

AIR DJIBOUTI CARGO COMMERCIAL PRESENTATION

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CARGO SALES & NETWORK PLANNING MANAGER

AIR DJIBOUTI

- Founded in 1963, relaunched the activity in 2015
- Operating an efficient fleet of 4 aircrafts (Boeing 747F & 727F, MD11F)
- Djibouti Airport as A Hub





AIR DJIBOUTI CARGO

Mission & Vision

➤ **Our Mission** is to ensure your goods are safely transported and delivered on time to their destination through a choice of reliable, cost effective services with best people, systems and processes.

➤ **Vision**

To be recognized as one of the most competitive cargo airlines by providing safe and customer focused cargo, Express courier and mail transport by 2020.

MARKET PERSPECTIVE



AIR DJIBOUTI Position In the Supply Chain

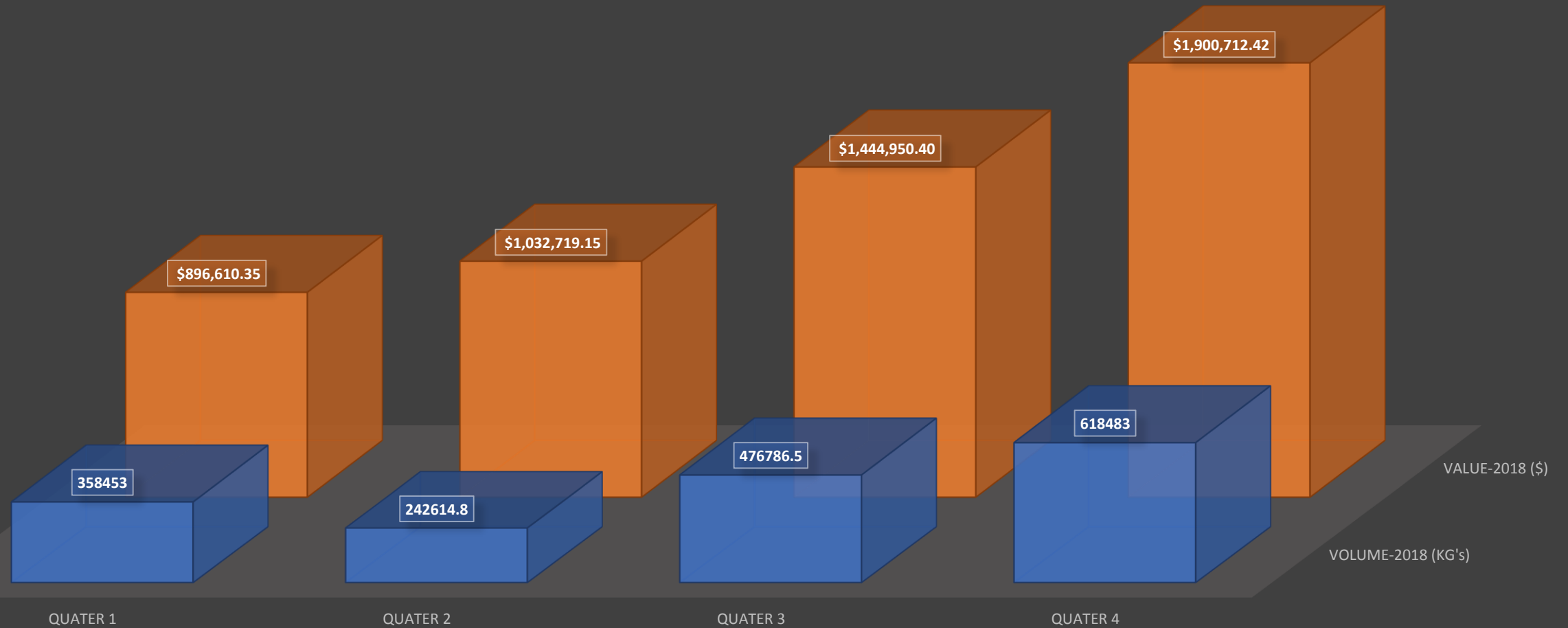


*HANDLING AGENT: ONLY IN JIB AIRPORT

AIR DJIBOUTI- IMPORT-EXPORT 2018

VALUE & VOLUME

VOLUME-2018 (KG's) VALUE-2018 (\$)



