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The World's Best-Read Air Cargo Publication

November 2019 / No. 876

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FREIGHTERS

GECAS unveils its B777F conversion programme

GECAS is forecasting that its 777-300ER freighter conversion programme launched together with Israel Aerospace Industries (IAI) could secure more than 150 orders in the years up to 2030.

The IAI conversion programme was unveiled in October by leasing giant GECAS, which has placed a launch order for 15 firm conversions, plus 15 options.

The conversion is designated 777-300ER Special Freighter (SF) and is the first after-market cargo modification launched for the 777 family.

Boeing produces the new-build all-cargo 777F, which is based on the shorter-fuselage -200LR platform and has a list price of $352m.

"We're dubbing the -300ERSF the 'Big Twin' as it's larger than the factory freighter," said Richard Greener, senior vice-president and manager of GECAS's cargo aircraft group.

"It's a case of 'build it and they will come'," he said, forecasting an overall market for 350 new and used wide-body freighters in the period to 2030.

Build it and they will come — the Big Twin has already attracted orders

Of these, 200 will be for replacements and 150 for fleet growth.

GECAS believes the -300ERSF can capture 40-50% of the overall wide-body market, with the remainder taken by new-build freighters.

IAI has not yet disclosed the list price, but it is understood it will be in the region of $35m per aircraft.

The -300ERSF's marginally lower payload and greater volume than the 777F mean it will be optimised for the lower cargo densities of e-commerce and express operators rather than general freight operators.

Greener added that the -300ERSF's payload range characteristics mean it will be able to serve 95% of routes currently flown by the 747-400F.

The first aircraft will be delivered to IAI's Tel Aviv facilities in December 2020 for conversion, with certification and service entry scheduled for late 2022. Once the line is up and running, conversion time will average four to five months per aircraft.

CONFERENCE

Looking to the future

Air Cargo News is delighted to announce the return of our annual conference next year.

The one-day event, which last year attracted around 100 attendees, will take place on April 24 at the Runnymede on Thames Hotel, just a short taxi ride from Heathrow Airport.

The theme of the 2020 conference is: Looking to the future in a challenging market.

Must-attend sessions include: Building the cargo airline of tomorrow; Targeting growth and profitability in a challenging market; and Shippers' and forwarders' take on air cargo in 2020.

The event will also feature a world café breakout session, which is a chance to grab a coffee and network with other attendees while discussing sustainability, air cargo's next generation and the future of GSSAs.

Meanwhile, a panel discussion will focus on cargo airports and how the industry can work together to mitigate congestion and to capitalise on future opportunities.

The conference will take place alongside the prestigious Air Cargo News Awards, now in its 36th year.

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NEWS

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DATA HUB

CONTAINER SHIPPING

SHRINKING LINKS: Volga-Dnepr Group subsidiary AirBridgeCargo Airlines and partner airline CargoLogicAir plan to cancel 11 freighter connections, from November 1.

GDP-APPROVED: Worldwide Flight Services (WFS) has been awarded with Good Distribution Practice (GDP) certifications for its temperature-controlled pharma centres in Johannesburg and Cape Town in South Africa.

CONTAINER MAINTAINER: ASL Airlines Belgium, based at Liege airport, has chosen Jettainer to manage and maintain its fleet of 1,500 ULDs over a five-year contractual period.

PIECE-FUL FLIGHTS: Air Charter Service divided a 5-ton, urgent shipment into 186 packages so it could be sent by 25 on-board carriers on routes from Hong Kong to Portugal.

UP AND RUNNING: Nippon Cargo Airlines will utilise all eight of its Boeing 747-8 freighter aircraft to carry out its winter schedule flights. Last year, the aircraft were grounded due to maintenance record discrepancies.

A NEW ADDITION: FedEx Express has continued to modernise its European air fleet with the addition of a new Boeing 767-300F to be used on its Madrid-Paris route.

PHARMA

Swissport opens pharma centre

Ground services provider Swissport International has opened a new, state-of-the-art pharma centre for handling temperature-sensitive pharmaceutical shipments at Brussels Airport.

The new facility, which opened on October 23, has 3,620 sq m of temperature-controlled warehouse space.

"The Swissport Pharma Center at Brussels Airport will play a key role in our growing global network of temperature-controlled warehouses," said Luzius Wirth, executive vice-president Europe, Middle East & Africa at Swissport.

"We operate 120 facilities and none of our other centres are equipped to the same level as this new centre. We're investing in a state-of-the-art automated material handling system and many other new features. That's why we've got this listed as our state of the art, leading facility."

The pharma centre incorporates two areas dedicated to the handling of pharmaceutical products.

One area, covering 2,620 sq m, is available for shipments to be kept at temperatures in the +15°C to +25°C range.

This is three times the size of the area formerly available to Swissport at the gateway for keeping cargo at this temperature range.

Another 1,000 sq m of space is available for cargo to be kept at temperatures in the +2°C to +8°C range.

Its automated material handling system offers 432 rack and ground positions, castor decks and associated forklifts and pallet movers.

The facility also has eight dedicated truck docks, allowing fully temperature-controlled transfer of containers and pallets to the warehouse. It is located adjacent to the handler's pre-existing air cargo facility in the north-west area of the airport.

Swissport has signed a 20-year lease contract on the new facility and is investing roughly €11m into interior fittings.

After a 10-month construction period (construction work on the new facility started in January this year), the Swissport Pharma Center represents the first part of a wider refurbishment project for the handler at Brussels Airport, which will come to take in a total of 25,000 sq m of warehouse space in a phased process of development.

Landside, the completed warehouse will feature 47 truck loading bays in a closed perimeter. Airside, 'speed gates' will facilitate quick and efficient cargo handling.

The full development project will also include a new four-story office building, to be completed in the autumn of 2020.

AIRPORTS

Second stage of expansion at HIA

Doha's Hamad International Airport (HIA) has revealed plans for a second stage of expansion that will include the development of a new state-of-the-art cargo terminal to increase its freight handling capacity to an estimated 3.2m tons a year, which is expected to be ready for use by 2023.

The hub is planned to be a multi-storey facility with an 85,000 sq m land footprint. Including its three storeys, as well as its three mezzanine levels, the facility will offer about 323,000 sq m of gross floor area.

The HIA expansion plan also includes new concourse areas that will increase the hub's passenger throughput capacity, as well as providing new retail and lounge space.

Qatar Airways Group chief executive, Akbar Al Baker, commented: "The expansion of HIA is a vital part of the future success of the Qatar Airways Group.

"It is also a strong sign that Qatar's economy is robust and acts as a further economic stimulus, providing excellent opportunities for local and international contractors."

HIA increased its cargo throughput by 14.5% to just more than 2m tonnes in the 12-month period that ended on March 31 this year.

EDITOR'S COMMENT

Damian Brett

Droning on

The development of drone operations seems to have picked up pace in the last couple of months (see our special report on page 12).

For a while it seemed like the development of autonomous aircraft delivering packages, air cargo, pharma shipments and so on had lost its momentum.

However, in October, UPS announced it had received US certification to operate a drone airline. Following approval, an UPS subsidiary launched the first drone delivery flight by any company under Part 135 Standard at WakeMed's hospital campus in Raleigh.

Meanwhile, later that month, FedEx Express partnered with Wing Aviation to execute the US's first commercial drone delivery as part of the US Department of Transportation's unmanned aircraft systems Integration Pilot Program.

The delivery marks the start of a drone trial operating in the US, following Aviation Wing's authorisation from the FAA to deliver commercial packages to residences.

My track record with innovation isn't great — I couldn't see how the iPad would ever be a success — but I still can't envisage a sky full of drones making home deliveries.

However, I can just see a cat or a dog with too much bravado trying to attack one of the things as it comes into land, or a child playing in a garden trying to grab one and being injured by what is essentially a miniature helicopter.

That doesn't mean I don't think drones won't have their uses, making deliveries to cordoned off areas on medical campuses, or the roofs of newer office blocks with helipad-style areas, or larger drones delivering cargo or medical supplies to secured 'drone airfields' in remote locations.

However, when it comes to Amazon packages being dropped off to you in a park by a drone that monitors your location via your phone, or left in your garden while you are out and about for the morning… I just can't see it taking off.

AIRLINES

Volga-Dnepr Group faces financial challenges

The Volga-Dnepr Group has downplayed Russian press reports regarding the scale of the current financial challenges it faces, stating that it has already initiated an optimisation plan.

A report in news service Ulnovosti states that the company was not immediately able to pay employees for September and that it is $200m in debt.

The report also claims that workers in Ulanovsk had been asked to accept no pay until January and that lenders will consider their options if the situation does not improve by the end of the year.

Another report from *Russian Aviation Insider* claims Volga-Dnepr will cut 100 jobs and that it plans to put up to two of its eight operational An-124s into storage.

However, Volga-Dnepr told *Air Cargo News* that salaries for September had been paid and that it is able to meet contractual obligations with customers and suppliers.

Volga-Dnepr An-124

The airline group admitted that it is facing tough market conditions but added that it is adopting an optimisation plan, which includes reducing staff numbers. It added that it is not considering a bankruptcy plan.

"As we are in market downturn stage and [the] forecast for next year is not rosy, yes, we are running [an] optimisation and staff reduction programme," the company stated.

In August, the Volga-Dnepr Group, which includes Volga-Dnepr, AirBridgeCargo (ABC) and Atran, announced that it would restructure its management team after a tough first six months with volumes 20% below expectation.

As part of the restructuring, Nikolay Glushnev was appointed the general director of ABC.

Meanwhile, ABC chief executive Sergey Lazarev and Volga-Dnepr Group vice president for sales and marketing Robert van der Weg have left.

The Ulnovosti report said there are three reasons contributing to the situation: Volga-Dnepr's exit from a contract with NATO, issues maintaining the airworthiness of its Ukrainian-built An-124 aircraft due to frictions with Antonov, and the loss of expertise within the group.

DIGITISATION

Etihad Cargo launches new digital projects

Etihad Cargo is pushing on with its digital development with the launch of several new projects.

Abdulla Mohamed Shadid, Etihad Aviation Group's managing director cargo and logistics services, said that over the next few months it plans to launch a new cargo control centre, a new website, a mobile app, dynamic pricing and APIs to allow it to hook into more booking channels.

Etihad Cargo implemented a full overhaul of its booking processes and platforms 12 months ago with the migration of its front-end systems to SPRINT — an IBS iCargo fully integrated technology platform that combined six legacy Etihad platforms into one.

Since its launch, the system has successfully handled almost half a million bookings, equating to 115,000 flights processed and 10m messages from almost 3,000 customers and nearly 6,000 users.

The half a million bookings made through its new portal accounted for 20% of total orders.

