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Winter 2023 | No. 904

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TURKISH CARGO
A NEW JOURNEY FROM TURKISH CARGO
THE LONELY KOALA
We carried koala Yani, in danger of extinction and alone in her current setting,
to her new friends to ensure the continuation of her species.
TO WATCH THE MOVIE
SCAN THE QR CODE
TURKISH CARGO
#MISSIONRESCUE

Winter 2023 No. 904

Cover image: Intradco Global

Editor
Damian Brett
d.brett@aircargonews.net

Deputy Editor
Rebecca Jeffrey
r.jeffrey@aircargonews.net

Divisional Manager
Annie Roberts
annie.roberts@
dvvmediainternational.com

Advertisement Manager
Richard Perry
richard.perry@aircargonews.net

Production
Isabel Burton
production@aircargonews.net

Digital
Jamie May
j.may@aircargonews.net

Circulation Manager
subs@aircargonews.net

Events
Beatrice Olsen
events@aircargonews.net

Publisher
Andy Salter
andy.salter@
dvvmediainternational.com

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UPS EXPANDS

UPS is expanding its presence at Hong Kong International Airport with the development of a huge new facility. It will measure 20,000 sq m and will be able to handle about 1m tons per year.

SOUTH AFRICA INVESTMENT

Dachser has acquired the remaining 30% of shares in Dachser South Africa and is now the sole owner of the Johannesburg-based organisation. The company had been a joint venture since 2011 with family-owned firm Jonen Freight.

VAAYU PARTNERS WITH PRADHAAN

UAE-headquartered Vaayu Group has signed an agreement to be a strategic investor in non-scheduled Indian cargo carrier Pradhaan Air Express. The deal was announced on the sidelines of the Dubai Airshow on November 16. Pradhaan Air Express operates the world's first A320P2F aircraft.

SWISSPORT REIGNS IN SPAIN

Ground handler Swissport has opened a new air cargo terminal at Zaragoza Airport. The new cargo terminal spans more than 4,000 sq m. The facility has 14 truck docks for fast pick-up or delivery of general and express cargo.

COMAC'S ARJ21 FIRST

The Commercial Aircraft Corporation of China has delivered the first two freighter conversions of ARJ21 short- to medium-range turbofan regional aircraft.

Maersk tries out a peak season service to China

MAERSK AIR CARGO is launching a new trial service between the UK and China to help meet peak season demand.

The airline will operate the weekly service between Bournemouth Airport and Hangzhou Xiaoshan International Airport in Zhejiang province, using a Boeing 767-300 freighter with a capacity of about 45 tonnes. Cargo will be handled in Bournemouth by the airport's in-house business, Cargo First.

The service will initially operate until the end of 2023 to cater for peak season demand, but there is the potential to continue after that.

The additional service comes as the airline has been ramping up operations since its launch earlier in 2023, when it began flights from its Billund hub in Denmark to Hangzhou.

In April, the carrier added flights from Hangzhou to Chicago Rockford.

Gary Jeffreys, area managing director, UK and Ireland at Maersk, said: "This represents our integrator strategy and demonstrates our product offering and capabilities across all modes of transport. Whether it be time-critical [cargo], capacity challenges or product launches, we have the capabilities to meet our customers' demands."

Steve Gill, managing director of Bournemouth Airport, added: "We are delighted that Maersk has chosen Bournemouth for this new route as we grow our ambition to become the UK's number one entry and exit point for time-critical cargo.

"We now have 500 tonnes of weekly import capacity operating between China and Bournemouth as more customers take advantage of our location, lack of slot constraints and 'one team' integrated approach across all airport and cargo handling operations."

The south coast UK airport has seen its cargo operation grow over recent months, after European Cargo launched operations using its A340 converted freighters back in May, flying three times a week to China.

European Cargo added a second aircraft and ramped up flights to six per week in September. In November it added a third freighter and increased flights to nine per week.

The airport has based its strategy on a faster cargo processing time than its busier rivals such as Heathrow.

The airport claims research shows that deliveries via Bournemouth to London warehouses could halve the time of delivery to the same end destinations, compared with using a London hub airport.

Photo: Cargo First

The Denmark-based carrier is trialling a UK-China route from Bournemouth

FAA orders 747 lightning safety checks

THE US FEDERAL Aviation Administration (FAA) has ordered all US Boeing 747 operators to carry out urgent inspections of lightning protection systems on the aircraft.

The FAA on November 30 issued an airworthiness directive ordering operators to carry out the inspections because of early degradation of the lightning protection safety system.

Boeing also issued a multi-operator message on November 13, recommending that the inspection work is completed.

The FAA directive gives freighter operators 120 days to comply, while operators of passenger 747s have 90 days.

Freight forwarders have expressed concern that the inspections and any corrective work may disrupt operations.

One forwarder contact had been told that each aircraft would be out of service for four to five days while the inspections and work is carried out. Boeing said the process would take two or three days.

Atlas Air Worldwide Holdings and its affiliates operate 56 747s, UPS has 41 of the type, Kalitta Air 24 and National Airlines eight, according to Cirium data.

Airlines globally have 495 747s in service or storage.

Photo: Renatas Repcinskas/Shutterstock

Turkish is aiming to expand its fleet to 40 freighters in the next "five years plus"

Turkish Airlines plans rapid freighter growth

TURKISH AIRLINES HAS given more details on its plans to expand its freighter fleet over the coming five to 10 years.

Speaking at the TIACA Executive Summit hosted by Brussels Airport, Turkish Airlines chief cargo officer Turhan Özen said the carrier had ambitious plans for its passenger fleet and in line with this it is also planning to expand its freighter fleet.

The carrier is hoping to expand its current overall fleet from about 429 aircraft to more than 800 in 10 years' time.

On freighters, Özen said that over the next "five years plus" the freighter fleet would expand from 24 aircraft to 40.

Turkish Airlines has been working on an order for 400 narrowbodies and 200 widebodies in order to meet these ambitions.

The airline had initially hoped to finalise that deal in summer 2023, but completion has been complicated by challenges securing delivery slots at Airbus and Boeing and engine supply issues.

Özen said that the airline may turn to wet lease, dry lease and ACMI in the short term to meet its freighter requirements because of the production limitations.

He pointed out that the carrier already operates leased freighters – 18 of its 24 freighters are owned, with the remaining six leased.

However, in the long run, Turkish Cargo will base its strategy mainly on new, owned aircraft.

On the sidelines of the event, he added that the freighters would be widebody aircraft but final details on the makeup of the order and exact timeline could not be confirmed.

He said the main purpose of the freighter network is to optimise its belly network with the most profitable types of cargo.

According to an investor presentation released earlier in 2023, the carrier expects cargo volumes to increase from an estimated 1.6m tons in 2023 to 3.9m tons in 2033 in line with its fleet expansion.

Western Global out of Chapter 11

US CARGO AIRLINE Western Global Airlines successfully completed financial restructuring and emerged from Chapter 11 bankruptcy proceedings in early December.

The freighter operator, which during the high-demand Covid era had plans to expand, filed for Chapter 11 bankruptcy protection, and confirmed a plan with financial stakeholders to reorganise, in August.

Since then, the cargo airline has materially reduced its debt by more than $460m and now has less than $100m of funded debt.

The company has retained its fleet of four Boeing 747-400 and 15 MD-11 freighters, as well as two MD-11F's that have "not yet been conformed".

"My top priority has always been to preserve the long-term viability of our company and protect our people," said founder and chief executive Jim Neff. "I am pleased our restructuring process has achieved that."

EDITOR'S COMMENT

Damian Brett

If there are no alternatives, SAF is a good choice

AVIATION HAS BEEN busy raising awareness about its efforts to reduce its carbon emissions in recent weeks, from various headline-making SAF flights to new targets from ICAO.

However, as much as aviation is keen to promote the use of SAF, there are also those that question its credentials.

For instance, burning SAF adds as much carbon to the atmosphere as burning normal jet fuel. Estimated carbon emissions savings of 80% compared with jet fuel come into play only when lifecycle emissions are taken into account.

Crops used for SAF absorb carbon when growing, so this can count against the carbon output when flying. Or, when utilising waste products, airlines are using something that would have created carbon anyway by either being incinerated or put in landfill.

But some have argued this makes SAF just a glorified carbon offsetting scheme.

There are also concerns over how crops are grown to make SAF, which can result in deforestation, as well as production limits and the high cost.

But, at present, the only alternative is keeping planes on the ground.

Kenya meets demand with two 737-800 conversions

KENYA AIRWAYS IS introducing a pair of Boeing 737-800 converted freighters in order to expand its cargo capacity.

The flag-carrier said the freighters will contribute to its "diversification strategy" and address a "growing demand" for cargo carriage in the region.

Kenya Airways currently operates a pair of older 737-300 freighters. It indicated that it was launching 737-800F operations during a logistics event in Nairobi in November, and said a second aircraft is due to enter service in February 2024.

"With the addition of this [new] freighter, Kenya Airways will now offer increased cargo capacity to existing routes as well as new cargo destinations," said chief executive Allan Kilavuka.

Kilavuka stated that the carrier will use the 737s on routes to Dubai World Central – the location of the city's Al Maktoum airport – as well as Sharjah, plus the Saudi Arabian cities of Riyadh and Jeddah.

He also identified destinations including Mumbai and the African cities of Lagos, Dakar, N'Djamena, Mogadishu, Freetown and Monrovia.

Kenya Airways' cargo director Dick Murianki had told *Air Cargo News* of the carrier's plan to add the freighters earlier this year.

Murianki said that the -800s had better range than the existing freighters. He added that once the two 737-800Fs are in place, the carrier would then examine long-haul freighters.

On the reasoning behind the freighter investments, Murianki said that during the Covid-19 crisis the airline had expanded its cargo operations using its passenger aircraft.

"We developed a customer base during Covid that is yearning for more, especially to the Middle East and India," he said.

FedEx offers pilots cash bonus for PSA transfer

FEDEX EXPRESS HAS launched an offer encouraging pilots to move to regional passenger carrier PSA Airlines as direct-entry captains, with the opportunity to flow through to PSA parent firm American Airlines.

The airlines are sweetening the deal, which was available until December 1, with a $250,000 signing bonus.

According to a memo to FedEx pilots from Pat DiMento, vice president flight operations and training, which has been widely circulated online, the carrier told pilots that "air cargo demand remains down, with decreased revenues and volumes similar to 2019".

The express giant's flight operations are "significantly overstaffed", he added.

FedEx is therefore encouraging pilots to consider moving to Dayton, Ohio-headquartered regional airline PSA.

"Given the softness in air cargo demand across the industry and current FedEx flight operations staffing levels, we shared information about this unique opportunity with our pilots," the carrier said on November 6.

Photo: Markus Mainka/Shutterstock

FedEx has devised the job-swap scheme to tackle "significant overstaffing"

"FedEx and American Airlines have had a good relationship for many years, and their recognition of the quality of our crew force is clear in this recruitment initiative that provides FedEx pilots an additional career path opportunity."

PSA has established a website for pilots considering switching from cargo to passenger flights.

Pilots would be trained to fly the carrier's Bombardier CRJ700s and CRJ900s, with guaranteed minimum days off and career-progression promises.

"While I understand that this is not something that will appeal to every pilot, for those of you who are frustrated with current flight hours [or] career progression, or have just been on the fence about available options, you may consider this unique opportunity enough of an incentive to make a move," DiMento's memo reads.

Earlier this year, FedEx pilots rejected a new four-year contract that had been negotiated by their union, Air Line Pilots Association, International (ALPA).

The deal would have taken effect in August and provided a 30% pay increase and improved pension benefits, the union said.

It is not just FedEx that has been hit by the tough market conditions. In September news broke that UPS was offering severance packages to 167 pilots.

SGL grows with ENK Logistics acquisition

SCAN GLOBAL LOGISTICS (SGL) has expanded into the South Korean market through the acquisition of its partner, ENK Logistics.

ENK Logistics was established in 2006 by Hoe Jick (Erick) Yang and Kwon Jik (Kevin) Yang.

It provides freight and warehouse solutions to a customer base across retail, industrial, chemicals, food ingredients, and other industries.

SGL said that the addition of operations in South Korea was the latest milestone in its growth in the Pacific region, following its purchase of Pioneer International Logistics (Australia) in 2020 and Orbis Global Logistics (New Zealand) in 2021.

The forwarder also pointed out that as a G20 economy, South Korea holds a "pivotal and well-established position in the trade markets of Southeast Asia and beyond".

"This acquisition aligns with SGL's strategy to be present in the largest economies worldwide," SGL added.

Following the acquisition, the company has a presence in 50 countries, up from 17 in 2016.

Atlas Air orders two more 777 freighters

ATLAS AIR HAS ordered two new Boeing 777 freighters that are due to be delivered in the second half of 2024.

The company said strong customer demand for dedicated large widebody airfreight capacity, particularly for cross-border e-commerce shipping, prompted it to make the order.

The two 777Fs were ordered earlier this quarter.

The company most recently ordered four 777Fs in 2021, which are placed on a long-term ACMI agreement with Mediterranean Shipping Company (MSC), for use by MSC Air Cargo. Three of these aircraft have been delivered, with the fourth 777F expected to be delivered in December 2023.

"These [orders] come at a time when retirements of older widebody freighters [are due to] significantly increase and when the introduction of new widebody freighter capacity will be limited," said Michael Steen, chief executive of Atlas Air Worldwide.

"We have a deep pipeline of prospective customers interested in these 777 freighters, and we are confident in our ability to place them under long-term agreements."

Steen added: "We have a strong and resilient business model that is highly diversified, with strong support from our investment partners."

The 777Fs – the highest-payload and longest-range twin-engine freighter – deliver high reliability with less fuel use, a reduction of emissions, and a smaller noise footprint compared with other older freighter models.

