESTINATIONS SERVED
Domestic 11
Intra-Africa 11
Intercontinental 9

EMPLOYEES
3,064

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

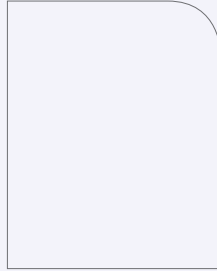
IATA CODE: VR
ICAO CODE: TCV

AFRAA MEMBERSHIP
Became member in 2014
Established in 1958

**OWNERSHIP
STRUCTURE**
Government: 100%

DESTINATIONS SERVED
Domestic 7
Intra-Africa 2
Intercontinental 7

FLEET
ATR 42-500 1
ATR 72-500 2
Boeing 737-300 1
Boeing 757-200 1



Mr. Adil Cherouati
Chief Executive Officer

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

IATA CODE: SF
ICAO CODE: DTH

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

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

DESTINATIONS SERVED
Domestic 53
International 6

EMPLOYEES
1,477

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



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**

DESTINATIONS SERVED
Domestic 9
Intra-Africa 10
Intercontinental 34

EMPLOYEES
3,781

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



Mr. Cornwell Muleya
Chief Executive Officer

ADDRESS
EagleAir Hangar
Complex,
Entebbe International
Airport – Old Airport
PO Box 431
Entebbe, Uganda
Tel: +256 754 355 860

IATA CODE: UR
ICAO CODE: UGD

AFRAA MEMBERSHIP
Became member in 2019
Established in 2018

**OWNERSHIP
STRUCTURE**
Government: 100%

**COMMERCIAL
PARTNERSHIP**

DESTINATIONS SERVED
Intra-Africa 7

EMPLOYEES
90

FLEET
Bombardier CRJ 900 2

FLEET ON ORDER
Bombardier CRJ 900 2
A330-Neo 2

Amadeus Airline Platform

amadeus

Creating a playground for **OPEN** innovation



You can follow us on:
AmadeusITGroup



amadeus.com/airlineplatform

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. Headquartered in Barcelona, Spain, Accelya has been working with the airline industry since 1976. Accelya partnered with IATA right from the introduction of BSP processing in the UK and, based on the success, it was introduced in other countries in Europe and across the world. Along the years Accelya has become leader in IATA's BSP Processing operations, currently being the data processing centre in more than 114 out of 180 BSP countries. Accelya was also the first to introduce the Sales Audit (Revenue Assurance) and Credit Card Processing and Settlement to the airline industry, becoming a leader in these areas.

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

Key contacts:

Roger Page-Morris

Regional Director - Sales & Account Management
Tel: +44 (0)1276 401223, Mobile: +44 (0)7775 884834
Email: roger.page-morris@accelya.com
accelya.com

Monica Ramchandani

Pre-Sales Manager EMEA - Commercial Solutions
Mobile: +33 6 21 52 36 41
Email: monica.ramchandani@accelya.com
accelya.com

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

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

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AIRBUS

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

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

Dedicated to assisting airlines enhance the profitability of their fleets, Airbus also delivers a

wide range of customer services in all areas of support, tailored to the needs of individual operators all over the world.

Employing around 55,000 staff world-wide, Airbus is a truly global enterprise with fully-owned subsidiaries in the United States, China, Japan, India and in the Middle East, and spare parts centres in Hamburg, Frankfurt, Washington, Beijing, Dubai and Singapore. Airbus also has engineering and training centres in Toulouse, Miami, Mexico, Wichita, Hamburg, Bangalore, Beijing and Singapore, as well as an engineering centre in Russia. There are also more than 150 field service offices around the world. Airbus also relies on industrial co-operation and partnerships with major companies all over the world, and a network of some 7,700 suppliers all around the world.

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

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Aero Industrial Sales Company, (AIS), located, since 1986, at the global aviation hub: The New York JFK International Airport, is an FAA AC 0056A / ASA-100 accredited distributor for commercial aviation spare parts, avionics, components, chemicals as well as GSE (Ground Support Equipment). Subjected to regular FAA/ASA-100 surveillance and audit, AIS maintains an 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 Johannesburg for an aileron because of a food truck damage, our location gives us global reach unmatched by many.

