

African growth horizons

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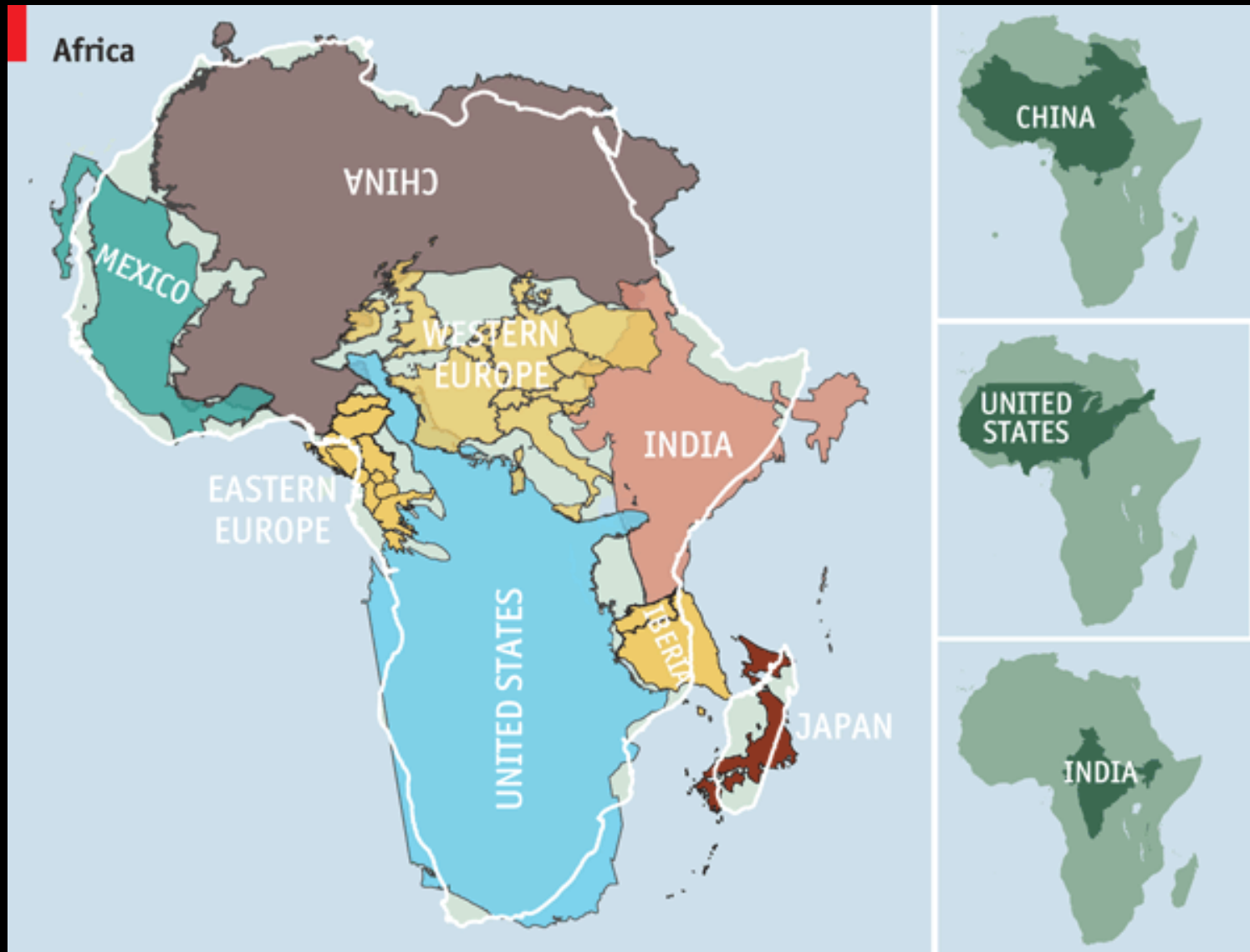
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Source: The Economist