PUTZGER PERSPECTIVE

Ian Putzger

Customs wants more of your data

In one of those moments that borders on slapstick, US president Trump tweeted in late August that he had just mobilised all parcel carriers in a war on drugs.

"I am ordering all carriers, including FedEx, Amazon, UPS and the Post Office to SEARCH FOR & REFUSE all deliveries of Fentanyl from China (or anywhere else)," he declared.

Setting aside the fact that the Fentanyl epidemic was created by US drug makers aggressively selling opioid painkillers while downplaying the addictive nature of the substance, tolerated by government agencies, the president is right to worry about Fentanyl being shipped to users in the US from overseas.

He was a bit off the facts in one other respect. The integrators have been working closely with regulatory authorities to monitor their traffic for illegal substances, as UPS and FedEx were quick to point out.

Nevertheless their shares dropped more than 3% after that tweet.

It is widely agreed that mail has been the chief conduit for illegal drugs as well as counterfeit goods being shipped as e-commerce.

Neither postal agencies nor the US Customs & Border Protection agency (CBP) have the resources to screen the flood of parcels.

E-commerce shipments going by parcel carriers or as air cargo stand a higher chance of being detected, but this does not mean that these modes are impregnable.

If anything, e-commerce consolidations usually contain a broad spectrum of different products, which makes screening a huge challenge.

With its resources stretched beyond the limit, CBP has signalled that it will rely heavily on shipment data to put up a meaningful defence against illegal shipments.

'I am **ordering all carriers**, including FedEx, Amazon, UPS and the Post Office to **SEARCH FOR & REFUSE** all deliveries of **Fentanyl** from China (or anywhere else)'
Donald Trump

The agency has already run a number of trials with carriers in different modes submitting advance information on the type of cargo, number of items and weight, shipper and consignee information and the departure schedule and port of departure, plus house and air waybill numbers. More will follow.

Many forwarders question if CBP is grabbing more data than it really needs, but the agency is unlikely to climb down on this.

Forwarders and carriers will have no choice. They need to make sure they have all the required data and are able to submit them electronically.

Expect more efforts from authorities around the world to improve the visibility of what enters their jurisdiction through e-commerce.

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• BY 2020, 700,000 SQ.M OF WAREHOUSES IN DIRECT CONNECTION WITH THE RUNWAYS
• 4 RUNWAYS
• 142 HECTARES AVAILABLE LAND RESERVES

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FORWARDERS

DSV Panalpina warns of job cuts during restructure

DSV Panalpina Group has outlined the number of jobs that are likely to be cut as it relocates the former Panalpina base (in Basel) to its headquarters in Denmark.

The company said it is finalising its analysis of the impact on corporate functions at the former Panalpina headquarters, but warned the relocation could result in up to 165 job losses, despite intending to expand its logistical footprint in the Basel area.

While it is no surprise that jobs will be lost as a result of the merger, this is the first time an outline of which positions are at risk has been put forward.

Jens Bjørn Andersen, chief executive, DSV Panalpina, explained: “As we integrate Panalpina into the DSV Panalpina Group, we recognise that there are substantial duplications of corporate functions.

“We are also seeing considerable overlaps in the IT department, as IT systems that will no longer be used in the combined group are phased out. As a result, we are considering several restructuring measures.

“According to our analysis, we will not be able to avoid job cuts and the relocation of positions to DSV Panalpina’s headquarters in Denmark.”

DSV Panalpina expects to retain approximately 50% of Panalpina’s current head office workforce following completion of the restructuring by the end of the second quarter 2020.

Retained functions will include critical positions in sales, operations, IT and innovation.

Speaking to employees at the former Panalpina headquarters in October, group chief financial officer Jens Lund reinforced the company’s commitment to do all that it can, within its reasonable control, to find appropriate solutions for everybody affected.

Lund also underlined DSV Panalpina’s interest in retaining a commercial and operational presence at its Basel office and in expanding its logistical footprint in the area by consolidating suitable operational activities in Switzerland.

In August, upon completion of the merger, DSV Panalpina also made changes to Panalpina’s board of directors.

The company said that it had decided to downsize Panalpina’s executive board by eliminating the positions of chief commercial officer, chief legal officer, chief information officer, executive vice president, airfreight, and executive vice president, ocean freight.

Lucas Kuehner, executive vice president airfreight, resigned from his position and took up the role of executive vice president charter network and perishables at DSV Air & Sea.

Karl Weyeneth resigned from his position as chief commercial officer, but maintains a senior role at DSV Panalpina.

Christoph Hess left his position as corporate secretary and chief legal officer, but continues to serve as group legal for DSV Panalpina and was also nominated by shareholder Ernst Göhner Foundation to serve as an observer to the DSV Panalpina A/S board of directors for up to 12 months from the settlement.

Ralf Morawietz, chief information officer, and Peder Winther, executive vice president ocean freight, also left their positions but have not taken up new roles.

The board of directors thanked Morawietz and Winther for their “long and loyal” service to Panalpina — and in recent months for being welcoming and constructive in preparing the business and employees for the upcoming integration with DSV.

DSV completed its acquisition of Panalpina on August 19, in a deal worth up to $5.5bn.

The combined company, recognised as DSV Panalpina, is the second-largest airfreight provider in the world — DHL currently leads the pack.

AIRPORTS

E-commerce in Latin America faces challenges

A report from DHL and the Panamanian Government suggests that poor logistics infrastructure could hold back the growth of e-commerce in Latin America.

The whitepaper states that e-commerce is predicted to grow at an annual rate of 22% in Latin America up to 2021, but while this presents opportunities for the transport and logistics sector, there are also challenges.

"Inconsistency in the ease and speed of customs clearance, poor GPS coverage, difficulties with congestion and sub-optimal infrastructure for last-mile delivery are all potential brakes on growth," DHL said.

The whitepaper identified five elements that comprise a successful regional logistics hub to support cross-border e-commerce: free trade zone capabilities; efficient port and airport infrastructure; business-friendly trade and customs regulations; specific e-commerce logistics knowledge and inter-industry co-operation with merchants; technology; and logistics providers working in sync.

AIRLINES

Major upgrades for UPS healthcare network

UPS has announced major upgrades to its healthcare-dedicated warehouse and distribution network in the US and Europe.

The upgrades include adding 1.3m sq ft of total distribution space in key US markets and receiving the European Union's Good Distribution Practice (GDP) compliance certification for its healthcare operations in France and Germany.

Altogether, the US express parcel and logistics giant's healthcare warehouse and distribution space in the US will total 4m sq ft by 2020.

Among the largest upgrades include a new 450,000 sq ft facility near the healthcare campus by UPS's Worldport air hub in Louisville. A new centre in Harrisburg will measure 315,000 sq ft and is located near UPS's local transportation hub that has the capability of reaching key northeast markets in one day.

The centre is also near UPS's Swedesboro healthcare operation, which is the first in the UPS network to offer medical device services such as autoclave capabilities, decontamination and the replenishment of surgical kits, and instrument inspection.

Europe and the US are UPS's key areas of focus for pharma growth

Darren Cockrel, UPS president of global logistics, said: "By increasing warehouse and distribution space, and optimising multi-client facilities, our customers have a greater opportunity to reduce supply chain costs, and get their shipments to the right places globally at the right time and in full regulatory compliance."

Other US cities with expanded healthcare warehouse space will include Atlanta, Columbus, Reno and Tracy.

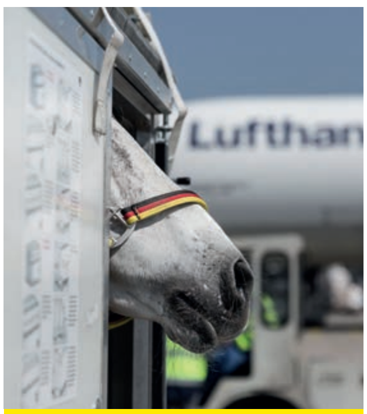
"We align our healthcare distribution network to deliver a broader one-to-two day coverage, giving customers the transit time benefits and later pickups they need to provide competitive advantage," said Dan Gagnon, UPS vice president of global healthcare and life science strategy.

SHIPPER SPOTLIGHT

Alex Veitch

Flying horses? Whatever next?

Earlier this month, American Airlines Cargo transported a 33-year old orangutan on an 11-hour flight from Buenos Aires to its new home: a sanctuary in Florida.



'**Equine cargo** can be **big business**'
Alex Veitch, FTA

While the story attracted worldwide interest, it is not uncommon for live animals to be transported by air.

Let's have a look at some more unusual cargo often moved in the world's skies.

The notion of horses flying is one that would not normally be entertained.

However, in this industry, equine cargo can be big business.

With competitions taking place worldwide, riders often need to transport their horses via air.

Transported in specialised containers, it is a highly complex operation including leg wraps to aide with any potential compression issues and on-board snacks to chew as this helps to equalise ear pressure.

And, while cars are also traditionally designed for all four wheels to remain on the ground, supercars often take to the skies above us.

In recent years, London — specifically Sloane Street — has become a hotspot for some of the world's most luxurious cars, often imported from across the globe.

With Boeing 747 freighters able to transport up to 46 vehicles per flight, specialised pallets and high strength fabric are used to minimise movement during the flight.

However, luxury supercars may not be the most expensive items regularly transported by air.

If you have ever wished you were sitting on a small fortune, there is a possibility that wish has, at some point, come true.

Gold bullions, precious artworks, bank notes and jewellery including diamonds are regular air cargo.

Security for this is strict, and includes surveillance cameras, locked storage and, on occasion, security escorts.

In addition to the above examples, other rarer instances of air shipments in the past have included penguins, pandas and even elephants.

For many, air cargo evokes thoughts of parcels or luggage however, next time you notice a passing plane you may perhaps find yourself wondering what else it may be carrying.

Alex Veitch,
head of multimodal policy, FTA

CASPIAN AIR CARGO SUMMIT

The Air Silk Road

The Belt and Road Initiative — a strategic freight distribution route — was a focal point at the Caspian Air Cargo Summit hosted in Azerbaijan. Rachelle Harry reports

At the Caspian Air Cargo Summit recently hosted in Azerbaijan, a focal point of discussion was the Belt and Road Initiative (BRI) — a strategic freight distribution route based upon the historic Silk Road. Developed by the Chinese government, the BRI aims to directly connect China to Europe, Africa, the Americas and the Middle East, by road, rail, air and sea.

Since 2013, China has invested $90bn into the countries involved.

At the Summit, Vladimir Zubkov, secretary general of TIACA, revealed that weeks before the event, Azerbaijan's president Ilham Aliyev outlined a vision for his country to become a regional transportation hub as part of the BRI, due to it being perfectly situated between Europe, Asia and the Middle East. Aliyev also hoped for Azerbaijan to take cooperation with China "to new heights" and to work jointly to promote the initiative.

