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Anti-trust Guidelines



The following types of agreements are strictly prohibited:

- Any collective agreement concerning prices or charges for airline services;
- Any collective agreement allocating markets, territories, customers, suppliers or agents;
- Any collective agreement relating to prices or charges to be paid to suppliers, etc.
- Any agreement that is intended to, or in operation is likely to induce airlines or their suppliers or agents to engage in anticompetitive behavior, etc.



Anti-trust Guidelines



The exchange of information of the following types of information is for example prohibited:

- Individual airline rates, charges or surcharges;
- Individual airline costs;
- An individual airline's intentions regarding increasing, reducing or reallocating aircraft capacity (including entering or exiting routes);
- An individual airline's intentions regarding charging for certain products or services or changes to the existing charges for such products or services;
- Information on individual airlines customers; and
- Any other sensitive commercial or proprietary information that the company would not disclose in the absence of an express or implied agreement to exchange such information for the purpose of reducing or restricting competition in the airline industry.



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IATA Opening and Welcome

**Director General
IATA**

Willie Walsh





Government of Ethiopia

**State Minister of
Ethiopian Transport and
Logistics**

H.E. Mr. Dhenge Boru





Ethiopian Airlines

Chief Executive Officer
Ethiopian Airlines
Group

Mesfin Tasew





**Federal Aviation
Administration (FAA)**

**Chief Operating Officer
Federal Aviation
Administration (FAA)**

Timothy Arel



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African Civil Aviation Commission

**Secretary General
AFCAC**

Adefunke Adeyemi





IATA Economic Outlook

**SVP, Sustainability and
Chief Economist**

Marie Owens-Thomson



Focus Africa Aviation Update and Outlook

Marie Owens Thomsen

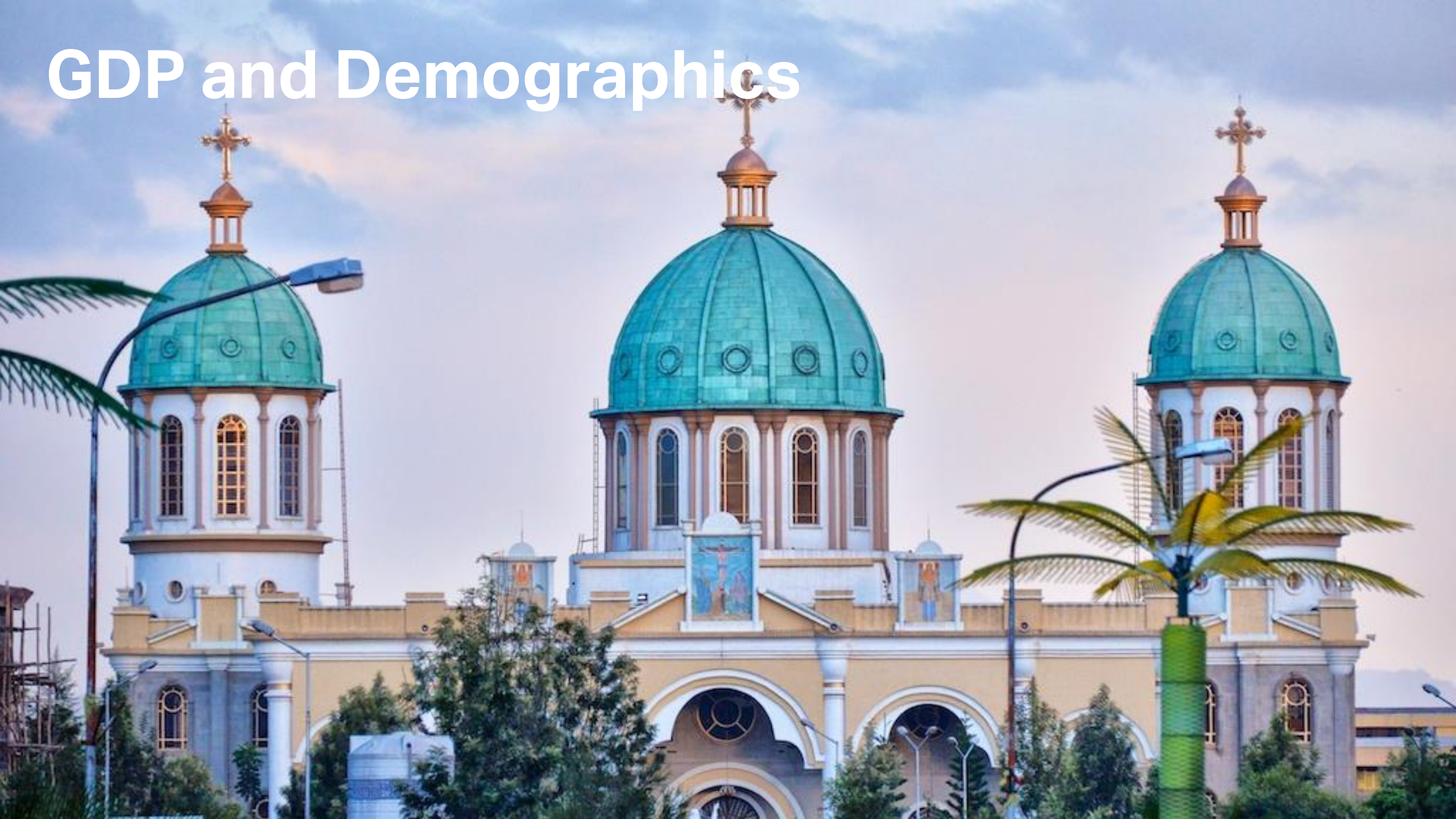
Senior VP & Chief Economist
IATA Sustainability & Economics

20 June 2023

Addis Ababa, Ethiopia



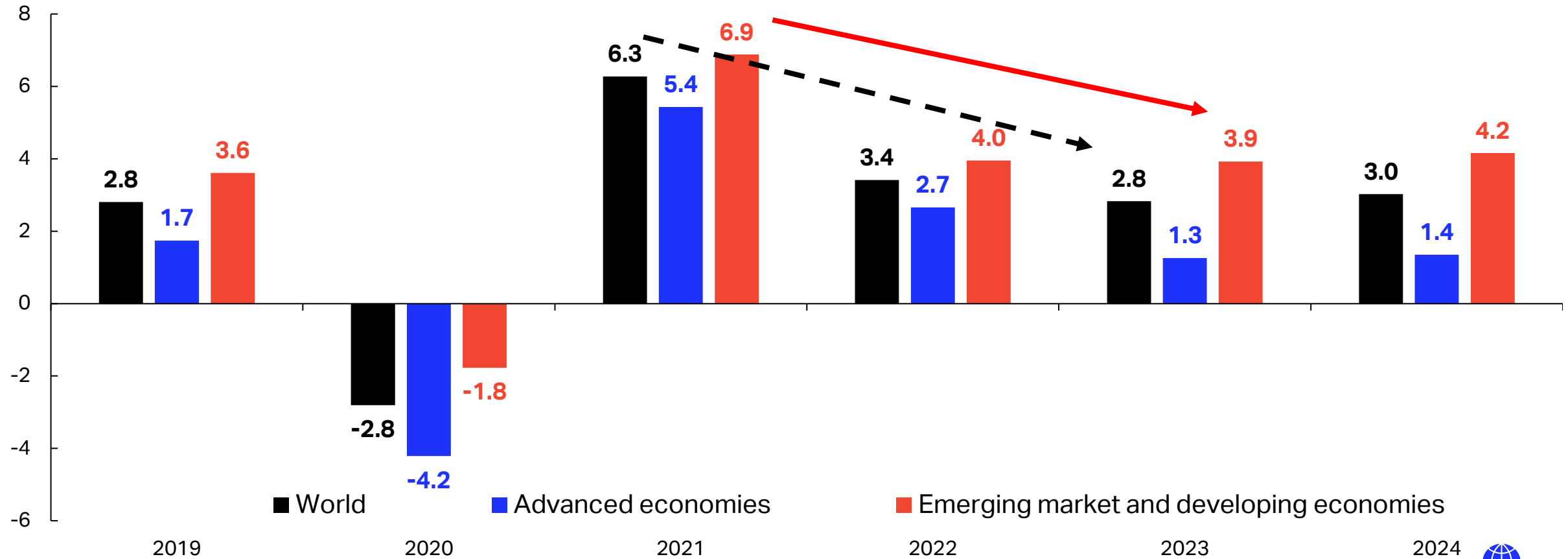
GDP and Demographics



The big slowdown



Real GDP growth, %, year-on-year

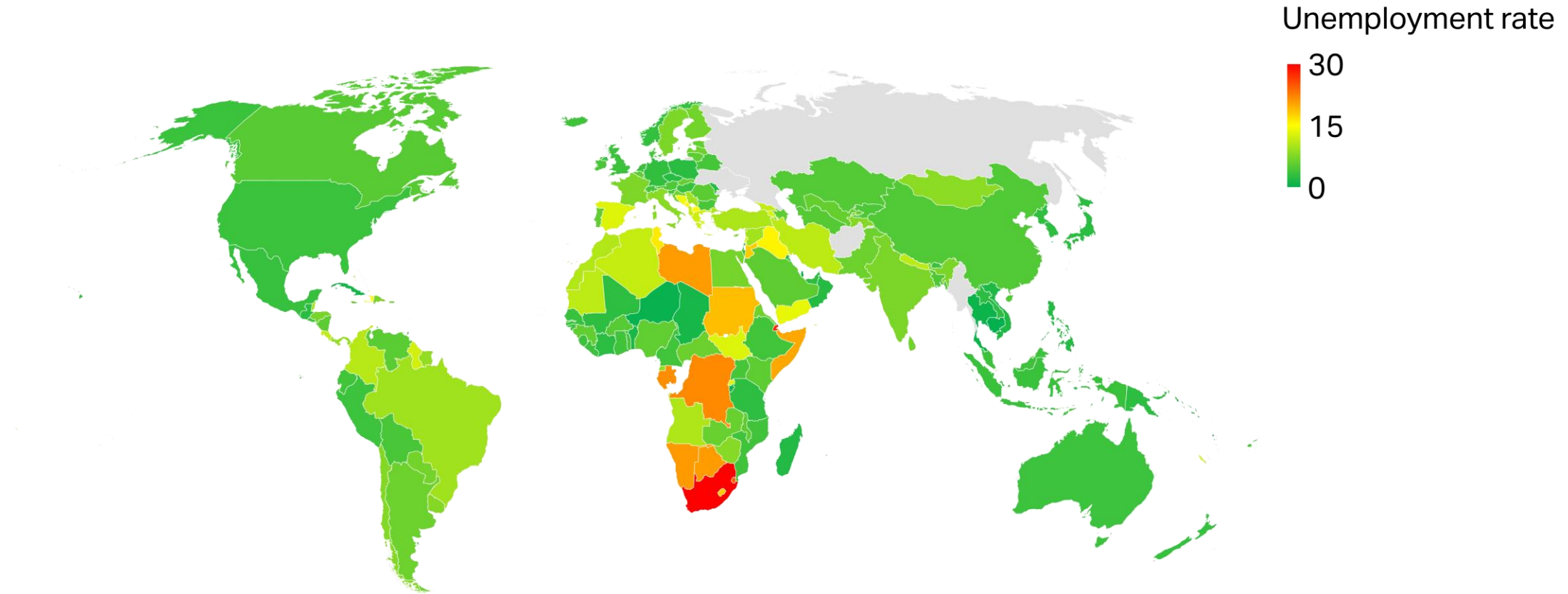


Areas of high unemployment in Africa

while advanced economies see record low unemployment rates



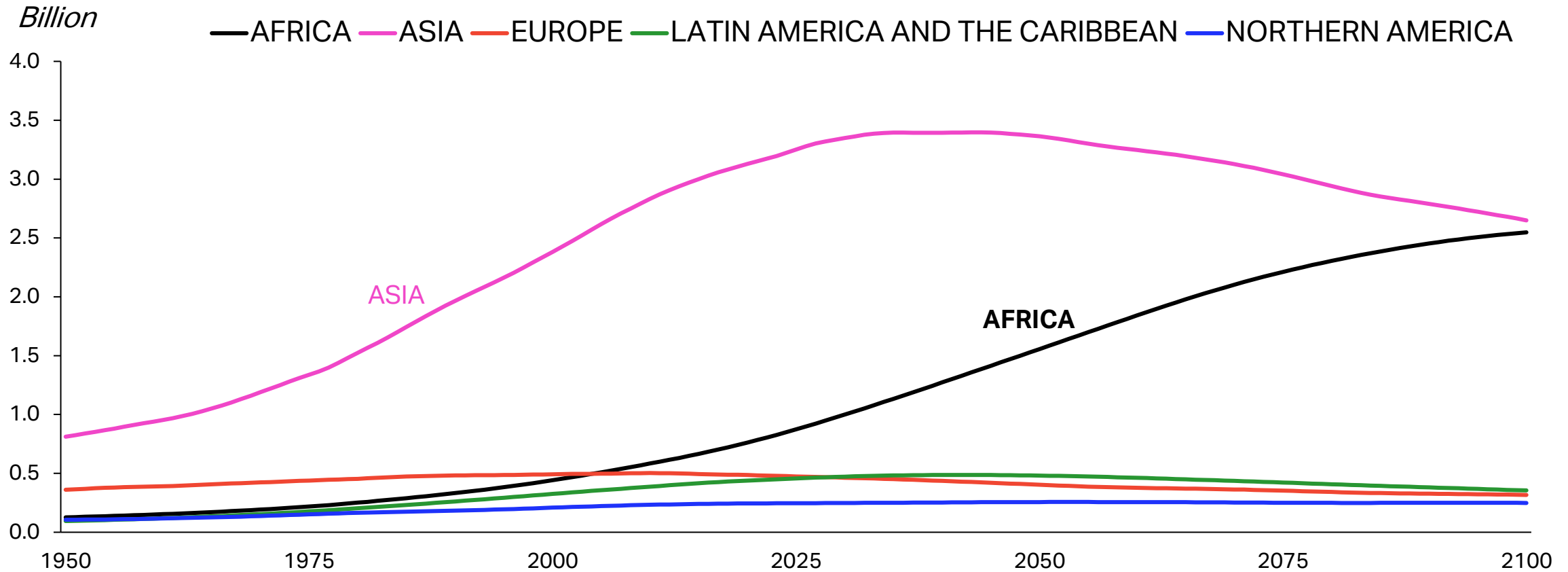
Unemployment Rate, % of labor force, 2022