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Over the last few years, AIS has successfully undertaken major Initial Provisioning for Boeing 777 & 737 NG fleet as well as complete renovation of ground support and delivery of over 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 emphasizes that the 'African Economic Independence is through Interdependence'. It's not the unit price of the bolt you were quoted; as it's what it costs you on arrival at your door. We make that difference.

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amadeus

Travel powers progress. Amadeus powers travel. Amadeus' solutions connect travellers to the journeys they want through travel agents, search engines, tour operators, airlines, airports, hotels, cars and railways. We have developed our technology in partnership with the travel industry for over 30 years. We combine a deep understanding of how people travel with the ability to design and deliver the most complex, trusted, critical systems our customers need. We help connect over 1.6 billion people a year to local travel providers in over 190 countries.

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

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

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

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

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APG Network is the world's largest network for commercial and distribution services for airlines, providing its 200+ airline clients with a range of services aimed at increasing incremental revenue. With its headquarters in Paris, APG has a network of +110 worldwide offices, covering 176 countries across all continents. The 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 maximise an airline's distribution network with a comprehensive approach based on a tailored portfolio of solutions. APG has been a market leader in developing new distribution solutions for airlines, building on its roots as a GSA airline representation company, a service which still remains at the heart of its operation.

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

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

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

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

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

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

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

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

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ATR is the world number one regional aircraft manufacturer with its ATR 42 and 72 aircraft the best-selling aircraft in the less than 90-seat market segment. In 2018 the company had a turnover of US\$1.8 billion. The unifying vision of the company's 1,400 employees is to help everyone, no matter where they are in the world, to connect and develop in a responsible manner. Thanks to the efficiency of turboprop technology and the benefits of the

company's focus on continuous innovation, ATRs open more than 100 new routes every year, burn 40% less fuel and emit 40% less CO² than regional jets. For all of these reasons, ATRs have been chosen by some 200 companies in 100 countries around the world. ATR is a joint-venture between Airbus and Leonardo.

For more information, please visit <http://www.atr-aircraft.com> and www.atr-intolife.com

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

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

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

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

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

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

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



Boeing is the world's largest aerospace company and leading manufacturer of commercial jetliners and defense, space and security systems. A top U.S. exporter, the company supports airlines and U.S. and allied government customers in 150 countries.

Boeing is organised into three business units: Commercial Airplanes; Defense, Space & Security; and Boeing Global Services, which began operations 1 July 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.

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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
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CHAMP Cargosystems provides the most comprehensive range of integrated IT solutions and distribution services for the air cargo transport chain. The portfolio spans cargo management systems, messaging services, and eCargo solutions. These include applications to meet customs and security requirements, quality optimisation 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

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

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

For further information see: www.champ.aero

CHAMP Cargosystems – Connected thinking for the air cargo community.

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

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

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

These core values have established the company reputation as a reliable and customer-focused marketer in the industry.

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

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

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

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



DERICHEBOURG

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

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

Industrial Processes

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

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Assembly / Manufacturing

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

Ground Handling Support

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

Supply Chain Consolidation / Logistics

Supply chain monitoring
 Coordination of industrial partners
 Flow management, repair circuit management
 Management & replacement of parts

After-Sales Support

(Part M agreement – FR MG.0236)
 Customer representation & Delivery assistance
 Continuing airworthiness
 Aircraft transition
 Training & Knowledge transfer

For further information please visit
<http://derichebourg-atis.com/en/home.html>



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

with more than 100 customers from all over the world. For the E-Jets programme alone, Embraer has logged more than 1,800 orders and 1,500 aircraft have been delivered. Today, E-Jets are flying in the fleet of 80 customers in 50 countries. The versatile 70 to 150-seat family is flying with low-cost airlines as well as with regional and mainline carriers.