An international affair

Zubkov informed delegates that the BRI route, which has created 244,000 jobs globally, will be jointly built by 29 international organisations from 126 countries. Infrastructure will comprise of highways, energy pipes and streamlined border crossings.

Wolfgang Meier, president and chief executive of summit host Silk Way West Airlines, highlighted that the carrier, which is headquartered in Baku in Azerbaijan, is in a good position to act as the hub of an "Air Silk Road" — a term that was first coined by Chinese president Xi Jinping after Henan Aviation Development and Investment acquired a 35% equity stake in Cargolux Airlines and subsequently set up a direct route from Zhengzhou, central China, to Luxembourg.

"Our airline has a versatile route that sits along the Silk Road," he explained. "It's us, with our Boeing 747 [freighter aircraft], that can run an Air Silk Road freighter network like nobody else."

"Baku is located at a crossroad from the Orient to the west," he added. "Our core markets are Asia, Western Europe, North America and the Middle East. That's the turf that we serve and we also have the right infrastructure, airport and support already in place to make our network better to support the BRI."

Jenny Zhau, vice president Asia Pacific at Silk Way West Airlines, explained that aviation can play such a crucial role in the BRI because it stimulates trade by quickly and effectively moving goods and people. Airports also have the necessary facilities, infrastructure, staff and paperwork to execute logistics tasks such as customs, quarantines, ground services and transits.

Zhau pointed out that the theoretical Air Silk Road would connect China to countries in the east and west, rather than solely connecting it to the west — as is the case with the BRI rail and road routes.

After completion, how might the BRI impact the airfreight industry?

> 'Our airline has a **versatile route** that sits along the **Silk Road**'
>
> Wolfgang Meier, Silk Way West Airlines

Dmitry Obsharov, general director at cargo carrier Atran Airlines, explained to delegates that although e-commerce is driving growth in the airfreight industry, the overland elements of the BRI — when complete — may act as direct competition to air and could counteract this positive trend.

Obsharov advised that in order to keep air shipping competitive, regulations could be put in place to speed up airfreight customs processes, making the mode more appealing as a shipping option compared with the road and rail operations being developed as part of the BRI.

Obsharov also explained that the airfreight supply chain could be enhanced further with improved data-sharing capabilities, live tracking and temperature tracking.

In addition, links in the supply chain could be improved if efforts were made to better unite carriers with airports, ground handlers, etc. This, in turn, could decrease delivery times from production to the consumer.

The Caspian Air Cargo Summit took place in Baku, Azerbaijan, on October 8 and 9. acn

CASPIAN AIR CARGO SUMMIT

Industry must prepare for future growth

IATA's global head of cargo Glyn Hughes has called on the air cargo industry to "apply equal vigour" to all the "challenges and opportunities" currently faced by the sector.

Speaking at the Caspian Air Cargo Summit in a global market outlook session, Hughes gave an overview of the tough market conditions that the industry currently faces, but also outlined opportunities.

Speaking on the China-US trade war, he warned the situation could potentially get worse. Brexit could also pile on extra pressure, he explained.

"Both countries [the US and China] are saying that if nothing concrete is resolved from talks, then further tariffs will be added," Hughes said.

Hughes pointed out that the US has imposed tariffs that are three times higher, in value terms, compared with China.

Hughes also drew attention to the risk of recession, as well as revealing that "hundreds of billions of dollars could be lost from GDP" in the aftermath of Brexit, of which the terms still remain uncertain.

Although there are also positive developments. The booming e-commerce sector has the power to positively impact the market, he said.

However, he cautioned that "one size does not fit all" in terms of methodology and companies' individual capabilities to drive the industry forward. Hughes urged industry professionals to prepare now for anticipated growth by being quick to embrace digitalisation.

"Today, we [in the industry] still rely a lot on paper and we dabble in technology," he explained. "But when you look at the projections and see that cargo volumes are expected to double over the next 20 years, we have to ask ourselves: are we ready for this?

"Are we thinking about those volumes now, rather than it happening and us saying that we didn't act quick enough?

"The industry has to now start preparing by looking to advanced automation, robotics, the use of data, artificial intelligence — every technological opportunity will have to be embraced today in order to cope with the demands of tomorrow."

Hughes concluded by revealing that IATA will release new initiatives to create awareness about dangerous counterfeit lithium batteries, including a tool to report incidents when they are moved along the supply chain.

"This is absolutely of critical concern," he said. "Every week we are being made aware of a new incident somewhere in the world."

Drones ready for take-off

The race is on as cargo drones take to the skies. Ian Putzger reports on the contestants already emerging on the horizon

This autumn may prove a pivotal point in the history of cargo drone operations. With major players on different continents ramping up for commercial service, they are about to become part of the industry landscape.

Two operators were planning to kick off operations before the end of October, with rivals in hot pursuit and others awaiting certification to join the race.

The charge is led by the big guns in the parcel business.

October began with an announcement from UPS that it had obtained certification from the US Federal Aviation Administration (FAA) to operate drones under Part 135 regulations, which govern commercial aircraft operations like charter and air taxi activities — the first US operator to get this licence.

However, the scope of the permitted activities is limited for now.

UPS Flight Forward, the drone subsidiary established this summer, can use drones for deliveries at hospitals, universities and corporate campuses, which is in line with the trials that the outfit has run in partnership with Matternet at hospitals in the Raleigh area carrying samples and other biologics between buildings.

UPS chief executive David Abney said that the company will expand the scope of activities soon, eventually to include residential deliveries.

Separately the company has indicated that it intends to use drones to carry both parcels and freight.

Wing, the drone offshoot of Google parent Alphabet Inc, obtained partial approval to operate as a small airline back in April.

In mid-September it announced that delivery tests would get underway in Virginia the following month.

This undertaking is in partnership with FedEx and pharmacy chain Walgreens Boots Alliance, a pharmaceutical conglomerate that holds manufacturing, distribution, wholesale and retail firms including the Walgreens and Boots pharmacy chains.

North of the US border, Drone Delivery Canada (DDC) was set to commence flights for its first commercial client in October.

Utilising a small model designed to carry up to 10 lbs, these drones carry tools and repair equipment between various sites of a technology-driven group of companies focusing on the building products sector.

Unlike most trials, which have focused on enclosed sites or remote areas, this one is between locations in suburban Toronto within a radius of 20 km.

According to Tim Strauss, vice-president cargo at Air Canada and a member of the advisory board of DDC, suburban operations are the final step, once the operator is granted permission for unfettered activities by Transport Canada.

Inevitably, Amazon is also in the picture, although it seems to be some way back in terms of certification.

During the summer it applied to the FAA for several exemptions from drone-specific rules, including the restriction not to operate beyond visual line of sight.

For that matter, UPS obtained an exemption from this restriction for its first job under Part 135 designation.

Initially, Amazon intends to limit its deliveries to a round-trip length of 15 nautical miles and packages weighing no more than 5 lbs.

Management declared in June that drone deliveries would get underway "within months".

Across the Pacific, Yamato Holding, parent of Japan's largest door-to-door delivery player, intends to blaze a trail in its home market.

After the first successful flight in late August of a delivery drone that was developed in partnership with Bell Helicopter Textron, Yamato president Yutaka Nagao declared "the start of a new logistics business model".

Yamato intends to field the drone, which can carry up to 32 kilos, in the early 2020s in Japan and later take it global.

Remote locations

China has been a step ahead in terms of drone deliveries in remote areas and licensing these activities.

In March of last year, SF Express was the first player to get official blessing for a unit designed to carry 25 kilos.

Kenya-based Astral Aviation, which carries the torch in Africa through its Astral Aerial subsidiary, is employing the largest drone to date for cargo operations.

Its Flyox model is designed for loads up to two tons. In addition, the company has ordered a drone with folding wings that can take Euro-size pallets of up to 250 kilos and it has also been using smaller models.

In early September it signed a deal with Japanese drone maker Yamaha Motor Company to deploy its FAZER R G2 drone, which can carry cargo up to 35 kilos and has a cruising range of 90km.

The African operator intends to use the FAZER R G2 both for cargo and crop spraying.

At this point, Astral Aerial's operations are largely confined to aerial surveillance and crop spraying activities, while management awaits the Kenyan authorities to promulgate the overdue regulations for commercial drone activities.

Sanjeev Gadhia, chief executive of Astral Aviation, cannot wait to get going.

Astral has agreements with Kenya Post for parcel deliveries and a UN agency to airdrop 1,500 kilos of humanitarian supplies, once the shackles are off.

Woman of the airfreight hour

Since her surprise departure from IATA Cargo, Céline Hourcade has set up Change Horizon, a new consultancy company based in Geneva, with TIACA and Aerotropolis Institute of China her first clients. Roger Hailey reports

When Céline Hourcade announced in June that she was leaving IATA Cargo after 11 years at the forefront of airfreight innovation, there were two unanswered questions: why and what next?

Hourcade, who originally joined IATA on the passenger side and was part of the successful e-ticketing team, acknowledges that it was neither an "easy" nor an "obvious" decision and that "it came as a surprise for lots of people around me".

There was no one single reason, but three combined ones: "I turned 40 years of age last year and I think the 40 crisis is not a myth — that it actually exists. I really questioned myself on who I am and where I want to go. I wanted to learn something new and something different."

Regular change

Hourcade, who praises the work of her boss at IATA Cargo, Glyn Hughes, adds: "I have seen nine years working with Glyn, but within that period I always changed focus every two or three years. I am someone who needs to have regular change.

"I am not somebody who can do the same thing all the time, and I need new challenges. I had already spent three years as head of cargo transformation. It was a super cool job, probably the best job in the whole team, but I thought it was time for me to move on."

The third reason is more to do with the slow pace of change in the air cargo industry.

"Being in charge of transformation I saw all the companies that are really trying to innovate, move quickly, challenge and come up with something new.

"I was very excited with that but to be completely honest, IATA was not moving fast enough for me, so I got a bit frustrated last year."

Hourcade praises a "great cargo team" at IATA that is both "creative and works hard to make a positive impact for the industry under the leadership of Glyn [Hughes]", but she adds: "Having said that, we are also suffering like every other company that has some cargo and a passenger business: cargo is not the main focus.

"I got frustrated because, for me, the industry is not moving quickly enough. It was my New Year's resolution to have a change, to leave IATA Cargo and to do something different."

'Sustainability is the **integration** of **three elements**, the 3Ps: **people, planet and profit**, so we need to be good for the **environment**, good for **business** and good for **people**'

Céline Hourcade

IATA's slow progress

It seemed appropriate to ask about the slow progress of IATA Cargo's signature policy, implementation of the electronic air waybill (e-AWB). It reached 65.1% in July 2019 after its launch nine years ago.

