



AFRICA PARTNERSHIP CONFERENCE 2016

*Championing the power of connectivity in Africa
from a cargo perspective*

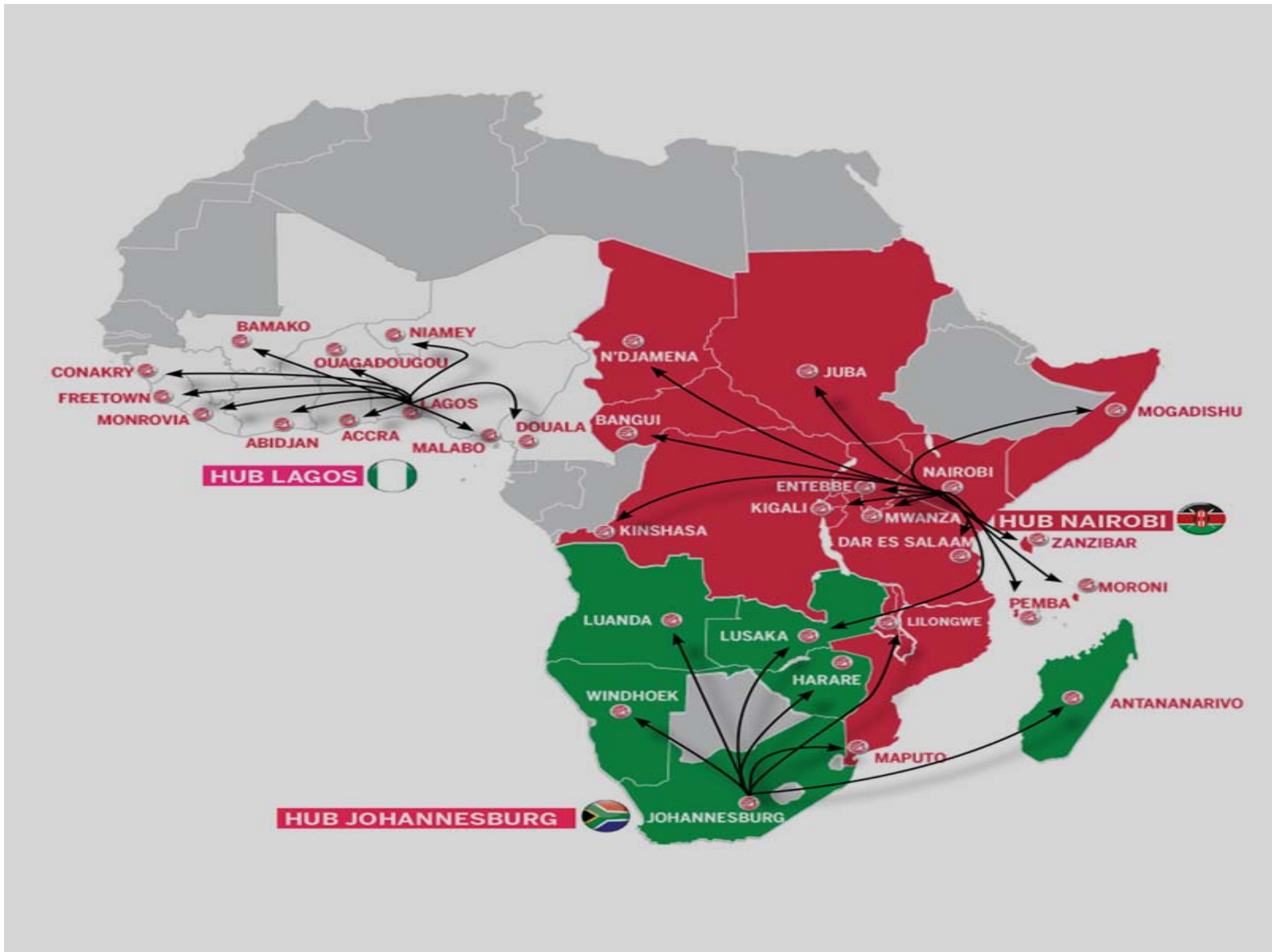


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Who we are – What we do



- **All-Cargo Airline** which is based at JKIA, Nairobi - Kenya and operational for 16 years. Designated by Government of Kenya as a National carrier.
- **Strategic Partnership** with Network Airline Management (UK) with a combined fleet of 1 x B747-400F + 3 x MD-11F + 2 x B727-200F + 1 x DC9-34F + 1 x F27. (Fleet on Order: B737-400F)
- **Interlines** with 6 African Airlines in addition to 16 Airlines from Europe, Middle East & Asia.
- **European Hub:** Liege (Belgium)
- **African Hub:** Nairobi. (Lagos & Johannesburg new hubs)
- **Scheduled Freighter Network:** 20 Destinations
- **Charter Network:** 50 Destinations
- **Membership:** AFRAA, IATA-ICH, WCA