Air travel will be **more accessible**

Growing propensity to travel

- Growing middle class
- Increasing FDI
- More business and leisure travel



30%

fastjet 



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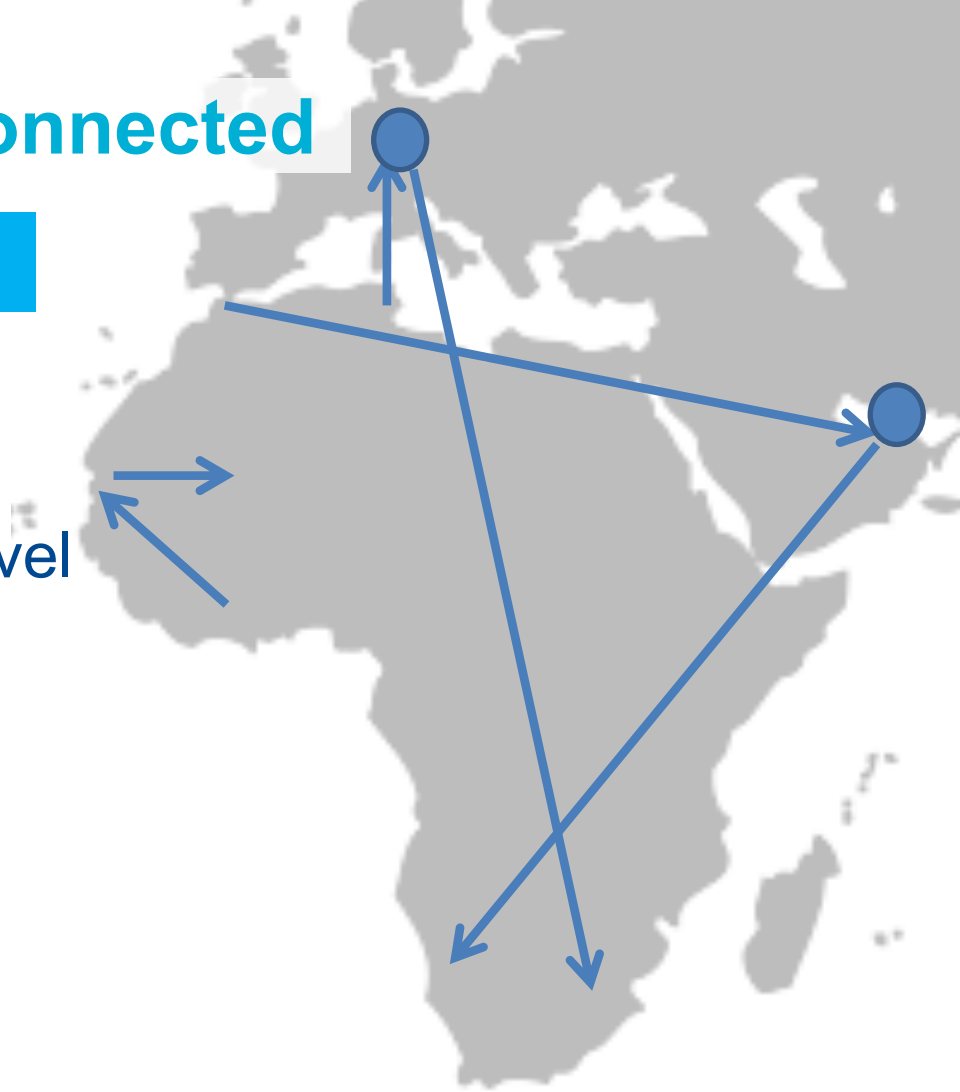
Air travel will be **better connected**

Growing propensity to travel

- Growing middle class
- Increasing FDI
- More business and leisure travel

Need for better connectivity

- Intra-African connectivity
- Rail and road infrastructure



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Air travel will need **more aircraft**