Atlas Air currently has eight 737-800Fs, 51 747Fs, 23 767Fs and three 777Fs in its active fleet, including those in service with other airlines.

Dronamics teams up with Qatar Airways

DRONAMICS AND QATAR Airways Cargo have signed the first interline agreement between an international airline and a cargo drone airline.

The interline agreement enables the extension of the delivery networks of both partners, increasing their reach as well as providing access to areas previously hard to get to for traditional airfreight.

Through the agreement, Dronamics, which has a licence to operate in Europe, can offer cargo services from any of its droneports, initially in Greece, to the wider Qatar Airways Cargo network – including destinations such as Singapore, China, including Hong Kong, and the US (JFK).

Qatar Airways Cargo is also able to access remote locations that Dronamics serves, such as the Greek islands, on the Dronamics cargo drone network.

Through this network expansion, Dronamics customers can make a single booking to transport goods from a Dronamics droneport to any destination that the interline joint network covers, and vice versa.

Svilen Rangelov, co-founder and chief executive of Dronamics, said: "We are very excited to have the world's largest air cargo carrier as our partner for the first-of-its-kind interline agreement with our category-defining cargo drone airline.

"While currently less than 1% of global trade [volume] moves by air, the vast global reach of Qatar Airways Cargo and their world-leading capacity and service give us the perfect platform to massively expand air cargo accessibility to countless more communities worldwide, enabling same-day delivery for everyone, everywhere."

"As a part of our Vision 2027 five-year strategy, we are committed to remaining at the forefront of our industry by embracing new disruptive technology," added Elisabeth Oudkerk, senior vice president, cargo sales and network planning at Qatar Airways Cargo.

Dronamics is expected to begin operations in Greece early in 2024, focusing on establishing a same-day service connecting Athens with the industrial north area of the country, as well as the islands in the south.

Earlier this year, Dronamics became the first cargo drone airline to obtain IATA and ICAO designator codes.

Photo: Dronamics

Dronamics' Svilen Rangelov and Qatar Airways Cargo's Elisabeth Oudkerk

WestJet extends reach with Flexport

CANADIAN AIRLINE WESTJET Cargo has partnered with forwarder Flexport to widen the reach of Canadian airfreight exports into Asia.

Under the agreement, Flexport will ship WestJet Cargo's export cargo to key Asian hubs via its existing dedicated freighter network.

WestJet Cargo will deliver Canadian cargo to Chicago O'Hare International Airport (ORD), where Flexport operates dedicated freighters from the US to key airfreight hubs in Asia, including Incheon International Airport, Shanghai Pudong International Airport and Hong Kong International Airport.

"Given the surge in demand for Canadian products in key Asian markets, particularly perishables like seafood, WestJet Cargo and Flexport's comprehensive solution meets the needs of customers in Halifax and the surrounding regions at a pivotal time," the companies said.

Kirsten De Bruijn, executive vice president, cargo at WestJet Cargo, said: "Using ORD as a connection point, we are able to transfer cargo within a matter of hours, further ensuring the freshness and integrity of key Canadian perishable exports."

WestJet Cargo began freighter operations in April this year.

Brussels names five tenants for cargo zone

BRUSSELS AIRPORT HAS confirmed which five companies will occupy its new cargo zone, with work on the site now underway.

Nippon Express, Hazgo, Deny Cargo, EV Cargo and DSV have all been confirmed as tenants.

The Brucargo Central site has now been cleared of old buildings and work on roads and construction is underway, with the first building piles now in place.

In total, €70m will be invested in the site, which will be located on an area measuring 83,500 sq m.

The site will have a warehouse area of 34,200 sq m with adjacent offices, and will be built by 2025.

The logistics firm Nippon Express will take a 10,000 sq m building at the site, while dangerous goods and healthcare company Hazgo will have a 2,000 sq m facility.

Forwarder Deny Cargo will also increase its warehousing space to 2,500 sq m with a facility that includes dangerous goods and cool storage.

Plus, DSV will move into a 12,000 sq m facility.

The size of EV Cargo's new warehouse was not confirmed.

Arnaud Feist, chief executive of Brussels Airport Company, said: "I am very pleased to have reached this important milestone in the redevelopment of Brucargo Central with the placement of the first piles and the announcement of the names of the five users."

The project will be in line with Brussels Airport's target of net zero carbon, with efforts including BREEAM-Excellent certification, optimising the use of the area with a 30% increase in storage capacity and a 20% increase of green zones.

Photo: Anthony Bryant via Kuehne+Nagel

A Virgin Atlantic 787 Dreamliner was powered by 50 tonnes of SAF from London Heathrow to JFK Airport in New York

K+N shipment on first transatlantic SAF flight

A KUEHNE+NAGEL (K+N) shipment was on board the first-ever commercial transatlantic flight 100% powered by sustainable aviation fuel (SAF).

The flight hit the headlines on November 29 when a Virgin Atlantic Boeing 787 Dreamliner was filled with 50 tonnes of SAF for its journey from London Heathrow to JFK Airport in New York.

Forwarder K+N said that as part of its efforts to reduce emissions, it had secured the available cargo space on the flight and utilised the corresponding amount of SAF for the transported goods.

Yngve Ruud, member of the management board of K+N responsible for air logistics, said: "This is a historic moment in our collective journey towards sustainable aviation and we are very proud to represent the air cargo industry on the world's first 100% SAF transatlantic flight by a commercial airline."

The SAF used to power the two Rolls-Royce Trent 1000 engines on the 787 is produced by Hydroprocessed Esters and Fatty Acids (HEFA) (waste fat) and Synthetic Aromatic Kerosine (SAK) (waste from corn production) at an 88% HEFA and 12% SAK blend ratio.

The Virgin Atlantic-led consortium that made the flight possible is joint funded by the UK Department for Transport and includes Rolls-Royce, Boeing, University of Sheffield, Imperial College London, and Rocky Mountain Institute.

Member countries of UN aviation body ICAO have also recently agreed to target a 5% reduction in CO2 emissions generated by aviation compared with current fossil fuels by 2030.

The target includes a "collective vision" for green energy transition, harmonised regulatory foundations, supporting implementation initiatives and improved access to financing for related initiatives so that "no country is left behind".

The target will be achieved through a transition to SAF, lower carbon aviation fuels (LCAF), and other cleaner energies.

GSSA ECS Group buys Ireland's IAM

ECS GROUP HAS acquired GSSA International Airline Marketing (IAM) to expand its market share in Ireland to 30%.

IAM was founded in Dublin, in 1989, by Sean McCool, father of current managing director Ian McCool. It currently serves more than 15 airlines.

Its main office is in Stoneybatter, about 15 minutes from Dublin Airport. It also has a presence in Cork and Belfast.

The company added a trucking division in the mid-1990s and also offers handling and dangerous goods training. It claims to process about 25% of Ireland's annual air cargo exports.

Ian McCool said that joining ECS Group would allow the company to have a global presence, something that is becoming increasingly important in the GSA market.

"Our rapidly changing air cargo industry landscape demands a solid global presence and innovative and flexible service solutions," McCool said.


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SO YOUR
PROJECTS
CAN TAKE OFF

Netherlands thinks again on Schiphol flights cut

THE DUTCH GOVERNMENT has backed down on its plans to cut the number of flights at Schiphol Airport after objections from the US and the European Union (EU).

In August, the government announced that it would implement plans to cut flight numbers at the airport from 500,000 per year to 452,500 from winter 2024, as it looks to reduce noise pollution at the Dutch hub as part of an "experimental scheme".

It also planned to cut the number of night flights at the airport from 32,000 to 28,700 annually and required the use of quieter aircraft at night.

However, the Dutch minister of infrastructure and water management, Mark Harbers, in November said the government had decided to back down after the US and European Commission objections.

The Commission and the US said that the plan did not follow the "balanced approach" process where a reduction in the number of aircraft movements is allowed only if it is clear that other measures to limit noise pollution are insufficient.

At the start of November, the US Department of Transportation issued an order indicating that it viewed the planned reduction without following the balanced approach procedure as a violation of EU rules and the US-EU Air Transport Agreement from 2007.

Harbers said that the government would continue to look at obtaining flight cuts through the balanced approach procedure and may yet pursue the experimental scheme, depending on the outcome of a court case that airlines lodged against the plan.

Photo: Thanhliemnguyen/Shutterstock

The acquisition of Asiana would give Korean Air about 60% of cargo capacity between South Korea and Europe

Takeover leads Asiana to sell cargo business

THE ASIANA AIRLINES board has approved plans to sell its cargo business as part of efforts to appease European regulators concerned about the impact of its takeover by Korean Air.

In November, the carrier's board approved the plan to offload the cargo unit to another Korean airline after the European Commission in May said the takeover would result in reduced competition between Europe and South Korea.

Its figures showed that the combined entity would control about 60% of cargo capacity between South Korea and Europe.

The board had originally been due to make a decision in late October, but decided more time was needed to discuss the plan.

Korean Air said that it had now submitted its plans to European regulators. The plans also include the ending of four European routes.

However, the deal still faces further hurdles. The two airlines also require approval from competition authorities in Japan and the US – and Korean will need to find a buyer.

However, it has gained approval in Singapore, China and the UK.

Unions are also thought to be opposed to the deal over fears of job losses.

Korean Air's network covers 120 cities in 43 countries and it operates an extensive freighter fleet, handling 1.6m tons of cargo internationally and 36,000 tons domestically in 2020.

Asiana Airlines' international cargo business covers 12 countries, 27 cities and 25 routes and accounts for about 20% of the carrier's total revenue.

According to Airfleets.net, Asiana operates 10 Boeing 747-400 freighters and a single Boeing 767-300 freighter.

Korean Air first announced plans to acquire Asiana in November 2020 but the timetable fell victim to the Covid-19 pandemic and resulting turmoil in the airline industry.

According to earlier reports, Korean Air has been in talks with several other carriers to buy the cargo assets but none has yet made an offer.

The carrier will need to sell the business to another South Korean operator, which severely narrows down the list of potential buyers.

Cathay Pacific may choose A350F

CATHAY PACIFIC IS now considering ordering the Airbus A350 freighter instead of the Boeing 777-8 freighter, according to Reuters.

Quoting industry sources, the newswire said the Hong Kong-headquartered airline had switched from favouring the 777-8F to the new Airbus freighter.

The sources said the airline was considering an initial order for six of the aircraft, which are worth about $2bn at list prices.

The airline has been tight-lipped on its plans for freighter orders, telling *Air Cargo News* that there were no specific updates or announcements to make regarding the fleet.

In August, the airline said it was continuing to study various options.

Some of the airline's fleet of Boeing 747 freighters are 15 years old and will reach the point of replacement in the next 10 years.

The A350F is not due to take flight until 2026 and there are already 39 orders for the aircraft, which would add to the waiting time for the new freighter.

Forecasts flat for 2024

Delegates at TIACA's autumn executive summit did not expect much improvement in air cargo demand until later in the year, writes Damian Brett

Air cargo executives are expecting air cargo demand in 2024 to be flat or at best slightly above this year's levels, according to speakers at the TIACA Executive Summit event.

Adopting probably the most positive outlook for air cargo demand in 2024 at the event was data provider WorldACD's director of product development and customer support, Rogier Blocq.

Blocq said that WorldACD had studied quarterly figures between 2010 and 2019 and, in the first and second quarter, year-on-year increases tended to be an improvement on the final quarter of the previous year.

And the latest projections from WorldACD show that demand is expected to increase by 1% in the final quarter of this year (-1% in October, +1% in November and +2% in December).

With this trend in mind, WorldACD expects demand to increase by 2% year on year in the first quarter and by 3% in the second quarter.

"For 2024 we are to some extent optimistic because we do see that demand is picking up," Blocq said. However, he cautioned that demand for 2024 was hard to predict, given all the uncertainties there are in the market at the moment.

Meanwhile, during a panel discussion, TIACA director general Glyn Hughes asked speakers whether they expected 2024 to be the same, better or worse than 2023.

Photo: Air Cargo News

The global political situation will continue to put a brake on growth until late in 2024, delegates said

Conflict risk

Turkish Airlines chief cargo officer Turhan Özen said he was optimistic that demand would pick up by the fourth quarter of 2024 at the latest.

"Of course, there are geopolitical risks, wars or threat of wars, and any kind of conflict can jeopardise this," he said. "But if politically things do not get worse – and, hopefully, they get better – it is only a matter of time until the European Central Bank and the US Federal Reserve lose their worries about inflation and start to focus on growth."

Meanwhile, Challenge Group chief executive Yossi Shoukroun was expecting the geopolitical situation to be a drag on demand expectations.

"Unfortunately, in terms of the global economy and the geopolitical situation, 2024 will not change. Hopefully, it will not escalate, but the signs are not that good," he said.

This could in turn put pressure on cargo capacity, he added, as passenger services are reduced in response to lower demand from travellers because of the instability and higher fuel prices.

Passenger demand could also be affected by extreme weather conditions, he added. Both of these developments would benefit freighter operators, he explained, as they pick up on the lack of bellyhold space.

Marco Tafuro, airfreight director, UPS Europe Region, said UPS was positive for growth towards the end of 2024 but added that the first half of the year would be a continuation of this year's performance.

And Brussels Airport Company chief cargo and real estate officer Geert Aerts said that the geopolitical situation, most recently in the Middle East, had pushed air cargo's recovery back by a year. He expected demand in 2024 to be flat compared with 2023, or at best a little bit up, but added that there would be a better picture of 2024 at the end of the fourth quarter of 2023.

"Maybe we can recalculate at the end of the year – but for now, keep it neutral and push expectations of a recovery one year down the road," Aerts said.

Hong Kong handler Hactl's chief executive, Wilson Kwong, pointed out that the airport would benefit from the full opening of the three-runway system next year.