Hourcade says that IATA "chose a wrong approach" in the e-AWB adoption programme: "IATA kept setting targets for the industry, targets that it was not able to meet itself, but setting targets and then communicating on it."

That said, Hourcade is quick to add that the airfreight industry has done a "fantastic" job with the e-AWB by coming up with electronic standards to replace the paper document, and points out the many complicated reasons why the e-AWB is nothing like e-ticketing in the passenger world, which had only one document to replace.

"People often say that e-ticketing is the equivalent of the e-AWB but obviously it is not. The e-AWB has the contractual part to it, so it is more complex than electronic ticketing.

"The air cargo industry is global, and the e-AWB has to work for every country and it has to work for every stakeholder in the transport chain."


Hourcade is an advocate of drone projects, led by companies such as UPS in the US

The e-AWB has a number of associated documents linked to it that are used by the local customs authority, the airline, the airport, the ground handler, the freight forwarder, the shipper and customs broker.

Adds Hourcade: "There are so many players involved in every part of the world, with legal constraints, mindsets and cultural barriers.

"It is massive change management programme that IATA, and then the entire industry, pushed for. Today you can see a glass half-empty, ie adoption is not fast enough and that we are a very difficult industry to organise et cetera.

"But you can also see a glass half-full, the fact that this project was a giant task and that we managed after many years finally to convince and show the light to so many players, including regulators, custom authorities and global leaders — that they have to move to digital solutions."

Is e-AWB the future?

But there is a sting in the tail of that analysis from Hourcade who, while praising the momentum in e-AWB adoption, observes: "I'm not sure today whether or not the e-AWB is the answer. It was a good answer 10 years ago but not anymore. I don't think it is appropriate to just focus on the removal of the paper document and replace it with an electronic one.

"It is not modern enough for today's world and we now need to embrace smart data sharing, but I regret the approach from many traditional players in this industry in that they have a tendency to say let's first do the e-AWB before we try something else. I think that approach is wrong."

Hourcade, whose grandfather was an engineer who installed radar systems at airports around the world — something that inspired her to join the aviation industry after studying at a French telecom business school, says: "I come from the telecommunications industry and when I started, mobile phones were at an early stage.

"It was not a smart phone but a dumb phone, and then little by little, a new generation of mobile phones became smartphones. Do you really think today that we can tell someone that first he has to start with an old-fashioned mobile phone before he can get a smart phone?

"No, it does not make sense, so don't try to force digital documents when you can have smart-data sharing. It is not appropriate anymore and is not worth the investment in time and money rather than just jumping into the next generation of digital solutions."

While striking a necessary negative note, Hourcade says that the airfreight industry and customs authorities have done "a tremendous job and should be really proud of all those achievements in accepting digital solutions, it is amazing".

> 'We are in a **process of the unknown,** but I am certain that in a **decade** from now, **unmanned** vehicles will be transporting cargo'
>
> Céline Hourcade

Commenting on the mushrooming start-ups in airfreight these days, allowing stakeholders to share data and to book directly online: "Finally we have the momentum and that is why they can go to the market and be successful."

Time for reflection

After Hourcade's decision to leave IATA Cargo was announced, she set off on a month-long hiking trip with her husband and two children across Indonesia, Malaysia and Singapore, deliberately disconnecting herself from the world of work.

Synchronicity then played a helpful part, with the announcement that Steven Polmans of Brussels Airport was the new chairman of airfreight industry body TIACA, joined by Astral Aviation's Sanjeev Gadhia as vice chairman, with both men putting sustainability and diversity issues to the fore.

Hourcade congratulated both men on their focused agenda, because sustainability is close to her heart, and subsequently an offer came from Polmans to join the project.

Hourcade, who has a notebook full of new ideas for transforming airfreight, each one covering at least three pages, will be a consultant to TIACA and not a full-time employee.

She is setting up Change Horizon, a new consultancy company, based in Geneva. She has one other client, the Aerotropolis Institute of China, and is negotiating with three other potential clients to help companies, organisations and customers with their digital transformation projects, their innovation and sustainability programmes and their drone initiatives.

"TIACA is my main focus and ➜

→ it is also very exciting as a topic. I have lots of ideas for what to do with the sustainability programme. I don't have to sell it myself and TIACA already has companies that raised their hand and volunteered to join the sustainability strategy and to be really active. That is very motivating too."

Hourcade says it is important to raise sustainability's profile as an issue within the air cargo industry while also repositioning TIACA in a different role as an organisation engaging with aviation regulatory body ICAO, plus IATA, to lead concrete initiatives that will "really make an impact".

She adds: "Sustainability is the integration of three elements, the 3Ps: people, planet and profit, so we need to be good for the environment, good for business and good for people. For me this is 3+1, with the plus one being innovation."

Future of drones

One example of innovation is the application of drone technology. Hourcade is a passionate believer in the future of drones, or unmanned aviation, which she believes will revolutionise the transport of goods and the transport of passengers.

"When we say drones, the general public has the image of a small recreational drone that can be bought very easily, and which can used to take pictures and nice videos et cetera.

"But drones are much more than that in aviation and can be used for aircraft maintenance inspections, also at airports for the management of birds and for the transport of goods and passengers.

"The only thing we don't know today is how long it will take and which ones will be successful because we are at the emerging stage of this technology with lots of start-ups popping up everywhere that have an idea.

"We don't know yet which ones are not only technologically feasible but are economically viable and scalable and will be acceptable for the regulators."

She adds: "We are in a process of the unknown, but I am certain that in a decade from now, unmanned vehicles will be transporting cargo."

Can airfreight be green?

On environmental issues, the global aviation industry produces 2% of all human-induced CO_2 emissions. Asked if airfreight can really be green, Hourcade says: "Yes it can, and it can be greener."

She cites greater use of alternative fuels, aircraft weight reduction and optimised loads.

"There is also the definition of green. If you want to have zero emissions, then no, that is probably not the case for transport."

But she is doing her bit for the environment and gives an example: "I drive a 100% electric car and I create emissions only for the electricity part and the manufacture of the car. I'm not carbon neutral and environmentally neutral with my car, but I am greener than most of the people." acn

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FACT FILE

- Céline Hourcade was part of the IATA Cargo team for 11 years and spearheaded several projects, including heading up cargo transformation for three years.
- Other projects she was involved in include: the Future Air Cargo Executives (FACE) programme; the Air Cargo Makes It Happen promotional campaign; and the standard to measure emissions: the Air Cargo Carbon Footprint.
- After leaving IATA after 13 years, Hourcade set off on a month-long trek across Southeast Asia with her family.

Talking Turkey

With e-commerce market volumes worth $5.9bn in 2018, it is easy to see why big businesses are keen to invest in Turkey. Roger Hailey reports

Turkey's gleaming new Istanbul Airport opened fully for passenger flights in April 2019 and the partial transfer of all freighter aircraft operations from the former Ataturk hub means that there are now up to 120 freighter flights per month there as well.

The new mega airport, costing $10.5bn by its fourth and final stage, will eventually have six runways.

The first phase, able to handle 90m passengers a year with two runways and a third now near to completion, will handle 45 air transport movements per hour, twice that of Ataturk, some 30km away.

The new airport can handle 2m tonnes of cargo per year and has a final phase annual target of 4.5m tonnes, compared with cramped and congested Ataturk which struggled with 1.2m tonnes in 2017.

IGA built the airport and has a 25-year concession to operate the hub.

Flag carrier Turkish Cargo, which is investing heavily in 110-tonne capacity Boeing 777 freighters, intends to be a top five global cargo carrier. It already has an impressive fleet of 10 Airbus A330-200Fs, six B777Fs, four B747-400Fs, three A310-300Fs and one A300-600F.

And with access to a bellyhold passenger fleet of A321 aircraft, Turkish Cargo serves 319 destinations in 126 countries.

> **'Turkish Cargo will have a facility with an annual capacity to handle 4m tonnes of cargo'**
>
> Turhan Özen, Turkish Cargo

The carrier's chief cargo officer, Turhan Özen, tells *Air Cargo News*: "We'll double up our capacity upon acquisition of the new-generation aircraft, and add 10 destinations across the continents of Africa, Asia, Europe, South and North America, increasing the number of our cargo destinations to 100 in the upcoming period. By 2023, Turkish Cargo has plans for direct flights to more than 150 destinations."

Doubling the business

Turkish Cargo's vision to be among the top-five preferred global cargo brands means that it has to double its business in the next five years in terms of revenue and capacity as well as in terms of customer expectations and satisfaction.

Özen says the cargo carrier is growing by around 25% annually — and it will need to keep that up in order to double the business.

"For 2023, Turkish Airlines' passenger fleet target will reach around 500 passenger aircraft, including 20 more freighters to double the business and volume."

As *Air Cargo News* went to press, it seemed US sancations imposed against Turkey, which could affect disposable incomes in the country and so air cargo volumes, would be withdrawn.

Per capita GDP in Turkey has trebled in 15 years, reaching $10,500 in 2017 for a country with a population of around 80m people, with The World Bank reporting that Turkish firms have become "increasingly integrated in the global marketplace".

Turkish merchandise exports' global market share increased from 0.5% in 2000 to 1% in 2015.

A report published early in 2019 by Turkey's Association of International Forwarding and Logistics Services Providers (UTIKAD) predicted a surge in e-commerce volumes.

According to the study, the share of online retail within total trade in Turkey stood at 3.5% in 2016 and rose to 4.1% in 2017.

Turkish e-commerce market volumes, worth TL30.8bn ($5.3bn) in 2016, climbed 37% to TL42.2bn in 2017, while the country's e-commerce market amounted to $5.9bn in 2018.

Some 21% of internet users in Turkey are shopping online, while penetration rates of companies and individuals using e-commerce are 11% and 25% respectively.

Turkey's government, under President Recep Tayyip Erdoğan, has a New Economic Program for 2020-22 that targets a growth rate of more ➜

than 5% in the coming years, while also dampening inflation and lowering unemployment.

Big business wants to be in Turkey, with European manufacturer Airbus expected to invest around $2.5bn there in 2020 and $5bn by 2030. German carmaker Volkswagen will invest $1.5bn in a production unit with a maximum annual production capacity of 300,000 vehicles.

One of the thriving local logistics operators with an eye on expansion is the Asset Grup, an Istanbul-based Turkish family-owned business started in 2003 which now has more than 300 people employed across Turkey working in two divisions, one for customs brokerage and the other for freight forwarding.

Asset Grup general manager Avsar Dada took up his new role in April this year, moving from Austrian forwarder Gebrüder Weiss where he was Turkey managing director. Before that he was with Gefco, the European automotive logistics specialist, responsible for 11 countries.

Says Dada: "We have a lot of ongoing projects for the future growth of the company, such as establishing an office in Asia, but also in the Middle East, in Qatar and Dubai, and we will also grow organically in Turkey."