OVERVIEW OF INTRA AFRICA NETWORK



➤ Existing Intra-African Hubs

- **East Africa:** Nairobi & Addis Ababa.
- **South Africa:** Johannesburg.
- **West Africa:** Lagos & Accra
- **North Africa:** Casablanca & Cairo.
- **Indian Ocean:** None (Potential of Mauritius)

➤ Cargo Airlines operating on the Intra African Network

- **East Africa:** Astral Aviation, Ethiopian & Kenya Airways.
- **South Africa:** South African Airlines Cargo.
- **West Africa:** Allied Air & DHL Aviation.
- **North Africa:** Egyptair & Royal Air Maroc.
- **Indian Ocean:** Air Mauritius

Rank	City	Country	Airport	Iata Code	cargo 2015	cargo 2014	%
1	Cairo	Egypt	Cairo International Airport	CAI	318 425	292 224	8,979%
2	Johannesburg	South Africa	OR Tambo International Airport	JNB	311 576	286 358	8,809%
3	Nairobi	Kenya	Jomo Kenyatta International Airport	NBO	243 873	259 143	-5,89%
4	Addis Ababa	Ethiopia	Addis Ababa Bole International Airport	ADD	208 620	175 636	16,98%
5	Lagos	Nigeria	Murtala Muhammed Airport Two (MMA2)	LOS	169 878	174 438	-2,61%
6	Kinshasa	Congo (Dem Re)	Aéroport de Kinshasa/NDjili	FIH	168 586	20 808	-3,25%
7	Casablanca	Morocco	Aéroport Mohammed V	CMN	60 448	50 072	20,72%
8	Entebbe	Uganda	Entebbe International Airport	EBB	55 022	53 502	2,82%
9	Plaine Magnien	Mauritius	SSR International Airport	MRU	54 836	54 681	0,28%
10	Accra	Ghana	Kotoka International Airport	ACC	50 807	54 388	-6,58%
11	Algiers	Algeria	Aéroport d'Alger Houari Boumediène	ALG	37 515	36 598	2,51%
12	Khartoum	Sudan	Khartoum International Airport	KMT	36 654	28 660	27,88%
13	Dakar	Senegal	Aéroport International Léopold Sédar Senghor	DKR	35 378	30 667	15,36%
14	Saint-Denis	La Reunion	Aéroport de la Réunion Roland Garros	RUN	32 084	32 480	-1,32%
15	Calabar	Nigeria	Margaret Ekpo Int'l Airport Calabar	CBQ	25 234		
16	Tunis	Tunisia	Aéroport International de Tunis Carthage	TUN	22 628	18 542	22,04%
17	Dar Es Salaam	Tanzania (U nite)	Julius Nyerere International Airport	DAR	22 014	21 255	3,57%
18	Abidjan	Cote D'Ivoire	Aéroport Felix Houphouët Boigny	ABJ	20 724	21 067	-1,38%
19	Douala	Cameroon	Aéroport International de Douala	DLA	18 224	19 836	-8,13%
20	Brazzaville	Congo	Aéroport international de Brazzaville-Maya-Maya	BZV	16 686	18 300	-8,82%
21	Lusaka	Zambia	Kenneth Kaunda International Airport	LUN	15 524	10 577	46,77%
22	Libreville	Gabon	Aéroport International Léon-Milla	LBV	15 276	18 457	-21,48%
23	Lome	Togo	Aéroport de Lomé-Tokoin	FWL	12 155	9 670	25,70%
24	Pointe Noire	Congo	Aéroport de Pointe Noire	PNI	11 862	16 880	-29,58%
25	Eldoret	Kenya	Eldoret Airport	EDL	11 636	10 456	11,29%
26	Durban	South Africa	King Shaka International Airport	DUR	11 082	9 014	23,05%
27	Antananarivo	Madagascar	Antananarivo Airport - Ivato	TNR	10 591	12 533	-15,50%
28	Victoria	Seychelles	Seychelles International Airport	SEZ	10 086	8 388	20,58%
29	Maputo	Mozambique	Maputo International Airport	MPM	10 046	9 092	10,49%
30	Kano	Nigeria	Mallam Aminu Kano International Airport	KAN	9 524	5 663	68,18%
31	Ouagadougou	Burkina Faso	Aéroport de Ouagadougou	OUA	8 539	7 185	18,84%
32	Kigali	Rwanda	Kigali International Airport	KGL	7 882	7 906	-0,30%
33	Port Harcourt	Nigeria	Port Harcourt International Airport	PHC	7 785	6 486	20,03%
34	Bamako	Mali	Aéroport International de Bamako-Sékou	BKO	7 724	8 680	-11,13%
35	Borg El Arab	Egypt	Borg El Arab Airport	HBE	7 462	6 588	13,27%
36	Abuja	Nigeria	Nnamdi Azikiwe International Airport	ABV	7 211	10 880	-34,38%
37	Cotonou	Benin	Aéroport International de Cotonou	COO	7 071	7 595	-6,90%
38	Yaoundé	Cameroon	Yaounde Nsimalen International Airport	MSI	5 378	5 062	6,24%
39	Conakry	Guinea	Aéroport de Conakry G'Bessia	CKY	5 104	5 948	-14,19%
40	Mombasa	Kenya	Moi International Airport	MBA	4 664	4 554	2,35%
41	Bangui	Central African	Aéroport de Bangui M'Poko	BGF	4 133	4 555	-9,26%
42	Port Elizabeth	South Africa	Port Elizabeth National Airport	PLZ	3 828	6 470	-40,06%
43	Kilimanjaro	Tanzania (U nite)	Kilimanjaro International Airport	JRO	3 203	3 358	-4,62%
44	Nairobi	Kenya	Wilson Airport	WIL	3 182	3 944	-18,32%
45	Bujumbura	Burundi	Aéroport International de Bujumbura	BJM	2 612	2 884	-9,43%
46	Nouakchott	Mauritania	Aéroport de Nouakchott	NKC	2 484	3 704	-32,75%
47	Dzaoudzi	Mayotte	Dzaoudzi Pamandzi International Airport	DZA	2 376	2 271	4,62%
48	Nyala	Sudan	Nyala Airport	NYL	2 119	4 345	-51,29%
49	Mwanza	Tanzania (U nite)	Mwanza Airport	MWZ	1 960	2 144	-8,58%
50	Banjul	Gambia	Banjul International Airport	BJL	1 846	1 860	-0,75%