Growing propensity to travel

- Growing middle class
- Increasing FDI
- More business and leisure travel

Need for better connectivity

- Intra-African connectivity
- Rail and road infrastructure

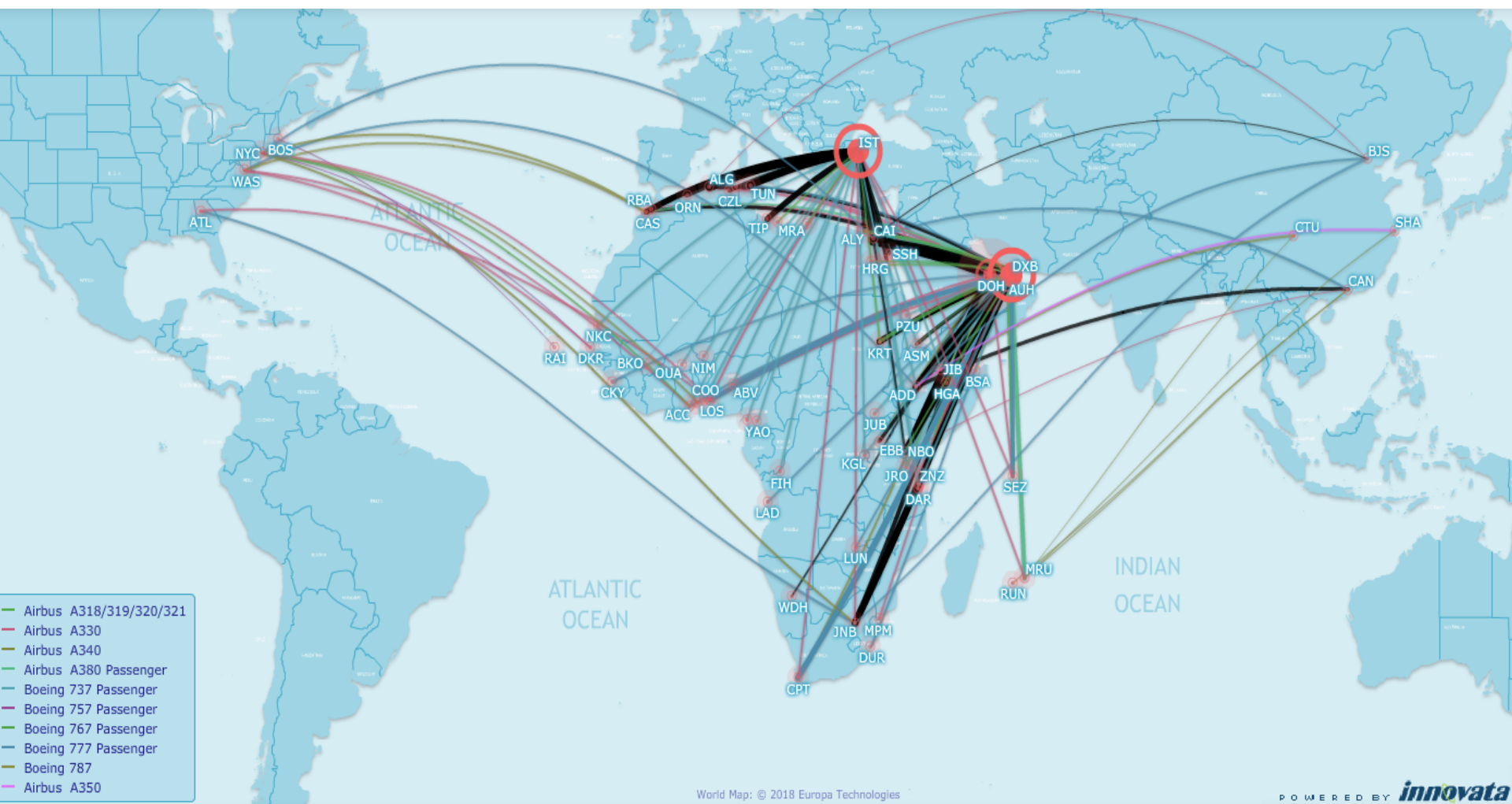