VAR- 2018 & 2017

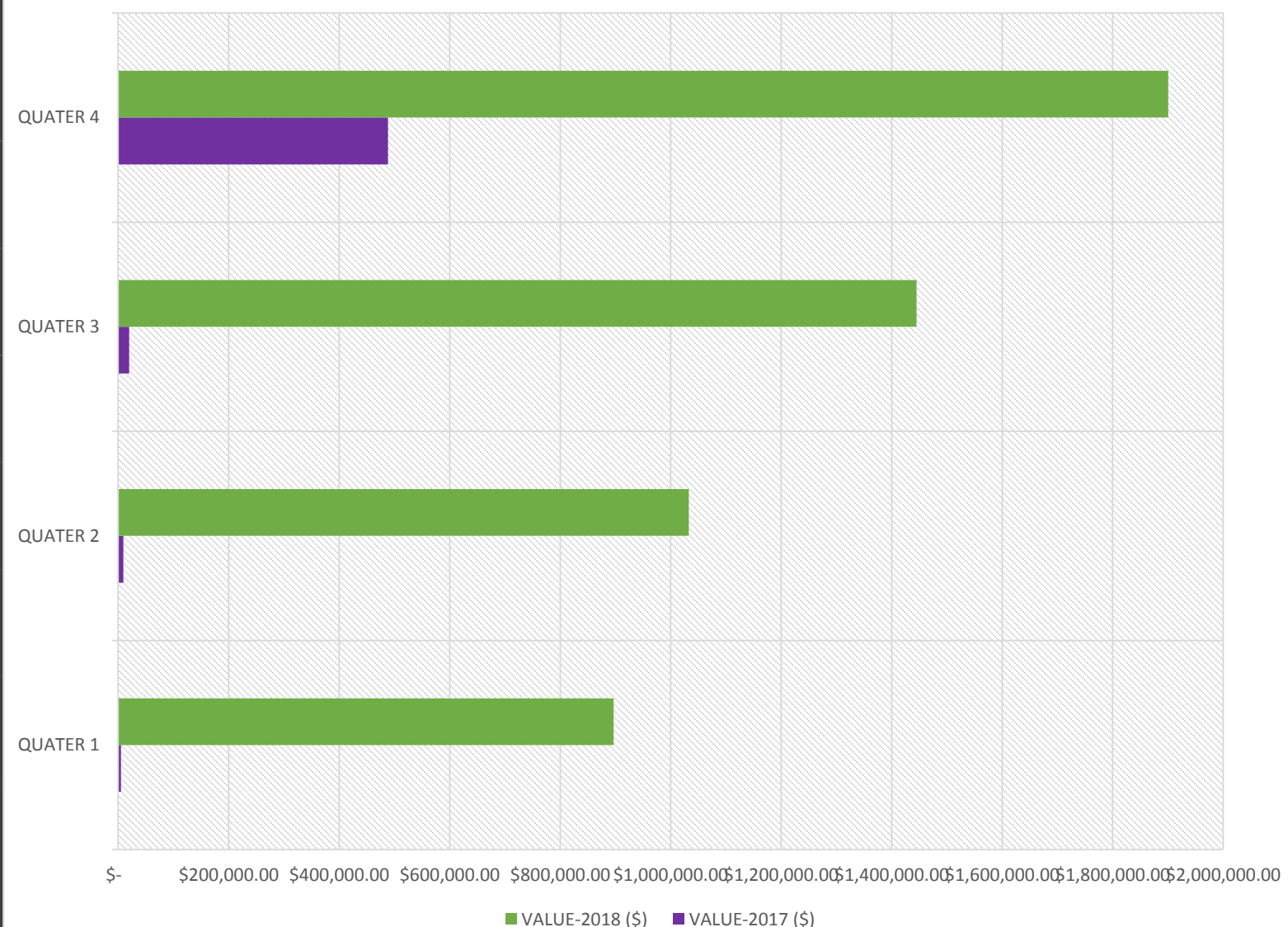


VAR IN VOLUME 2017 & 2018

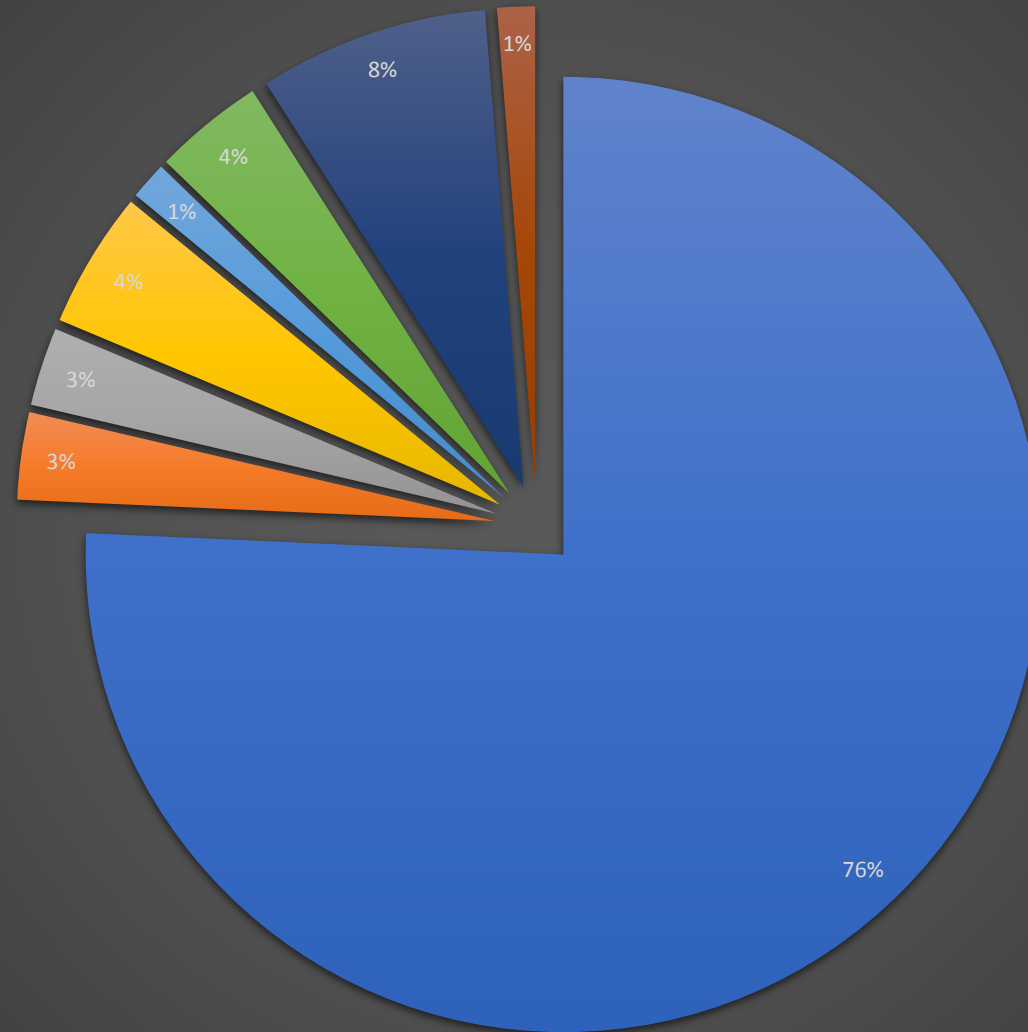
VOLUME-2017 (KG's) VOLUME-2018 (KG'S)



VAR IN VALUE 2017 & 2018



PIE GRAPH - PER COMMODITIES IN 2018



■ HUMANITARIAN RELIEF CARGO ■ DRUGS ■ MEDICAL EQUIPMENT ■ SPARE PARTS ■ LIVESTOCK ■ EXPRESS (COURRIER & PARCELS) ■ PERISHABLES ■ VALUABLE CARGO



AIR CARGO MARKET TRENDS AND OUTLOOK

Ongoing moderate uptrend in freight Volume



Air freight volumes grew much faster than global goods trade in 2017 as firms turned to the speed afforded by air freight to restock inventory levels quickly. However, FTK (freight tonne kilometres) growth is on track to underperform that of global goods trade in 2018.