The airport added a third runway in 2023 but only two have been in use while upgrades are carried out to one of the existing runways.

"I think 2024 will see a lot of volatility, judging from all the events that are happening, but I think that next year we will see a small growth compared with this year," Kwong said.

One factor that could affect the market in 2024 is the reliability of ocean shipping services.

Xeneta chief airfreight officer Niall van de Wouw said that the low rates in seafreight meant shipping lines were missing out sailings to balance supply and demand.

"Interestingly enough, we have seen [ocean reliability] go down a little bit," Van de Wouw said. "They say there is a bloodbath in rates on the ocean side, which means more blank sailings, they cancel the vessels, which reduces the reliability – which makes shippers a little bit worried."

And in 2024 there could be further disruption, after the European Commission in October decided not to extend container shipping's block exemption from certain competition rules.

The current block exemption runs until April 2025, but after this date container carriers will be less able to co-operate on operations.

EXPANSION FOR EGYPTAIR
EgyptAir has placed an order with EFW for two A330-200 passenger to freighter (P2F) conversions. The A330-200P2Fs will join the carrier's existing freighter fleet of three A330-200P2Fs and one Boeing 737-800P2F.

MY FREIGHTER'S 767 ARRIVAL
Airborne Global Leasing has delivered a newly converted Boeing 767-300 freighter to Uzbekistan-located My Freighter. The cargo airline took delivery of a Boeing 747-200 freighter in October last year and stated it had plans to expand its fleet.

EL AL RESPONDS TO CONFLICT
Israeli airline El Al added a Boeing 737-800 converted freighter into service in October as it expects that the negative impact of the Israel-Gaza conflict is likely to persist into the first quarter of 2024.

POSTAL DRONES
Cargo drone airline Dronamics and Hellenic Post (ELTA) have announced a letter of intent agreement that will bring the first postal services by cargo drone to Greece.

ETHIOPIAN 777F ADDITION
Ethiopian Airlines has taken delivery of a 10th Boeing 777 freighter to grow its capacity. The twin-engine commercial cargo plane, due to be operated by Ethiopian Cargo, has a payload of more than 100 tons.

BBN and Raindo target Indonesian expansion

FREIGHTER OPERATORS ARE continuing to target the Indonesian market with the addition of all-cargo capacity.

Most recently, start-up operator BBN Airlines announced the arrival of one Boeing 737-400SF to join its existing fleet of two 737-800Fs.

At the same time as announcing the freighter arrival, the carrier also received three 737-800NG passenger aircraft.

The four new aircraft will undergo a redelivery check at FL Technics Indonesia before being operated commercially at the beginning of 2024.

The aircraft will be used for both domestic and international routes, with a focus on the China to Bali route, the carrier said.

Martynas Grigas, chairman of BBN Airlines Indonesia, said: "Since ACMI providers are still a rarity in Asia, BBN Airlines Indonesia is expected to give an extra boost to support the ever-growing aviation needs in Indonesia.

"This expansion will allow us to better serve our customers and meet the growing demand from airline, logistics, and tour operator companies."

The airline received its Air Operator Certificate (AOC) in August 2023 and is aiming to capitalise on the lack of ACMI providers and growing e-commerce demand.

Photo: BBN Airlines Indonesia

BBN Airlines now has three Boeing 737s for its Indonesian cargo operations

The carrier was the second Indonesia-based cargo airline to receive its AOC in August.

Freighter operator Raindo United Services gained its AOC that month and had plans to launch operations in 2023.

The carrier will launch operations with two 23-tonne capacity Boeing 737-800Fs, with the first (PK-RUS) delivered on July 14 and the second (PK-RFS) arriving in August.

Raindo plans to offer both domestic and international services.

Earlier in 2023, the carrier said domestic routes would include Jakarta, Medan, Balikpapan, Makassar and Surabaya, as well as international routes to Singapore, Hong Kong and Guangzhou.

When the carrier was first announced, founder Benny Rustanto, said: "The presence of Raindo United Services is expected to be a catalyst for a change that can support the development of the micro-, small- and medium-sized enterprises [MSME] industry in Indonesia, particularly on the logistics side through seamless and sustainable connectivity."

He added: "We realise that the MSME sector in Indonesia has greater potential if supported by a logistics ecosystem that synchronises the traffic flow – both internationally and locally – from the point of departure to the destination."

Oman Air gets first dedicated freighter

OMAN AIR HAS taken delivery of its first cargo aircraft, a 737-800 Boeing Converted Freighter (BCF).

The order is the first dedicated cargo aircraft for the Muscat-based carrier, Boeing said.

Traditionally a passenger airline, Oman Air in February 2023 announced it would add its first freighter by the end of the year.

With the ability to carry up to 23.9 tonnes of freight at a range of 3,750 km, the 737-800BCF will contribute to continued capacity growth at the airline.

"The 737-800BCF brings the right payload and range to complement Oman Air's passenger fleet with dedicated cargo capacity," said Kate Schaefer, vice president of Boeing Commercial Modifications.

Oman Air Cargo saw its cargo volume increase by 42% during the first half of 2023, compared with the same period in 2022, driven primarily by capacity expansion across its passenger aircraft fleet following Covid.

The 737-800BCF has up to 20% lower fuel use and CO_2 emissions per tonne than the previous generation of standard-body freighters, Boeing said.

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China Airlines plans to sell five 747-400s

CHINA AIRLINES IS looking to offload five of its ageing Boeing 747 freighters next year.

The Taiwan-based carrier has mandated AMS Aircraft Services to sell the five 747-400 freighters via a Request For Proposal process.

The aircraft, all CF6-powered, were manufactured between 2001 and 2003 and are available for delivery from April through to October 2024.

The decision to offload the freighters comes as the carrier has been busy renewing its cargo fleet and as air cargo demand remains subdued.

In January last year, the carrier announced an order of four Boeing 777 freighters, in addition to the six it had previously ordered. So far, the carrier has taken delivery of seven of the 10 777Fs, while its fleet of 747 freighters is down from its previous high of 18.

In total, PlaneSpotter.net shows that the carrier currently operates 14 747-400Fs but eight of these have been parked.

By the end of the year, the airline is aiming to have offloaded another 747 freighter to bring the total down to 13.

The remaining three 777 freighters are due for delivery in 2024.

When the 777 order was initially announced, the carrier said: “The ongoing fleet acquisition programme will boost operating performance by balancing network development and market movements against the aircraft replacement schedule.”

In the first half of the year, China Airlines saw its cargo revenues decline by 54.5% to T$29.3bn as rates fell and the market readjusted following the Covid-19 pandemic.

In 2022, China Airlines was ranked by IATA as the 10th busiest cargo carrier in the world as traffic reached 6.4bn cargo tonne km.

Photo: Ingrid Barrentine at Alaska Airlines

The new Boeing Converted Freighters are at the centre of Alaska Air Cargo’s plan to explore long-haul routes

Alaska puts first 737-800 conversion into service

ALASKA AIR CARGO has put into service a new 737-800 Boeing Converted Freighter (BCF) and plans to add a second 737-800BCF “early next year”.

The feedstock 737-800 freighters were sourced from Alaska Airlines’ passenger fleet.

The US cargo airline currently has three 737-700Fs in its fleet.

Alaska Air Cargo took delivery of the first 737-800BCF, from lessor Babcock & Brown Aircraft Management (BBAM), in October.

The first aircraft was converted at Cooperativa Autogestionaria de Servicios Aeroindustriales (COOPESA), a maintenance facility in Costa Rica.

The second aircraft is being converted by Boeing at KF Aerospace in British Columbia.

Ketchikan, Sitka, Juneau and Bethel airports will be among the first in Alaska to benefit from the increased capacity, with expanded freighter service coming to their communities by mid-December.

The new freighters are in the process of becoming ETOPS-certified, which will enable them to fly long ranges over open water.

The aircraft’s expanded range will allow the cargo team to explore new routes, such as a possible nonstop from King Salmon to Seattle.

“The conversion of passenger aircraft -800s to freighters allows us to build cargo capacity for the long haul,” said Alaska Air Cargo managing director Adam Drouhard, who pointed out that infrastructure improvements and new equipment across Alaska would support the freighter fleet growth.

Each 737-800BCF can carry 10,000lb more than a 737-700F. They also have a configuration that holds more containers.

This means the fleet will offer additional space for e-commerce shipments, fresh seafood and essential goods such as groceries, medical supplies and building materials transported to communities in Alaska.

“With a fleet of five, we will have the flexibility and capacity to do even more drop-ins for fishing communities when the salmon are running,” said Shannon Stevens, Alaska Air Cargo sales manager for the state of Alaska.

Eighth 767BCF completes LATAM plan

LATAM CARGO HAS completed its freighter fleet expansion with the addition of another Boeing 767 freighter.

The Boeing Converted Freighter is the third 767 delivered to the airline this year and is the final unit of an expansion plan announced in 2021 to convert eight of the aircraft.

The carrier now operates a total of 19 767 freighters. The new cargo aircraft will strengthen the export of cherries from Chile during the final quarter of the year and increase available capacity for the markets of Colombia and Ecuador during the Valentine’s Day flower season.

Subsequently, it will enable the group to expand its long-haul operations from North America and Europe to South America, LATAM Cargo said.

Gudny Genskowsky, senior vice president of network and alliances for cargo at LATAM, said: “While the industry faces challenging times, we are pleased to have access to this new aircraft to take advantage of opportunities in the territory.”

Expansion put on ice

Photo: Icelandair Cargo

The downturn has forced Icelandair Cargo to suspend services on certain routes and postpone growth plans as it waits for an economic bounceback, writes Roger Hailey

Icelandair Cargo has put on hold its planned US network expansion because of a weaker global market, but it is exploring wet lease and charter opportunities for one of two converted Boeing 767-300ER freighters that continue to serve New York's JFK airport.

Air Cargo News spoke to Einar Már Guðmundsson, Icelandair Cargo's interim manager director for airfreight and logistics, who stepped in after the resignation of managing director Gunnar Már Sigurfinnsson in September.

The global downturn saw Icelandair Cargo suspend operations to Chicago from Belgian hub Liege in September after their start-up in January this year (2023). It also cancelled the launch of services to Los Angeles. Both services are likely to lift off when the global air cargo market stabilises.

Guðmundsson says: "Of course we are always evaluating whether we will start again in Chicago and also if we want to launch Los Angeles flights, but those decisions depend on market conditions.

"We do not rule out a return to these markets in the near future but at the moment we will not be serving them."

Icelandair Cargo continues to operate a four-times-a-week 767 freighter to JFK from Liege and Keflavik this winter and is looking to increase utilisation of the freighter pair, which are on a long-term sale, conversion, and lease-back deal with Titan Aviation, signed early in 2021.

Other options

The Icelandic carrier previously operated two Boeing 757-200 freighters, one of which has left the group, while the second is expected to exit by the end of 2023 or in the spring of 2024 at the latest – when it is returned to lessor WNG Capital.

The interim managing director says that there are currently no plans to expand the freighter fleet: "For the short term, we have the two 767 freighters and we are also always looking into options to maximise their utilisation through wet leasing, charter flights or other opportunities."

He adds: "It was a big change to go from two Boeing 757 freighters to two Boeing 767 freighters plus one Boeing 757.

"We have too much capacity at the moment and so we are looking into opportunities in the market to maximise utilisation."

The Icelandair Group operates several passenger aircraft, such as Boeing 737 MAXs, 767s and 757s, which offer an extensive network for bellyhold capacity.

But there will be a fleet expansion on the passenger side.

In July this year, Icelandair placed a firm order for 13 Airbus A321XLR aircraft, a deal that makes Icelandair a new Airbus customer. The airline is also planning to lease four A321LRs.

In 2019, bellyhold accounted for close to 70% of the group's airfreight volumes, with the remainder carried on the freighters.

The cargo head continues: "But with the arrival of the 767 freighters the mix has changed, and we are now carrying around


Photo: Icelandair Cargo

'It was a big change to go from two Boeing 757 freighters to two Boeing 767 freighters plus one Boeing 757. We have too much capacity at the moment and so we are looking into opportunities in the market to maximise utilisation'

Einar Már Guðmundsson, Icelandair Cargo

Icelandair Cargo runs a 767 freighter service to JFK four times a week

50% in belly and 50% in the freighters.

"Bellyhold capacity is very good for Icelandic fish exports, and because of the strong Icelandair network we can offer more than 40 destinations in Europe and the US."

European growth?

The passenger fleet expansion will see the 757s phased out over the next three to four years, but there is no intention to convert to freighters for use within Icelandair Cargo.

The switch to a 767 freighter fleet was all part of a plan to expand the freighter network beyond the Iceland to Europe operations, dictated by the flight distance limitations of the 757 aircraft.

The potential network growth of the 767 freighters was stalled by the economic shocks of the Covid-19 pandemic, quickly followed by the Ukraine-Russia war and a global downturn.

However, Icelandair Cargo's strategic infrastructure investment at its Keflavik hub – a 40-minute drive from the capital, Reykjavík – had gone ahead and has 1,400 sq m of temperature-controlled facilities for handling perishable goods and pharmaceuticals.

"We have added the new facility and are fully prepared for the temperature-controlled market. There are not many airports with such good cool chain facilities, and so we are in a good position to grow and operate in that market," he says.

The airline hopes that its cold chain investment at Keflavik will see it serve a greater share of the global pharma and life-sciences markets, helped by the fact that Iceland has a large home-grown pharma company on its doorstep.

Currently, some 90% of export volumes handled by Icelandair Cargo are fresh fish, which is no surprise, but one aspect of the remaining 10% of general cargo is the Icelandic horse, a breed popular in Germany, for example, because they have a unique gait, are quite small, good natured and child-friendly.