Emerging & restructuring airlines

- Emerging airlines
- Fleet replacement
- Liberalisation

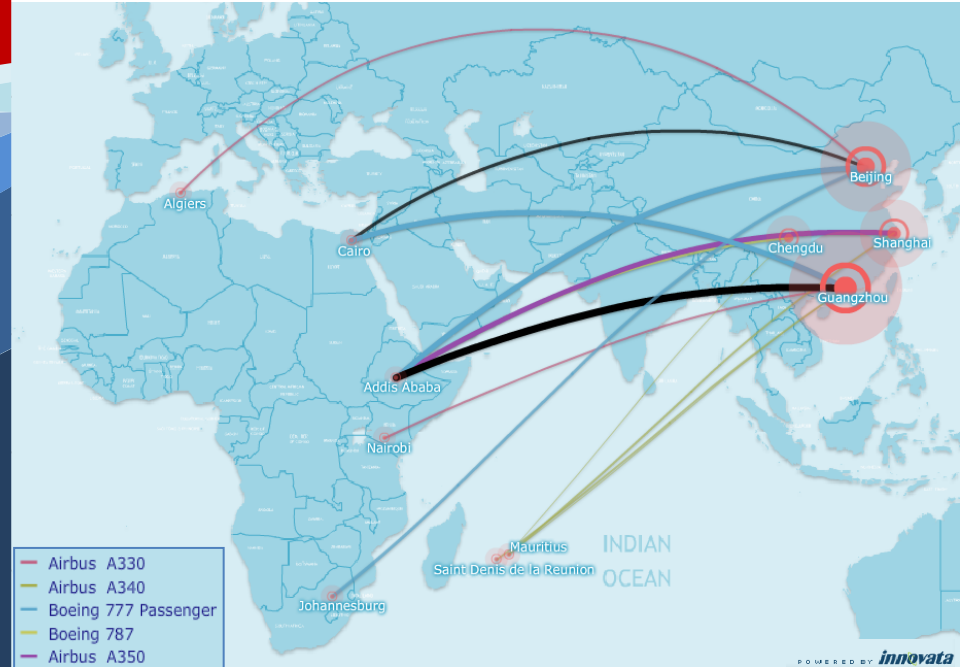
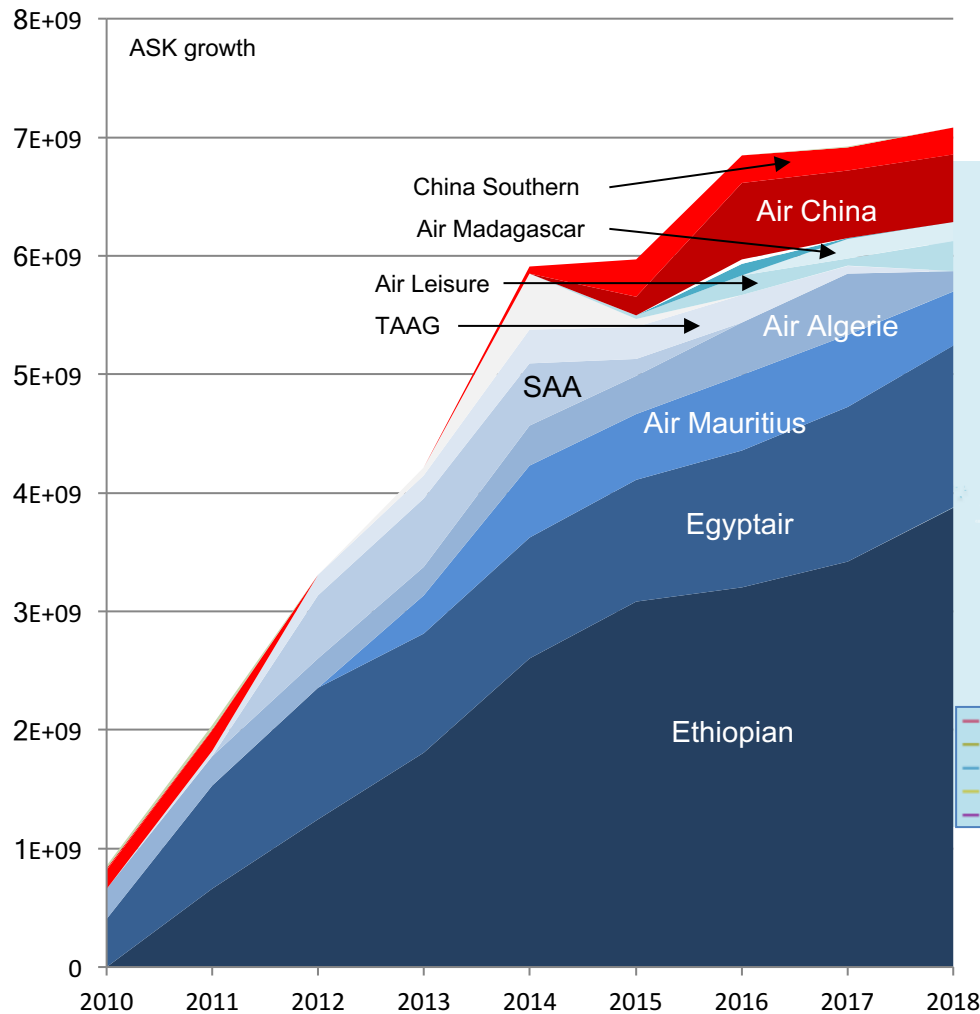


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So which are the trendiest markets?