External environment

Economic development: GDP growth in developed and emerging countries

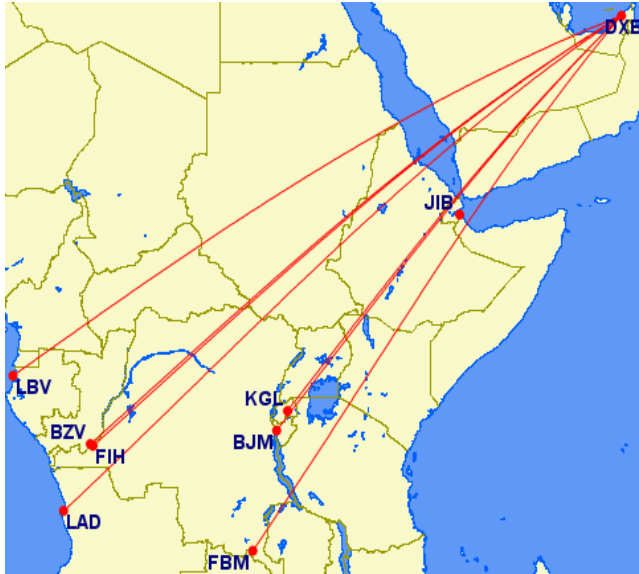


	2018
IMF World GDP growth	+3.7%
Emerging Market and Developing Economies GDP growth	+4.7%
Djibouti GDP growth	+6.7%

After a prolonged slowdown, investment growth in emerging markets and developing economies (EMDEs) picked up to 4.5 percent in 2017, and is projected to accelerate to 5.2 percent in 2018 and 2019 (investment refers to real gross fixed capital formation, public and private combined).

JIB AS STRATEGIC POSITION

DXB vs JIB : B747-400F to Central Africa

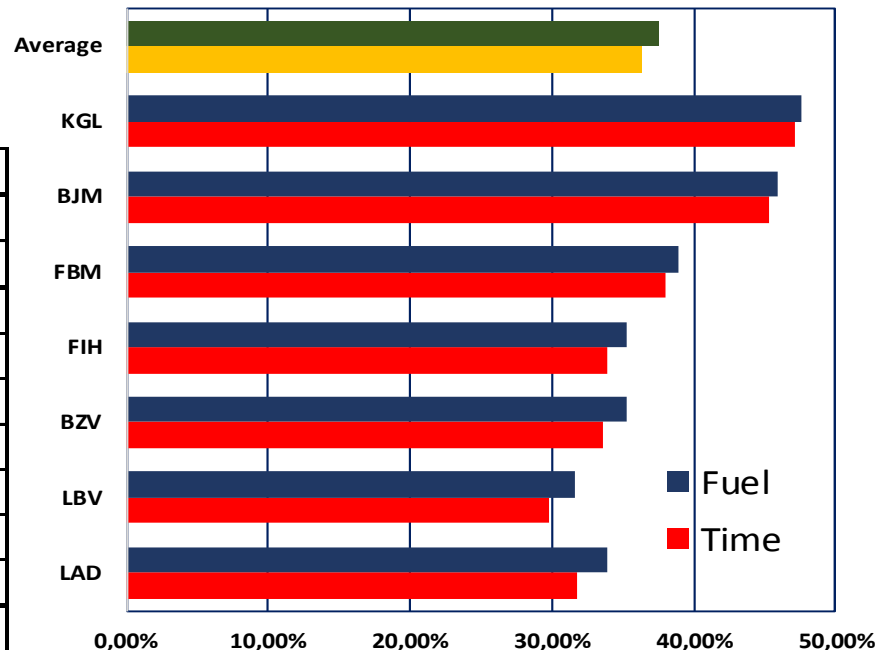


From DXB				From JIB			
Dest	Dist (NM)	West Bound		Dest	Dist (NM)	West Bound	
		Flt Time	Burn (kg)			Flt Time	Burn (kg)
LAD	3 294	7:09	78 735	LAD	2 229	4:53	52 041
LBV	3 140	6:49	74 572	LBV	2 184	4:47	51 013
BZV	3 017	6:33	71 291	BZV	1 974	4:21	46 203
FIH	3 014	6:33	71 238	FIH	1 968	4:20	46 066
FBM	2 821	6:08	66 128	FBM	1 717	3:48	40 393
BJM	2 354	5:09	55 007	BJM	1 250	2:49	29 724
KGL	2 257	4:57	52 697	KGL	1 155	2:37	27 644