One important upcoming project for Dada is a planned acquisition in Germany, recognising the strong trade and cultural links between Germany and Turkey, with more than 5m people of Turkish roots living and working in the European Union's largest economy.

German interest

Dada, referencing Volkswagen's investment decision, says: "All those big German brands are very active in Turkey and that is one reason why we are trying to acquire a company there.

"That is the first phase of our growth strategy for the Ruhr region in northern Germany, which also has easy access to where the Turkish population is living in Belgium and the Netherlands for example."

The Middle East is an important, if not an easy, market for Asset Grup with exports of electronic and construction materials to the region.

The relatively short distance from Turkey to the Middle East has also opened up export opportunities for Turkish agricultural products such as eggs and milk, plus seafood products like frozen and fresh fish.

Just one example of this cool chain saw Asset Grup fly 45 tons of dairy products to Qatar in a single day on three different carriers out of Turkey.

North Africa is another strong market for Asset Grup, with a large number of Turkish construction companies in situ with building programmes.

The fluctuating exchange rate of a weakened Turkish Lira affects large inbound markets, particularly from Asia to Turkey, a trade lane that took a big hit from the start of 2019 due to currency fluctuations. An estimated 90% of the volumes are imports.

Dada says that the currency has stabilised after a weak start to the year, but that the freight market sentiment, especially for imports, is "wait and see".

Blackberries being loaded

That wait and see attitude does not apply to the new airport, where Turkish Cargo has already established a special two-way trucking corridor between its airfreight facilities there and at Ataturk.

Turkish Cargo boss Özen says: "Cargo transfer operations are performed in a maximum of two hours between the two airports. We have successfully integrated customs and security processes into the truck operations. Everything was flawless during the last five months of this new operations type."

Freighter operations will continue from Ataturk Airport until completion of Turkish Cargo's SmartIST mega cargo facility at the new hub on a total area of 165,000 sq m.

SmartIST

Since February 2019, Turkish Cargo has worked with passenger aircraft cargo at a satellite facility within the new airport, which Özen says is "completely adequate in terms of infrastructure".

He adds: "Thanks to investments in the mega hub at SmartIST, Turkish Cargo will have a facility with an annual capacity to handle 4m tonnes of cargo after all phases are completed.

"Besides a capacity increase, our focus will be on speed, efficiency, high quality services, special cargo and special products.

"In order to optimise the operational processes, SmartIST will be equipped with automatic storage systems and will use smart systems in operations such as augmented reality, optimisation and robotics."

In addition to those technological advances, Istanbul's new hub is within narrowbody aircraft range of 60 capital cities, which the airline says will make it possible "to rank among the busiest airports based on trade flows".

Reinforced with Free Trade Zone status, Istanbul Airport is, says Özen, "set to become one of the most preferred hubs in the world".

Asset Grup already has an office at the new airport but is keeping an Ataturk Airport office to help those

ISTANBUL AIRPORT

The building of a global hub

IGA is the Turkish conglomerate that built the new Istanbul Airport (IST) and has a 25-year concession to run its operations.

A spokesperson says there are currently eight cargo airlines operating at IST: MNG, Lufthansa Cargo, EgyptAir Cargo, Qatar Airways, SilkWay, Turkish Cargo, Atlas Air and Uzbekistan Airways.

Three of those carriers, SilkWay, Atlas Air and Uzbekistan Airways, are new airlines to Istanbul and did not operate at the former Atatürk Airport.

There are currently between 110-120 freighter flights per month on average at IST, compared with 1,300 passenger flights per day.

Turkish Airlines has completed the first phase of its new cargo terminal and the second phase is under construction. Work is planned to be completed at the beginning of 2020, when all of its freighter operations will be based at the new airport.

IGA confirms that integrators UPS and DHL will have cargo facilities in Istanbul. FedEx flights will start in November 2019 and its warehouse is under construction.

The IGA spokesperson adds: "We are in contact with the other courier companies that are

planning to make Istanbul Airport their regional hub.

"With its high standards of security and efficiency, Istanbul Airport Cargo City will be an important part of the economic growth of Istanbul and is also one of the most important air cargo and logistics hubs of Eastern Europe, the Middle East and Central Asia.

"Situated between two runways, the Cargo City is located in the aerodrome to facilitate the access of freighters. Its location also enhances the accessibility of aircraft to the cargo terminal thereby facilitating the shortest possible turnaround times.

"The fact that it is connected to Istanbul city road system by tunnels, through which loading and unloading trucks can easily access the cargo terminal area, means there is easy movement between landside and airside."

The spokesperson continues: "Efficient infrastructure greatly facilitates the cargo handling process because air cargo carriers have their own aircraft parking spaces in front of the warehouses."

The parking positions of the centre, which can be used by more than 29 widebodied cargo aircraft at the same time, are located just in front of the warehouses.

The Cargo City within IST will house all warehouses, cold chain storage, valuable and vulnerable storage, agency offices, customs offices and all cargo/logistics operations.

With the completion of the fourth runway, another cargo terminal will be added between the third and fourth runways.

customers who are uncertain which airport will handle their cargo, with some 10% of weekly volumes still moving via Ataturk Airport as, phase by phase, all the volumes shift to the new gateway.

There is some speculation among the forwarding community as to when the full complement of their staff will move out of Ataturk, given the sizeable offices and warehouses still in use there.

For Turkish Cargo, eventually having both its passenger bellyhold and freighter operations at the one mega airport clears the way for its ambitious expansion plans to go full throttle.

Özen makes the point that the dual-hub operation has been "very smooth" due to the intensive planning efforts and precautions taken by the carrier.

"We have done very well from the beginning and we aim to increase the quality of our service by decreasing connection times between airports via new concepts/products," he says.

After it completes the final transition to its Istanbul Airport SmartIST Cargo Hub, Turkish Cargo will capitalise on a list of benefits offered by the cargo-friendly design of the new airfreight city.

These include quick connections for transfer cargo with "simplified and technology-intensive processes" plus park positions located in front of the cargo terminal, providing immediate access to the freighters, with quick transfer services at the apron using tunnels and dedicated service roads.

Other benefits are dedicated warehouses for valuables, perishables, pharma and live animals, plus express and courier.

Adds Özen: "With the modular design principle, we have solutions not only with current volumes but also for the future requirements and unexpected changes in the market."

Getting connected

These solutions include effective use of passenger and freighter flight networks with "short minimum connection times", and the integration of digital transformation projects such as optimised work order systems, robotic process automation and augmented reality, together with automated storage and operations systems.

Turkish Cargo has a clear route map to becoming one of the big five global airfreight carriers.

Says Özen: "In 2023, we plan to launch direct cargo flights to 10 destinations." The planned destinations are Sheremetyevo, Aktobe, Ouagadougou, Harare, Maputo, Misrata, Columbus, Abu Dhabi, Quito and Narita.

He continues: "While expanding our flight network, we maintain our growth rate. Turkish Cargo carried 1.6m tons of cargo in 2018, and we will carry 1.7m tons this year. Significant increases have been observed in special cargoes: pharmaceuticals, valuable cargo, dangerous goods, live animals, flowers, vegetables and fruits, meat and seafood, and also in general cargo transport."

Turkish Cargo increased its special cargo shipments by 34% in 2018, with live animal transports seeing a rise of 145%. According to August data, a 19% increase was achieved compared with the previous year. The product with the highest rate of increase, at 32%, is valuable cargo.

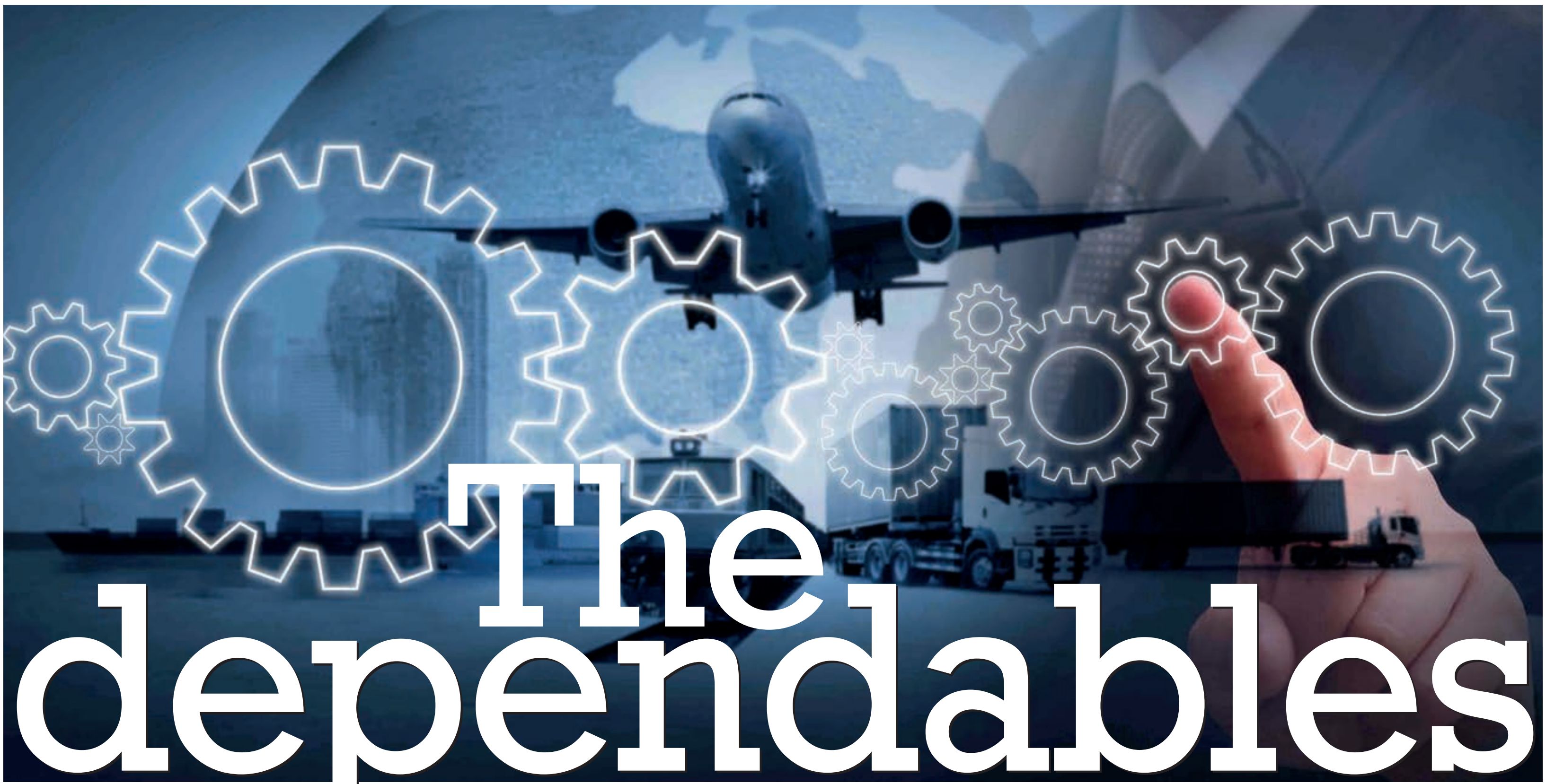
Observes Özen: "As [research group] WorldACD's reports confirm, we are increasing our capacity and widening our network even though the market is in decline. With that being said, we will obviously be acquiring new aircraft to cover the world with our freighter network.