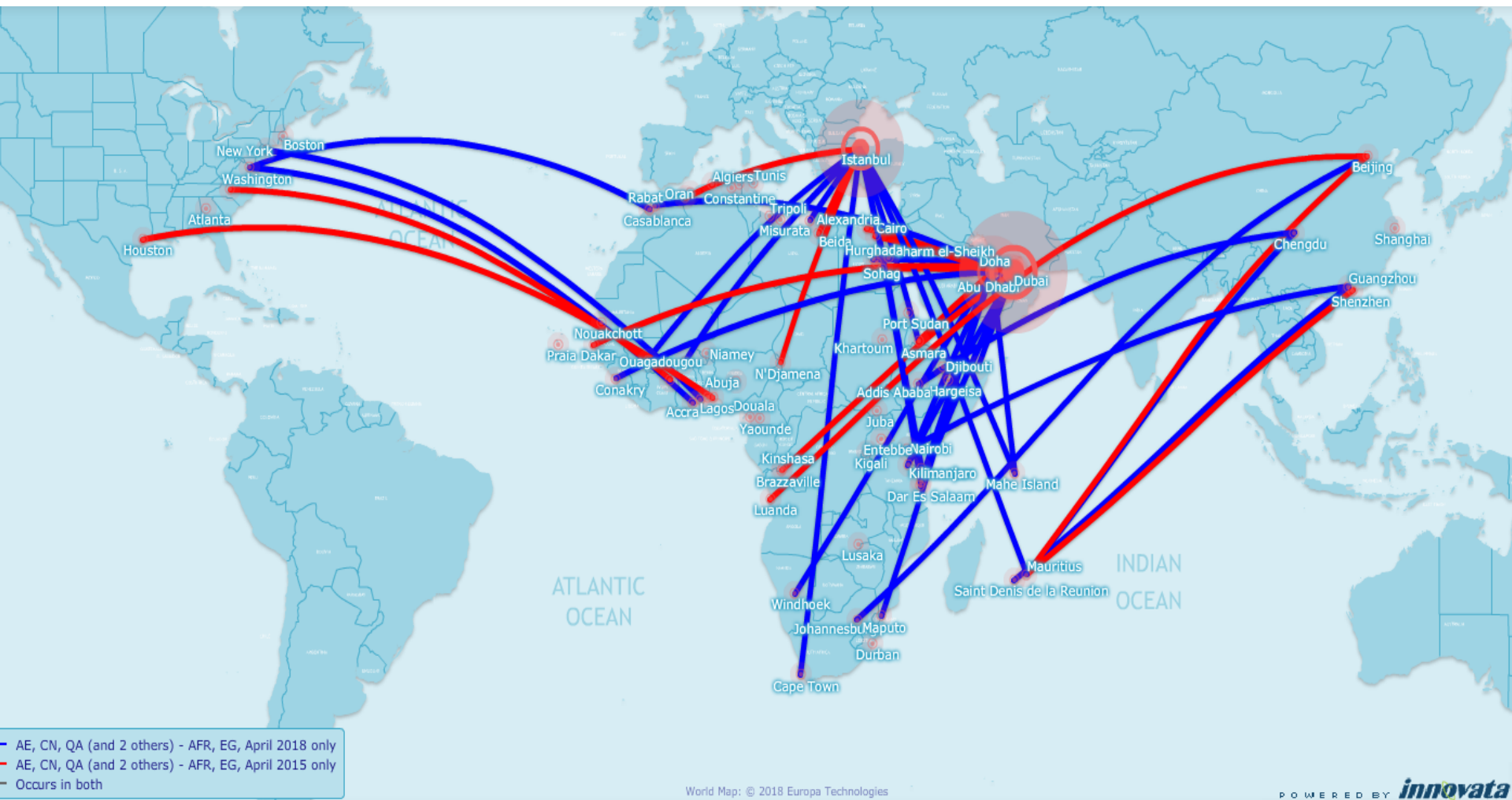


x6 growth in ASKs between China and Africa



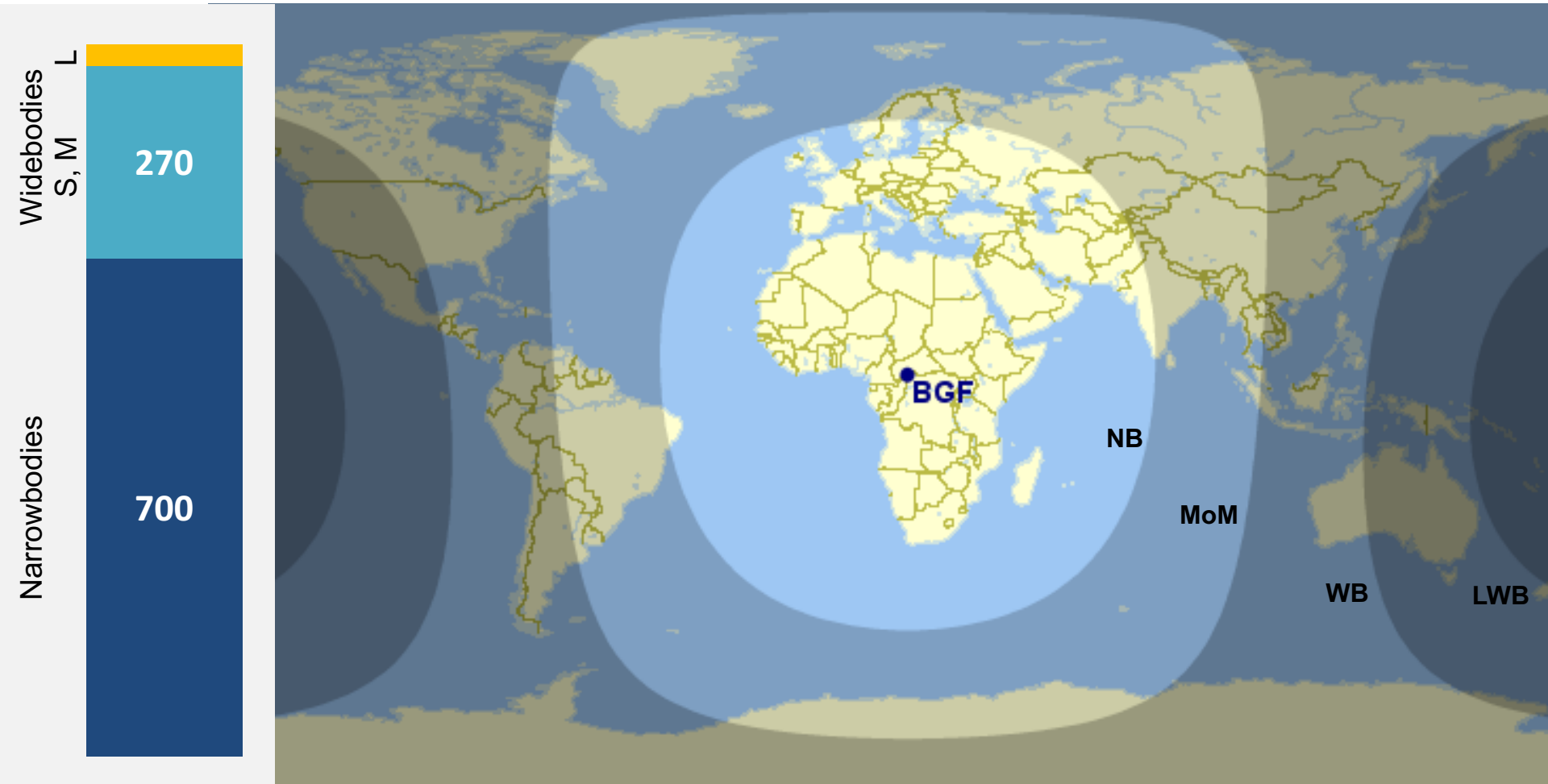
Frequencies

A story of hubs and spokes





1,000 new aircraft required over the next 20yrs



It's been busy!



30 new widebodies over the last 3 years

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Images courtesy of Airbus, Boeing, airliners.net, airplane-pictures.net



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... and it's getting busier!