Africa: highest population growth



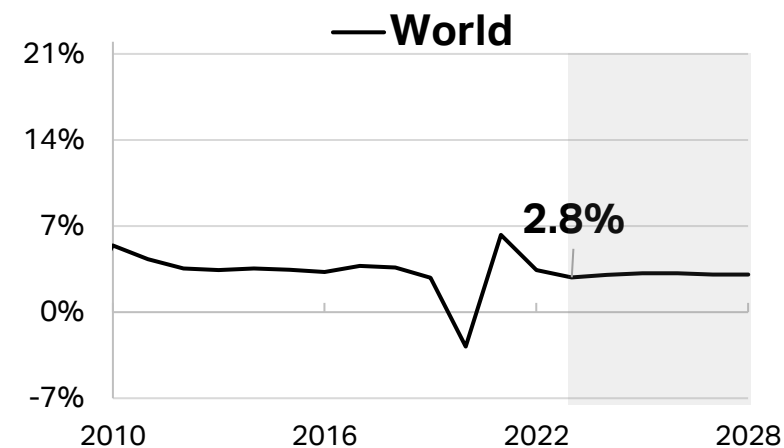
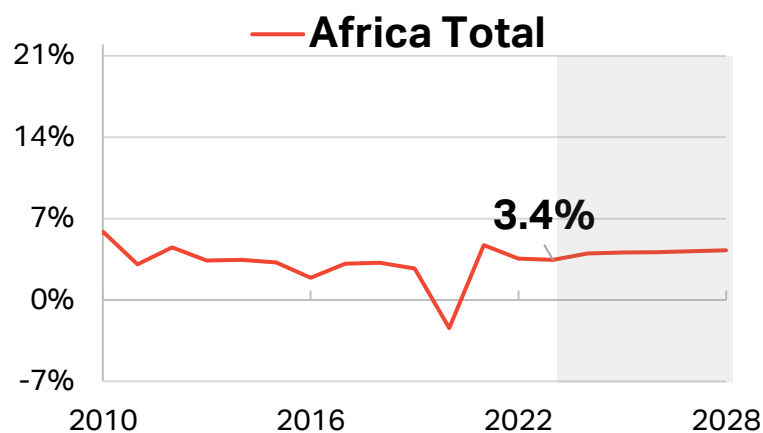
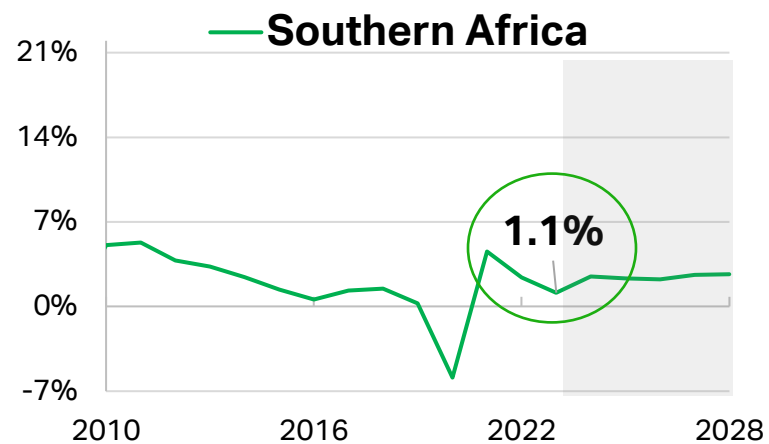
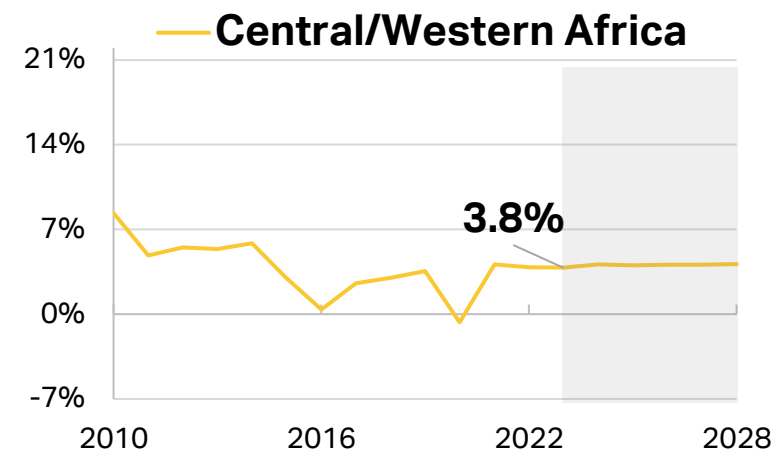
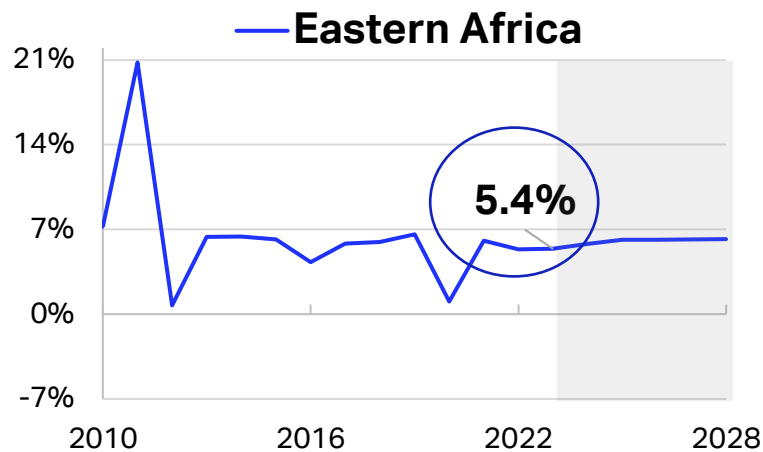
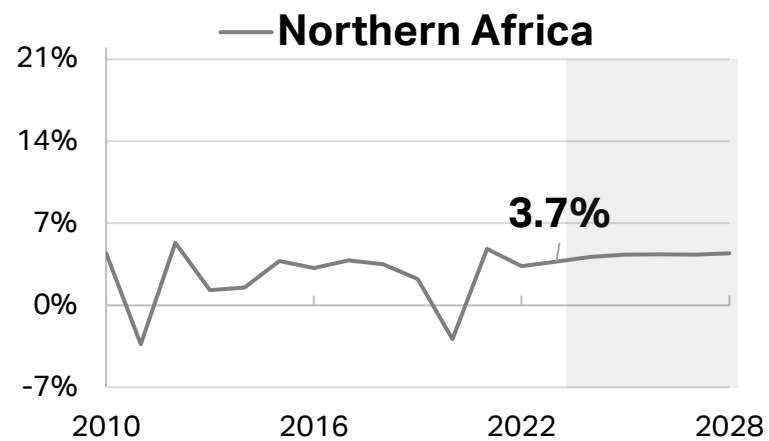
Working-age Population



Eastern Africa leads



Real GDP growth by region, %, year-on-year



Notes: The shaded area represents forecasts, and the forecasted growth rate for 2023 is labelled.

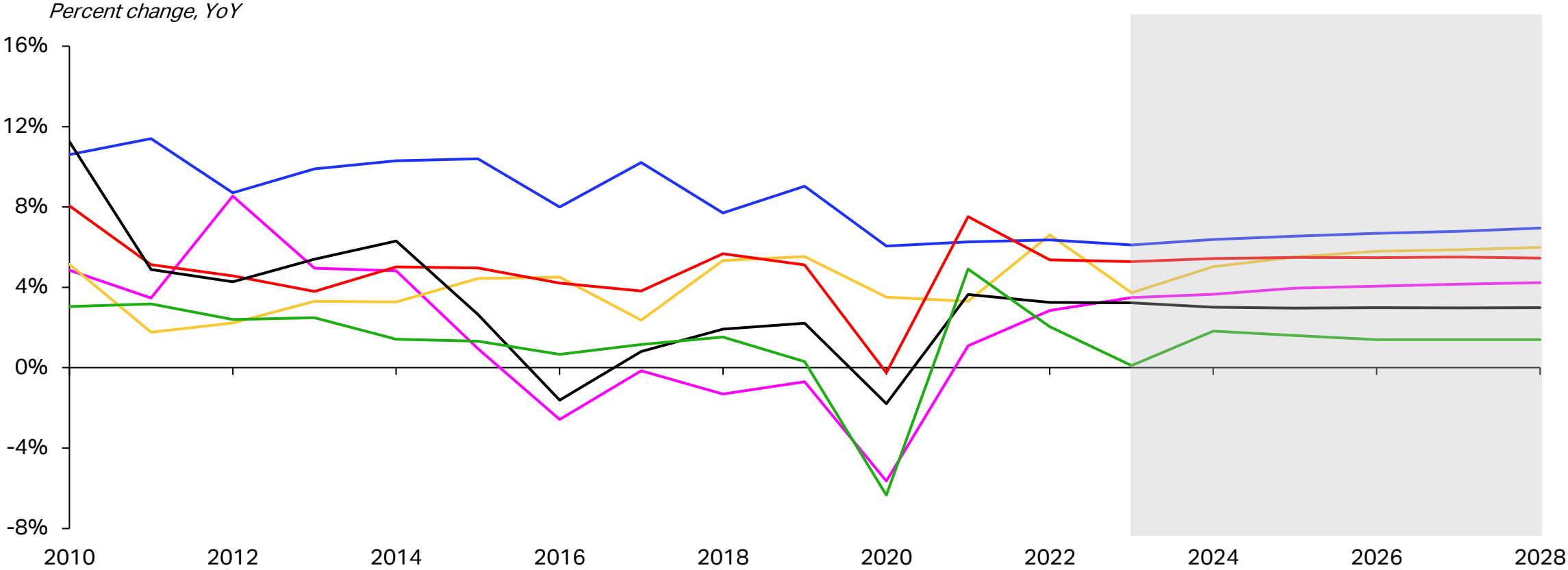


Ethiopia, Kenya, and Egypt are ahead



Africa: GDP growth in selected countries, %, YoY

— Angola — Egypt — Ethiopia — Kenya — Nigeria — South Africa



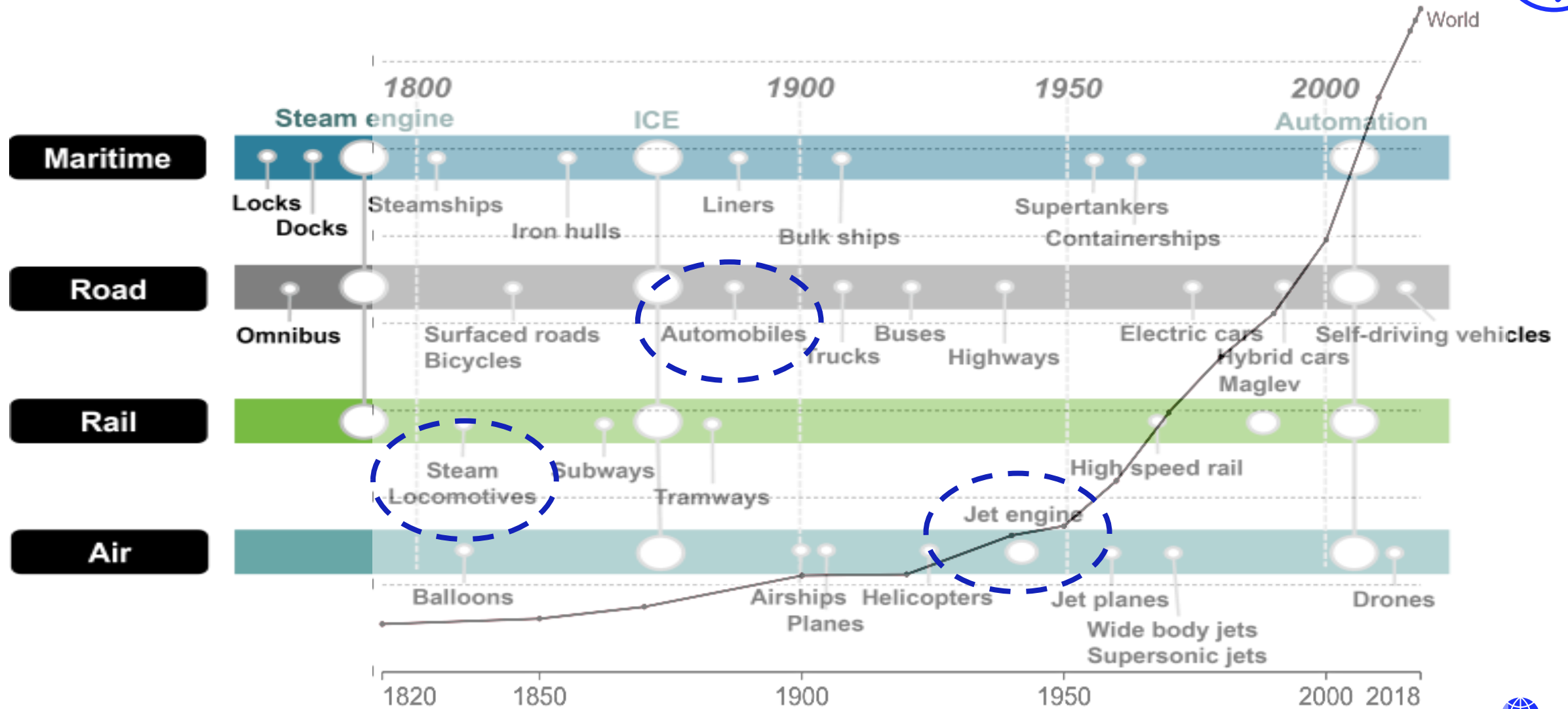
Notes: The first year of the forecast is as follows: 2022 for Angola, Ethiopia, and Kenya, and 2023 for Egypt, Nigeria, and South Africa.



Trade, Transportation, and Economic Development

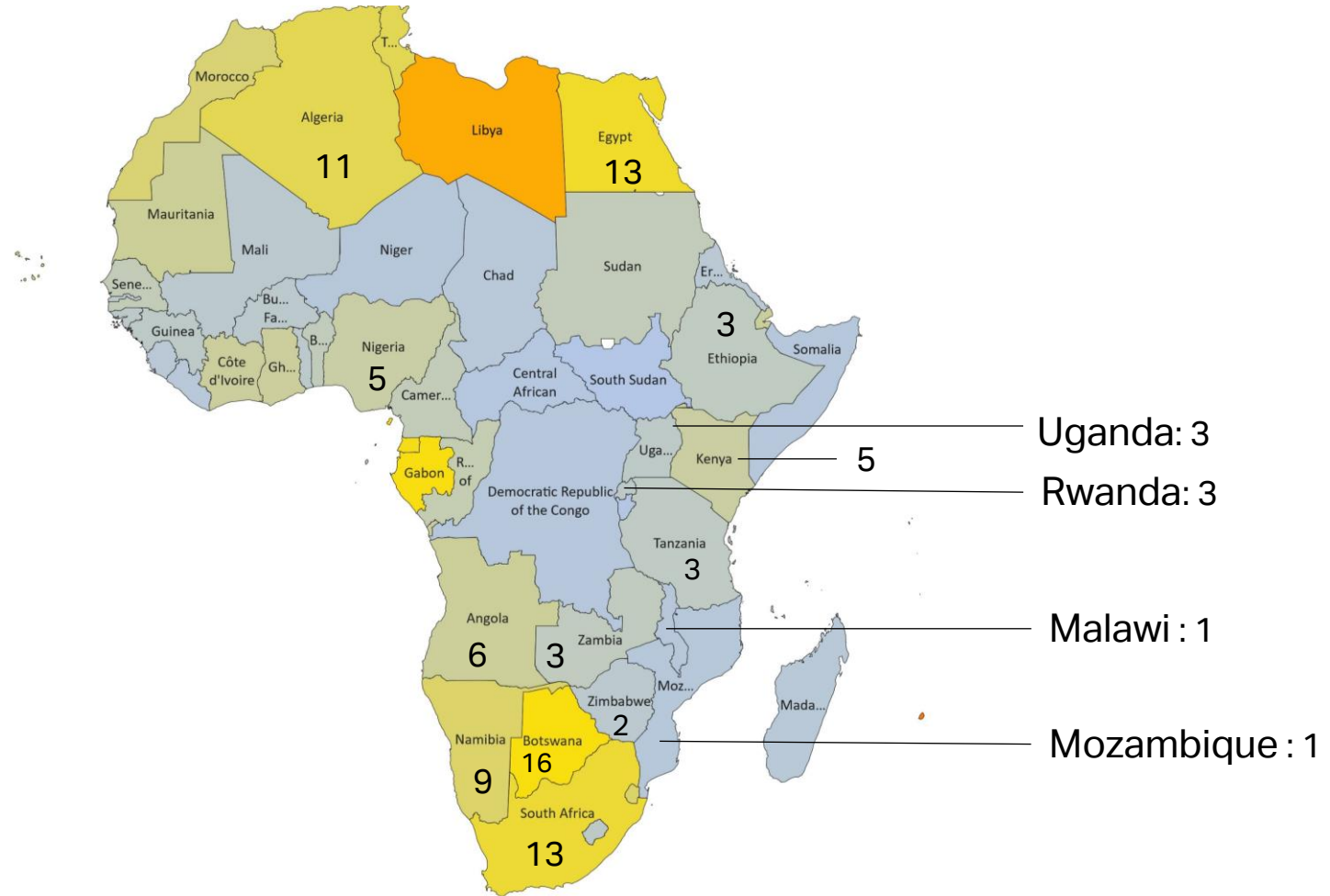
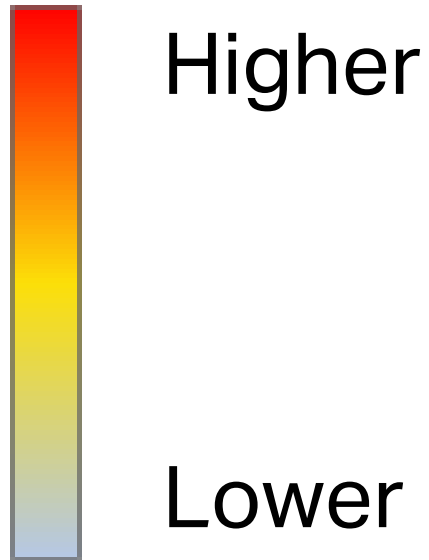