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

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

We are committed to providing customers with cost-effective approaches to service, developing

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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 partner airlines 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.

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.

Hahn Air is your expert for global, secure sales and

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

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

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

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

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



Lufthansa Consulting is an aviation and management consulting company, which is dedicated to assist international clients from the aviation sector and related industries to meet the challenges of the future successfully. Since 1988 the company has provided services and solutions to the air transportation industry in more than 3,000 projects worldwide and is a subsidiary of the Lufthansa Aviation Group.

Lufthansa Consulting is in the unique position of offering comprehensive consultancy and expertise to aviation specific client groups: air carriers, airport authorities, civil aviation authorities, governments, investors, financial institutions, manufacturers and aviation related entities. Our clients benefit from customised business solutions designed by consultants with a

global understanding of the industry and in-depth knowledge of factors which are critical for success.

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

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

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

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

Innovation and progress

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

Solutions for all airline business processes

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

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carriers all benefit from solutions that are customised to their respective needs.

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

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

The portfolio is divided into different categories:

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

Lufthansa Systems GmbH & Co. KG at a glance

Company headquarters Raunheim near Frankfurt/Main, Germany

Executive management: Olivier Krueger and Dr. Thomas Wittmann

Employees: Around 2,200 worldwide

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

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

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

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

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

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Portfolio

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

Business jets

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

Narrowbodies

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

Widebodies

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

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

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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.

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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.

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Palma Holding

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

Palma Holding's major affiliates are:

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

In 2015, Palma Capital was one of the lead arrangers of USD 400million 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 USD250 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 launched a restructuring action that gave rise to the

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recentralisation of the group with 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.

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

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

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Christophe Ritter
Managing Partner

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Predictive Mobility Holdings Ltd

Email: christophe.ritter@predictivemobility.com



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

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

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

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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Rolls-Royce International Ltd, HQ Building,
7th Floor, SW, PO Box 144294, Abu Dhabi, UAE

Sabre

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:

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- 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 travellers, 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.



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

Accenture (NYSE: ACN) is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital,

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

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

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

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

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

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

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



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

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

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

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



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

At present, we provide financial technology to more than 300,000 customers around the world, including more than 95 international airlines. Wirecard also has effective connections and partnerships with all key industry-specific providers in the travel segment. Wirecard is furthermore a strategic partner of both IATA and AFRAA.

Wirecard is unique in offering a portfolio featuring a flexible combination of technology, services and banking solutions, while also operating our own acquiring service for airline customers, including e-commerce, BSP, ATO/CTO, Call Center and

POS. We currently accept more than 100 different transaction currencies and facilitate direct settlement in all major currencies. In addition to our Principal Membership with Visa and Mastercard, acquiring license agreements are also in place with JCB, Discover/Diners and UnionPay, allowing us to offer global acquiring services to our airline customers. We also offer PSP services for AMEX and UATP. Banking services such as foreign exchange management supplement the outsourcing of financial processes.

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

Our flexible end-to-end solutions are integrated in many airline booking and reconciliation systems such as Amadeus, Sabre, Navitaire, SITA and AeroCRS etc. This range of versatile integration options and plug-ins can be easily added to booking platforms and corporate processes. With our solutions, all available via a single interface, airlines are therefore able to simplify and fully digitise their processes.

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ANNEX 1: AFRAA member airlines performance