A three-year deal signed in 2020 between FedEx/TNT and Icelandair Cargo remains in place for parcel traffic between Iceland and mainland Europe.

New processes

The cargo team remain optimistic about the air cargo market's immediate prospects, with a strategy already in place to respond rapidly to the inevitable bounceback.

In response to the fleet transition from 757 to 767, Icelandair Cargo refined its processes at Keflavik and Liege stations. The Icelandair Cargo leader says: "We had some difficulties in the early stages and the market conditions were not favourable. There were some issues, but we are working quite hard now to turn it around.

"We cancelled the Chicago flights and made some quick fixes around the operations. We adjusted the schedule and at the moment we are focusing on the flights between JFK and Liege, but we will grab the opportunities when they open up again."

He adds: "We are quite optimistic about the last quarter peak season [2023] for imports and exports.

"Because of the high inflation, high interest rates in Iceland, and the stuttering world economy, our customers are looking at the possibility of taking small amounts of products by air instead of building up stocks."

Ground control sets up efficiency drive

One of the world's busiest airports is looking at how it can move cargo on and off aircraft faster by getting rid of some outdated processes and infrastructure, writes Roger Hailey

Heathrow, the world's most connected international airport*, is unblocking legacy issues in customs clearance that will speed up the flow of bellyhold cargo on the ground.

The UK hub handled 1.4m tonnes of airfreight in 2022, the vast majority being bellyhold cargo.

Owner and operator Heathrow Airport Ltd (HAL) expects a similar volume for 2023.

HAL has received backing from UK government departments and cargo stakeholders to speed up airfreight transfers and to meet sustainability goals.

James Golding, HAL's head of cargo, says: "For the past six months we have been working with HMRC (revenue and customs), colleagues from the Cabinet Office and Border Force on how Heathrow can remove some of the barriers to trade from legacy operating procedures."

One legacy issue, termed 'canalisation', meant the temporary storage of goods for control checks, holding up the processing time for airfreight consignments.

Trial phase

HMRC gave permission in September for 'milk runs' at Heathrow, which enable landside multi-drops and multi-pickups by forwarders and hauliers to consolidate loads at multiple sheds on a single vehicle.

Golding estimates that this will reduce the more than 2,500 daily landside vehicle movements.

There is now also the trial phase of an airside process, called co-loading, by selected companies, which means that more than one handler can go directly to an aircraft at Heathrow.

Participating express operators, ground handlers and airlines are not being named at this stage but are significant players in the global air cargo industry.

The benefit of co-loading is that express consignments, for example, can go straight from a warehouse to the aircraft for loading, rather than via a handler's shed.

Golding explains: "The processes are going really smoothly, and we are hopeful that the trial will be scaled up."

Under its digitalisation banner, HAL is also looking at a truck slot booking system.

Golding says: "We believe there is a need to better manage the flow of vehicles entering and exiting the cargo estate. The implementation of a digital slot booking solution would allow us to do that.

"We would not run that slot booking system, but it would be complementary to the CCS UK user group and their advance information system (AIS) system.

"We just want to put in place a standard procedure so that a truck operator coming to Heathrow has certainty about the slot time, removing any of the negative consequences of not having one today."

In tandem with the slot booking system, HAL is now conducting internal discussions about developing a long-stay truck park at the airport, with driver welfare facilities.

There is currently no designated truck parking at Heathrow other than a holding area in the cargo estate with a two-hour time limit.

The new truck park would be aimed at longer distance hauliers coming from mainland Europe who must pad out their journey schedule because of the uncertainty around ferry crossings or passing through the Channel Tunnel.

Photos: HAL

Korean Air is one of four carriers that operate regular dedicated freighter flights from the airport

Redevelopment work should allow Heathrow to increase the number of dedicated freighter slots it offers

Currently, that can mean arriving at Heathrow four hours ahead of schedule and clogging up local roads.

Another initiative by HAL saw the launch at the end of 2022 of Heathrow's Cargo Community Forum, which held its fifth meeting in November this year (2023).

Broadcast news?

It is less formal and structured than those at Brussels and Frankfurt airports, and is more about "broadcasting Heathrow content and news" to cargo stakeholders from the very senior to more operationally focused colleagues.

Guest speakers from HAL, those dealing with recruitment and those responsible for sustainability and regulated charges, have made presentations to the forum.

Golding adds: "We would like some kind of mechanism to have a better-quality discussion rather than just a dissemination of information."

The plan is to create smaller working groups for specific stakeholders, such as forwarders, hauliers and ground handlers.

"And while we are not putting in place a dedicated cargo community organisation, we want to make our engagement more targeted in getting the right people involved in dedicated working groups," Golding says.

New infrastructure is also on the agenda. Heathrow's cargo area, with its 1960s 'horseshoe' design, will require substantial redevelopment to meet the growth of air cargo and the global Britain trading ambitions of a post-Brexit UK.

Golding says: "It is still very much our intention to develop the horseshoe, including the two runs of buildings on Shoreham Road and Sandringham."

HAL is working closely with property company Segro, which has a long lease on Heathrow's cargo buildings and land, about future redevelopment of the site.

Golding adds: "We continue to have in-depth conversations, not just with Segro but also with a number of its customers, about the future Southside Transformation project.

"Both parties are committed to finding a solution that works practically, and we now have an outline design on the table which has evolved over the past 18 months.

"We are working through that plan with stakeholders and internally within HAL, to understand things like future aircraft stand capability, services requirements for the estate and what we need to do as an airport to enable that development."

James Golding: committed to finding a solution

He continues: "We know that [the horseshoe] is not fit for purpose and is a life-expired asset.

"There are times when it is congested and when all of us involved wish that it was a 21st-century building rather than a 1960s one, so that it could complement our other, newer cargo facilities at the airport."

He adds: "If we can't fix the alignment of the buildings, then the most efficient way of using that space is to keep the buildings in their existing alignment but change the landside vehicle flow so it is much more efficient than the horseshoe layout today."

Extra slots?

Physical work on site is unlikely to commence before 2026, subject to the final design and surveys – and receiving planning permission.

A third runway, if built, would also offer the potential for more freighter slots at Heathrow, currently about 3,500 movements per year out of 480,000 movements in total.

DHL, Cathay Pacific, Singapore Airlines and Korean Air have historical permanent freighter slots, while additional movements can occur when ad hoc aircraft slots become available.

Golding says of the 2023 performance so far: "I would predict us ending at a very similar level to last year [2022], so around 1.4m tonnes.

"I would be pleased with that figure, given that competitor airports in mainland Europe have reported some real negative reductions."

**OAGMegahubs Index 2023, based on the number of international connections*

Emirates builds capacity

Emirates SkyCargo is steadily increasing freighter capacity in the face of strong demand in Asia, writes Rebecca Jeffrey

Photo: Emirates

Ravi Mirle: "E-commerce is showing a phenomenal amount of trajectory, particularly in the Asia region"

Emirates SkyCargo has more demand than it can cater for – but that is not for lack of effort.

In fact, the cargo division of Emirates is awaiting a total of 15 freighters, and the first of these to arrive can't come soon enough to serve demand in the Asia market, according to Ravi Mirle, vice president of Far East and Australasia, Emirates.

"Our biggest challenge is the need for more freighters and extra capacity. We have got enough cargo to fill them," Mirle says.

"We are running short of aircraft time, particularly this quarter, and we are actually walking away from business."

Emirates SkyCargo currently has 11 Boeing 777Fs in its fleet, plus two leased Boeing 747-400Fs, which it took delivery of in April and May.

The cargo carrier has also ordered five new 777-200Fs, with four aircraft to be delivered in 2024 and the remaining one in 2025.

Ten 777-300ER Emirates-owned aircraft are also undergoing conversion by Israel Aerospace Industries (IAI) with the first of the aircraft expected to arrive next year.

As for further investments, Emirates has not yet decided on which other models might join the fleet.

While the current freighter fleet is all Boeing, Emirates hasn't ruled out Airbus models.

Speaking about the A350F, Mirle reflects: "I think it could be a good fit to help us feed interim points. The range and the payload is good."

More demand

Emirates SkyCargo is now aiming to consolidate business in the general cargo and special cargo segments.

E-commerce in particular is a growth sector. "E-commerce is showing a phenomenal amount of trajectory, particularly in Asia, including Southeast Asia and China," Mirle says.

The carrier is optimistic for demand next year following an "unexpectedly good fourth quarter peak".

"We were a bit pessimistic for the last quarter. But come October things have changed," explains Mirle.

The cargo business is also seeing more demand from shippers and forwarders for long-term capacity to help regulate their costs.

"Very slowly the optimism seems to be coming back. Because the amount of long-term contract requests which we are getting has increased," notes Mirle.

"Customers are telling us they want to sign up capacity on specific O&D [origin destination] pairs.

"I think customers are taking a calculated risk to secure capacity to better manage their logistics costs."

Challenges in Asia

However, Mirle says that even if more cargo capacity were to hand right now, the demand from Asia to the West is higher than demand from the West to Asia.

"There is a combination of poor demand and low prevailing rates because of excess capacity," he says of the backhaul route.

A second challenge for Emirates in Asia is ground operations as staff shortages continue.

"We are ready to scale growth at certain ports, but our partners are not able to resource it, and that is hindering our growth," Mirle says.

Emirates has a well-established network in Asia already, and as a result of this it says the race to expand in the continent – alongside changing global supply chains, with the growth of nearshoring and "friendshoring" – doesn't negatively affect its operations.

Mirle says: "I think it is going to have a positive impact on us only for the simple reason that our capacity is already in markets such as Vietnam, India, Thailand and Indonesia.

"We are seeing more new movements, but a lot is organic growth."

Moreover, China's One Belt One Road initiative, the UAE-India Comprehensive Economic Partnership Agreement (CEPA), and the new India-Middle East-Europe Economic Corridor all present opportunities for Emirates to consolidate its position. acn

Starting from One

The UK's newest freighter airline took to the skies in July as the only registered 747 operator in the country. One Air is already flying to Asia and has its eye on US destinations, writes Damian Brett

The UK is not known for having an abundance of freighter operators, so it was welcome news when reports began to circulate that a new all-cargo operator was set to take to the skies.

One Air broke finally broke cover in April 2023, when it was announced that the carrier had been awarded its Air Operators' Certificate (AOC) by the UK Civil Aviation Authority (CAA).

The airline commenced flight operations in July, utilising a Boeing 747-400 freighter, becoming the only 747 operator on the UK register.

One Air is based at London Heathrow and its majority shareholder is chairman and chief executive, Paul Bennett.

Bennett has a long history in the aviation industry, having worked with defunct UK freighter airline Heavylift Cargo Airlines before moving over to the charter side of the industry with Chapman Freeborn and Air Charter Service.

He then launched his own business, Sky Cargo Charters, which was later renamed Chartersphere and then became sales agency Air One Aviation, where Bennett continues to hold the role of chief executive.

Photo: One Air

The One Air fleet consists of two 747 aircraft at present but the airline may add other types in 2024

The airline's chief operating officer, Chris Hope, who joined in 2022 and has previously worked for the forerunner to TUI as well as easyJet and most recently at Flybe, tells *Air Cargo News* that the start of operations has gone well, after some delays waiting for the conclusion of regulatory work to achieve its AOC and operating licence.

"The initial start-up of operations is always challenging, particularly with a single aircraft in the fleet, but we are really pleased that through our first few months we have delivered a strong operational performance and completed all our planned flying without any significant issues," he says.

"We are seeing a significant level of demand, which suggests we've got a good offering in the market, but we are still open to opportunities to grow."

Long-term relationships

He adds: "We have started flying to the Far East, with good regularity and good performance operationally. We have established ourselves operationally and commercially with some good flying contracts to get us going, particularly carrying electronics and e-commerce shipments between Hong Kong and London."

The airline is currently offering full charter capacity and its target customers include freight forwarders, logistics firms and charter brokers. Long-term business relationships are proving to be key to the company.

"When you have the level of investment in assets that you do as an airline, it's important to establish long-term, sustainable relationships underpinned by long-term commitments," Hope says. "These are the types of relationships we are seeking and starting to build."

The carrier has appointed Air One Aviation as its first sales agency but as it grows it will consider working with others to ensure good demand and competitive rates.

Chris Hope: "We have found the team at Heathrow to be very supportive and positive about the business"

Photo: One Air

Elsewhere, the airline hopes to develop ACMI business with other airlines that are looking to fill short- and medium-term gaps in their own capacity.

"However, right now the arrangement with Air One is offering us more flying opportunities than we can fulfil, and the relationship is proving to be a really valuable benefit for the airline," Hope says.

The airline added a second freighter in October – a converted 747-400 on a long-term lease – and work continues to expand its network.

Hope says that the carrier has conducted flights to China and is working to achieve a licence for long-term operations to the country.

Meanwhile, One Air has also been awarded a two-year operating permit by the US Department of Transportation. "Plus, there are a number of other countries where we are already operating to and have approvals for, including in Europe and beyond," Hope says.

He adds: "We have established regular flying connecting London Heathrow and Hong Kong and our aspiration is to grow this to a daily Hong Kong service."

UK market

The UK air cargo market, like most, has had a tough time of late – and Heathrow isn't known for its freighter operations – but Hope is confident there is enough demand to fill the two freighters.

"We are obviously confident there is a strong market for a UK cargo carrier, particularly in terms of some of the markets we can access from the UK," he says.

"China, for example, is a huge market and yet capacity between the UK and China is still relatively low – and a lot of the dedicated cargo capacity that is available is being operated by non-UK airlines."

On Heathrow, he says the team at the airport have been nothing but helpful and he isn't concerned that the return of passenger operations following the Covid-19 pandemic could change the situation.

"While some people have a perception that the airport is not particularly freighter friendly, we have found the team at Heathrow to be very supportive and positive about the business we are bringing," he says.