Transportation and World per capita GDP



GDP per Capita, 2023

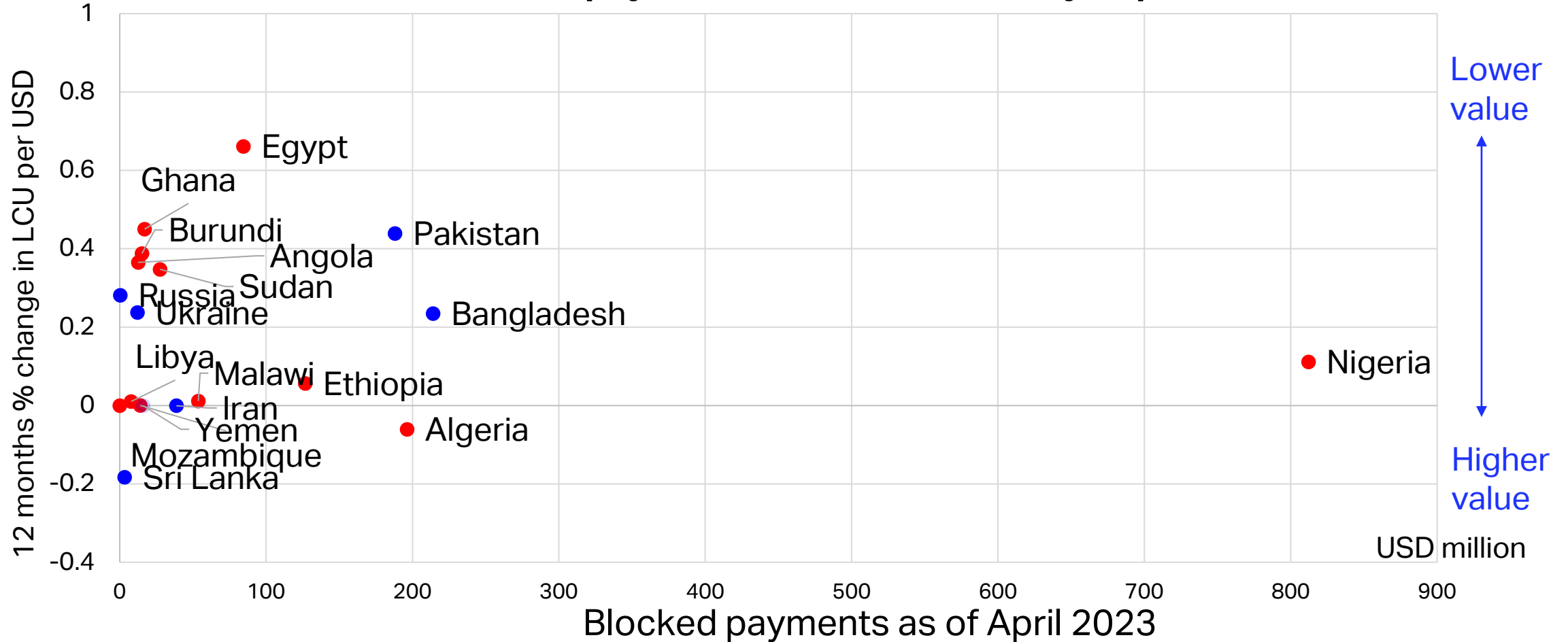
Constant 2017 PPP international dollars, thousands



Blocked funds add to woes



Airlines' blocked payments and local currency depreciation



Notes: The y-axis represents the evolution of local currency (LCU) against USD between May 2022 and May 2023, and the x-axis represents the amount of blocked funds being held from airlines as of April 2023. Red circles represent African countries, while blue circles represent countries in other regions. Lebanon is not shown in this chart due to high levels of currency depreciation but has blocked airline payments as well.

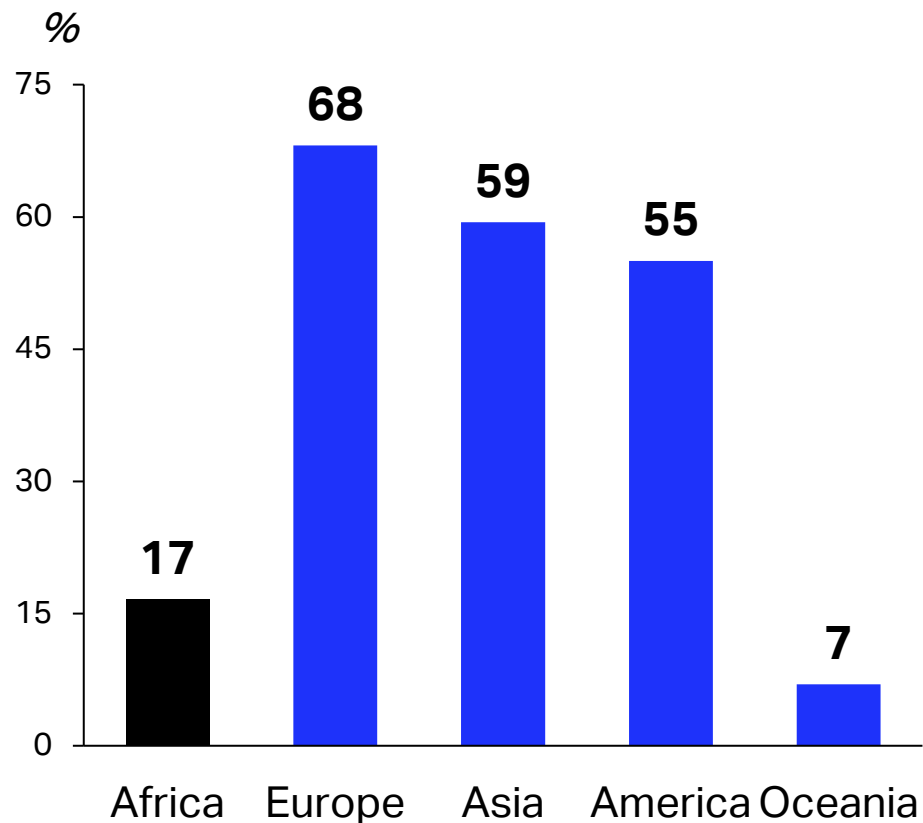
Source: IATA Sustainability and Economics, IATA Treasury, Macrobond