Over 50 more widebodies to be delivered soon

It's not just about new aircraft

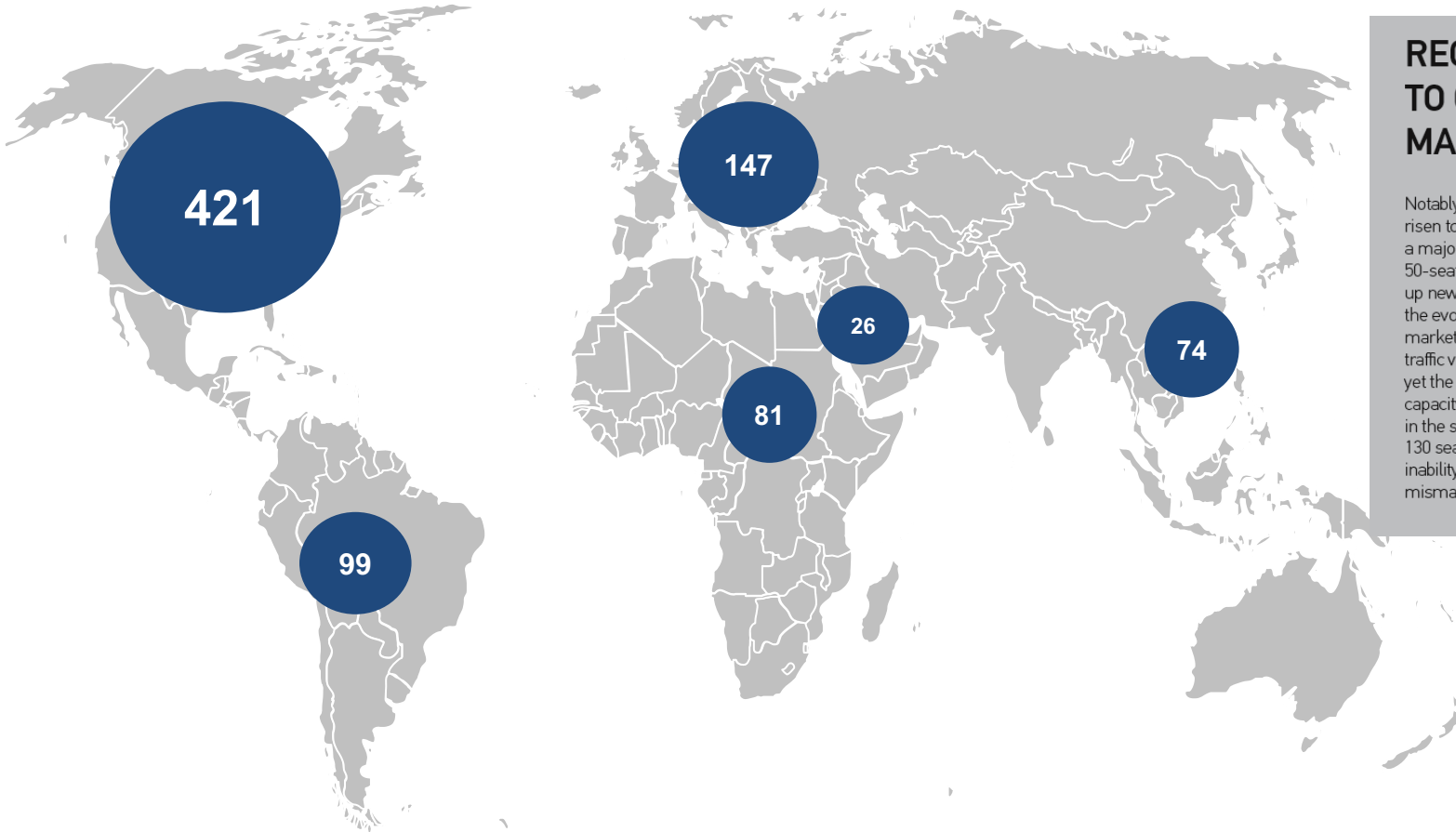


Very healthy uptake of Trent 800-powered 777s

Our AE3007 fleet is transitioning to Africa

ERJ135-140-145

850 aircraft in service



REGIONAL JETS TO OPEN VIRGIN MARKETS

Notably, the importing of 50-seat RJs has risen to prominence with low capital cost being a major factor in their popularity. In addition, 50-seaters are the perfect tool for opening up new, thin markets and later facilitating the evolution into larger capacity jets as said markets mature. Some 65% of city pairs have traffic volumes of up to 100 daily passengers, yet the current fleet is comprised of large capacity aircraft – around 70% of the aircraft in the single-aisle jet fleet have more than 130 seats. This clearly indicates not only the inability to expand air service, but also of mismatched capacity and demand.