"We have not had any issues in gaining slots to access Heathrow and, given that the airport's capacity is more constrained by terminal capacity for passengers than it is by →

Photo: One Air

Recruitment is challenging, but One Air has had interest from pilots who want to fly the "Queen of the Skies"

runway capacity, we don't see this as a barrier to growth.

"The Heathrow cargo centre is ideal for our operation, and we have so far found the operations there to be pretty seamless. So, we see Heathrow as strategically important to One Air and, for the flight volumes we expect to operate over the next two to three years, we are not foreseeing any significant issue."

Looking to the future, the carrier aims to expand its fleet and expects to add a third freighter in the first quarter of 2024 – subject to receiving the necessary regulatory approvals.

Higher capacity

Hope says the airline has access to a previously UK-registered Boeing freighter.

"This is a younger aircraft and, being a factory-built freighter, has a gross weight capacity 40 tonnes higher than the current aircraft," he says.

"This clearly provides significant payload and range benefits. This aircraft also has a nose door, which gives us more opportunities to carry ad hoc specialist cargoes."

He says that the third aircraft is an important step towards achieving a full operating licence for China.

"With a daily flight on Hong Kong-London and a return to the other China flights we were operating a few months ago, we have more than enough work for three aircraft," Hope explains.

Looking further ahead, the carrier could introduce a new type, possibly as early as 2024. Hope says the Boeing 777 freighter is the "obvious successor" to the 747 freighter.

However, he says the carrier will also explore other options for new/leased aircraft.

"We do not want to prejudice our position in negotiations as we determine absolutely the best option for the airline, so we can't say much more at this stage, but we hope to be able to share our plans very soon and we are really excited about the opportunities this will create for the future," he says.

"We want to gear up now for future growth because we think there is an opportunity in the market and we think we have a capability to grow. We have a three- to five-year plan that is based on continued steady growth."

One challenge facing companies at present is recruitment, an issue the aviation sector has keenly felt.

The carrier currently has a team of more than 100 people, but Hope admits that pilot recruitment has become more challenging as the market recovers from the pandemic.

"We are continuing to recruit to replace some attrition and to prepare for fleet growth," he says. "I am pleased to say we are seeing strong interest in the airline from pilots with great experience who want to fly the 'Queen of the Skies' and like the culture we offer as a small and friendly airline.


Photo: One Air

Airfreight volumes have improved recently

"Overall, we have been fortunate in attracting very high levels of experience in all areas across the business.

"We have recruited people with a lot of widebody cargo experience and knowledge of the 747, particularly pilots and operations and engineering specialists from the likes of Cathay Pacific and Emirates as well as CargoLogicAir and a range of other airlines."

Geopolitical tensions

On the topic of challenges, the obvious big question mark around airfreight is expectations for 2024.

Volume figures have improved over recent months but there remains much uncertainty, given geopolitical tensions and economies only gradually getting inflation under control.

Hope remains positive that One Air can navigate difficult market conditions.

"My background includes 12 years in the low-cost passenger airline market, so I know the airline industry is always volatile," he says.

"While the cargo market has similar volatility, the benefit of having long-term contracts is that, when there's a change in the market – whether it's an improvement or a deterioration – you tend to have a little more lead time to prepare for it.

"Our focus is on having a highly efficient operation as we build our fleet and network and to gain economy of scale benefits as we grow.

"We aim to establish high levels of utilisation of the aeroplanes and our people to deliver as low cost of operation as we can.

"If we deliver an efficient cost base versus competitors, then we are well placed to withstand ups and downs in the market."

GSSAs: air cargo made easy?

Photo: Schusterbauer.com/Shutterstock

Managing the intricacies of airfreight is a problem that many carriers prefer not to have – but GSSAs and GSAs can offer a solution, writes Chris Lewis

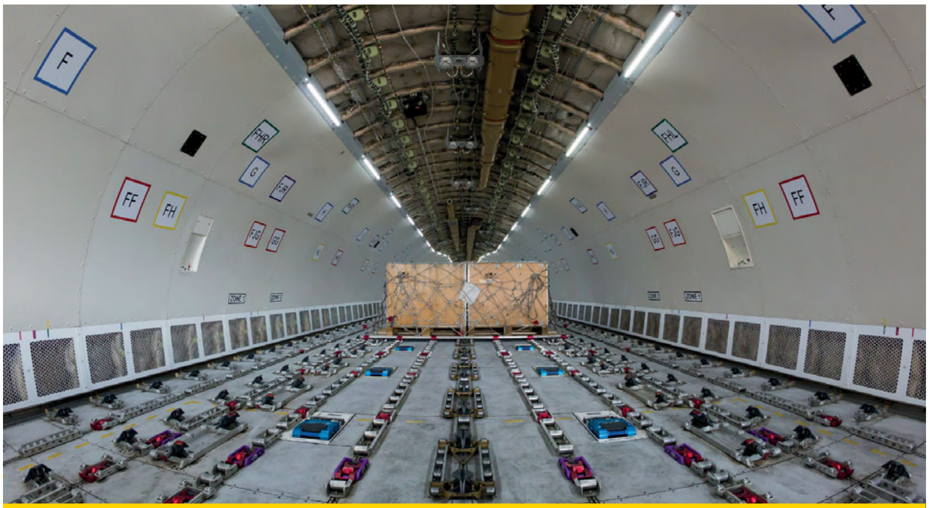
Photo: M101Studio/Shutterstock

Even larger airlines sometimes see the benefits of outsourcing their cargo operations to a GSSA

General sales and service agents (GSSAs) have so refined the scale and scope of their offerings that it's scarcely an exaggeration to say that, in some cases, almost all an airline has to do is get the pilot to turn up at the airport and fly the plane.

GSSAs (or GSAs – general sales agents) these days provide complete packages of services that can take most of the headache out of cargo sales and operations.

ECS, for example, has developed its Total Cargo Management (TCM) and Total Cargo Expertise (TCE) concepts to the point where it can take on most ground handling and revenue optimisation.

It can also capture air waybill information and provide a full reporting service to customs.

"Airlines want to reduce the amount of time and money they spend on cargo," explains ECS executive chairman Adrien Thominet.

"TCM can provide all-inclusive management of all their cargo activity, at zero cost to them."

ECS also has its new Mail & More service up and running with Ethiopian Airlines – in effect a GSA service dedicated to mail and e-commerce traffic.

It handles traffic from Asia and selected European countries and has helped the African carrier boost its revenue at pretty much zero cost to itself, Thominet says.

Thominet regards the Ethiopian business as a proof of concept and hopes that other carriers will adopt it soon.

Other GSSAs are also providing specialised services to differentiate their offerings.

Online platform

In the UK, Air Logistics Group has established a dedicated pharma product to achieve the highest standard of quality and service in the cool chain.

Chief executive Stephen Dawkins says that it includes a tailored online pharma platform for quotes and bookings and highly trained teams managing shipments across the network, with dedicated staff manning a "control tower" for day-to-day contact with airlines, forwarders and shippers.

All shapes and sizes of airlines use ECS services – leisure airlines flying long haul are a prime example.

Cargo is a significant revenue generator for such carriers – perhaps about 5% of the total, Thominet suggests – but they do not want to have the overheads associated with staffing and running their own cargo operation.

Large legacy carriers, in contrast, are possibly the least willing to outsource cargo sales and services.

While in theory these operators would have most to gain from doing so, in practice, agreements with staff and unions may make this difficult to achieve.

But the somewhat newer breed of Middle East carriers are much more open to the outsourcing idea and in fact handle about half their cargo activity this way.

But perhaps market conditions will force more carriers into using GSSAs.

In a tight labour market, finding experienced, trained cargo staff is a headache that many airlines would probably wish to do without, and an agent could be the ideal way of achieving this.

At many of the world's major air hubs, "getting staff is now close to mission impossible", Thominet says.

ECS has been expanding its scope geographically. It opened offices in Japan and Korea earlier in 2023 and is in the process of finalising further acquisitions in the Americas and Europe.

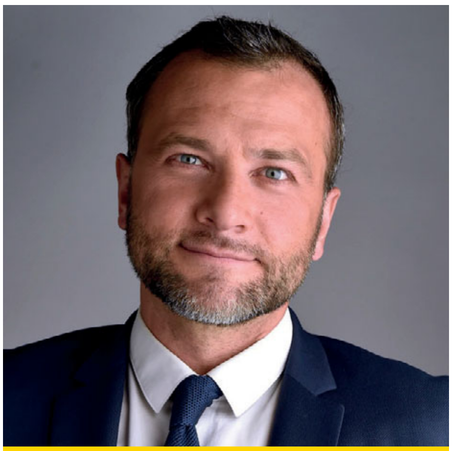
Photo: ECS

Adrien Thominet, ECS

However, plans to further extend into Asia have moved a little more slowly than hoped. The extreme volatility in airfreight markets at the moment is making it hard to value companies, and this has put a brake on progress, Thominet says.

Nevertheless, ECS's Jetstar concept is up and running in Asia and Thominet hopes to build on this.

Niche opportunity

GSAs and GSSAs are still a very fragmented market – just think of the number of cargo-carrying airlines there are in the world and how many countries and territories where they might want representation.

There is still scope for the smaller niche companies serving a small handful of airlines in just one or two countries – although the trend, as in everything else airline-related, is for consolidation and the emergence of large entities, Thominet says.

There are quite a number of variations on the GSA/GSSA theme.

There are GSAs that represent only one airline, for example.

The carrier concerned may in these cases wish to outsource their cargo operation but still maintain exclusivity.

The attraction to the airline is that, if cargo markets fluctuate, it is the GSA/GSSA's responsibility to size the operation up or down.

→

In some cases, carriers may not want to directly employ staff at their relatively high levels of pay and conditions.

There are also instances of carriers being represented by GSA/GSSAs within their home countries – for example, in more remote areas or smaller cities.

This model has been used in the UK and in Canada, for example.

Again, the motivation may be carriers wishing to avoid heavy overheads or more expensive staff.

One of the problems with the airfreight industry is the large number of 'moving parts' – including shippers, forwarders, handlers, trucking companies and of course airlines and GSAs – which has made true automation hard to achieve.

However, the new breed of electronic platforms offer some hope for the future, as does IATA's API-based One Record project, all of which aim to make connecting the different pieces of the jigsaw easier and simpler.

For example, Awery's CargoBooking platform, now being launched in Europe following its pilot roll-out in South Africa, allows GSSAs to give their freight forwarder customers rates, quotes, and bookings.

While the airlines themselves remain Awery's biggest customer-base, GSAs and GSSAs come a good second, particularly those with multiple office networks, says Vitaly Smilianets, founder and chief executive of Awery Aviation Software.

Awery is winning GSA clients – 17 at the last count – across all continents, including in Australasia, Eastern Europe, Israel, France, Germany, Spain and the UAE.

Its GSA clients report that it has helped them cut costs, in a low-margin sector, while offering a one-stop shop for numerous different functions.

Staff shortage

Smilianets says: "We can help GSAs do more business with the same number of staff."

In a highly competitive market – and, moreover, one where qualified people are in short supply – that can be an important consideration.

Awery can integrate with airlines' own systems and can manage processes such as trucking, rates and schedules, as well as the flight booking process itself.

The company also offers a full accounting package and can even email air waybill copies automatically.

It can also take care of operational processes such as handling or pallet-building.

In addition, it offers a 'white label' airline booking platform that could be used by GSAs to show their customers available capacity and services.

Photo: Awery

Vitaly Smilianets, Awery Aviation Software

Photo: AIA Cargo

Jaime Salguero, AIA Cargo

For GSAs to develop their own links with the many parties involved could take years, with no guarantee of a satisfactory result, whereas Awery offers a near-instant, flexible software as a service solution.

Smilianets adds: "We also hope soon to be among the first companies to adopt the IATA One Record standard, which will make for easier data sharing – perhaps by the end of 2023 or early 2024."

OneRecord will allow communication of more data and more complex data.

Jaime Salguero, chief commercial officer at London-based AIA Cargo, agrees that technology will help cargo GSA/GSSA efficiency "and evolve our business further".

"We are investing in this direction to prepare ourselves for next GSA generation in the global industry," he says.

"Digitalisation, efficiency and quality are the three key future trends in the industry."

Salguero is seeing more interest in the market and increasing demand for independent cargo GSA/GSSA companies such as AIA across all regions.

"Our flexibility, full dedication and investment to protect our business together with our freight forwarder customers and airline partners explains this," Salguero says.

Photo: Air Logistics Group

Stephen Dawkins, Air Logistics Group

In the short term, AIA is seeing pressure on yields but expects stability to come back in the mid to long term, with a return to normal business cycles also bringing significant opportunities to the business.

Salguero adds: "We expect a market recovery in 2024. We faced a fast market decline in 2023 and anticipate a moderate recovery in the fourth quarter followed by a business upturn next year when we predict tonnage growth and better yield in most sectors."

Digital distribution

Dawkins at Air Logistics Group concludes: "Our industry is undertaking a substantial change with digitisation. There is no doubt that the use of e-sales channels has increased significantly over the last few years with the growth of digital distribution platforms.

"But we must not forget that this digitalisation currently still needs a degree of manual intervention with skilled and experienced employees who know their job well."

He says that GSSAs will need to combine experienced employees, technology and innovative sales solutions, alongside value-added services for their airline and forwarding clients and will need "a super swift speed to market to have a competitive edge in the coming years."

He says that GSSAs must embrace an ever more digital world, but must also understand that an effective service cannot be transacted with technology alone.

However, it can improve the services that GSSAs provide: "Our teams have access to the most up-to-date data on their laptops and mobiles, allowing them to identify and to monitor performance and market trends.

"Our teams have shifted from the traditional manual reporting to proactive management by technology."