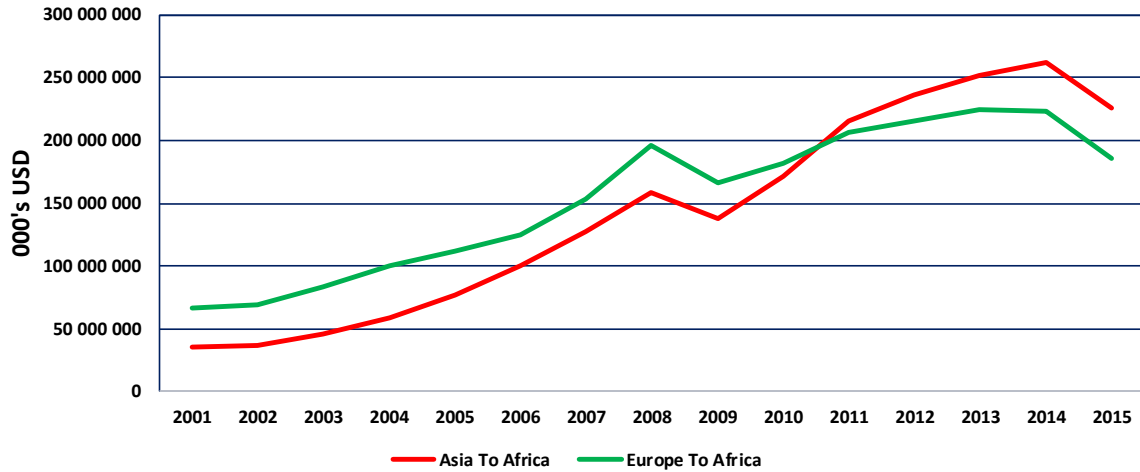
Savings JIB vs DXB to Central Africa

Saving JIB versus DXB				
One way to	Flight Time		Fuel Burn	
	Hr	%	kg	%
LAD	2:16	31,70%	26 694	33,90%
LBV	2:02	29,83%	23 559	31,59%
BZV	2:12	33,59%	25 088	35,19%
FIH	2:13	33,84%	25 172	35,34%
FBM	2:20	38,04%	25 735	38,92%
BJM	2:20	45,31%	25 283	45,96%
KGL	2:20	47,14%	25 053	47,54%
Average	2:14	36,30%	25 226	37,60%