	AB Aviation	Afriqiyah Airways	Air Algérie	Air Botswana	Air Madagascar	Air Mauritius	Asky Airline	Carnair Co.	Congo Airways	EgyptAir	Ethiopian Airlines	Kenya Airways	Mozambique Airlines	Nile Air	Nouvelair Tunisie	Precision Air	Royal Air Maroc	RwandAir	South Africa Airways	Tang Angola	Tassili Airlines	
TRAFFIC DATA																						
Domestic Passengers (000)	52	70	2,030	75	384	186	0	244	344	1,584	1,814	703	435	326		226	1,107	19	1,614	636	852	
Regional Passengers – Within Africa (000)	14	0	437			298	559	107	15	995	4,736	2,311	104	0	0	244	1,582	929	2,942	363	0	
Intercontinental Passengers (000)	0	446	4,128	178	95	1,211	0	0	0	6,157	4,965	1,103	0	717	648	0	4,653	187		529	91	
Total Passengers (000)	66	516	6,595	253	479	1,695	559	351	359	8,736	11,515	4,117	539	1,043	648	470	7,342	1,135	4,556	1,	943	
Domestic Freight	610	107	652	60	1,273	122		107	866	619	355	934	3,480	0			997	19	18,497	4,343		
Regional Freight – Within Africa	263	7	369	395	2,053	16,220		7	0	7,463	58,712	18,054	548	0	0		5,231	867	91,719	450		
Intercontinental Freight	0	0	19,090			23,865		0		123,429	343,652	38,534	0	900	10		21,585	187		67		
Total Freight	873	114	20,111	455	3,326	40,207		114	866	131,511	402,719	57,522	4,028	900	10		27,813	1,073	110,216	4,860		
Revenue Passenger Kilometre – RPK (000)		656,698	8,853,559	106,022	881,276	7,366,000	635,421		415,272	19,654,223	42,622,068	11,027,595	53	1,063,704	951,176	208,692	16,817,620	2,228,806	16,085,576	4,364		
Available seat Kilometre – ASK (000)		860,177	11,950,347	153,564	1,443,362	9,339,000	1,043,275		668,696	27,503,587	57,842,245	14,227,297	77	1,522,518	1,193,883	394,886	23,186,181	3,785,988	22,196,465	9,442	1,148,669	
Passenger Load Factor – PLF (%)		76	74	69	61	79	61		62	71	74	78	73	70	80	53	73	59	73	46	58	
Freight and mail Tonne Kilometre – FTK (000)			8,005			205,000				434,542	2,197,515	30,564	4,571	213			97,966			80,160	0	
Revenue Tonne Kilometre – RTK (000)			804,825	11,776	116,661	873,000			40,594	2,357,967	7,522,533	1,151,991	53,000	106,584	81,828		1,779,728		2,115,684	472,952	0	
Available Tonne Kilometre – ATK (000)			1,095,947	16,892	169,334	1,376,000			96,061	4,118,224	11,877,545	1,961,794	77,000	175,193	103,288		3,482,180		3,780,204	1,371	0	
Weight Load Factor – PLF (%)			73	70	69	64		42	42	57	63	59	69	61	79		51		56	35	0	
EMPLOYEE DATA																						
Pilots	8		548	28	54	204		31	36	913	784	418	48	62	75	50	529	86	661	124	112	
Cabin crew	6		1,238	33	161	571		84	57	2,181	2,144	673	127	121	221	35	212	260	1,547	473	141	
Engineers	6		1,278	40	146	128		52	37	4,566	2,348	528	120	106	7	99	251	57	2,615	394	217	
Traffic/Marketing	15		2,795	36	73	433		155	43	1,450	1,707	468	334	31	64	54	802	60	424	758	95	
Other	10		2,811	277	378	1,612		3,066	257	19,190	6,232	1,651	236	450	201	169	488	904	2,646	1,315	912	
Total Employees	45		8,670	414	812	2,948		3,388	430	28,300	13,215	3,738	865	770	568	407	2,282	1,367	7,893	3,064	1,477	
DESTINATIONS SERVED																						
Domestic	3	6	30			1		7		11	22	4	11	4	8		18	1		11	53	
Regional – Within Africa	3		9			7		7		16	58	43	4	0	2		29	20		11		
Intercontinental		9	34			17		0		70	62	10	0	15			54	4		9	6	
FLEET IN OPERATION	3		59	6	10	15		6	6	64	114	36	5	7	10	7	62	12	49	13	15	