- **Mauritius** has the potential of becoming the Cargo-Hub between Asia - Africa due to its **geographical location** and **dual-membership** of COMESA / SADC.
- **Greater Investments** required in cargo-infrastructure, cargo aircrafts and value-addition, along with collaboration with Airports and Customs.
- Existing Cargo Hubs in UAE (DXB) & EUROPE (CDG, AMS, FRA) offer immense advantages in **cost, connectivity, network and liberalization**.
- **Air Mauritius** has to take the lead as the National carrier and embrace strategic partnerships to develop the HUB.
- **Govn of Mauritius** has to **promote liberalization** in the aviation sector and **encourage foreign investment** in developing the cargo infrastructure

POSITIVE STEPS ON INTRA AFRICAN SECTOR



- **Liberalization:** Creation of “**Single African Air Transport Market**” in 2017 by 20 African countries will improve market access, connectivity and new traffic.
- **Regional Trade:** Creation of **Tripartite Free Trade Area (Tripartite FTA)** between 26 African countries. (632 million people / 57% of Africa’s population / GDP of US\$ 1.3 Trillion / 58% of Africa’s GDP) will boost regional trade.
- **Infrastructure:** Development of new cargo terminals / PPP’s
- **Middle Class:** Growth in the Middle Class population (300M / 35%) and role of e-commerce and mobile pay.
- **Lobbying:** AU, AFCAC, AFRAA, ICAO & IATA

Conclusion



- **INTRA-AFRICA** sector has the highest growth rate (10-15%pa) and offers immense opportunities for African airlines. Asia-Africa trade is estimated to reach \$1.5 trillion by 2020.
- **HUB's** of Johannesburg, Nairobi, Addis Ababa, Lagos and Cairo offer good opportunities and connectivity to their domiciled airlines. Mauritius has the advantage of being the cargo hub for Asia - Africa.
- **CHALLENGES** do exist for African airlines however the **OPPORTUNITIES** of further liberalization and increase in regional trade will boost the intra-African sector.
- **AFRICAN AIRLINES** will need to invest in more freighters and expand into new regional markets, as the intra African sector will offer better yields and profitability.

Welcome to AFRICA



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