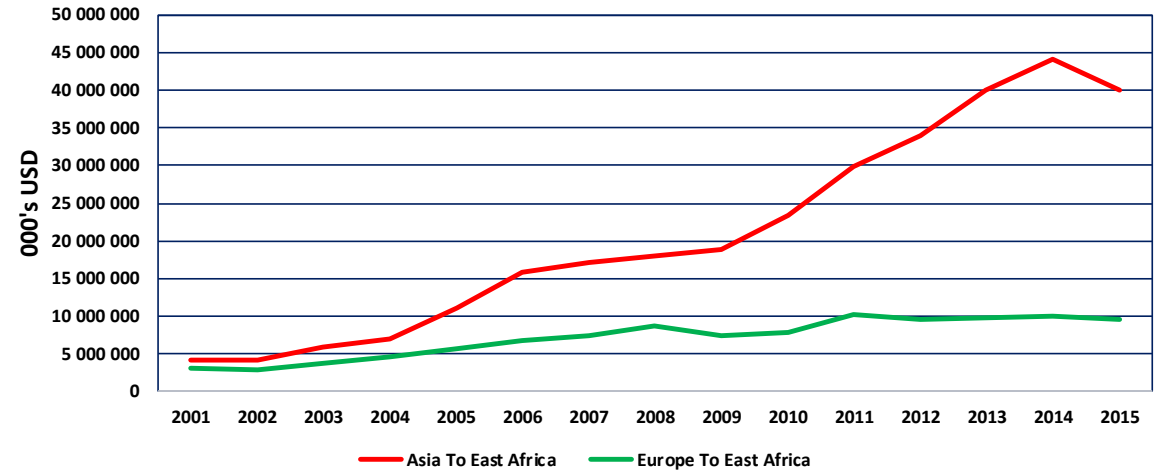


Evolution of export to Africa : Europe and Asia

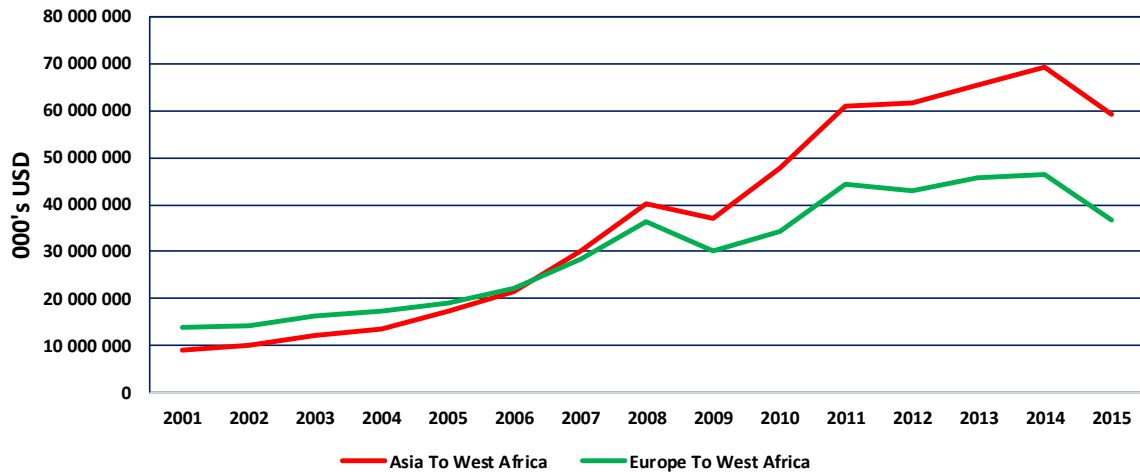
Export to Africa (Values in 000's USD)



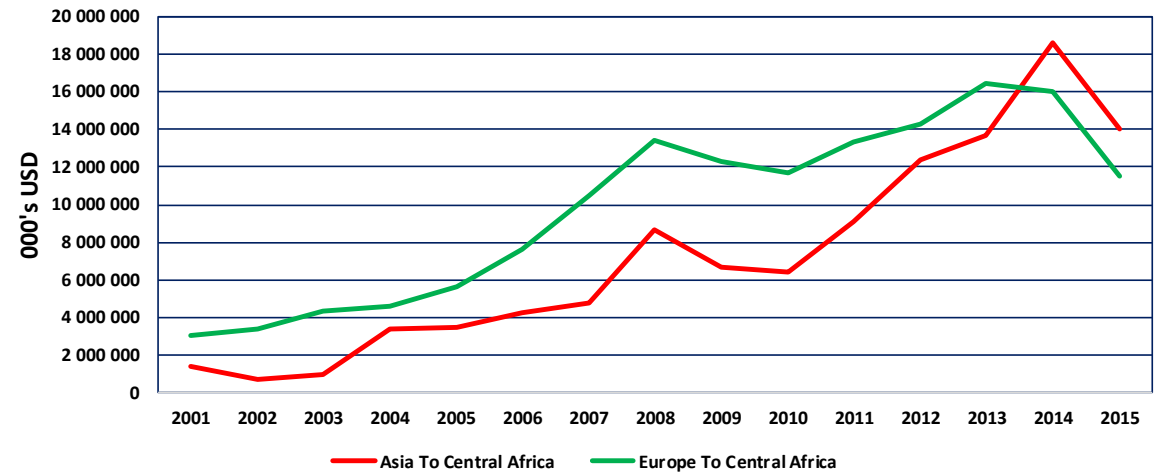
Export to East Africa (Values in 000's USD)



Export to West Africa (Values in 000's USD)



Export to Central Africa (Values in 000's USD)