"But we all know that in today's world, getting new aircraft is not enough on its own. We also invested a lot in the new Istanbul Airport and our new facilities there will provide the capacity we need and, moreover, they will be housing new autonomous systems which will help us better utilise our operations."

Recognising the automation is not an answer in itself, Özen emphasises that "hundreds of new colleagues" have been recruited by Turkish Cargo in the past two years and that recruitment process will continue. acn

'In 2023, we plan to launch direct cargo flights to 10 destinations'

Turhan Özen, Turkish Cargo



The dependables

'Advanced training and **further education,** as well as hand-selected management teams are the **secret of our success'**

Ingo Zimmer, ATC Aviation

While the air cargo industry suffers from negative market trends, GSSAs are playing a crucial role by providing an extra revenue stream to airlines, saving them the need to invest in cargo sales and operations infrastructure. Rachelle Harry reports

This year and the months running up to it have been noticeably challenging for the airfreight industry, but for general sales and services agents (GSSAs) a downturn can present opportunities.

The downturn experienced by the market is captured in the latest monthly update from airline association IATA, which shows that volumes over the first seven months of 2019 were 3.5% down compared with the same period in 2018.

There are many global and economic factors that have had a negative impact on the airfreight market in recent months.

Tensions between the US and China are growing as the trade war between the two countries continues.

Ongoing protests in Hong Kong, as well as uncertainty around the terms of how the UK will exit the European Union, are amongst the reasons given for the tough conditions.

Negative trends across the air cargo industry have, in turn, impacted the GSSA sector.

But, in challenging times such as these, GSSAs are playing a crucial role in air cargo supply chains and logistics flows by providing an extra revenue stream to airlines without the need to invest in cargo sales and operations infrastructure.

"You only have to look at six months of trade wars and political unrest to see how quickly things in our industry can change," says Stephen Dawkins, founder and chief operating officer of Air Logistics Group, which provides sales and services for 100 airlines and has a presence in 48 countries across six continents.

According to Dawkins, downturns are positive for the GSSA industry and bring opportunities. "It's a time when airlines look towards professional organisations like us, which are well-financed, to give them quick solutions," he explains.

Ingo Zimmer, chief executive of ATC Aviation, agrees: "The market is suffering and there is an overall industry trend of falling cargo yields and tonnages," he says, "but GSSAs are extremely busy."

ATC Aviation, which was founded in Switzerland almost 50 years ago, now generates a total of €400m in revenue per year for its more than 75 airline customers.

"At ATC, we are extremely busy with tenders every day, because airlines are looking for solutions to cut costs."

'We believe that data — and the **mastering of data** — is the biggest asset that we can have, **after our people**, of course'

Adrien Thominet, ECS Group

In times of change, GSSAs can be particularly beneficial to their clients if they remain versatile, John Gilfeather, sales director at Network Airlines, explains.

"What we have seen in the past year, and what has been even more pronounced in the past six months, is a decline in cargo volumes year on year," he says. "The reality of the situation is that the market has declined irrespective of the carrier or GSSA's performance.

"As a GSSA, we have to show our clients that we're thinking on our feet and that we're reacting to that new market reality."

Digital domination

As the air cargo industry continues to invest in digitalisation, GSSAs are focusing their attention on streamlining and speeding up their operations with the latest technologies and systems.

ECS Group has been making its digital transformation a top priority for more than a year and it is already seeing the benefits.

"Over the past 12 months, we have been going through a transformation, integrating digital technology into several areas of our business," says Adrien Thominet, chief executive, ECS Group.

"We now have a digital laboratory for testing, creating and inventing, and our team of experts deploy digital solutions to improve our employees' efficiency and our clients' performance."

Thominet explains that ECS Group has developed and implemented a reporting system called Apollo, which delivers real-time data analytics and visualisations.

"We believe that data — and the mastering of data — is the biggest asset that we can have, after our people, of course," he says.

In-house, in its digitalisation laboratory, ECS Group has also created a pathfinder system called Track & Trace, which gives its clients a real-time view of the status of their cargo via a "best in class" user interface.

Air Logistics Group's Dawkins is also embracing the digital revolution.

"The GSSA industry has evolved tremendously over the past 25 years from a 'Ma and Pa' industry to organisations that are financially well-backed and have very strong networks investing heavily in IT development, because that's what it's all about now," he explains.

"We [at Air Logistics Group] are investing heavily into technology to provide a faster response to the freight forwarder because a faster response means capacities can be filled quicker for our airline clients."

'The future of the business is how **quickly** you can quote to your client to be able to **secure** that **business** for the **airlines** you **represent**'

Stephen Dawkins, Air Logistics Group

In the past five years, the company has invested $8m into new IT systems and platforms that can quickly process cargo movements, quotes and bookings.

Dawkins points out that a high level of detail and sophistication is required for such systems, as a single cargo movement, quote or booking could have numerous variants.

This differs from passenger bookings, which are "one and the same" (because for all passenger bookings, a seat is reserved with the option of additional luggage or meals).

"The cargo industry is diverse," says Dawkins. "Of the 600,000 bookings we take per year at Air Logistics Group, every single one of them is different. You have customs issues, different types of unit and different types of aircraft — as in passenger or freighter."

He also reveals that, next year, Air Logistics Group will be rolling out a new quotation platform capable of providing its clients with faster, more automated responses. "It's not a →

PEOPLE

Robert van de Weg to help ECS Group redefine GSSA

ECS Group has recruited Robert van de Weg (pictured) as chief commercial officer to act as "a disruptive force" to help the GSSA reinvent itself "to embody a new business model".

"We're completely redefining the contours of what we do," says Adrien Thominet, ECS Group chief executive. "We've created a robust set-up that's built entirely around sales development, supported by an innovative digital strategy.

"This means that we are capable of bringing new expertise and a business vision to the table that perfectly meet the needs expressed by airlines and Robert is without doubt the perfect contact for our clients."

Van de Weg, most recently vice president sales & marketing for Volga-Dnepr Group, previously worked with KLM Cargo, Atlas Air and Cargolux. Volga-Dnepr Group, which includes AirBridgeCargo and ATRAN, has recently undergone a restructuring after a financial year that saw cargo volumes decline 6%, falling to 20% under budget.

ECS says van de Weg will help the group, already committed to Total Cargo Management, continue its transformation away from the traditional GSA model. "Robert Van de Weg is the ideal coach to help our (sales) teams reach new heights," Thominet adds.

➜ booking platform, it's a quote management system," he explains.

"We've listened to what our clients want — they want solutions in terms of varied options to be able to quote business on. For example, tomorrow they might want a direct service; the day after that, they might want a shipment service because a particular booking is not such high priority.

"What's exciting about this system is that it's going to be driven by capacity as well," he adds. "So it gives the airline the opportunity for a quicker process, as well as to the freight forwarder by cutting out emails, because everything can be transacted via the system."

In the GSSA business, time is money and with that, speedy quotes and bookings are ever more important, as Dawkins explains.

"The future of the business is how quickly you can quote to your client to be able to secure that business for the airlines you represent," he says.

Stronger territories

Despite the current tough market conditions, global expansion at GSSAs remains a top priority — with Asia being a particularly desirable destination to expand their networks.

"Asia is the region with the highest demand," says Thominet, whose organisation, ECS Group, already has offices in China, India and Malaysia.

"It offers significant opportunities to roll out both our GSSA and total cargo management solutions, thanks to the boom in e-commerce and cross-border e-commerce."

ECS Group recently acquired Australia and New Zealand-based Wexco (not to be confused with Wexco Cargo GSSA) to establish its presence in the Australasia region.

At the time of the acquisition, which took place in early October, Bertrand Schmoll, chairman of ECS Group, commented: "Wexco is a well-established GSSA with a very good reputation in the Australia and New Zealand market. We were not previously represented in either country and our strategy involves expanding our footprint in the Asia Pacific region. Wexco is the perfect partner with which to do this, and one of its biggest assets is its unrivalled market expertise."

The group has also spotted and seized opportunities in South America.

"In less than three years, we have built a strong position in countries such as Mexico, Brazil and Ecuador," Thominet explains. "Our expansion plan is to maintain double-digit growth year on year and to be present in South America's main countries by the end of 2020."

Air Logistics Group, which was originally established in Europe

25 years ago, is also setting its sights on the east.

"Our expansion over the past 10 years has been in Asia and we will continue to invest and grow our business there," says Dawkins.

However, Dawkins also believes that airlines' destination choices influence the location of his organisation's expansion footprint.

"We are an organisation that is willing to invest in the future," he explains. "If it is necessary for us to open an office for an airline that we have worked with for a long time, then we will of course do that – but our main focus is continued growth in Asia."

ATC Aviation, which already has a strong presence in central Europe, the Middle East, central and south America — and more recently Canada — is now setting its sights on eastern Europe, as well as Asia.

Meanwhile, in addition to Asia, Gilfeather of Network Airlines, which was founded in the UK in 1985 under the name ANA Aviation, sees potential for expansion in Africa. "We've expanded progressively from Europe to the Americas, the Middle East and Africa," he explains.

"Africa doesn't have the growth of export or the volumes that other regions do, but a lot of airlines have their own representation or management based there.

"So one of our strengths as a company is to establish relationships with those contacts within the region."

Positive preparations

The opportunities — for maximising revenues, growth and digitising — that have presented themselves to GSSAs as the wider airfreight market declined, may be less available when the market begins to pick up again if airlines decide to take their cargo sales activities back in-house — afterall, there tends to be a natural ebb and flow between the in sourcing and outsourcing of certain auxiliary activities.

GSSAs must therefore ensure that they remain as necessary and beneficial to their clients when the market begins to shift as they are at present.

The digital systems and platforms that GSSAs have developed may help them in this respect, as they will be able to continue providing efficient and fast cargo quotes and bookings to their clients, which will not necessarily have the same level of technology available in-house.

In addition, GSSAs can continue to rely on data from sources such as IATA for up-to-date information about the size of the market and how they are performing for the carriers they represent, as Network Airlines' Gilfeather explains.