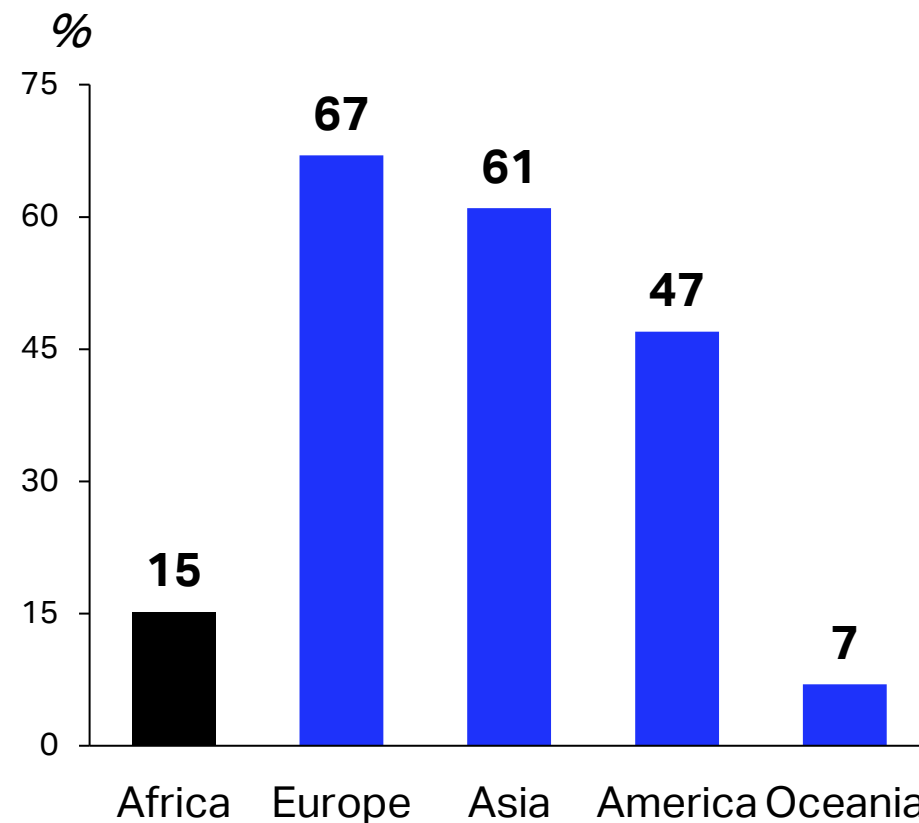
Within Africa trade is weak



Exports within regions



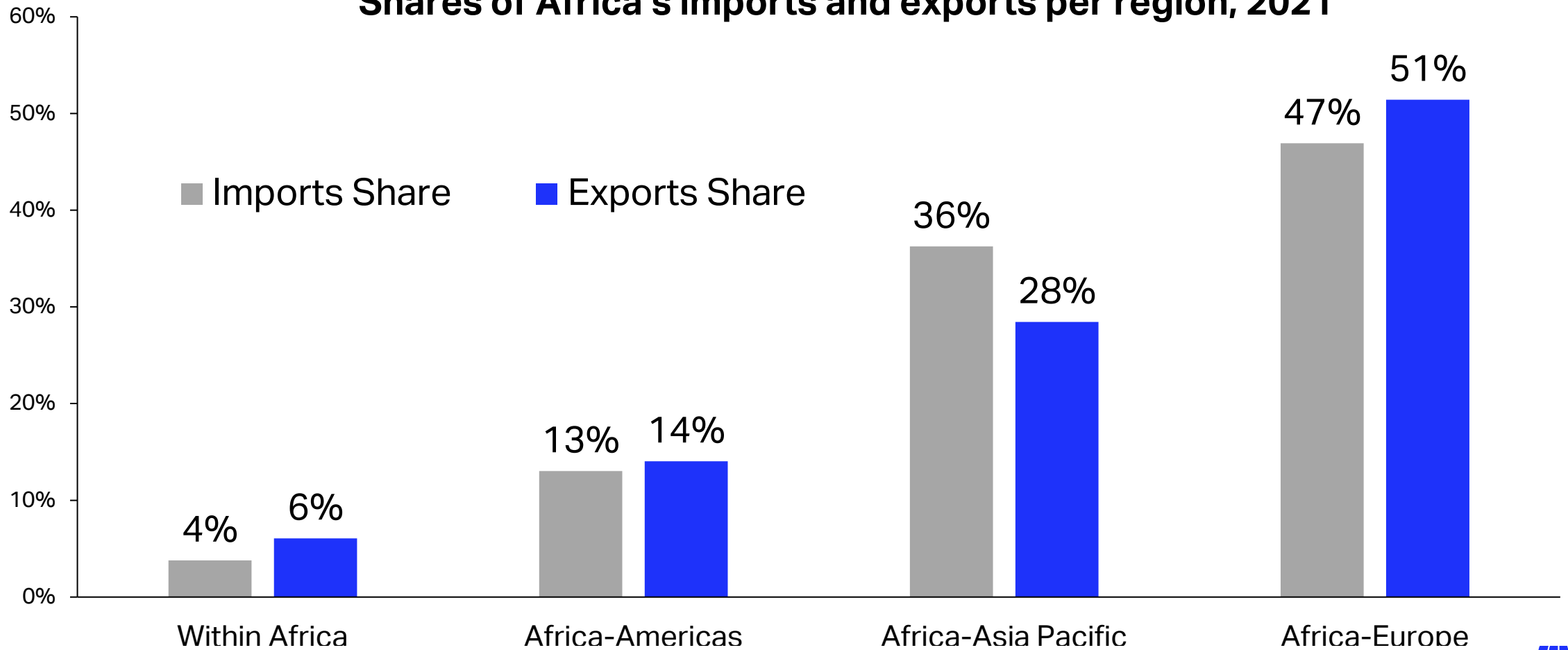
Total trade within regions



Africa trade the most with Europe and APAC



Shares of Africa's imports and exports per region, 2021

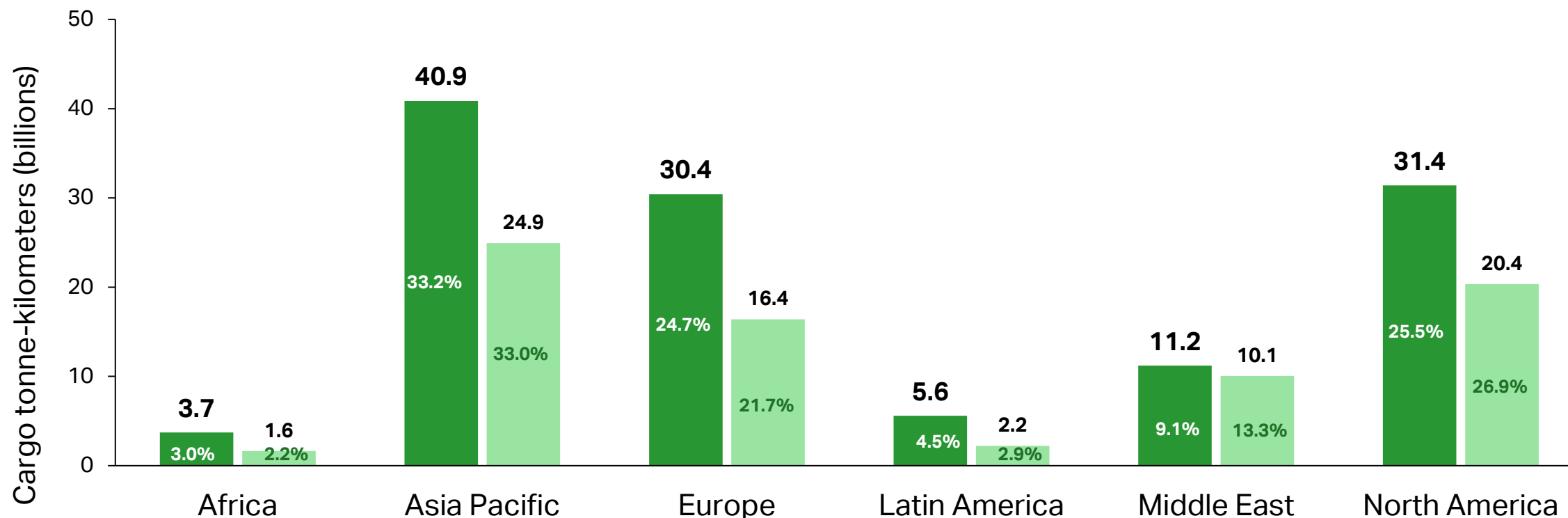


This is reflected in Africa's cargo traffic



International cargo tonne-kilometers (CTK) by region, Jan-Apr 2023

■ by airline region of operation ■ by airline region of registration



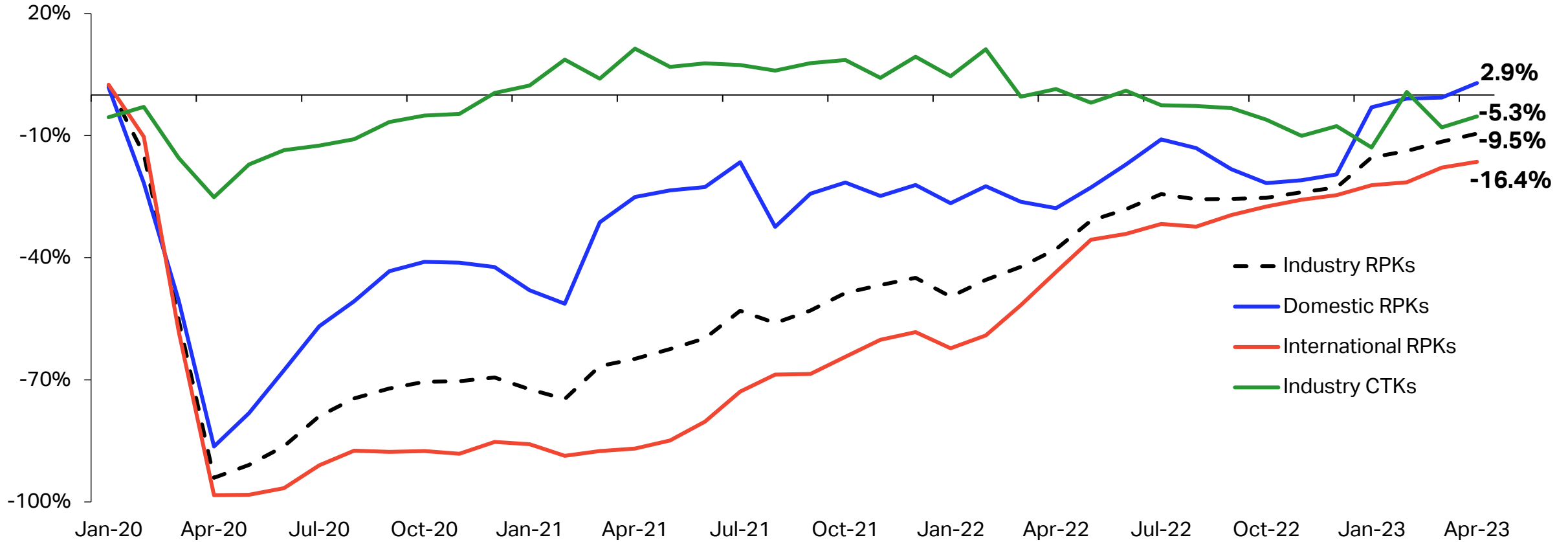
Our Industry



RPKs are currently within 10% of 2019 levels



Industry RPKs and CTKs, year-on-year % change vs 2019



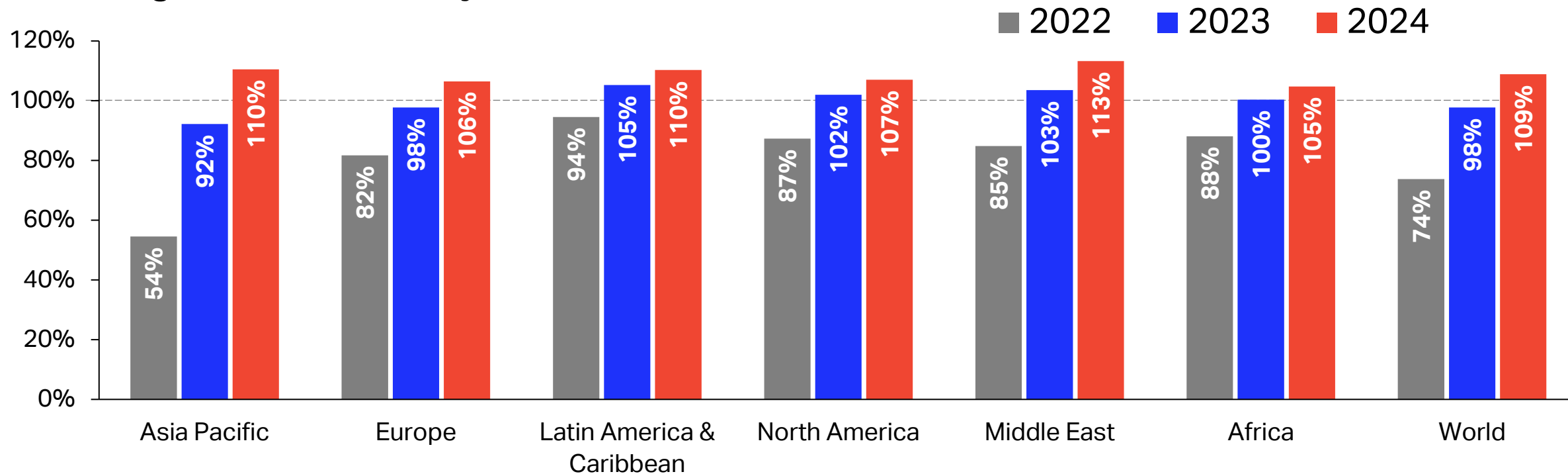
CTKs: Cargo Tonne-Kilometers; RPKs: Revenue Passenger-Kilometers



Africa, M-E, and Americas recover in 2023



Passenger traffic recovery (% share of 2019 levels)



Recovery year

2024	2024	2023	2023	2023	2023	2024
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Source: IATA/Tourism Economics Air Passenger Forecasts as of June 2023

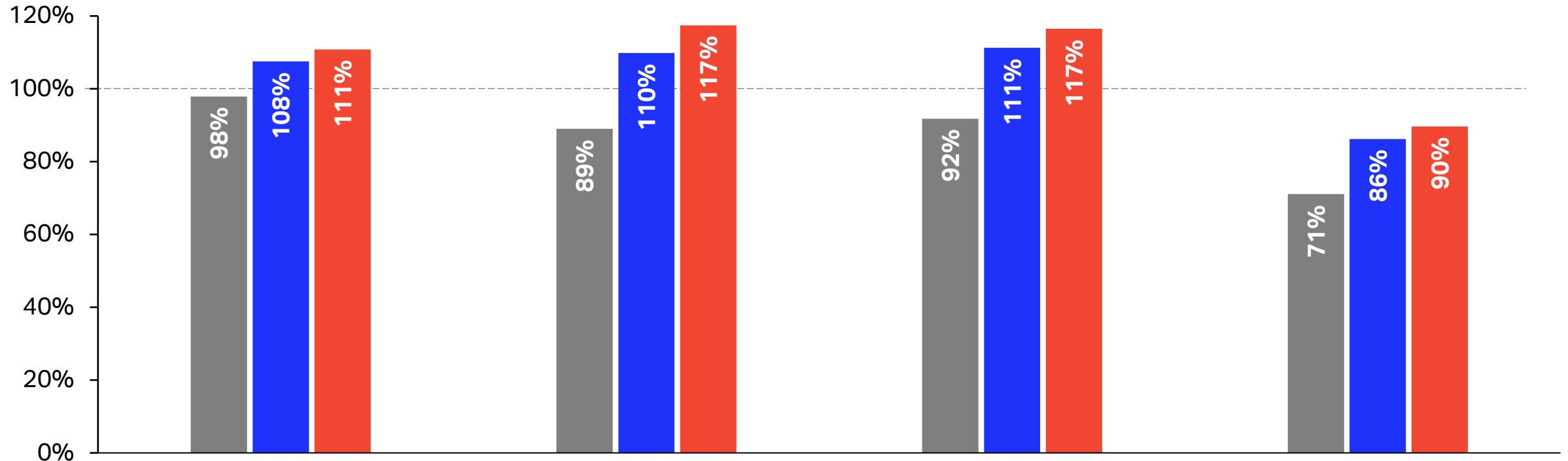


Africa recovery per region



Passenger traffic recovery (% share of 2019)

2022 2023 2024



Central/Western Africa

Eastern Africa

Northern Africa

Southern Africa

Recovery year

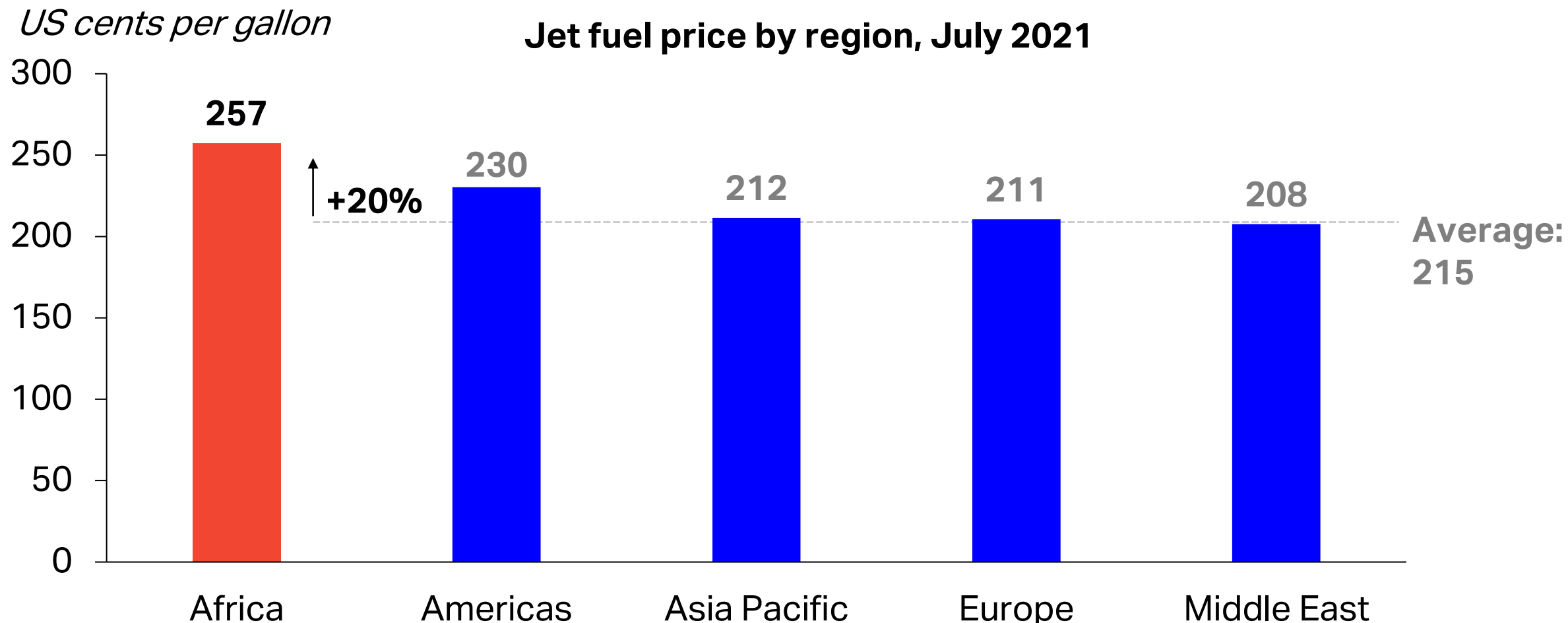
2023

2023

2023

2026

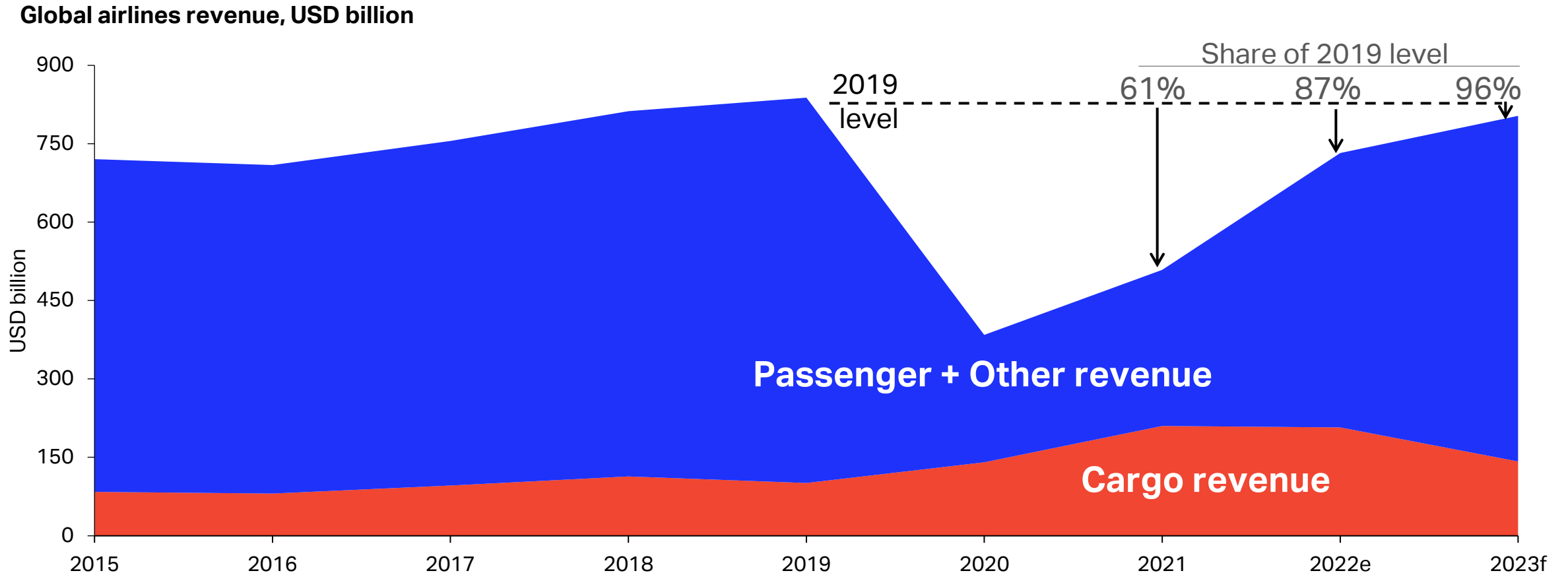
Africa pays more for jet fuel



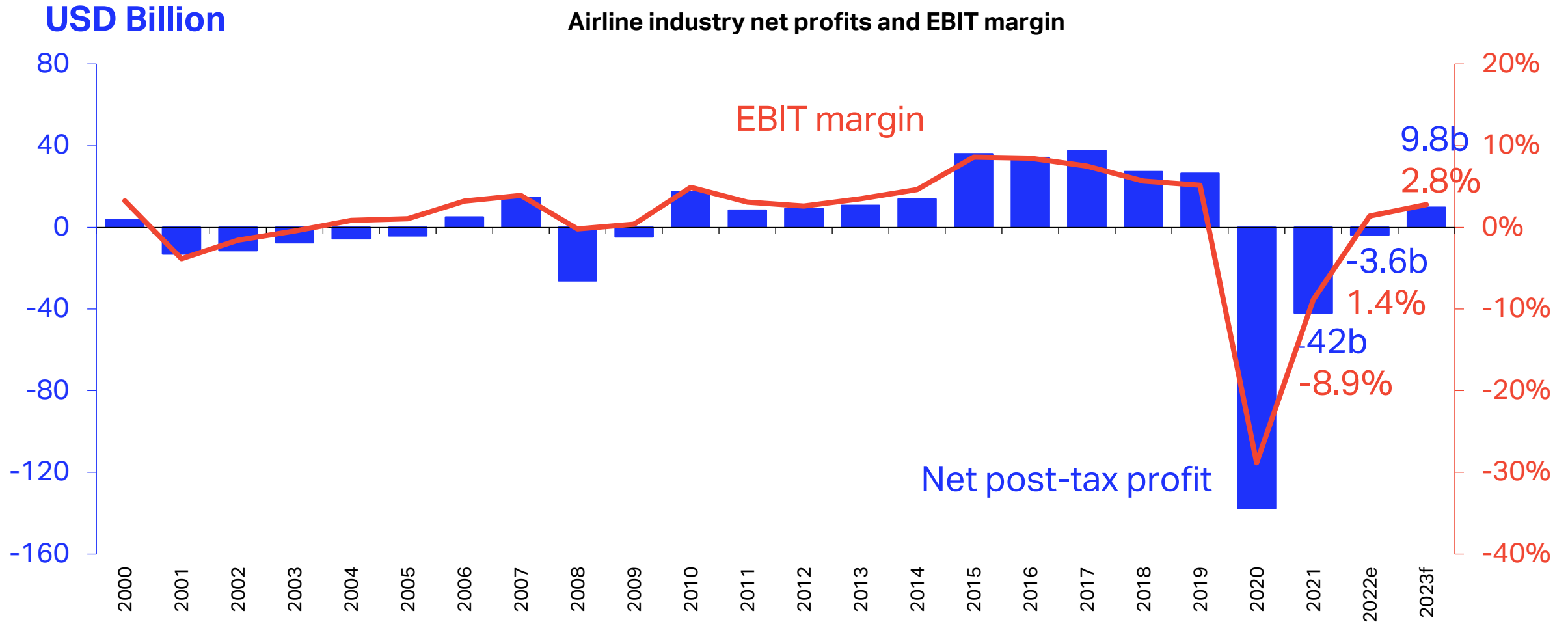
Notes: Results are based on a survey conducted for fuel uplift in July 2021, asking airlines to report jet fuel price charged across 181 locations across various regions, including 33 airports from Africa, 51 from the Americas, 46 from Asia Pacific, 41 from Europe, and 11 from Middle East. Unit Fuel Cost is defined as (Total Fuel Cost for the month)/(Total Volume uplift for the month).