Sea – Air Asia-Africa B747-400F

- Gain 3 days on the ocean route
- Save on average 30% on fuel and ACMI cost

Sea – Air distribution East-Asia-Africa B737-400F

- Save on average 60% on fuel and ACMI cost

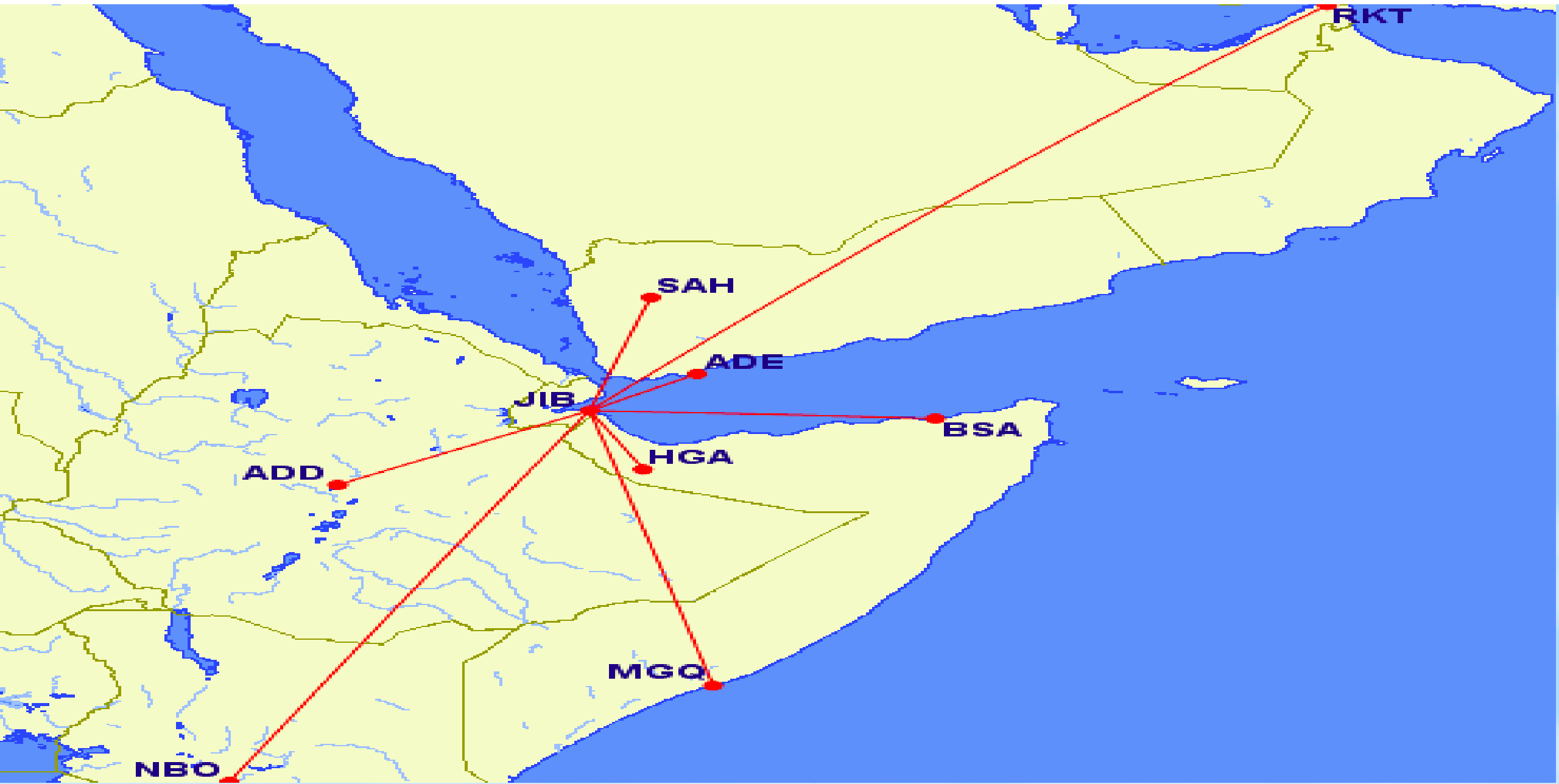
Additional air freight opportunities for Air Djibouti

- Repack an re-consolidation
- Logistic Hub for relief cargo
- Transit assembly operations (mobile phones, electronics.....)