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Creatures in comfort

Carrying live animals is a big business sector and volumes are now growing again after a lull during the pandemic. Several carriers and airports have invested in specialist facilities for horses and other species, writes Megan Ramsay

Photo: Intradco Global

Badly affected by the challenges of Covid, the transport of live animals appears to have recovered, with the airfreight community as intent as ever on ensuring the wellbeing of this very special category of cargo.

"The key thing to understand about live animal transport is that there are segments within it, so a variety of expertise is needed," says Charlie McMullen, chief executive at live animal air charter broker Intradco Global. "It's about the type of animals, and the demand on a particular lane."

For instance, more than 200 racehorses are shipped by air every day. So, it is hardly surprising that equine transport is the biggest portion (about 70%) of Intradco's business.

The company was the logistics partner for the Saudi Cup in February, moving 109 horses to Riyadh from seven locations using 12 aircraft.

Later in the year, Intradco provided a VIP client with a solution to move 77 horses from the UK to the UAE, working with London Heathrow Airport authority and Swissport LHR to bring all horse trucks airside within four hours.

Entry level

For horse charters, Intradco uses its own fleet of stalls, plus rentals when necessary.

"We will soon have 120 horse stalls of a new design, with the first 10 going into production in November," McMullen says.

"On the new HML and HMR stalls, which are used on Boeing 747s, a double hinge provides level entry, so that horses will no longer have a step down/step up approach when entering and exiting the stall."

While equine transport is still the lion's share of Intradco's business, the company has branched out into commercial and genetic livestock transport.

This was partly in response to the restrictions and extra requirements pertaining to travelling grooms during Covid, although global appetites for meat and dairy products are also a key driver of demand for live animal transport services.

"We fly between 20 and 30 747s full of pigs every year to China – mostly from the US but also from France and Denmark," McMullen says. "Some go to the Philippines, Vietnam and Thailand too."

Finally, there are the 'exotics': animals that are transported for zoological or conservation programmes.

Photo: Animal Defenders International

Ruben the lion was moved to a wildlife sanctuary

Here again, Intradco is developing its product further, including intra-Africa flights.

For instance: "We have a customer who is relocating animals into areas of Africa that have far lower records of poaching.

"The plan is to relocate 2,500 rhinos over the duration of the programme, so it's a huge logistical task."

Also in Africa, Qatar Airways Cargo recently partnered with Animal Defenders International (ADI) to move Ruben, a lion, from an abandoned Armenian zoo to the ADI Wildlife Sanctuary in Free State, South Africa.

Qatar Airways Cargo recently became the official airline partner of United for Wildlife, a British organisation founded by Prince William and The Royal Foundation of The Prince and Princess of Wales with the aim of making it impossible for traffickers to transport, finance or profit from illegal wildlife products.

Qatar Airways Group chief executive Engr Badr Mohammed Al-Meer, says: "We are taking measures to disrupt this illicit trade in order to conserve biodiversity and safeguard our delicate ecosystems."

Other carriers involved in United for Wildlife's work include Delta Cargo, which

Transporting horses represents about 70% of business at live animal air charter broker Intradco Global

signed the Buckingham Palace Declaration and joined United for Wildlife's Transport Taskforce in April this year.

IATA estimates the illegal wildlife trade to be worth as much as $23bn a year.

Meanwhile, IATA's Live Animal Regulations provide a useful framework for airlines working in the sector and its CEIV Live Animals certification "establishes baseline standards to improve the level of competency, infrastructure and quality management", IATA says.

Air Canada was the first airline to achieve the certification; along with London Heathrow Airport's Animal Reception Centre, the carrier was chosen to pilot the initiative, which was launched in April 2018.

CEIV "works well for handlers and airlines with bespoke hubs because the whole process is regimented", McMullen says.

But for a broker such as Intradco, the variables change all the time, especially in relation to which airports, warehouses, airlines or aircraft are being used.

'The key thing to understand about live animal transport is that a variety of expertise is needed'

Charlie McMullen, Intradco

At the time of writing, Intradco was visiting Boeing in Seattle to see the new Boeing 777-8F and provide feedback on how the aircraft could be improved to cater for live animal shipments.

"Factors like humidity, ventilation and lighting are important, and we hope this meeting will allow some extra insight into what engineering innovations Boeing could implement to improve overall welfare for animals flying in future Boeing aircraft," McMullen says.

Welfare work

When it comes to the care of live animals, one of the most important things an airport can do is select partners who will value and safeguard their welfare, observes Joost van Doesburg, head of cargo at Amsterdam Airport Schiphol, which has two animal hotels run by carrier Air France-KLM-Martinair and handler dnata.

The Air France-KLM-Martinair Cargo Animal Hotel at Schiphol features specially trained animal attendants and an on-call vet.

Dnata's centre, meanwhile, facilitates a Border Inspection Point for live animals.

"The most common type of animal we see here at Schiphol are horses," van Doesburg continues. "We also see a lot of exotic fish, along with pets such as cats and dogs."

→


Photo: Amsterdam Airport Schiphol

Van Doesburg: "Partners must share our values"

BIP: business as usual…

A SIGNIFICANT PART of the UK's live animal transport infrastructure is Stansted Border Inspection Post (BIP), which is located less than an hour from Newmarket Racecourse by road, making it especially handy for equine transport.

But the BIP at Stansted Airport is currently "in limbo", says Instone Air, managing director Jeremy Instone. Instone Air is the majority shareholder in the facility.

Manchester Airports Group (MAG) is selling the north side of Stansted Airport, where the BIP is located, and the area will be razed and redeveloped.

So, Instone says, the BIP is looking for a new site – preferably on the south side, which is the cargo side of the airport. The move could therefore be good for the BIP, but a lot depends on MAG.

However: "It takes time to design, build, approve, get finance and so on, so it's business as usual for the moment," Instone stresses.

Another hub for live animal transport is located at Liege Airport, whose Horse Inn offers a round-the-clock veterinary team, among other benefits.

More than 3,000 horses pass through the facility by road or air every year and it is an approved EU Border Inspection Post.

However, building a live animal centre at an airport does not guarantee success, McMullen points out.

"You need connectivity, lanes that can benefit from that centre," he says.

"For example, Liege has links with China, Africa and the US. The EU-US lane accounts for up to 60% of the European horse transport market by air – so the match of connectivity and demand has created the right conditions for Liege to become a world-leading equine hub."

At animal transport specialist Instone Air, managing director Jeremy Instone agrees.

"The only freighter service from the UK to the US is FedEx out of Stansted to Indianapolis, whereas Liege, Amsterdam and Luxembourg have scheduled flights to New York, Los Angeles and Miami," all important destinations for equine events, Instone says.

Plus, he notes: "Liege is freighter friendly, open 24 hours a day and has no noise ban – so we can send charter aircraft through there without restrictions. We use Liege as one of our hubs."

Transatlantic links

Air Canada Cargo's twice-weekly 767F flights from Toronto to Liege, which began in March 2023, are among the services that use the Belgian airport's Horse Inn.

Steve Harvey, manager, business development specialist sales – cargo at Air Canada Cargo, says: "Its central location means it supports Belgium, the Netherlands and France.

"Europe's relationship with Canada is very strong too, in terms of the equine business. A lot of that business originates in Belgium, the Netherlands and the UK, and transits through Liege – which, as a 24/7 airport, lends itself to freighter operations."

Besides Liege, Air Canada Cargo also uses Frankfurt with its Animal Lounge.

Through the carrier's network, flights from Europe can connect to North America (Miami) and South America (Bogotá, Quito and Lima).

Its main equine business is on routes into Canada, along with Miami.

While it has always had a Live Animals department, the airline began moving live animals on freighters only at the start of 2023.

"In September 2023, we carried out our first horse charter, between Toronto and Calgary. This was a key milestone for us," Harvey says.

Photo: Intradco Global

A number of airports are now established as world-leading specialist hubs for equine transportation

The move comprised two charter flights on consecutive days, the first carrying 16 horses and the second 13.

Naturally, Air Canada Cargo places the health and wellbeing of its equine passengers top of the agenda.

"Every care and attention is taken to ensure the movement is as stress-free and comfortable as possible for these first-class passengers," Harvey says, highlighting the carrier's brand-new horse stalls and thorough staff training programme.

Grooms accompanying horses on Air Canada Cargo flights are also held to high standards; they must pass a security check and complete online training about the aircraft.

"As with all cargo, a core element to the level of care provided really comes from a love of what you are transporting," van Doesburg says.

Travelling in style

HONG KONG AIR Cargo Terminals Ltd (HACTL) has added an 'Animal Limo' to its live animal handling facilities.

The custom-built vehicle enables smaller animals and pets to travel between SuperTerminal 1 and aircraft in a comfortable environment.

Air conditioning ensures a steady ambient temperature while soundproofing spares the creatures the stress of a noisy apron.

HACTL's Paws Track programme includes six critical control points: the Live Animals Inspection Area; South Live Animals Handling Centre; North Live Animals Handling Centre; Horse Handling Centre 1; Horse Handling Centre 2; and its Live Animals Container – now including the latest Animal Limo.

HACTL's Live Animals Inspection Area has been relocated next to the Live Animals Handling Centre to improve efficiency.

Its Animals Handling Centres include dedicated areas for venomous, dangerous and poisonous animals; and its Horse Handling Centres have been improved with features such as new ventilation fans and extra capacity in case of a surge in demand.

IATA CEIV Live Animals certified, HACTL handles a wide range of creatures, including zoo animals, livestock and bloodstock.

It has been the handler for the Longines Masters of Hong Kong since its launch in 2013.

This has involved caring for more than 60 arriving competition horses, and their re-export after the competition's finish, each year.

Air cargo rises to decarbonisation challenge

Sustainability and decarbonisation matter more than ever, but is the air cargo industry on track for zero emissions by 2050? Rebecca Jeffrey investigates

Air cargo stakeholders are without a doubt exploring a greater variety of green solutions than in the past.

One of the industry's core focus areas is sustainable aviation fuel (SAF), made from renewable feedstocks. Neste, currently the world's biggest producer of SAF with its MY Sustainable Aviation Fuel product, says that both regulations and independent demand from companies are driving increased use of SAF within the air cargo industry. The Finland-based company expects the global SAF market demand to be around 15m tons per annum by 2030.

Jonathan Wood, vice president commercial management and business development, renewable aviation business unit at Neste, says: "The demand for SAF is on the one hand driven by mandates and other policy frameworks, which we see being established in different countries and regions across the globe. The European Union (EU), for example, has recently adopted the ReFuelEU Aviation regulation mandating SAF supply starting at 2% in 2025.

"On the other hand, voluntary demand from airlines, cargo companies, businesses and even end-consumers is complementing the regulatory developments."

Air France KLM Martinair Cargo (AFKLMP) is one of a growing number of companies that now offers SAF to forwarders and customers directly.

In 2022, the Air France KLM Group was the world's largest user of SAF, representing 17% of the world's total production. By comparison, the Group only accounts for 3% of the world's consumption of conventional kerosene.

"By 2030, the Group aims to incorporate at least 10% SAF on all its flights, and 63% by 2050. We are constantly expanding our sourcing portfolio to reach these challenging targets," says Michiel Potjer, chief of staff to the executive vice president at AFKLMP, and also the company's strategic sustainability lead.

AFKLMP launched its Cargo SAF programme in 2020, which enables shippers and forwarders to power a fixed percentage of their flights with SAF.

The air cargo business of the Air France KLM Group also offers four levels of SAF contribution with customer bookings through goSAF, introduced in 2022, within the myCargo digital online booking platform.

Additionally, AFKLMP also offers a 2% blend at its own airport tanker facilities at Paris Charles de Gaulle and Schiphol, and will increase this percentage next year, says Potjer.

Since the launch of the SAF programme there have been over 100 customers, a mix of large and smaller companies, mostly forwarders, but sometimes direct customers, says Potjer.

Airports are also investing in SAF. Amsterdam Airport Schiphol, for example, offers SAF to its airline partners.

"They can refuel with sustainable kerosene that is available on request, thanks to Neste's minority stake in Aircraft Fuel Supply (AFS)," explains Olaf van Reeden, cargo partnerships manager, Amsterdam Airport Schiphol.

"AFS operates Schiphol's fuel supply, and offers fuel made from sustainable sources, renewable waste and residual raw materials. The greenhouse gas emissions it produces may be up to 80% lower when compared to fossil kerosene."

SAF strife

Despite emissions-reducing credentials and increasing demand, the SAF pathway is not smooth.

"Currently, SAF usage is around 0.1% of total global jet fuel consumption, which means we have a long way to go before we can leverage the benefits of SAF at scale," admits Wood.

Perhaps one of the biggest issues is that going green with SAF is inevitably expensive.

"SAF typically costs three to five times fossil jet fuel, depending at any given time on factors including the price of fossil jet fuel, the cost of renewable feedstocks, and related processing costs. Supply-demand dynamics naturally impact price levels," says Wood.

During Covid, low capacity, high yields, and increased interest in sustainability acted as accelerators for SAF purchases, notes Potjer.

"However, now we see a changing cargo market dynamic combined with price increases on SAF and supply limitations," says Potjer.

Wood agrees security of SAF supply is an issue. He says: "The industry is working on expanding the number of terminals from which SAF can be supplied, to increase the availability."

And as SAF becomes more available, the cost of the fuel will go down, Wood points out: "Over time and as the industry scales up production of SAF, so the cost of SAF should benefit from economies of scale in its production, and learning benefits as we get smarter at how to make it."

Although, he admits, there isn't an exact timeline for when the cost will become less prohibitive for smaller players in the industry with less cash flow.

"Conversely, the cost of carbon will increase over time, so the total cost of fossil fuel will go up. These forces are likely to cause the cost of SAF and fossil jet fuel to converge over time – but it is impossible to predict when."