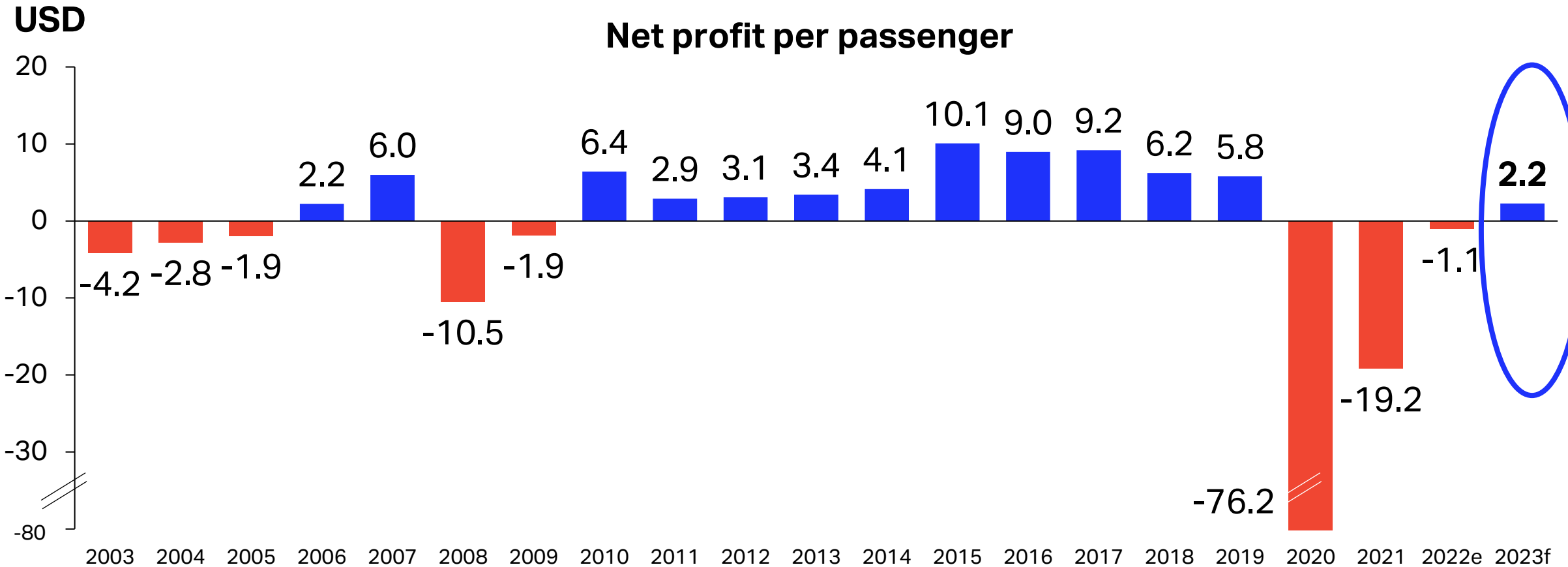
Global airline revenue, USD billion



Net profit of USD 9.8bn forecast in 2023



Slim profits at just USD 2.2 per passenger

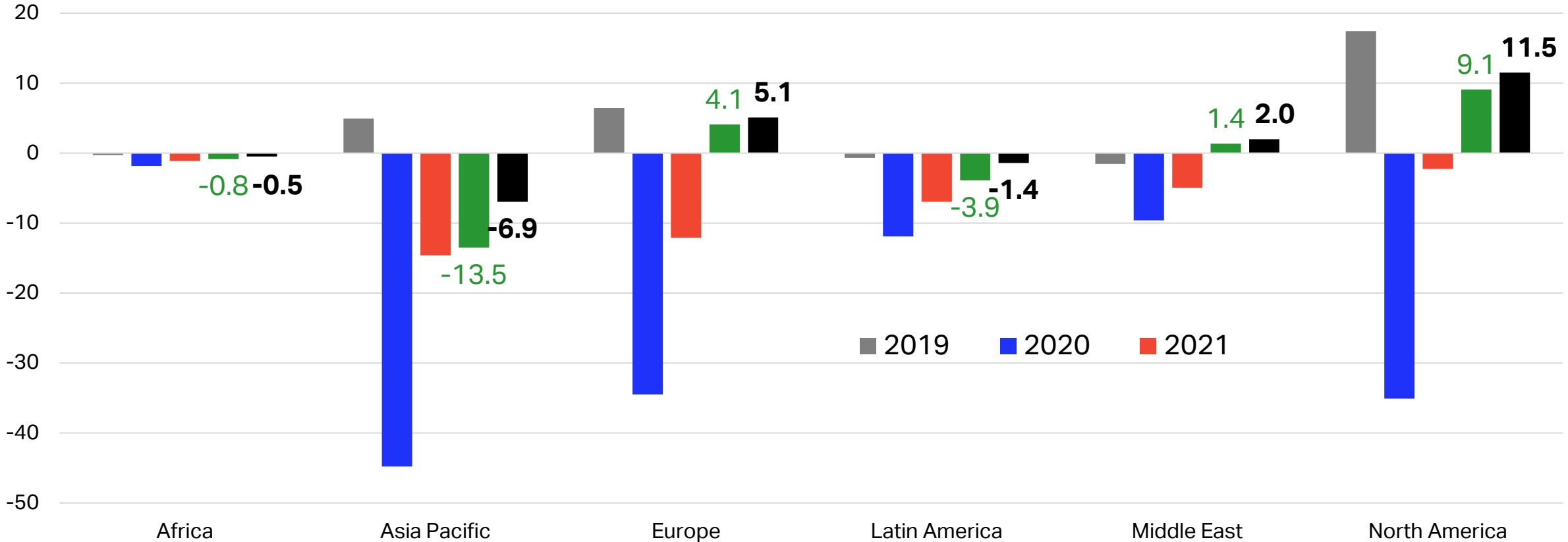


Profits vary across regions

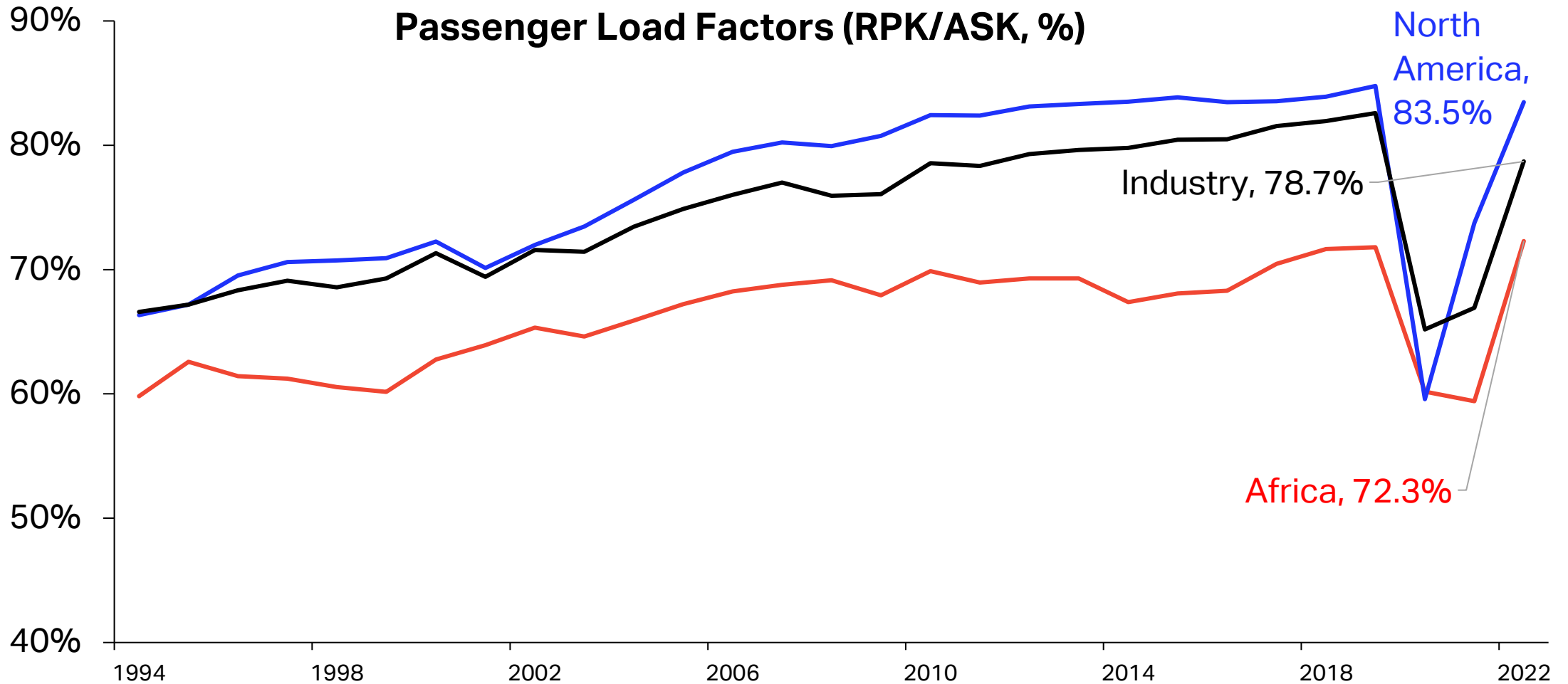


Regional net profit (USD bn)

USD billion



African airlines see lower load factors



RPKs: Revenue Passenger-Kilometers; ASK: Available Seat-Kilometers

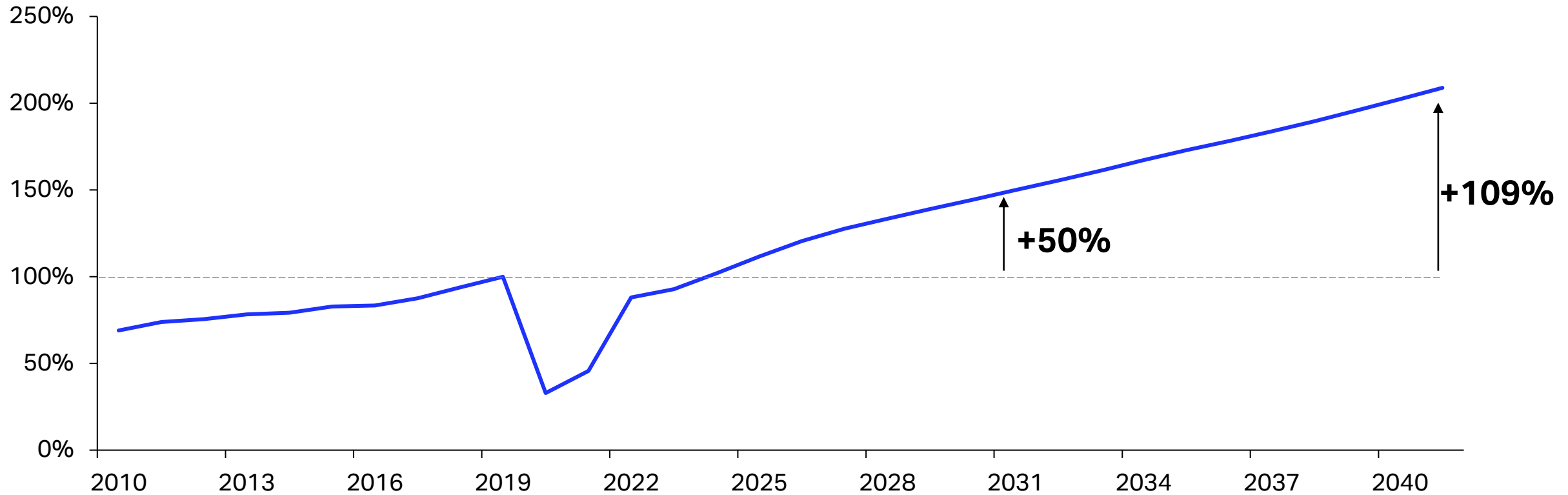
Source: IATA Sustainability and Economics, IATA Monthly Statistics



Africa's passenger traffic will double by 2040, eclipsing 300 million passengers



Africa passenger traffic indexed (2019 level = 100)

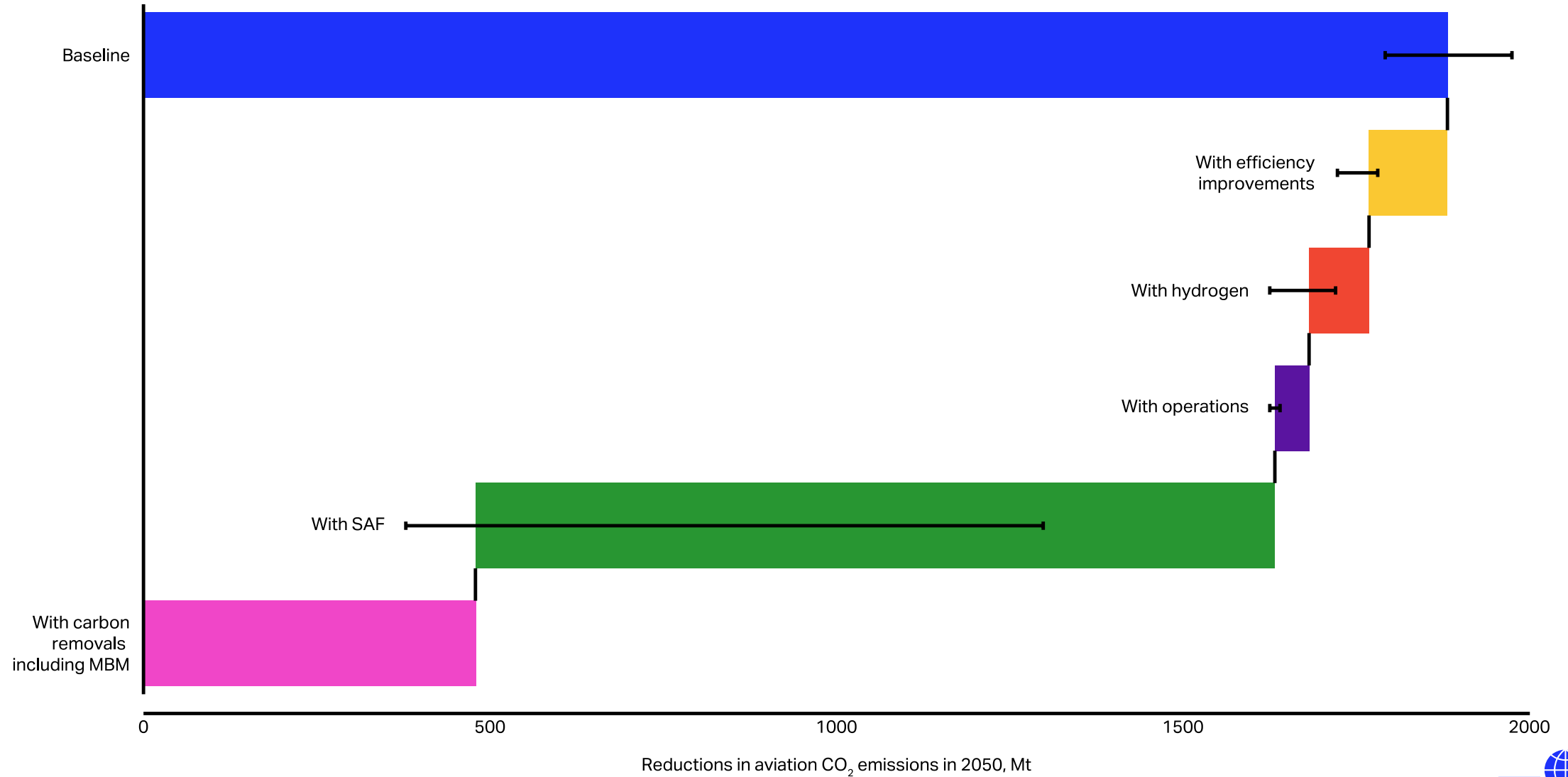


We must fly

We must fly sustainably



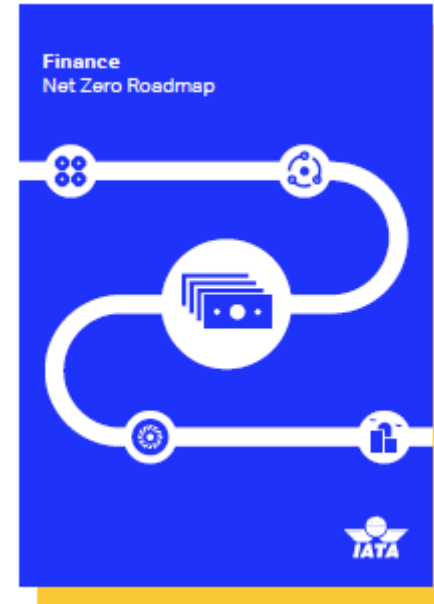
How to achieve net zero emissions by 2050



Finance Roadmap



The investment needs to bring about aviation's transition to net zero by 2050 could be as high as **USD 5 trillion** over the period to 2050. The annual investments required in that case would be close to **USD 180 billion**. This is not disproportionate to the annual investments in other industries.