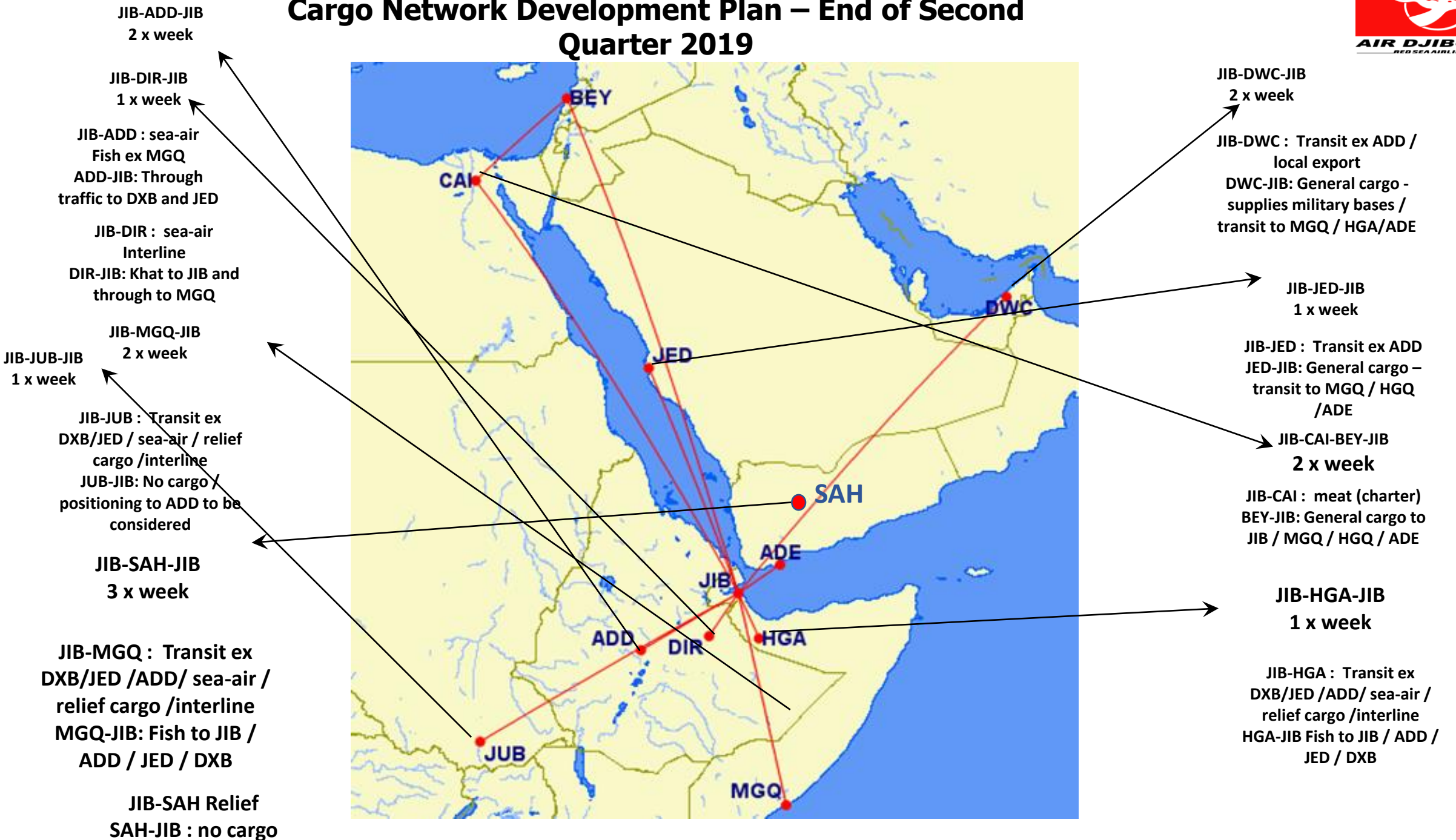


PROJECTION FOR 2019

AIR DJIBOUTI PROVIDES AIRFREIGHT CONNECTIONS to 8 city - ACTUAL



Cargo Network Development Plan – End of Second Quarter 2019



AIR DJIBOUTI PARTNERSHIP - 2019



**Feeder ex
US by air**

**EU Trucking
Network**

**Local / Regional
Onload JNB**



European trucking network - Regular trucking from and to LIEGE

Austria

Linz Vienna

Belgium

Brussels

Czech Republic

Prague

Denmark

Copenhagen

Finland

Helsinki

United Kingdom

Belfast

London

Manchester

Prestwick

France

Lille

Lyon

Marseille

Paris

Netherlands

Amsterdam

Maastricht

Rotterdam

Norway

Bergen

Oslo

Portugal

Lisbon

Porto

Germany

Berlin

Cologne

Dortmund

Frankfurt

Hamburg

Hanover

Leipzig

Munich

Switzerland

Geneva

Zurich

Hungary

Budapest

Sweden

Gothenburg

Malmö

Stockholm

Spain

Barcelona

Madrid

Valencia

Italy

Bologna

Florence

Milan

Rome

Turin

Venice

Ireland

Dublin

CARGO CENTER

- Total building area 10000 m²
- Direct customer and cargo access
- 40 loading docks,
- 8,000 m² of warehouse space / 20 10-ft ULD position stacker system
- Reefer Containers for Perishables, and all temperature controlled Cargo
- Annual capacity: 50,000 tonnes
- DGR and Pharma expertise

AIR DJIBOUTI strenghts in a competitive Market Environment

- Network Expansion
- Interline (block space agreement) with strong Companies.
- Lobbying at international organization (UN, UNICEF, UNHCR,WFP)
- Flexibility to adapt to market changes
- More Qualified and Trained staff
- Integration with the Djibouti Port & Free Zone
- Ideal Geographic location for distribution of Asian flows

THANK YOU FOR YOUR
ATTENTION

