Flying to Tokyo
Pioneering African Aviation since 1946:
*Past, Present & Future*

**1946:**
1st scheduled flight to Cairo with DC-47

**1958**
1st Flight to Frankfurt

**1960:**
1st East-West Africa flights

**1962:**
1st jet service in Africa

**1984:**
1st African B767

**1998:**
Launch of Transatlantic flight to US

**2010:**
1st African B777-200LR

**2011:**
Star Alliance member

**2012:**
Only direct connection between Africa & Canada

**2013:**
Only connection between Brazil & West Africa

**2016:**
1st African A350
## Key Facts

<table>
<thead>
<tr>
<th></th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Founded</strong></td>
<td>1945 with support of TWA</td>
</tr>
<tr>
<td><strong>Passengers</strong></td>
<td>6 million passengers</td>
</tr>
<tr>
<td><strong>Fleet</strong></td>
<td>66 aircraft (7 years av. age)</td>
</tr>
<tr>
<td><strong>Main Hub</strong></td>
<td>Addis Ababa</td>
</tr>
<tr>
<td><strong>2nd Hub</strong></td>
<td>Togo - Lomé</td>
</tr>
<tr>
<td><strong>3rd Hub</strong></td>
<td>Malawi - Lilongwe</td>
</tr>
<tr>
<td><strong>Destinations</strong></td>
<td>International - 82, Domestic – 18</td>
</tr>
<tr>
<td><strong>Employees</strong></td>
<td>+ 8000</td>
</tr>
<tr>
<td><strong>Ownership</strong></td>
<td>100% Ethiopian Government</td>
</tr>
<tr>
<td><strong>Weekly Flights</strong></td>
<td>+ 1330 – Weekly flights, + 200 – Daily departures</td>
</tr>
<tr>
<td><strong>Global Alliance</strong></td>
<td>Star Alliance Member</td>
</tr>
</tbody>
</table>
Africa: Last Frontier of Globalization

- **1 billion young** population
- **2nd fastest** growing continent
- **60%** of world’s uncultivated arable land
- **Untapped resources**: 42% of world’s gold; 12% oil; 90% diamond, etc...
- **Best solution** for possible food & fuel crisis in the world
- **Fast growing middle class** for consumer market
Ethiopia Roaring!

One of the Fastest Growing Economy in the World

Growth & Transformation
(2010-2015)

- **GDP:** +11%
- **Infrastructure** development:
  - **Road:** 64,500 km
  - **Rail:** 2395 km
  - **Energy:** 10,000 MW
  - **Telecom:** 50 million mobile users
- **Addis:** 2nd city in Africa to have city train service
- Significant improvement in **human development index**
- Broad based & **all inclusive economic development**
Fast Growing Africa-Japan Economic Relations

- Japan’s investment into Africa was **$6 billion** in 2012

- Japanese Official Development Assistance to Africa averaged about **$1.8 billion per year** between 2008-2012

- Japan pledges **$32 billion aid** for Africa to boost investment

- **25 billion $ worth of trade** between Africa & Japan in 2012 & growing

- Japan supports Africa in developing **human capital** for private companies & in management strategies
Growing Traffic Flow between Africa & Japan

• Total traffic flow between Sub-Saharan Africa & Japan: **over 100,000 annually roundtrip**

• Major destinations between Sub-Saharan Africa & Japan: **South Africa, Nigeria, Kenya, Tanzania, Uganda, Senegal, Angola, Ghana, Ethiopia**

*Source: PaxIS, traffic estimate between March 2013-'14*
Japan: The Land of Rising Sun

- **3rd largest economy** in the world

- Home to the **largest technologically advanced** producers of motor vehicles, electronics, machines and chemicals

- Eye-catching **cultural, historical & architectural marvels**

- **Strong air connectivity** in Asia thanks to ANA
• Ethiopian Airlines will operate **three weekly flights** to Narita International Airport using **B787**

• Narita airport considered **as the sky-gateway** of Japan

• **35.4 million passenger** handled in Narita airport in 2013

• **B787: Ultimate in on-board comfort**
  
  ✓ **Higher cabin humidity**
  
  ✓ **Lightening adaptable to outside environment**
  
  ✓ **Individual IFE in economy class**
  
  ✓ **Environmentally friendly**
All Nippon Airways: Strong Partner in Asia

- Ethiopian Airlines and All Nippon Airways are **launch customers** of the technologically advanced 787 aircraft

- Both airlines are **Star Member Carriers** offering seamless and convenient connectivity options between Africa and Asia

- Ethiopian **ShebaMiles** and All Nippon Airways **Frequent Flier Program** have a Star Alliance partnership allowing their frequent flyers to enjoy privileges in both airlines

- Strengthen commercial partnership
Largest Network of Any African Airline

5 Continents; 82 International; 49 African & 18 Domestic Destinations
Addis Ababa:
Soon Best Gateway for Japan to Africa thru the AU HQ

Shortest &
Most Efficient
Connection with Africa

10th destination in Asia

- Narita: Gateway to Japan & Asia
- With ANA: seamless & convenient connectivity options
Star Alliance:
**Seamless & Convenient Global Connection**

Connecting Earth: Leading global network, Serving +1,200 airports & 193 countries!
Most Convenient Connection between Japan & Africa

Departure at night from Tokyo

Arrival in morning in Addis

Immediate connection to 49 African destinations
Most Convenient Connection between Africa & Japan

Arrival in afternoon in Tokyo

Connecting in evening in Addis

Departure in afternoon from 49 African destinations
Fast Growing & Modern Fleet

66 in service

On order:
32 on order

+ Narrow body aircraft under evaluation
Largest Cargo Airline in Africa

Freighter Network: Africa (15), Gulf, Middle East & Asia (7), Europe (2)