Available on our website
(scan the QR code)



IATA WORLD SUSTAINABILITY SYMPOSIUM

Madrid, Spain
3-4 October 2023

Save the date

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www.iata.org/economics





The Issues Facing the Airline Industry in Africa

**Regional Vice-
President AME, IATA**

Kamil Alawadhi





For some time now, I have been questioned repeatedly by many on the purpose of having the “Focus Africa” event and my humble answer has always been

“To work as a collective aviation community to develop and improve aviation in Africa”

Today we will change the course of history. By this I mean we will collectively achieve what many have tried to do in the past.



Focus Africa Initiative



Africa is 54 countries and accounts for 18% of the global population, but just 2.1% of air transport.



ICAO

International Civil Aviation Organization



Vision:

Achieve the sustainable growth of the global civil aviation system.

Mission:

To serve as the global forum of States for international civil aviation. ICAO develops policies and Standards, undertakes compliance audits, performs studies and analyses, provides assistance and builds aviation capacity through many other activities and the cooperation of its Member States and stakeholders.



IATA

International Air Transport Association



Vision:

Working together to shape the future growth of a safe, secure and sustainable air transport industry that connects and enriches our world

Mission:

IATA's mission is to represent, lead, and serve the airline industry.





The two giants of the aviation industry
have identical visions.

**How well have we performed in
Africa?**



Are we satisfied with aviation in Africa?

Interactive Session



Questions





Coffee Break

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Panel: African Aviation Outlook

Moderator: Kamil Alawadhi

#IATAFocusAfrica





Panelists

Willie Walsh
Director General
IATA

Mesfin Tasew
Chief Executive Officer
Ethiopian Airlines Group

Aaron Munetsi
Chief Executive Officer
AASA

Abderahmane Berthe
Secretary General
AFRAA



IATA Focus Africa Initiatives

**Regional Vice-
President AME, IATA**

Kamil Alawadhi



Are we satisfied with aviation in Africa?

Interactive Session



CEO's Panel



- 1. Value of aviation**
- 2. Challenges / Opportunities in Africa**
- 3. Sustainability**
- 4. Looking Forward**



What are our challenges



Challenges

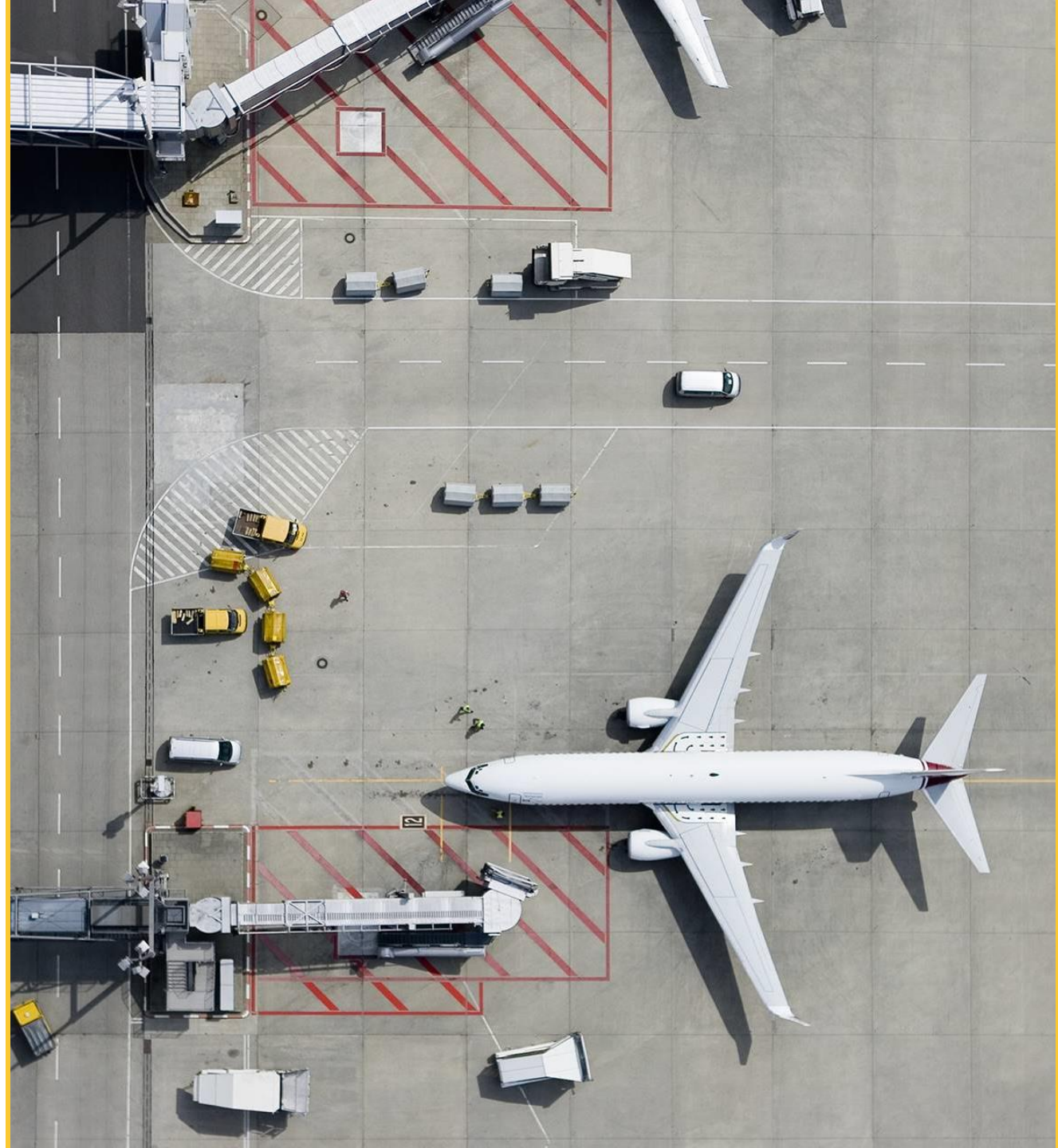


- Charges, Taxes, Fees
- Fuel
- Africa Interconnectivity (SAATM)
- Airport / Infrastructure
- Aircraft Maintenance
- Air Traffic Management
- Regulations
- Safety (Operational / Regulatory)
- Security
- Blocked Funds
- High operating costs
- Financial solutions / payment solutions
- Supply chain
- Expertise / Skilled Workforce / people development
- Others ...



1. Safety

Improve operational safety through a data driven, collaborative program to reduce safety incidents and accidents, in the air and on the ground.



2. Infrastructure

Facilitate the growth of efficient, secure, and cost-effective aviation infrastructure to improve customer experience and operational efficiency



3. Connectivity

Promote the liberalization of intra-African market access through the Single African Air Transport Market (SAATM)



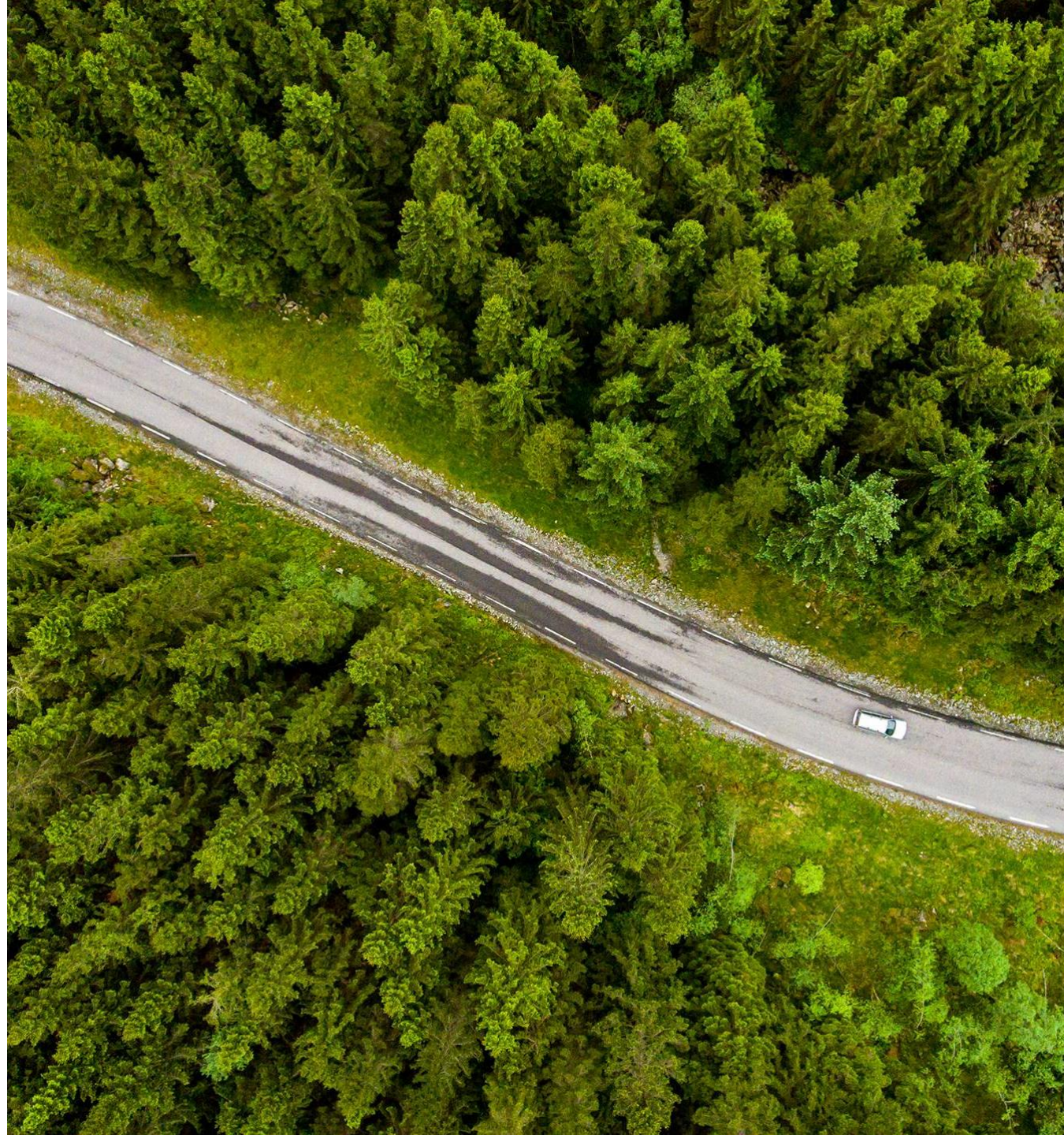
4. Finance & Distribution

Accelerate the implementation of secure, effective and cost-efficient financial services and adoption of modern retailing standards



5. Sustainability

Assist Africa's air transport industry to achieve the "Net Zero by 2050" emissions targets agreed to by industry and the UN's International Civil Aviation Organisation (ICAO) member states



6. Future Skills

Promote aviation as a career path to ensure a steady supply of diverse talent ready to meet future industry needs





Although we may come from vastly different stories and very different walks of life, we are one people who possess common values and common ideals; who celebrate individual excellence but also share a recognition that **together**, we can accomplish great and wonderful things we can't accomplish **alone**.

Barack Obama



Mother Teresa



I can do things you
cannot, you can do
things I cannot;
Together we can do
great things.

Questions





Lunch Break

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Panel: Towards Sustainable Recovery: Navigating the Impact of COVID-19 and Future Shocks

Moderators: Sandile Chipunza
Farah Mesmar

#IATAFocusAfrica





Panelists

Abderahmane Berthé
Secretary General
AFRAA

Francis Mwangi
Environmental Expert/Senior
Planning Officer, Kenya Civil Aviation
Authority (KCAA)

Nomasonto Ndlovu
COO and Acting CEO
South African Tourism

Abel Alemu
Managing Director
Ethiopian Airlines Cargo & Logistic
Services

Objectives



Resilience

1. Explore role of cargo in ensuring airline viable operations despite losses from border closures
2. Address role of tourism sector in supporting aviation from impact of similar crises
3. Review of current aviation model and its resilience to COVID-19 and similar crises.