He also points out: "We should also realise that combating climate change comes at a cost – SAF does cost more than fossil jet fuel, but

Photo: Air France KLM Group

Airbus A350F freighters offer over 40% less CO2 and 50% noise reduction compared to Boeing 747Fs

the incremental cost on a ticket for 5% or 10% SAF is relatively small."

"There are also growing long-term commitments both on SAF and within potential investment funds to secure sustained interest in the long run," says Potjer.

"Ultimately though, the industry needs to look beyond SAF," says Potjer. "I think SAF is a short- to mid-term solution, but will always play a role in the long run. We shouldn't shy away from different alternatives such as hydrogen and electric."

More broadly, Air France KLM Group earlier this year incorporated into its strategy a target of a 30% emission reduction per revenue tonne km in 2030 as part of the AFKLM Group Destination Sustainability Roadmap.

"We determined two objectives to help achieve our main target: firstly, 10% SAF by 2030, and secondly 64% of new generation aircraft in 2028. To reach our environmental ambition we identified three levers: fleet renewal, SAF and operational measures," says Potjer.

From 2026, Air France is due to receive four Airbus A350 freighters, and KLM will also take delivery of four A350Fs, offering over 40% less CO2 and 50% noise reduction compared to the Boeing 747Fs currently used.

Green ground

As well as cleaner fuel for flights, sustainable ground operations play an important role in helping air cargo become a green economy.

As part of its operational measures efforts, the Air France KLM Group has a target of reducing non-recycled waste by 50% by 2030 vs 2011, and zero emissions on the ground by 2030.

It is partly meeting these targets with electric vehicles and Hydrotreated Vegetable Oil (HVO) fuel for heavy vehicles, replacing wooden beams and pallets with cardboard ones, e-air waybills instead of paper, and electric-run warehouse operations.

Potjer says AFKLMP's ongoing HVO truck project with long heavy vehicle (LHV) road feeder services provider Jan de Rijk achieved a "reduction of over 141,000 kgs of CO2 between January and October".

Since June 2023, the company has also partnered with Prevost on the launch of an all-electric truck for use as a shuttle in the Paris area.

Elsewhere, Schiphol Airport aims to be free of all types of emissions in 2030, energy-positive in 2050, and, since 2012, has been CO2-neutral for its own activities, verified by Airports Council International (ACI).

Discussing current plans, cargo partnerships manager Olaf van Reeden, says: "First, we will make all non-aircraft traffic at ground level emission free. Vehicles will run on electricity or hydrogen.

"All the aircraft stands at the gate will be powered by Fixed Electrical Ground Power. All the organisations concerned have agreed to pool their equipment. This means that multiple handling agents will use the same equipment, which reduces both the number of movements and the amount of equipment needed."

As a temporary solution, Schiphol recently began operating all its aircraft ground handling vehicles with HVO100 fuel. "This renewable fuel emits 98% less CO2 than the kind of diesel that was used before," says van Reeden.

> **'We have a long way to go before we can leverage the benefits of SAF at scale'**
>
> **Jonathan Wood, Neste**

He says using this fuel has practical benefits too as the engines do not need to be modified.

Speaking on the airport's 2050 plan, van Reeden says: "Our emission-cutting practices, combined with our investment in green energy production, will see us to our ambitious goal of becoming energy positive by 2050.

"This means that we will generate more energy than we use, and the surplus will go to other consumers. To do this, we will run entirely on sustainable solar, wind, and thermal energy."

Fellow ground handler Worldwide Flight Services (WFS) reduced emissions by 11% between 2021 and 2022 through electrification of equipment and use of renewable energy, according to Spencer Low, chief sustainability officer at WFS parent company, Singapore-based SATS.

WFS' sustainability programme 'Our Sustainable Flight Path' aims for 75% of its ground support equipment (GSE) to be electric and full adoption of biodegradable plastics by 2030.

As part of this initiative, the Paris-based company is using biodegradable plastics to →


Photo: Air France KLM Group

Changes to ground operations, such as switching to electric towing, can help to lower emissions

wrap airfreight pallets, and has introduced nearly 1,000 electric ramp and warehouse vehicles.

For example, "WFS' GSE fleet in Spain is now 90% electric for all its cargo handling operations. This includes electric towing tractors, aircraft pushback tugs, and other heavy-duty vehicles," says Low.

WFS has been trialling electronic GSE and hydrogen-powered vehicles since 2022, and, says Low, is collaborating with start-up companies "to evaluate new types of electrically powered equipment, equipment engine conversions to hydrogen, and other electric devices, such as small cars and last mile vehicles".

It has also improved its green footprint with fuel and operational efficiency measures, LED lighting in over 30 warehouses, solar power, digitalisation, plus, as Low explains, "is exploring opportunities to install more solar panels on our buildings and source more renewable energy".

Policy matters

Regulation and policy development around energy, such as the EU's ReFuelEU Aviation regulation, is matching the pace of practical technology deployments in the industry.

"Changing the Fuel" serves as one of the key pillars within IATA's Net Zero Roadmaps, and IATA estimates that SAF could contribute around 65% of the reduction in emissions needed by aviation to reach net zero in 2050.

IATA also believes development of hydrogen aircraft could help cut emissions, and "continues to advocate for developments within the green hydrogen space (both as a feedstock and as a liquid fuel)", says Daniel Bloch, sustainable aviation fuel specialist at the trade association.

"Energy transition is central to the industry's future operations, and will underpin aviation's ability to deliver true sustainable growth," stresses Bloch, who explains IATA is also exploring non-CO2 emissions, life cycle emission modelling and carbon capture.

IATA, which in 2021 approved a resolution for the global air transport industry to achieve net-zero carbon emissions by 2050 and is working on developing a Net Zero Tracker by 2024, has some key SAF targets for next year.

Bloch expands: "2024 will be an important year for IATA in the decarbonisation space, with a strong focus on facilitating airlines' ongoing transition to SAF within their operations, whilst aiding the familiarisation with sustainability standards, procurement practices, and the claiming of environmental attributes from SAF."

The organisation will also continue working with governments and policy makers, seeking the implementation of supportive and appropriate SAF policies.

He adds that IATA will also additionally provide assistance with understanding SAF accounting and reporting, and work with the finance sector to increase investment and de-risk SAF projects.

David de Picciotto, co-founder and chief executive at Pledge says there is now also a greater push for emissions transparency.

Companies currently subject to the EU's Corporate Sustainability Reporting Directive (CSRD), which came into effect on January 5 2023, will have to report their emissions according to European Sustainability Reporting Standards (ESRS) during the 2024 financial year, for reports published in 2025, says de Picciotto.

Many air cargo businesses will fall under the CSRD, but this may not be until the later stages from 2027 onwards.

"Air cargo companies will have to conduct an inventory of all direct and indirect emissions, including Scope 3 emissions from upstream and downstream suppliers and customers," says de Picciotto.

"They will also need to establish a baseline of emissions to track progress over time, as well as implement systems to measure and monitor emissions on an ongoing basis."

The first phase of the International Civil Aviation Organization's (ICAO) Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) will also begin in January, following the 2021-2023 pilot phase.

"Air cargo companies in participating countries will need to adhere to the CORSIA scheme," highlights de Picciotto.

"CORSIA is voluntary during the pilot and first phases but will be mandatory for all ICAO member states in the second phase. It is expected to offset over 2.5bn tonnes of CO2 emissions by 2035."

Also, ICAO member countries in December agreed to target a reduction in CO2 emissions generated by aviation by 5% compared to current fossil fuels by 2030, with a focus on SAF.

However, more can be done to improve uptake of emissions reduction schemes and initiatives, de Picciotto believes. Such as making these "more affordable and accessible", and establishing a "supportive policy environment".

Shared learning

Bloch says IATA's view is that airfreight stakeholders should continue a multifaceted sustainability approach, focusing on upgrading fleets for efficiency, transforming airport infrastructure and facilities to reduce energy use, speeding up digitalisation and data visibility, and facilitating the transition to electric vehicles for ground and warehouse operations.

Meanwhile, on the front line of air cargo, collaboration is being recognised as a powerful tool.

Low says air cargo decarbonisation and sustainability "requires an ecosystem approach".

"We participate in multiple collaborative 'green projects' each year and we sense an increasing willingness to take action for collaborative advantage," says Low.

Likewise, Potjer says AFKLM Group has added a sustainability working group to its BlueSky partnership with Delta and Virgin.

The airlines have also joined Smart Freight centre's Clean Air Transport (CAT) programme to support transparency on emissions data sharing and reporting.

"We believe that the only way to make an impact in the airfreight industry is if we collaborate with several partners in the chain," says Potjer.

"The field of sustainability and specifically SAF still needs a lot of structure, standardisation and regulation.

"This CAT platform aims to make progress in this and to come up with new initiatives and collaboration with the goal to drive decarbonisation measures."

It seems while the sector is certainly exploring sustainability at a greater pace than in previous years, and with a greater variety of technologies, there are still many lessons to be learnt in best practise approaches to getting greener.


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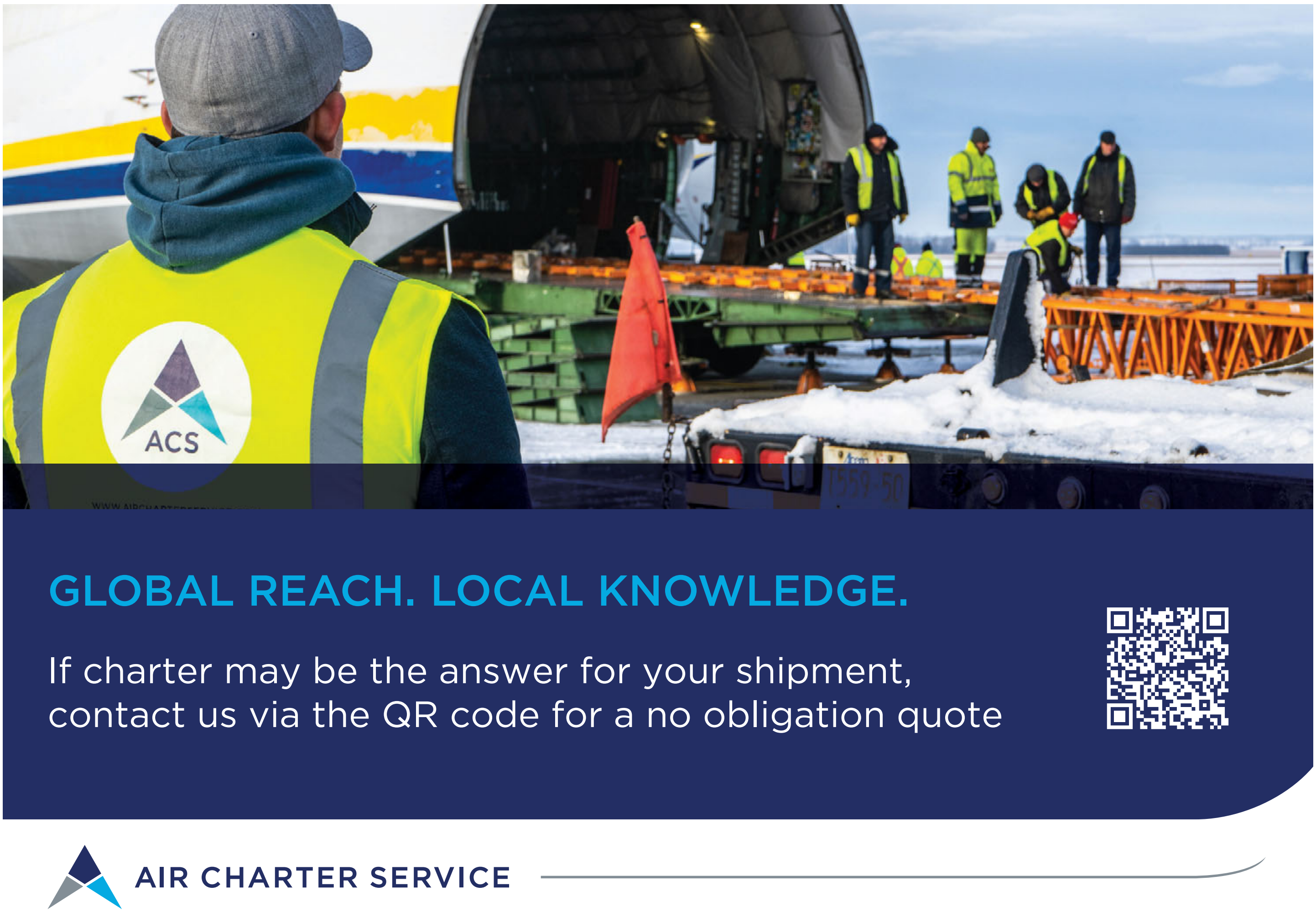
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Global uncertainty dampens optimism over volume increase

AIR CARGO traffic increased year on year for the third month in a row in October, but IATA has warned that optimism over the improvements should be balanced with caution.

The latest figures from the airline association show that overall cargo tonne kms (CTKs) increased by 3.8% year on year in October, while capacity was up by 13.1% as bellyhold operations continued to return.

As a result of capacity increasing faster than demand, the overall load factor was down four percentage points compared with last year to 45.2%.

IATA said that while it was welcome news that demand was on the up, there was still much uncertainty. The association pointed out that demand was still below 2019 levels and that economic activity indicators were weak in October.

On the other hand, inflation in advanced economies eased and air cargo yields picked up in September and October after 17 months of decline.

IATA director general Willie Walsh said: "Demand for air cargo was up 3.8% in October. That marks three consecutive months of year-on-year growth, placing air cargo on course to end 2023 on a much stronger footing than it began the year.

"Recovering demand, slightly stronger yields and the uptick in trade are all good news. But with demand still 2.4% below pre-pandemic levels, and much uncertainty remaining over the global economy, optimism must be balanced with caution.