ANNEX 2: AFRAA member airlines fleet – 2019

Airline	Fleet Type																																							
	A220	A300	A319/320/321	A330	A340-A350	B727	B737-200	B737-300/400/500	B737-600/7800	B737-Max	B747-400	B757-300	B777-300	B787-9	MD-80/82/90	MD-11	CRJ-900	CRJ-1000	CRJ-1200	ERJ-120/135/145/170/175/190/195	EMB-120/120	B/Ae 146/100/200/300	Fokker F27	Fokker F50/100	Dash-8 Q2/3400	ATR 72	ATR 42	DHC-6	Domier	Ilyushin IU/KJ	Shorts 360	Lockheed	Cessna	Xian MA60	HS Barron 55	Caravan	AN-12/26	Total		
1	AB Aviation																			1	3																		4	
2	Afriqiyah Airways	1	11	3																																				15
3	Air Algérie			12	31																														1					59
4	Air Botswana																																						5	
5	Air Burkina																																						5	
6	Air Djibouti																																						1	
7	Air Madagascar																																						10	
8	Air Mauritius		2	4	5																																		14	
9	Air Namibia		4	2																																			10	
10	Air Senegal		2	1																																			5	
11	Air Tanzania																																						7	
12	Air Zimbabwe		2				2																																6	
13	Allied Air																																						3	
14	Asky Airline																																						9	
15	Astral Aviation																																						5	
16	Badr Airline																																						6	
17	Camair Co.																																						5	
18	Celba																																						9	
19	Congo Airways		2																																				5	
20	Cronos Airlines																																						6	
21	EgyptAir		4	10																																			65	
22	Ethiopian Airlines																																						114	
23	Express Cargo																																						2	
24	Jubba Airways																																						3	
25	Kenya Airways																																						36	
26	Mozambique Airlines																																						5	
27	Lybian Airlines																																						18	
28	Mauritania Airlines																																							6
29	Nile Air																																						7	
30	Nouvelair Tunisie		10																																				10	
31	Precision Air																																						9	
32	Royal Air Maroc																																						62	
33	RwandAir																																						12	
34	Safarilink																																						4	
35	SAC Ltd																																						7	
36	South Africa Airways		17	11	16																																		47	
37	SA Express																																						24	
38	Sudan Airways		1	2																																			6	
39	TAAG Angola																																						13	
40	TACV																																						3	
41	Tassili Airlines																																						15	
42	Tunisair																																						29	
43	Uganda Airlines																																						2	
Totals		2	2	89	49	35	2	3	16	177	7	4	2	13	35	47	0	2	10	4	12	51	3	0	0	8	22	11	36	41	0	0	1	1	1	0	687			

ANNEX 3: AFRAA member airlines commercial partnerships – 2019

	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	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I					
Royal Air Maroc	I	I	I	IS	C	I	I	ISC	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	C	IS	I	I	I	I	I	I	I	I	IS					
Air Botswana	I	I	I	IS	IS	I	IS	I	I	IS	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I				
Ethiopian Airlines	I	IS	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I				
Kenya Airways	I	C	I	I	I	I	I	IC	I	I	I	I	I	I	I	I	C	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I				
Air Madagascar	I	I	I	I	I	I	ISC	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I				
Air Mauritius	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I			
EgyptAir	I	ISC	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I			
Precision Air	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I		
South African Airways	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I		
Air Namibia	I	I	I	C	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I		
Air Tanzania	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Air Tanzania	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I		
LAM Mozambique	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Tunisair	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Air Zimbabwe	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
RwandAir	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Air Burkina	I	I	I	IS	C	I	I	I	I	IS	I	I	I	IS	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Afriqiyah	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Asky Airlines	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Astral Aviation	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Camair - Co	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Ceiba Intercontinental	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Libyan Airways	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
South African Express	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Starbow Airlines	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Sudan Airways	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
TAAG Angola	I	C	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
TACV Airlines	I	IS	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Tassili Airlines	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Badr Airlines	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Congo Airways	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Nile Air	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Jubba Airways	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Nouvelair	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	
Mauritania Airlines	I	IS	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I

AFRAA member airlines two-letter codes

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