Sustainability

1. Explore how the net-zero commitment can shape future of aviation in Africa
2. Shed light on how can we reflect regional considerations in global standards in net-zero pathways
3. Review the necessary policy needed to transition to Net




Introduction to the Global Passenger Survey

**Regional Director,
Operations, Safety and
Security AME, IATA**

Kashif Khalid



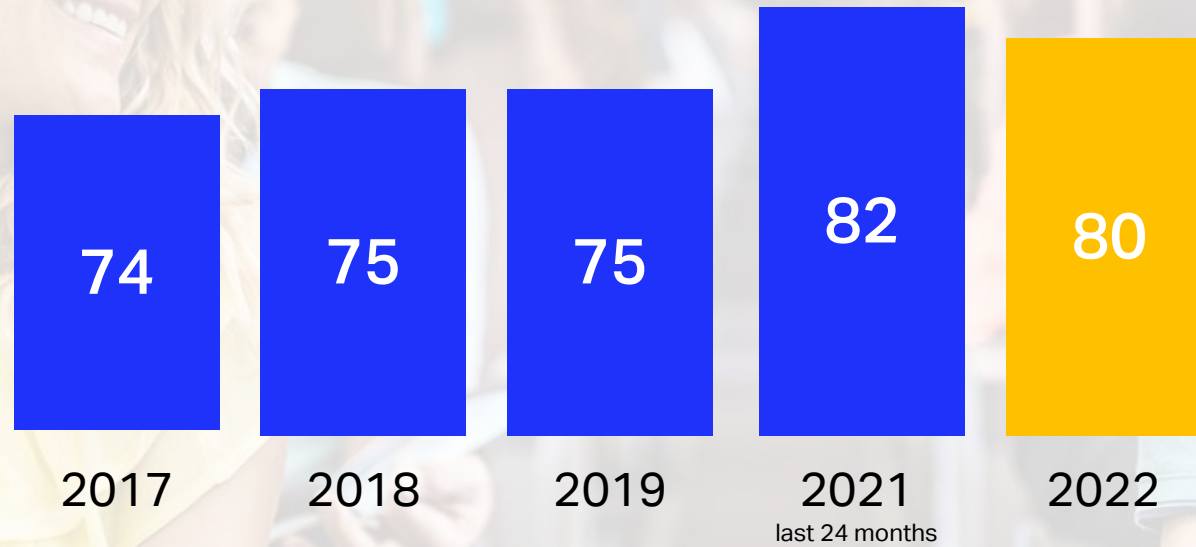


IATA Global Passenger Survey

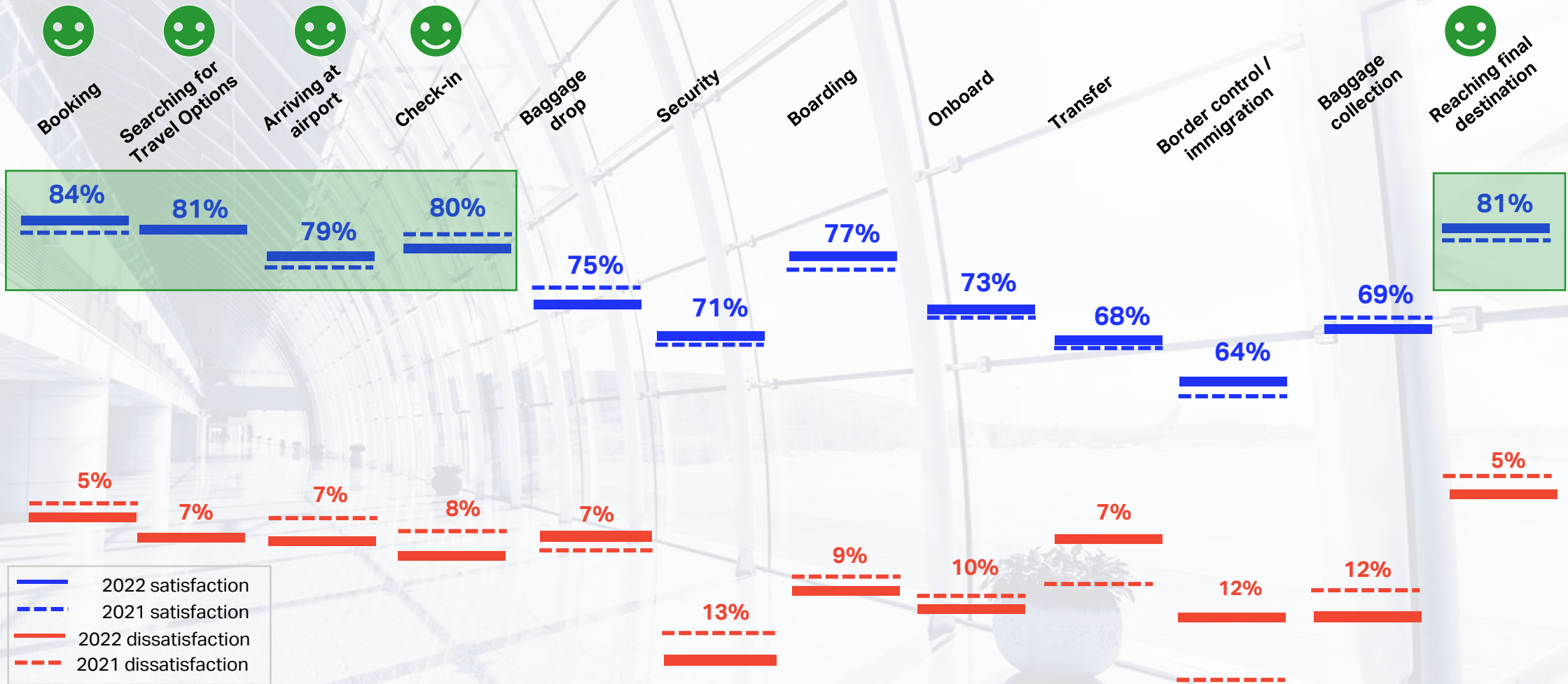
2022 Highlights

High satisfaction scores for 2 years in a row

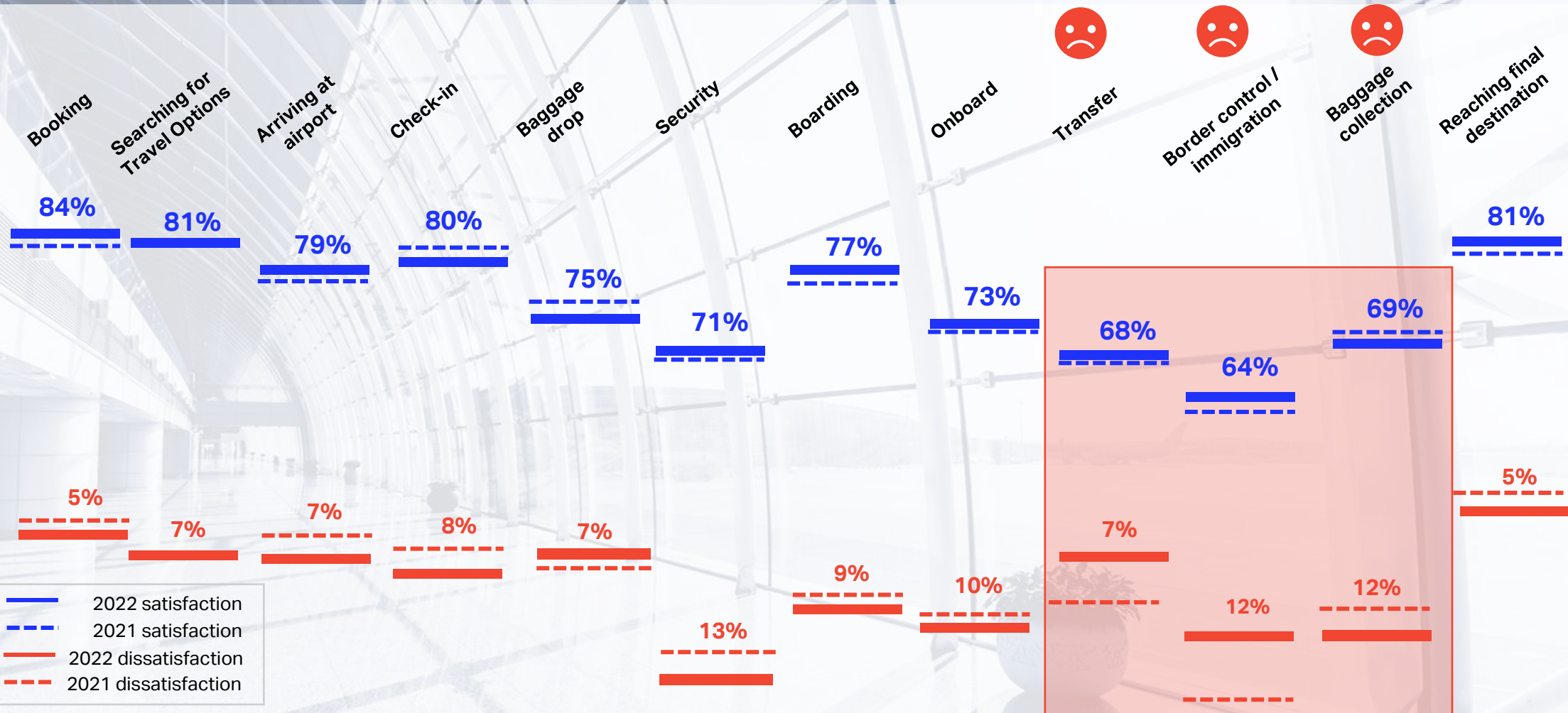
% of Satisfied (Very satisfied + Somewhat satisfied)



Across the travel journey, top satisfaction levels for:



3 stress areas: transfer, immigration and baggage



Convenience is a key enabler for all touchpoints

PLANNING & BOOKING

"It would be so easy access all my trip information from one single location"

TRAVEL FACILITATION

"I am willing to share my information in advance and have contactless travel"

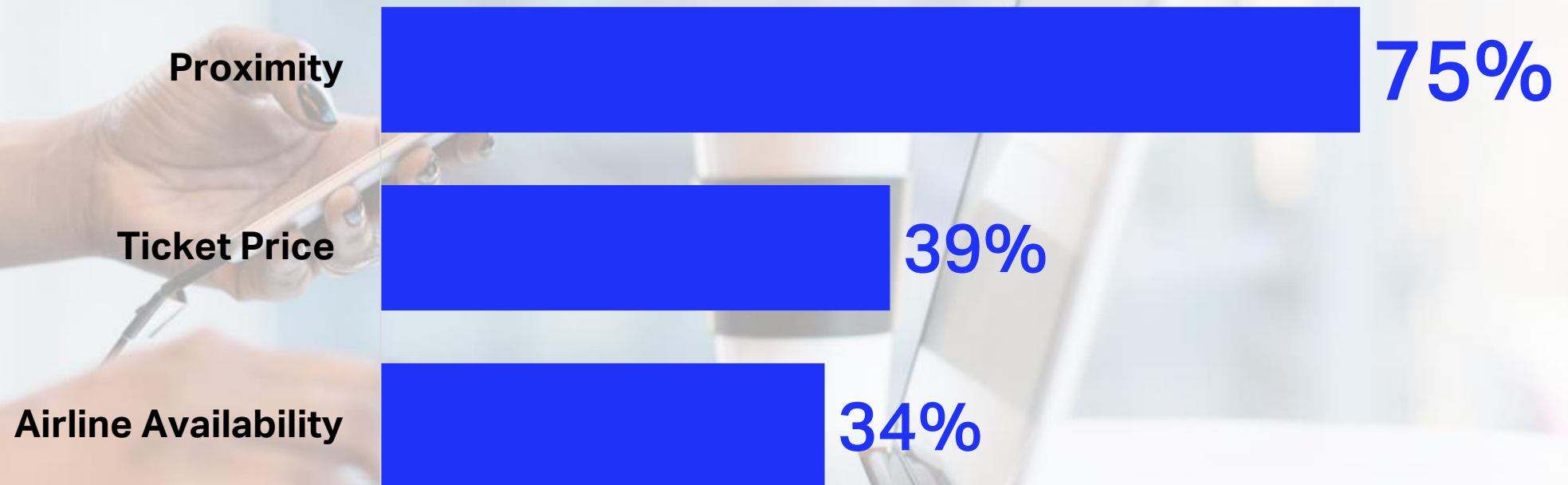
AIRPORT PROCESS

"I wish there could be alternatives to checking-in baggage"



Proximity is #1 reason for choosing departure location

Top 3 reasons for selecting your departure airport





Convenience is a key satisfaction driver when travel planning

82%

passengers are satisfied when able to pick their preferred payment method

Clear improvement areas:

- Access to information in one single place
- Clarity & transparency on the offer content
- Ease of seat selection



Need to raise awareness on CO2 offsetting

More than **80%**

of passengers don't offset their flight carbon emission



30% are not aware of such an option



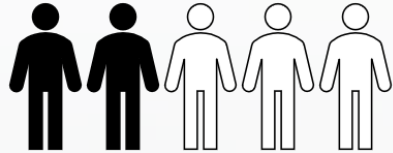
24% don't want to



18% don't have the option



Immigration requirements discourage travel



2 out of 5

have been discouraged from traveling
due to immigration requirements



65%

main deterrent is process complexity

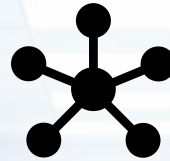
Technology simplifies travel and drives convenience



ONLINE VISA

66%

agree online application before travelling is the best way for obtaining a visa



DATA SHARING

83%

willing to share immigration data (e.g. passport, visa, health questionnaire, etc.) to expedite airport process



BIOMETRICS

1 in 3

Have already used biometrics in the travel journey



Biometrics in travel is here to stay

88%

Passengers are satisfied with overall biometric process

75%

passengers would be eager to use biometrics instead of passports or boarding passes

Boost biometrics usage with better data protection



Top concerns with using biometric information

56%

loss of data due to data breaches

52%

lack of knowledge of who the passenger data is being shared with

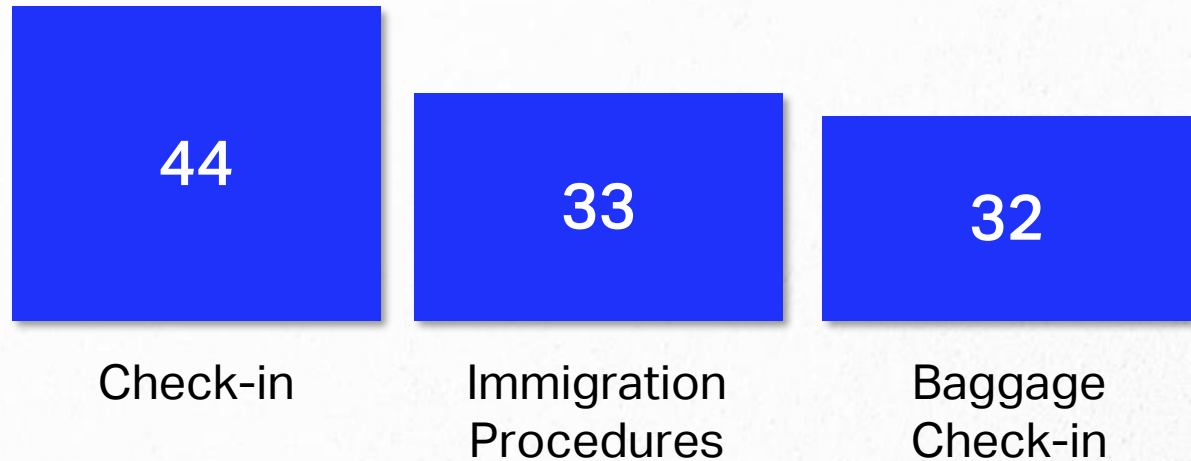
51%

not knowing how passenger data is being handled or stored

Preference to complete certain processes off-airport

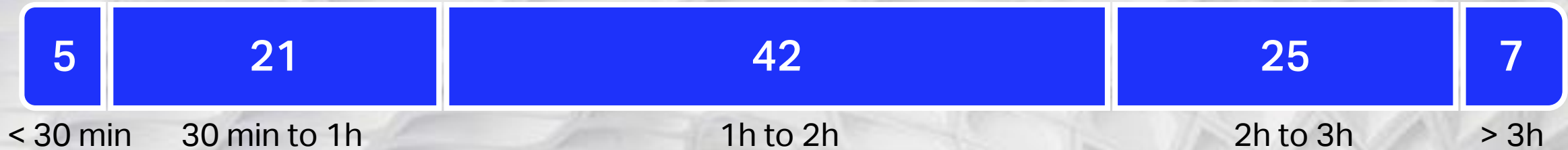


Top process to be completed before arrival at the airport



Passengers would like to get through the airport as quickly as possible

Overall time spent at the airport



Ideal time spent at the airport



Less than 30min

When travelling with a carry-on bag only



Less than 45min

When travelling with a carry-on & check-in bags



Less than 1h

When travelling with mobility aid or other assistance



Queuing is a top improvement area

#1 improvement area for

Examples of improvement :