"I think the GSSA business is unique and transparent, compared with other industries," he says.

"In real-time, we can really see the size of the market and how we are performing in relation to it."

Ultimately, it's a GSSA's people and their competencies that are the key to successfully navigating through change. Training, therefore, is essential. "Advanced training and further education, as well as hand-selected management teams are the secret of our success," says Zimmer. "People are our biggest asset." acn

PARTNERSHIP

Qantas Freight and Jetstar Asia join forces

Qantas Freight and low-cost carrier Jetstar Asia have entered into a new partnership covering the Singapore-based airline's cargo capacity.

The deal will see Qantas Freight manage Jetstar Asia's cargo capacity across 23 stations in 13 markets from November 20.

The Singapore-hubbed airline has a fleet of 18 Airbus A320 aircraft, each with a capacity of around two and a half tonnes per flight.

It handled around 17,000 tonnes of cargo in the year to June 2019.

Jetstar Asia chief executive Barathan Pasupathi says: "With a reliable schedule of services to 23 ports from Singapore, the new partnership will ensure our customers enjoy wider connectivity and more direct access through our integrated Qantas Group network of more than 110 markets in Australia, Asia, Europe and the US.

"As the only low fares airline operating services from Singapore to numerous Asia-Pacific destinations like Okinawa, Darwin, Medan and Siem Reap, Qantas freight customers will also benefit from direct access to fresh markets previously unavailable to them."

Qantas Freight executive manager Paul Jones adds: "We are excited to partner with Jetstar Asia and build on our strong relationship.

"Qantas Freight's extensive network into, out of, and around Australia, Europe and the US, combined with Jetstar Asia's strong coverage in Asia Pacific will offer great opportunity for our freight customers.

"By joining forces, we will improve efficiencies for the group, offer greater flexibility and leverage synergies while unlocking value for our freight customers by offering more connections. This partnership will provide a more streamlined freight journey through Asia, Australia, Europe and the US."

Australia's Qantas holds a 49% stake in Jetstar Asia.

DATA HUB

AIRLINE DEMAND

Demand falls for 10th month in a row

Air cargo is now in its longest slump in demand since the global financial crisis in 2008.

The latest figures from IATA show that demand in freight tonne km (FTK) terms declined by 3.9% year on year in August.

IATA director general and chief executive Alexandre de Juniac said the figures were "deeply concerning".

"The impact of the US-China trade war on air freight volumes was the clearest yet in August," he said. "Not since the global financial crisis in 2008 has demand fallen for 10 consecutive months. This is deeply concerning.

"And with no signs of a détente on trade, we can expect the tough business environment for air cargo to continue. Trade generates prosperity. Trade wars don't. That's something governments should not forget."

To compound the decline in demand, capacity in available FTK terms in August increased by 2% compared with a year ago and therefore cargo load factors slipped 2.7 percentage points to 44.6%.

> **'Trade** generates **prosperity.** Trade wars don't'
>
> **Alexandre de Juniac, IATA**

IATA said that key economic indicators pointed to a continuation of the tough trading conditions.

"Global trade volumes are 1% lower than a year ago," IATA said. "Trade in emerging countries has been underperforming that of advanced nations throughout most of 2019.

"This is due to higher sensitivity of the emerging economies to trade tensions, rising political instability and sharp currency depreciation in some of the key emerging markets."

IATA pointed out that global export orders continue to fall — the global Purchasing Managers Index (PMI) continues to contract and its tracking of new manufacturing export orders has pointed to falling orders since September 2018.

"And for the second month in a row, all major trading nations reported falling orders," IATA added.

Looking at regional performance, it was once again carriers based in the Asia Pacific region that suffered amongst the most as a result of the downturn. The IATA stats show that Asia Pacific airlines saw airfreight demand contract by 5% year on year in August as a result of the trade war and "the slowdown in the Chinese economy".

"The temporary shutdown of Hong Kong International Airport — the largest cargo hub in the world — added additional pressure," IATA said. "With the region accounting for more than 35% of total FTKs, this performance is the major contributor to the weak industry-wide outcome."

North American airlines saw demand decrease by 2.4% in August as they were also affected by the trade war as well as falling business confidence. On routes between Asia and North America, seasonally adjusted volumes are down by almost 5% compared with last year.

European airlines posted a 3.3% drop in freight demand in August due to weaker manufacturing conditions for exporters in Germany, softer regional economies and ongoing uncertainty over the UK's withdrawal from the European Union.

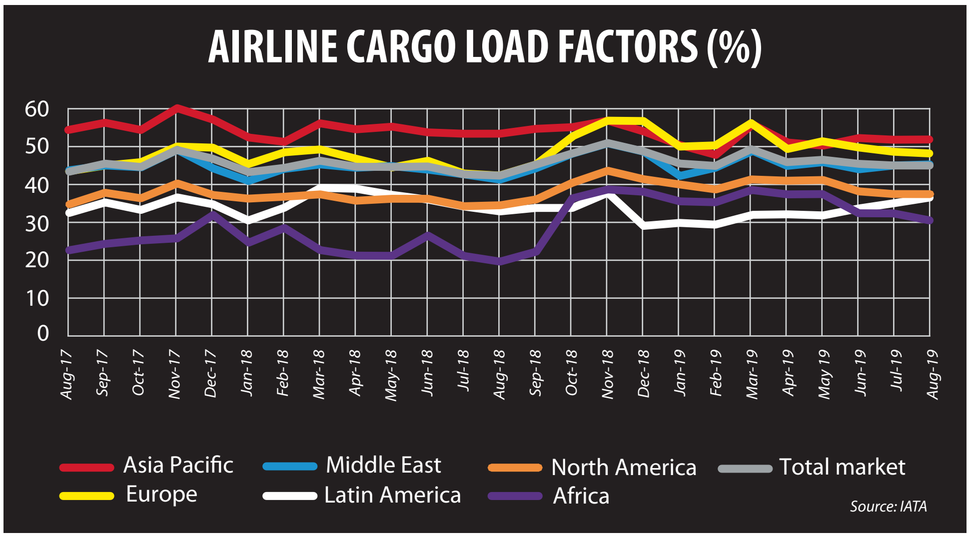
In the Middle East, airlines saw volumes decrease by 6.7%, which was the sharpest drop of any region.

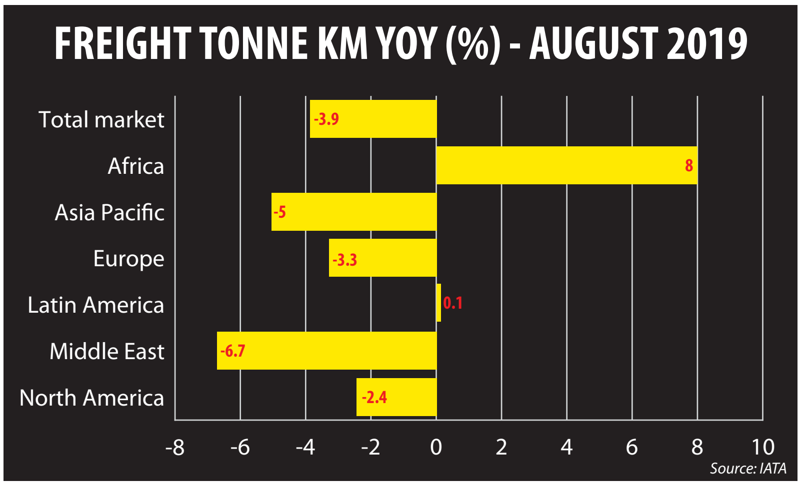
"Escalating trade tensions, the slowing in global trade and airline restructuring have impacted the region's performance since the fourth quarter of 2018," IATA said.

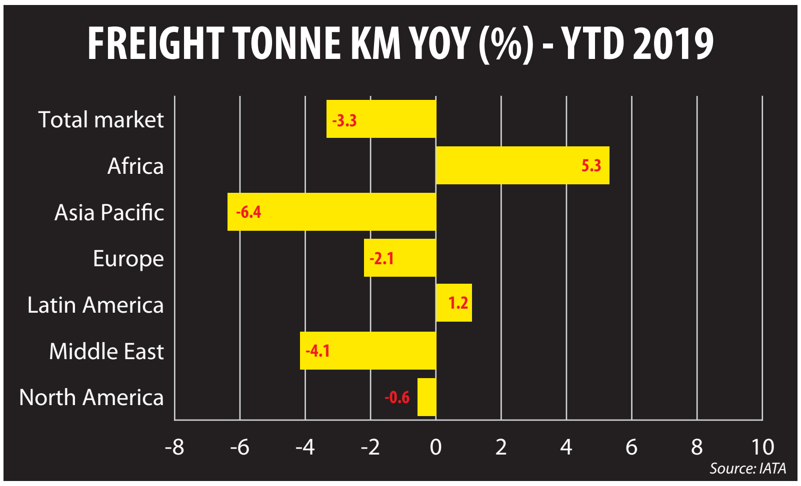
Latin American carriers managed to buck the trend — just — and reported an increase in freight demand of 0.1% in August. This performance was behind that of recent months.

Low economic growth compounded by the US-China trade war and political instability in some countries have impacted the region's performance. Recent currency volatility in the region's key economies have also contributed, IATA said.

Finally, African carriers reported an 8% year-on-year increase in FTKs but capacity was up by the larger amount of 17.1% on a year ago.







AIRFREIGHT RATES

Rates out of Shanghai on the up

The price of air cargo out of Shanghai Airport began to improve at the start of October as cargo volumes shifted from Hong Kong to the mainland Chinese hub.

At the start of the month, Tac Index figures show that prices from Shanghai to Europe increased by 4.7% compared with a week earlier to $2.43 per kg, while prices to the US were up by 4% to $3.13 per kg.

Conversely, prices from Hong Kong to Europe slipped by 1.5% week on week to $2.55 per kg, and from Hong Kong to the US they were down 1.5% to $3.37 per kg.

In a weekly market update, Peter Stallion of derivatives broker Freight Investor Services (FIS) said: “The big news is the clear transfer of cargo volumes out from Hong Kong through to Shanghai and Greater China. Beleaguered by continuous political strife, shrinking volumes, trade wars and overcapacity, rates out from Hong Kong continue to drop.

