

JOHANNESBURG OFFICE

BALLYOAKS OFFICE PARK, BUILDING B, 35 BALLYCLARE DRIVE, BRYANSTON EXT 7  
P O BOX 3044, RANDBURG, 2125  
TEL: +27 11 513 -1450 FAX: +27 11 463-2771

PORT ELIZABETH OFFICE

57 FIFE AVENUE, ROWALLAN PARK, PORT ELIZABETH, 6025  
P O BOX 505, HUNTERS RETREAT, 6017  
TEL: +27 41 371-5298 FAX: +27 41 371-5151

WEBSITE: [WWW.WHOOWNSWHOM.CO.ZA](http://WWW.WHOOWNSWHOM.CO.ZA)  
REG No: 1986/003014/07



Essential Business Information

## RESEARCH REPORT

on

**Air Transport**

SICCODE: 73000

Report Date: May 2010

Compiled By:  
**Amanda van der Westhuizen**  
[research@whoownswhom.co.za](mailto:research@whoownswhom.co.za)

## **Report Index**

INTRODUCTION .....	4
DESCRIPTION OF THE INDUSTRY .....	4
➤ Leasing of Aircraft .....	6
SIZE OF INDUSTRY .....	7
STATE OF THE INDUSTRY .....	9
➤ Local .....	9
Corporate Actions .....	11
Regulations .....	11
Black Economic Empowerment .....	13
➤ Regional .....	13
➤ International .....	14
INFLUENCING FACTORS .....	19
➤ Economic Environment .....	19
➤ Rising Input Costs .....	20
➤ Information Technology .....	22
➤ Labour Resources .....	22
➤ Technology .....	23
➤ Cyclicity .....	23
➤ Terrorist Activities and Other Security Threats .....	24
➤ Environmental Concerns .....	24
COMPETITION .....	25
➤ Barriers to Entry .....	28
INDUSTRY SUPPLY CHAIN .....	28
SWOT ANALYSIS .....	29
➤ Strengths .....	29
➤ Weaknesses .....	29
➤ Opportunities .....	29
➤ Threats .....	30
FUTURE OUTLOOK .....	30
INDUSTRY ASSOCIATIONS .....	30
REFERENCES .....	31
➤ Publications .....	31
➤ Websites .....	32
APPENDIX 1 .....	35
➤ South African Airports .....	35
APPENDIX 2 .....	37
➤ Three largest Airline Alliances .....	37
APPENDIX 3 .....	38
➤ African Members of IATA .....	38
APPENDIX 4 .....	39
➤ Airport Tariffs and Taxes .....	39
ORGANOGRAM 73000A .....	40
➤ Local Airlines .....	40

## **Companies Profiled**

Aero Africa (Pty) Ltd .....	42
Airquarius Contracts (Pty) Ltd .....	43
Bateleair Air Charter Cc .....	44
Capital Air (Pty) Ltd .....	45
CFA Air Charters (Pty) Ltd .....	46

Comair Ltd.....	47
Execujet Aviation (Pty) Ltd.....	49
Executive Turbine Aviation (Pty) Ltd.....	50
Fair Aviation (Pty) Ltd.....	51
Federal Air (Pty) Ltd.....	52
Global Aviation Operations (Pty) Ltd.....	53
Imperial Air Cargo (Pty) Ltd.....	54
National Airways Corporation (Pty) Ltd.....	55
Naturelink Aviation (Pty) Ltd.....	56
Phoebus Apollo Aviation (Pty) Ltd.....	57
SA Airlink (Pty) Ltd.....	58
Safair Operations (Pty) Ltd.....	60
South African Airways (Pty) Ltd.....	61
South African Express Airways (Pty) Ltd.....	63
Zenith Air Cc.....	65
ORGANOGRAM 73000B.....	66
➤ Low Cost Airlines.....	66

#### **Companies Profiled**

1Time Holdings Ltd.....	67
Comair Ltd.....	69
Mango Airlines (Pty) Ltd.....	71
ORGANOGRAM 73000C.....	72
➤ International Airlines.....	72

#### **Companies Profiled**

Air France - KLM.....	73
British Airways Plc.....	75
Deutsche Lufthansa Ag.....	77
The Emirates Group.....	79
Qantas Airways Ltd.....	81
Qatar Airways Inc.....	83
Singapore Airlines Ltd.....	84
Virgin Atlantic Airways Ltd.....	86