Security

93%

interested in a trusted program to expedite security screening

Boarding

25%

would appreciate not queuing on the jet bridge

Border Controls

20%

interested in automated solution to speed up control process



Baggage handling remains an issue



2 in 5

have had their bags
mishandled



1 in 5

expressed
dissatisfaction on the
service provided



Tracking could encourage passengers to check-in bags

29%

have flown with an airline that shared baggage information

81% (+8pp vs. 2021)

are more likely to check-in bags if it can be tracked at all times

51%

would be interested in a baggage information service

50%

have used and would be interested in using an electronic bag



Need for alternative options to check-in baggage



More room for improvement in transfer experience



Only 68%

satisfaction transfer at the Airport in 2022

Redundancy of processes negatively impacting satisfaction

Top 3 improvement areas for connecting flights



**Not having to pick up
and re-check my bag**



**Not having to go through
security screening**



**Not having to go through
immigration**



Focus on Accessibility

Growing special assistance requests on the horizon

20%

(+9pp vs 2021)

respondents sought assistance for self or someone else

Areas where the industry is doing good:

78%

Passenger's ability to request support according to their needs at booking

78%

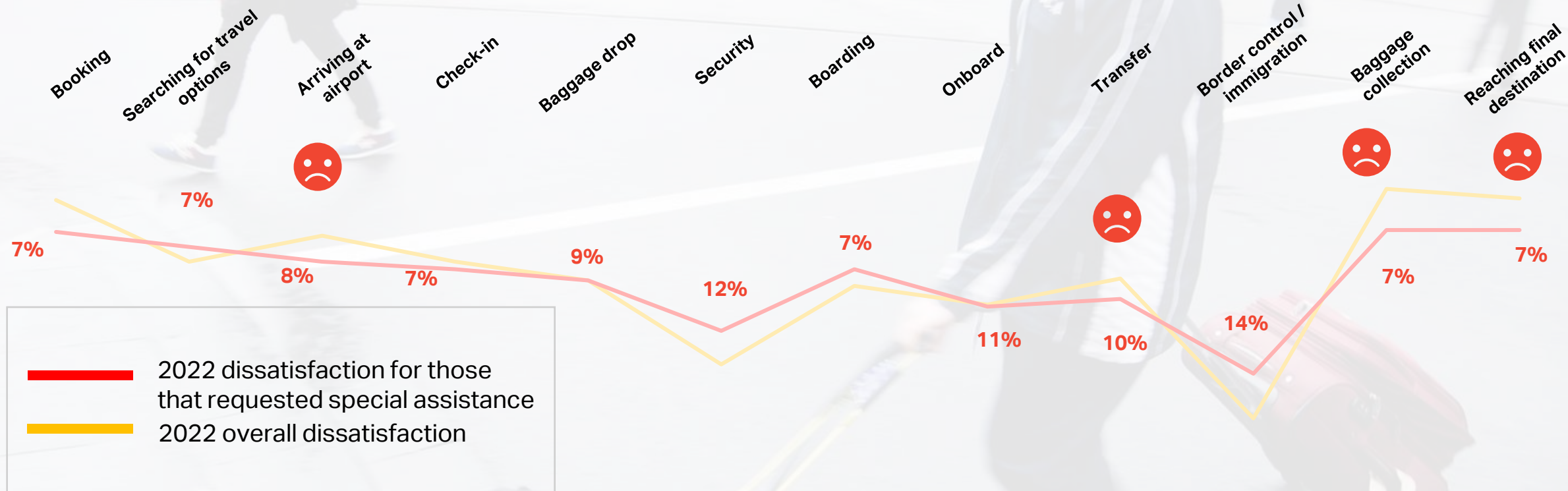
Felt comfortable in disclosing needs

77%

Felt that their needs were understood

Dissatisfaction levels for special assistance requests need to be monitored

Dissatisfaction levels vary on certain touchpoints vs. those that do not request assistance



More room for improvement in ensuring a seamless journey for passengers needing special assistance

34%

Seamless service across all touchpoints (from ground transfer / airport service / airline)

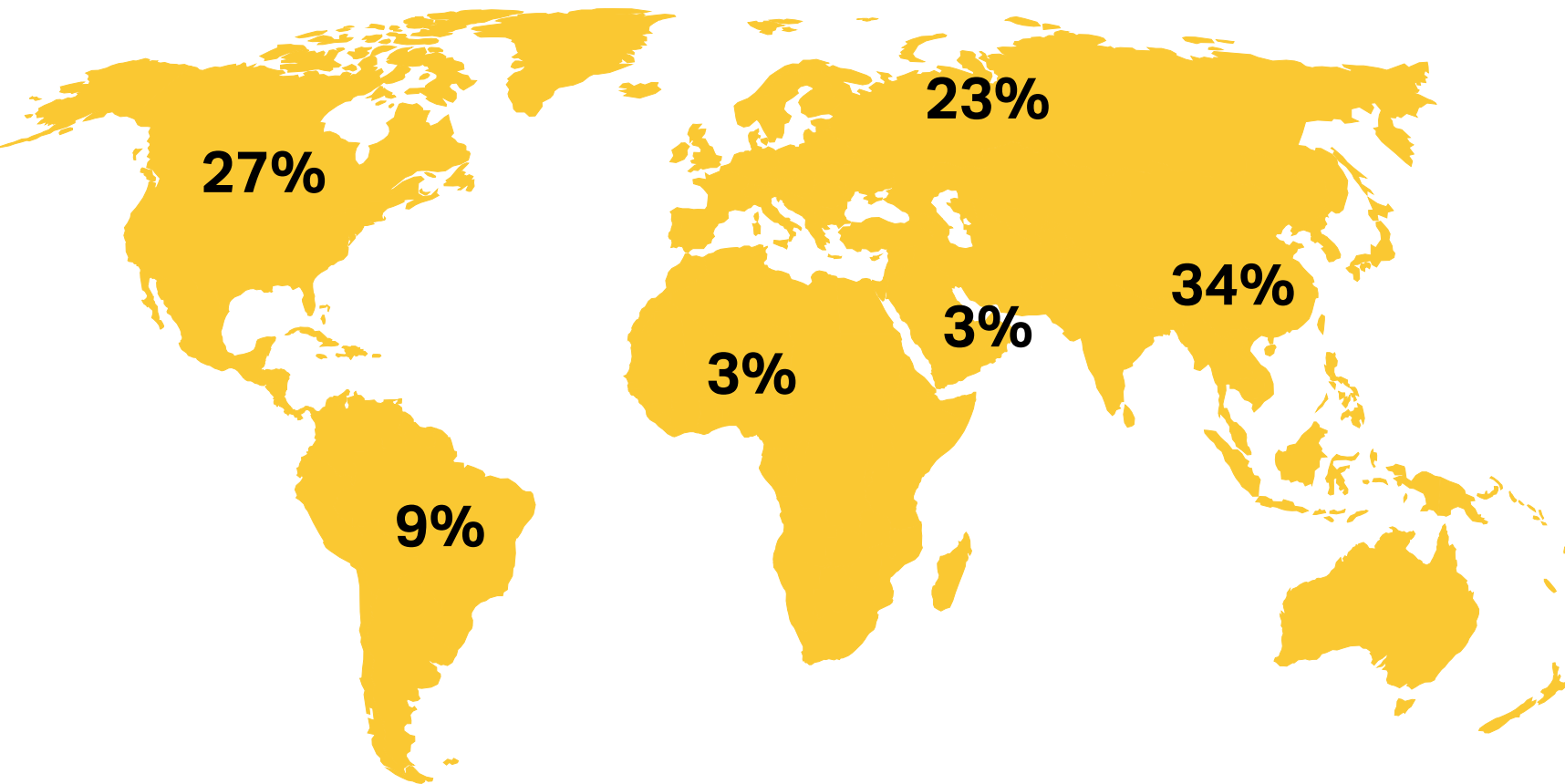
26%

Communication and information about the services provided for passengers with disabilities

23%

Accessibility for mobile travel solutions, booking and reservation services

Passenger profile



>75 years old

1.7%

56 – 75 years old

28.2%

41 – 55 years old

36.8%

25 – 40 years old

27.2%

<=25 years old

6.1%

63%



36%



1%



222 Countries
10,206 Respondents



Want to learn more?

Get your copy of:

**2022 Global Passenger
Survey Report**

or

**2022 Global Passenger
Survey Combo**

www.iata.org/gps



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- 8** Connection
- 9** Travel disruption
- 10** Arrival

Thank you!





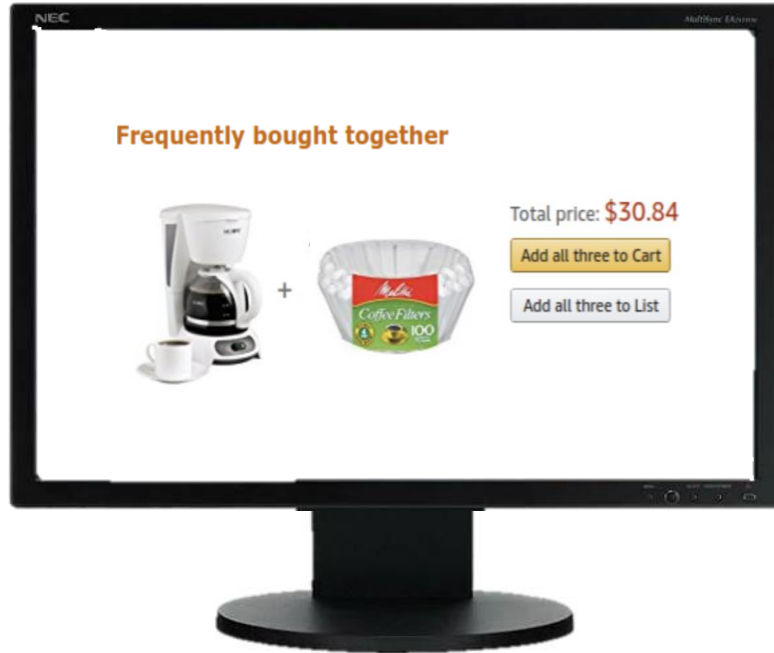
Airlines Creating Value Through Modern Airline Retailing

**Director Distribution,
IATA**

Yanik Hoyles



Airlines want to retail the Amazon way...



- Modern retailing standards
- Personalization

Modern Retailing

- One click shopping
- One click payment

Customer Centric Payment

- One purchase record
- Customer lifetime management

Orders

The Modern Airline Retailing program



Airlines in control of their Product, Money and Data

Customer
identification

Retailing
with Offers

Delivering
with orders

Key IATA Standards / Activities in scope: ONE ID, Verified Credentials, NDC, ONE Order, Settlement with Orders, Dynamic Offer Creation, Future of Interline & New Partnerships

And there is momentum



AA: 80 Percent Of Bookings Could Come Direct Or Via NDC By Year-End

Jay Boehmer April 27, 2023

Jay Campbell • February 15, 2023

Air France-KLM : « Objectif 2027 : 90% des ventes indirectes via NDC »

Par David Keller - 23 avril 2023

Australian Trade Advice



Important Update: KrisConnect NDC changes from 1 June 2023

Issued 05 May 2023

Amadeus CEO Eyes 2024 For NDC Booking Critical Mass

Amon Cohen May 9, 2023

Amex GBT to offer Air France-KLM's NDC content

BTNDAILY June 14, 2023

Sabre to Distribute Air Canada NDC Content

By Donna M. Airoidi

Travel technology provider Sabre has reached an agreement to distribute Air Canada's New Distribution Capability content for Sabre-connected travel agents, the companies announced Tuesday. Air Canada said it expects to activate its NDC content in Sabre "within the coming months." [Keep Reading](#)

By Jamie Biesiada | Apr 19, 2023

Singapore Airlines Expands NDC Content Differentiation

Jay Boehmer June 14, 2023

Singapore Airlines this month ratcheted up its actions to further make content and pricing available in EDIFACT-connected channels less attractive than that in New Distribution Capability-based and direct channels.

CWT Partners With Spotnana

Jay Campbell • June 14, 2023

With Amazon and Walmart expressing interest in Spotnana, a mature travel management company cozies up to the aspiring disruptor.

A+ A-

...some airlines are already seeing benefits



Airlines who terminated Full Content are reducing their overall distribution costs

Some airlines are expanding the scope of ancillaries, and report up to 10 times more sales via travel agencies

Airlines are implementing continuous pricing and report approx. 2% revenue uptake

Content differentiation is key





If they want to become truly customer centric airlines need a legacy free framework with Offers & Orders only



A Consortium will accelerate the journey

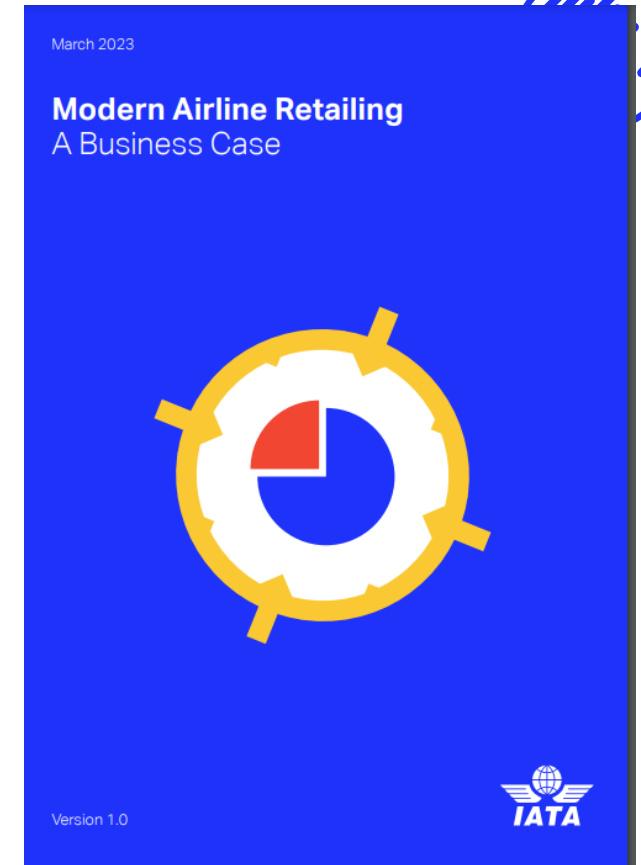


1. American Airlines
2. Air France - KLM
3. Emirates
4. Finnair
5. IAG (IB and BA)
6. LATAM
7. Lufthansa Group
8. Oman Air
9. Qatar Airways
10. Singapore Airlines
11. Turkish Airlines
12. Xiamen Airlines



And it is already delivering

- | | |
|---------------------------|-----------|
| 1. Business case | Delivered |
| 2. Reference Architecture | Delivered |
| 3. RFI Framework | Started |
| 4. Airline IT Transition | Started |
| 5. Industry Transition | Started |



If you embark on this transformation journey,
you may



- Offset your distribution costs
- Increase your revenues by an equivalent of up to 4%*
- Create even more value through greater agility in payment
- Increase your Net Promoter Score
- Increase staff satisfaction scores



Thank you

iata.org/Retailing

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Fireside Chat: Airlines Creating Value Through Modern Airline Retailing

Moderator: Yanik Hoyles

#IATAFocusAfrica



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Moderated by
Yanik Hoyles



Guest

Umesh Chhiber
Senior Vice-President
Revenue, Retail and Cargo
Oman Air

#IATAFocusAfrica





Coffee Break

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The Fundamentals for Safe, Efficient, And Sustainable Operations Throughout Africa

**Director General, South
African Civil Aviation
Authority**

Poppy Khoza



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Panel: Can African Airports Keep Up with Rapid Growth in Aviation?

Moderator: Kashif Khalid

#IATAFocusAfrica





Panelists

Gerold Temulka
Chief Strategy Officer
Kenya Airways

Abdoulaye Cisse
Head of Operations, Middle East,
Africa & Asia
Menzies Aviation

Georges Touma
Head, Airports
SITA

Jason Schwabel
Regional Director Africa, Middle East
& Asia
TSA

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Panel: Inspiring the Next Generation of Aviation Professionals

Moderator: Haya Zaidan

#IATAFocusAfrica





Panelists

Fadimatou Noutchemo Simo
Founder and President, Young
African Aviation Professional
Association (YAAPA)

Kassie Yimam
Managing Director
Ethiopian Aviation Academy

Félicité Kou-Nangue
Program Officer, African Union's
International Centre for Girls' and
Women's Education in Africa

Joep Ellers
Airline Marketing Director – Africa,
Airbus

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