- Ethiopia: major exporter of flowers; looking for new markets
- Ethiopian: ready to support Ethiopian flower exports to Japanese market
- 7 dedicated freighters (B777LR F)
Fast, Profitable & Sustainable Growth
2003/04 – 2012/13

Revenue Grew more than 530% in 10 years in USD

2003/04

2004/05

2005/06

2006/07

2007/08

2008/09

2009/10

2010/11

2011/12

2012/13

0.39

0.49

0.61

0.76

1.10

1.23

1.27

1.50

1.92

2.07
Continued Fast, Profitable & Sustainable Growth

2012-13 Performance: Fast, Profitable & Sustainable Growth

Capacity (ASK): +15%

Passenger carried: 5.5 million +13%

Available Ton Kilometer (ATK): +13%

Op. Revenue: 2.1 billion USD +14%

Operating Profit: 110 Million USD +165%
Our Vision 2025
Leading Airline Group in Africa
Our Vision 2025:
Bringing Africa Together & Closer to the World

- 10 billion $ revenue (2.1 billion $ currently)
- 1 billion $ profit
- More than 100 international & 26 domestic destinations (82 international currently)
- 140 aircraft (66 aircraft currently)
- 18 million passengers (6 million currently)
- 820,000 tons of cargo (200,000 tons currently)
- 17,000 employees

Leading Airline Group in Africa with 7 Profit Centres
Overarching Strategies: Vision 2025

• Fast, profitable & sustainable growth with strong synergy among business units

• Cost Leadership
  - Network
  - New & modern fleet
  - Labour cost
  - Operational excellence

• 4 Star airline with 5 star service delivery
  - African flavoured Ethiopian hospitality

• Multi-hubbing in Africa
  - One brand with multiple products (hub-spoke)
  - Transformation to Aviation Group with 7 SBUs
Multiple Hubs: Necessity for continent bigger than *USA - China - India - Europe - Mexico - Japan Combined!*

- 2nd Hub: Lome with ASKY
- 3rd hub: Lilongwe with Malawi Airlines
- Multiple gateways: Filling the void; availing critical air connectivity
New Business Model
Diversified Aviation Business Model

Ethiopian Airlines Group with 7 Business Units

- Ethiopian international Services
- Ethiopian Regional Services
- Ethiopian Cargo Services
- Ethiopian Airlines Group
- Ethiopian MRO Services
- Ethiopian Catering Services
- Ethiopian Ground Services
- Ethiopian Aviation Academy
Aviation Academy

EASA & FAA Certified

- Pilots Training School
- Aircraft Maintenance Technicians School
- School of Marketing & Finance
- Cabin Crew Training School
- Simulator Training
  - For B737, B757 & B767
  - Q-400
  - Soon B787 & B777

- 1,000 Trainees in-take annual capacity
- 4,000 annual in-take capacity by 2025
Complete **maintenance package** on Boeing & Bombardier models

- Complete **routine checks** per manufacturers planning data or **customized package**
- **Avionics** Installation (New/Upgrades)
- Extensive **structural repairs & modification work**

**Complete Repair, Modification, Overhaul and Testing:**

- **P & W Models:** PW127, PW121 and PT6
- **CFM Model:** CFM 56-3/7
- **APUs:** GTCP331-200

- **Modular Maintenance:**
  - **P & W Models:** PW4000 & PW2000

- **Engine Performance Test**

- **Special Process Shops:**
  
  (machining, electro-chemical plating, welding, plasma spraying & vacuum furnace heat treatment)
1. **Fleet:** Current Orders of 32 aircraft
   - B777s; A350s; B787s; B737s; Q-400s

2. **Infrastructure**
   - New cargo terminal: **1.2 million tons** capacity
   - New MRO hangar
   - Addis Airport expansion (**250 million $**)

3. **HRD**
   - Academy expansion: curriculum & in-take
   - **4,000 trainees** annual in-take capacity: **80 million $** investment
   - Additional investments in Pilot training: Q-400 simulator; B787 Simulator;

4. **Systems:**
   - ICT, Policies, Procedures & Processes: **32 million $** investment
9 Prestigious Awards in 2013

• “African Airline of the Year” Award from African Airlines Association (AFRAA) on November 26, 2013

• Africa’s Best Business Class Airline by Chinese passengers at the 9th Annual Best Travel Media Award ceremony held in Beijing, China

• SKYTRAX “Best Staff Service in Africa”, Paris 2013


9 Prestigious Awards in 2013

• “Customer Service Leader”, Service Quality Institute's Worldwide in Istanbul Turkey on October, 2013

• “African Airline of the Year” at 9th Travel Market, AKWAAB, meeting in Nigeria at Eko Hotel Convention Centre on 27 October 2013

• “Best Cabin Crew in Africa” at 9th Travel Market, AKWAAB, meeting in Nigeria at Eko Hotel Convention Centre on 27 October 2013

• 2013 Planet Africa Professional Excellence Award on 2 November 2013 during a ceremony held at the International Centre in Toronto, Canada
Fly Ethiopian

• Fast & efficient connections to **49 African cities** every day

• **Convenient schedules** – to any of African destinations of your choice

• **New, modern & latest technology** fleet

• **Award-winning cabin** service

• **Safe, reliable & comfortable** service

• **70 years of proven experience** in serving customers
Fly Ethiopian

One Stretch Flight from Japan to Ethiopian Tourism Destinations

Gondar

Harar

Axum

Lalibela
Fly Ethiopian

One Stretch Flight from Japan to African Tourism Destinations

Zanzibar
Serengeti
Johannesburg
Kilimanjaro
Arigato
ありがとうございます。