"Nonetheless, a continued strong peak year-end season will certainly help the sector to manage through whatever turns the global economy might take in 2024."

Looking at regional performance, Asia Pacific airlines saw their air cargo traffic increase by 7.6% year on year in October, while capacity was up by 30%.

Carriers in the region benefited from ongoing growth in international CTKs on three major trade lanes: Africa-Asia, Middle East-Asia and Europe-Asia.

North American carriers had the weakest performance in October, with a 1.8% decrease.

This was a slight improvement in performance compared with September.

IATA added that the North America-Asia trade lane recorded an increase in international CTKs and the North America-Europe market saw a slight improvement in international CTKs.

European carriers saw their air cargo volumes increase by 1% year on year in October.

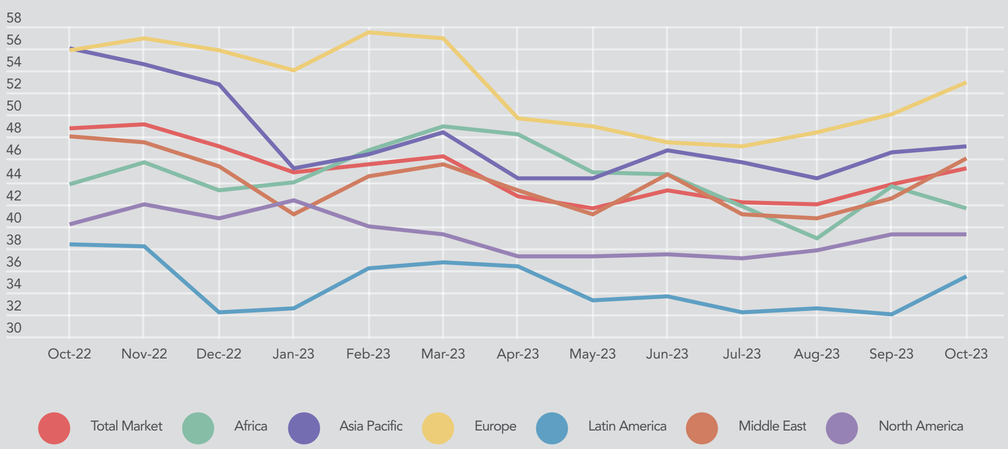
Carriers in the region benefited from improvements in the "within Europe" market for the first time since January 2022 and expansion in the Middle East-Europe trade lane.

Middle Eastern carriers had the strongest performance in October 2023, with a 10.9% year-on-year increase in cargo volumes.

Latin American carriers experienced a 4% increase in cargo volumes.

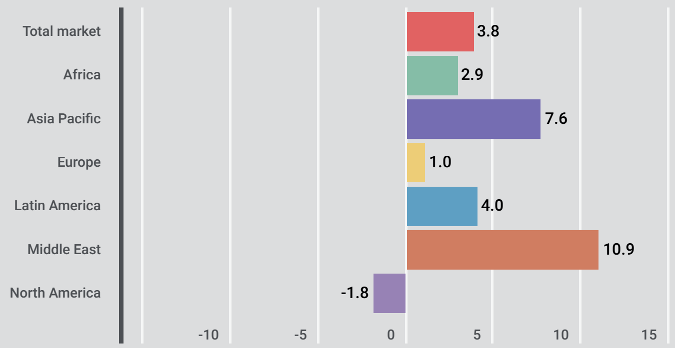
African airlines saw volumes increase by 2.9% in October, following a decline in September.

Airline cargo load factors (%)



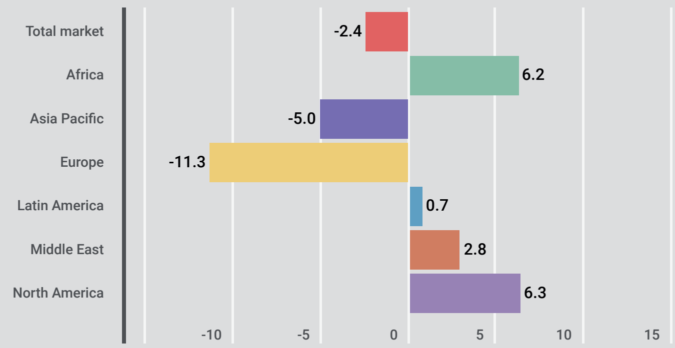
source: IATA

Oct 2023 CTK v Oct 2022 CTK (% change)



source: IATA

Oct 2023 CTK v Oct 2019 CTK (% change)



source: IATA

E-commerce adds to seasonal uplift

AIRFREIGHT RATES on major east-west trade lanes continued to pick up in November as weather conditions and e-commerce demand helped push up prices.

The latest figures from the Baltic Exchange Airfreight Index (BAI) – taking into account both spot and contract rates – show that in November forwarders paid an average of $6.15 per kg on services from Hong Kong to North America, up from $5.80 per kg in October.

Rates from Hong Kong to Europe, meanwhile, increased to $4.64 per kg in November, compared with $4.26 per kg in October.

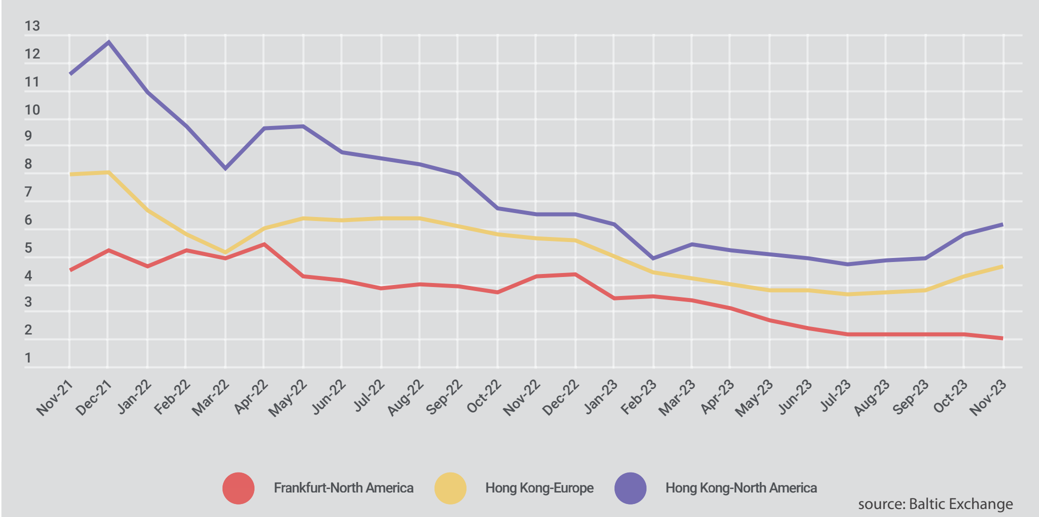
Price increases between October and November are usual as demand ramps up for the peak season.

However, TAC Index said that this year prices were boosted by e-commerce demand and disruptions to capacity ranging from wars, earthquakes, volcanoes and recent record snowfall in Anchorage.

Indeed, rates from Hong Kong to North America are now at their highest level of the year so far, while to Europe they are at their second highest.

Prices also continued to rise as the month progressed – rates to North America ended the month at $6.66 per kg; to Europe, they stood at $4.88 per kg. The increase in prices means rates on the route to North America are just 0.6% down on a year ago; to Europe, they are 13% down.

Baltic Exchange Airfreight Index ($ per kg) Powered by TAC data



source: Baltic Exchange

Demand lags behind positive outlook

RECENT IMPROVED prospects for air cargo were not well reflected in October's cargo volumes at key airports, which have reported mixed results as economic and geopolitical matters persist.

Frankfurt saw a slight drop in volumes, which airport operator Fraport attributed to factors including the suspension of business during "Golden Week" in China and continued "decline of demand in the eurozone industry".

Tonnage on freighter volumes was also down, said Fraport, but there was increased tonnage on passenger aircraft flights.

Schiphol also continues to experience tough operating conditions because of limited freighter slots.

This was in contrast to Hong Kong, which benefited from high export demand.

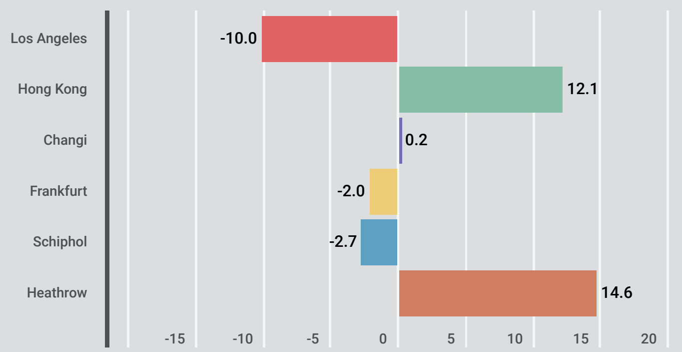
"Strong growth momentum of cargo throughput continued in October, rising 12.1% year on year to 393,000 tonnes," said Hong Kong International Airport (HKIA).

"Exports and transhipments recorded 24.7% and 2.1% year-on-year increases, respectively. Traffic to and from key trading regions in Europe, North America and the Middle East posted the most significant increases during the month."

Heathrow saw the biggest increase in cargo volumes as it continued to benefit from increased passenger flights.

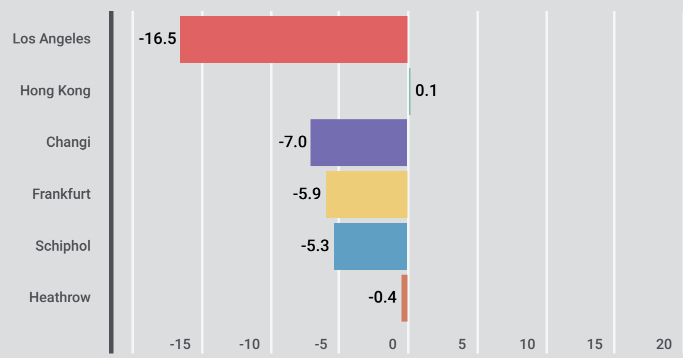
However, the airport blamed the effects of macroeconomic factors on demand for its marginal year-to-date decline.

Oct 2023 v Oct 2022 cargo volumes (% change)



source: Airports

Jan-Oct 2023 v Jan-Oct 2022 cargo volumes (% change)



source: Airports

EC calls time on CBER


Photo: Joyfull/Shutterstock

The big news in the container shipping industry over the past month has been the announcement that the European Commission (EC) will not renew the Consortia Block Exemption Regulation (CBER), the sector's exemption to operating shipping alliances, when current legislation expires in April next year.

The exemption allowed carriers to work together on capacity and vessel sharing agreements on services heading to Europe.

Its purpose was to allow shipping lines to work together to ensure supply chain continuity, although its opponents argued it allowed the carriers to work together to control the market.

However, the chaos in ocean shipping over the past few years brought into question the effectiveness of the exemption.

"Overall, the evidence collected from the stakeholders points towards the low or limited effectiveness and efficiency of the CBER throughout the 2020-2023 period," the EC said.

"Given the small number and profile of consortia falling within the scope of the CBER, the CBER brings limited compliance cost savings to carriers and plays a secondary role in carriers' decision to co-operate.

"Furthermore, over the evaluation period, the CBER was no longer enabling smaller carriers to co-operate among each other and offer alternative services in competition with larger carriers."

Carriers will still be able to work together on shipping services, but they will now need to be careful those arrangements do not exceed market share limitations.

The move has been welcomed by shippers and forwarders in the hope that it will level the playing field and make the market more competitive.

However, Simon Heaney of supply chain consultant Drewry has warned that the move could result in carriers downsizing service portfolios in terms of frequency and connectivity.

"That would reduce, not increase, competition on a port-pair basis and push up freight rates," he said.

Meanwhile, Niall van de Wouw of data provider Xeneta has warned that there is the potential for disruption, which could result in modal shift to air.

"[Block exemption] will no longer be extended, so there is a lot of concern about what the ocean freight market will look like from a supply point of view from April next year," said Van de Wouw at the recent TIACA Executive Summit event.

"If that were to result in more competition, less consolidation, it could well be that certain niche markets become underserved, become less reliable, and therefore potentially supportive of airfreight demand."

Meanwhile, carrier attempts to raise rates in November appear to have fallen short of target.

Rate portal Freightos said: "Ocean carriers hoped to push rates up by reducing capacity even as seasonal volumes decrease, but Asia-US west coast and Asia-Mediterranean prices are now about even with mid-October levels.

"Asia-US east coast rates, however, are 7% higher than in October and Asia-north Europe prices are 36% above their extreme lows last month, showing some gains through the General Rate Increases, though rates for both lanes remain below 2019 levels."

People

Challenge Group

David Canavan

The Challenge Group has appointed David Canavan as chief operating officer. He will be responsible for leading, planning, co-ordinating and overseeing all group operations. Canavan has more than 30 years' experience in supply chain and logistics, having previously worked at FedEx.

Menzies Aviation

Al-Anood Al-Suwaidi

Menzies Aviation has appointed Al-Anood Al-Suwaidi as senior vice president of cargo for the MEAA region. She joins after 10 years at Etihad Airways, where she most recently served as network safety and compliance manager for the cargo division.

Time:matters

Bernhard zur Strassen

Time-critical logistics firm time:matters has appointed Bernhard zur Strassen as its managing director and chief executive. He will succeed Alexander Kohnen, who left the firm in April, and is tasked with driving international growth with customers, digitalisation and sustainability.

Unilode Aviation Solutions

Janis Balkens

ULD firm Unilode Aviation Solutions has appointed Janis Balkens as chief operating officer. Most recently, Balkens was regional chief executive for new and emerging markets at handler dnata and has more than 20 years' experience in senior leadership, operational and commercial roles.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