A large proportion of the 850 aircraft will transition to Africa

Growth

1. Consolidation

2. Privatisation

3. Hubs



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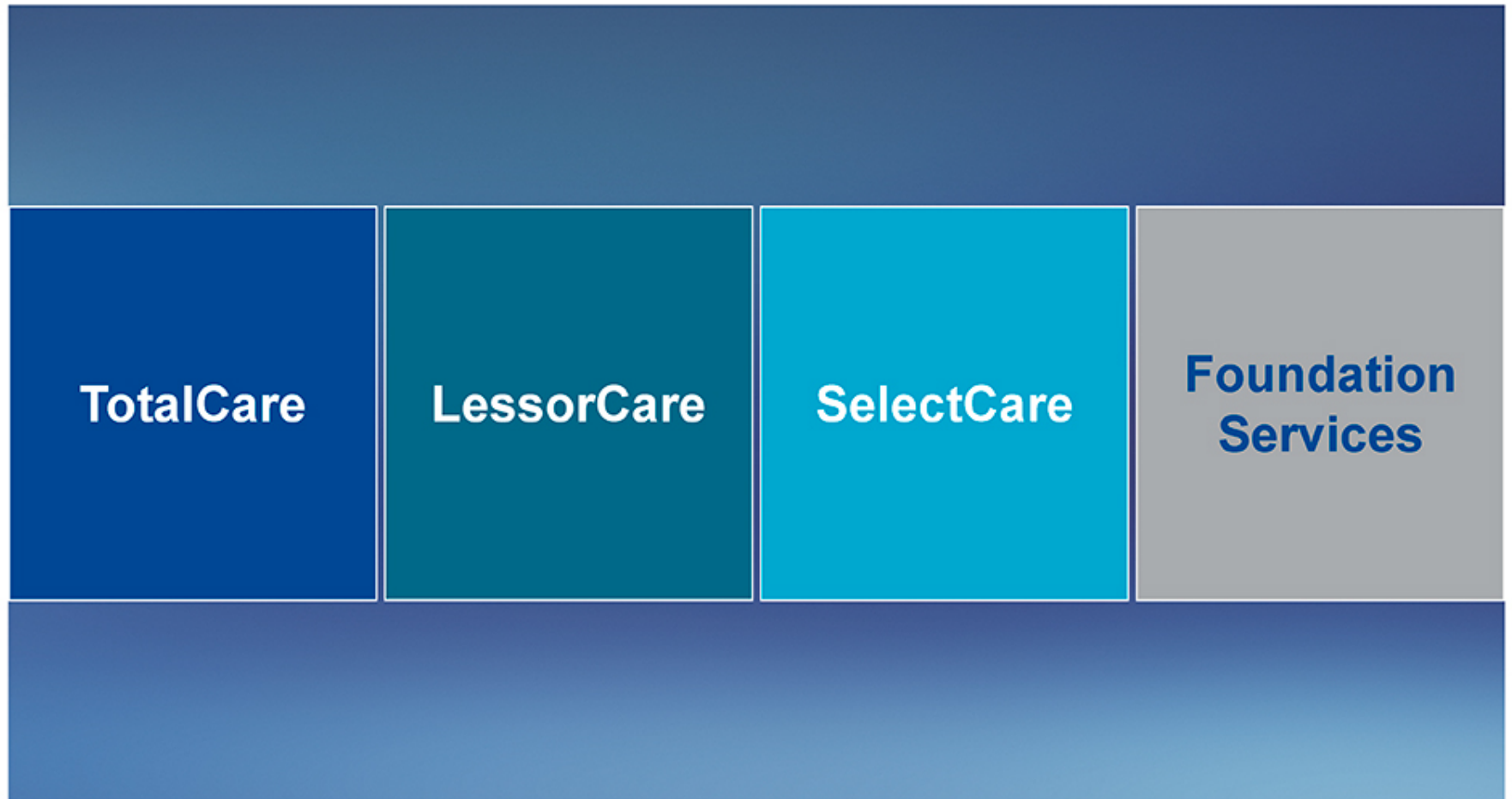
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