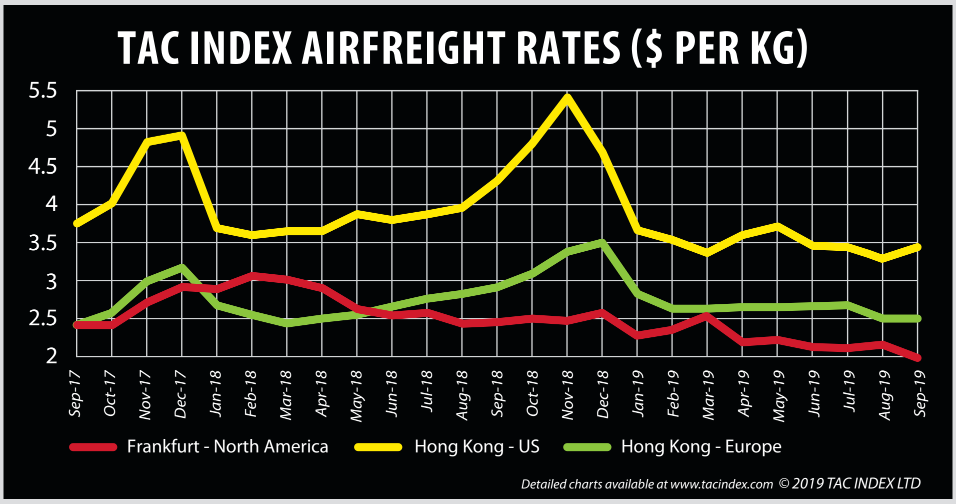
“Conversely, Shanghai lanes resemble a slow but stable climb out from slack season. Although positive for the market, the shift of volumes presents significant volatility that can be hedged. Shanghai to Europe has jumped 4.7% in the past week.”

Looking at monthly averages also makes for difficult reading for airlines operating out of Hong Kong.

Between Hong Kong and North America prices declined by 20.2% year on year in September to $3.44 per kg. The percentage decline is the highest recorded by Tac Index on this route since August 2016. It also the tenth monthly decline recorded on the trade lane in a row.

On a brighter note, rates increased compared with August as the industry begins its climb out of the summer lull.

There was a similar performance on services from Hong Kong to Europe, where Tac Index figures show a 12% decline for the month to $2.56 per kg. This is the third month in a row that the route has seen a decline in rates and it is the largest percentage fall since September 2016.



AIRPORT THROUGHPUT

Tough month around the globe

The tough market conditions continued to take their toll on airports’ cargo volumes in August.

The world’s largest airfreight hub, Hong Kong International Airport (HKIA), suffered as a result of both weak global trade and the ongoing political protests there.

HKIA said its cargo volumes for August dropped by 11.5% year on year to 382,000 tonnes as operations were “disrupted by public assemblies at the airport on a number of days”.

Global trading conditions also continue to have an impact on cargo volumes.

“Amid global trade uncertainties, cargo volume continued to contract in August,” HKIA said in a statement.

“Transhipments and imports declined by 19% and 15% year on year, respectively. The figures for Southeast Asia and mainland China decreased most significantly among key trading regions.”

Over the first eight months of the year, HKIA’s cargo volumes have dropped by 7.4% against a year earlier to 3.1m tonnes. Reports are also emerging that the airport is losing market share to Shanghai (see rates report above).

In Europe, airports also had a tough month in August, with conditions appearing to become increasingly difficult as the year progresses.

The latest figures from Airports Council International (ACI) Europe show that freight traffic declined by 4% year on year in August and for the year to date volumes were 3.2% down.

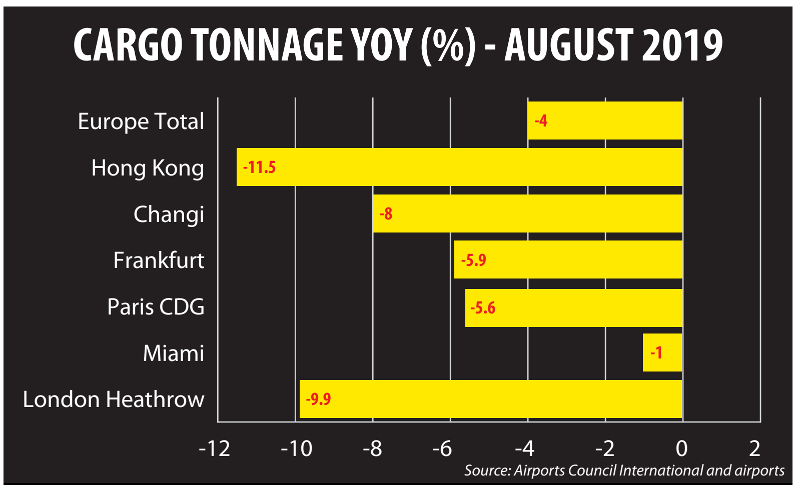
Freight traffic at European Union (EU) airports dropped by 5.9% for the month, while non-EU airports fared considerably better, averaging out at an increase of 6.2%.

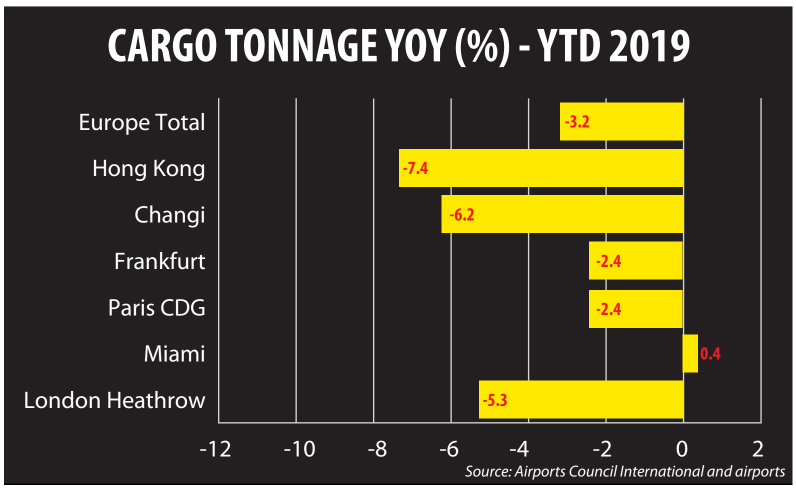
Amongst the top 10 European hubs for cargo operations, only Madrid-Barajas, with an increase of 7.2%, reported expansion.

Looking at individual airport performance in August, Frankfurt saw cargo volumes decline by 5.9% year on year to 163,213 tonnes, Paris CDG was 5.6% down to 149,200 tonnes, Heathrow was 9.9% behind a year earlier at 126,864 tonnes and Schiphol slipped by 10.9% to 130,581 tonnes.

Miami International has been one of the better performing airports in terms of cargo growth this year, but in August it did report a dip in volumes as freight and mail traffic slipped by 1% to 184,196 tonnes.

However, over the first eight months of the year, the airport’s cargo volumes are up by 0.4% year on year to 1.5m tonnes — not much of an increase but better than most of the world’s other major hubs.





'Strange' market sees rates continue to fall

The container shipping industry is currently facing "strange" market conditions as the cancellation of sailings and decent vessel utilisation levels are failing to stop rates from tumbling.

Writing in mid-October, consultant Drewry said it had been a "strange year in the Asia-North Europe container trade" as westbound demand has far exceeded expectations but spot market freight rates have "not recovered from a first quarter slump and are currently tracking at their lowest point of the year".

Drewry said that the unexpected demand growth had helped counteract the influx of big new ships and maintained load factors at roughly the same levels as last year, in the mid-80% range.

"Headhaul [Asia-Europe] demand after eight months was up by 5.9%, according to data from Container Trade Statistics," Drewry said.

"The year-to-date performance is a significant improvement over the measly 2.9% annual growth registered in 2018. The trade appears to be benefitting from trade diversion related to the US-China trade war, with Chinese exporters looking to Europe to fill the shortfall of US traffic."

So what is causing low pricing when vessels are relatively full?

"The disconnect between supply and demand fundamentals and freight rates is indicative of a return to predatory pricing on the part of some carriers within the trade, undermining the positive demand story," Drewry said.

"Unless lines match pricing discipline to that shown for capacity it will be for nothing."

There is further bad news for the shipping lines. The consultant said that growth had slowed in the second half of the year and it appears that the "demand upcycle" has now ended.

"The third quarter peak season did not witness any rolling of containers, and given the amount of capacity that is being withdrawn, it would appear that the lines themselves are not expecting any cargo surge.

"Nevertheless, we anticipate that full-year growth will be comfortably better than last year.

"Westbound slot capacity in September was down by 1.4% on the same month last year, which is the first time that has happened this year.

"Carriers appear to be bracing for weaker demand ahead with numerous blanked sailings programmed for October and November.

"Additionally, [shipping line] HMM has removed its AEX loop in preparation for its full entry into THE Alliance next April and, for the second consecutive year, the 2M [alliance] partners elected to suspend their AE2/Swan service from the end of September to mid-November.

"In fact, the service was pulled one week ahead of schedule due to poor demand in the run-up to China's Golden Week holiday at the start of October."

Carriers will also soon be entering negotiations with their forwarder and shipper customers for 2020 and Drewry is expecting lower contract rates next year.

Meanwhile, on the transpacific trade lane freight forwarder Flexport said that rates and vessel space from Asia to the US are steady.

Flexport expects winter space reduction programmes for the trade lane to be announced soon, which it said would add to already announced cancelled sailings.

In the opposite direction, Flexport said that vessel space is tight and it recommended that its customers make their bookings at least 10 days in advance of the vessel sailing date.

PEOPLE

AF-KLM hunts for new head of cargo

Marcel de Nooijer

Air France-KLM's head of cargo, Marcel de Nooijer, will be leaving the position at the start of next year.

De Nooijer will be joining KLM-owned Transavia, where he will replace Mattijs ten Brink, who left at the end of September, as chief executive.

Platts to join DAA International

Nick Platts

Heathrow Airport Ltd's former head of cargo, Nick Platts, will join DAA International to help develop Riyadh Airports Company's cargo operation.

His new two-year director of cargo role will see him establish a cargo and logistics department.

Riyadh Airports manages and operates King Khalid International Airport in the Saudi capital and is working on upgrading the infrastructure there.

Leschaco's new head of airfreight

Oliver Kaut

Leschaco has named Oliver Kaut as its new head of global airfreight and global automotive.

Kaut took up his role at the company on October 1. He replaces former head of global airfreight Antonio Oliveira, who is now managing director of Leschaco Aircargo.

A new COO for Dachser Air & Sea

Edoardo Podestá

Dachser has appointed Edoardo Podestá as chief operations officer of its Air & Sea Logistics business.

Podestá replaces Jochen Müller, who agreed with Dachser not to extend his contract when it expires in 2020.

The 57-year-old Italian joined Dachser back in 2003 as part of the team at subsidiary Züst Ambrosetti Far East Ltd (since sold).

QUOTE OF THE ISSUE

"I don't think it is **appropriate** to just focus on the removal of the paper document... **we now need to embrace smart data sharing**"

Céline Hourcade, Change Horizon

Emirates Charter

Emirates SkyCargo

THINK OUTSIDE THE BOX

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