



ARABIAN
CARGO
AWARDS

2023



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PUBLISHER'S NOTE

The Arabian air cargo and logistics industry has been an integral part of the region's economic landscape for many years, serving as a conduit for trade and commerce across the globe. Over the past decade, the Arabian cargo industry has witnessed unprecedented growth, evolving into a powerhouse on the global stage. This growth story is testament to the resilience and unwavering dedication of countless individuals and organizations who have pushed the boundaries of what is possible.

One of the most notable aspects of this industry's success is its adaptability. Whether it is the transportation of goods, development of cutting-edge logistics solutions, or expansion of infrastructure, the Arabian cargo industry has shown ability to evolve with the times. This adaptability has been particularly evident during COVID, where the industry played a vital role in ensuring the smooth flow of essentials, including medical supplies, across borders.

We applaud the industry leaders who have demonstrated exceptional leadership, innovation, and commitment to sustainability. Their efforts have not only propelled the industry to new heights but have also set an example for future generations.

The Arabian Cargo Awards 2023 are a tribute to their dedication, extraordinary hardwork, and vision.

SanJeet

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Middle East's leading cargo monthly

CARGO

talk

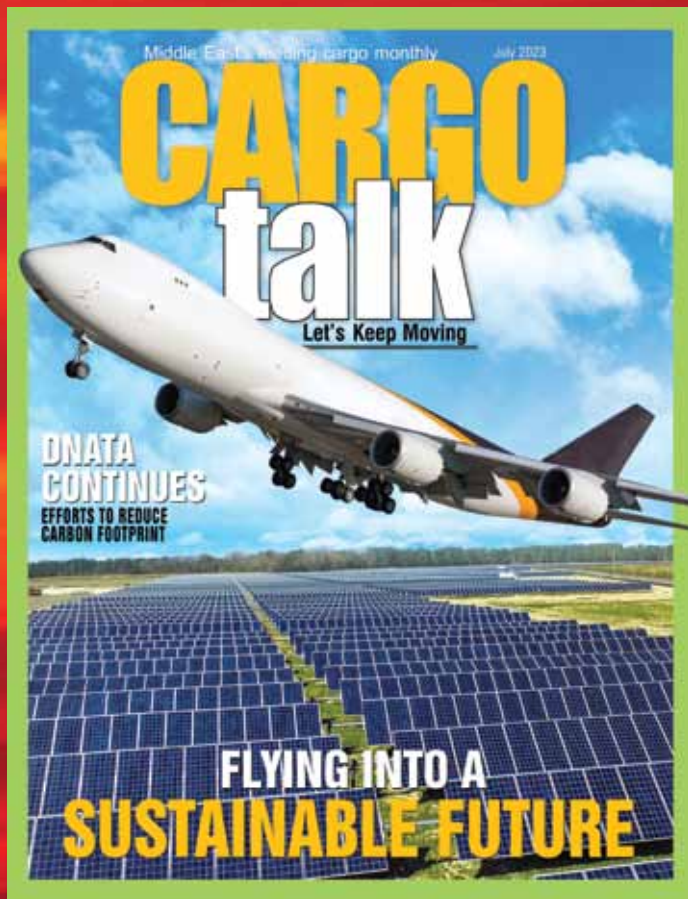
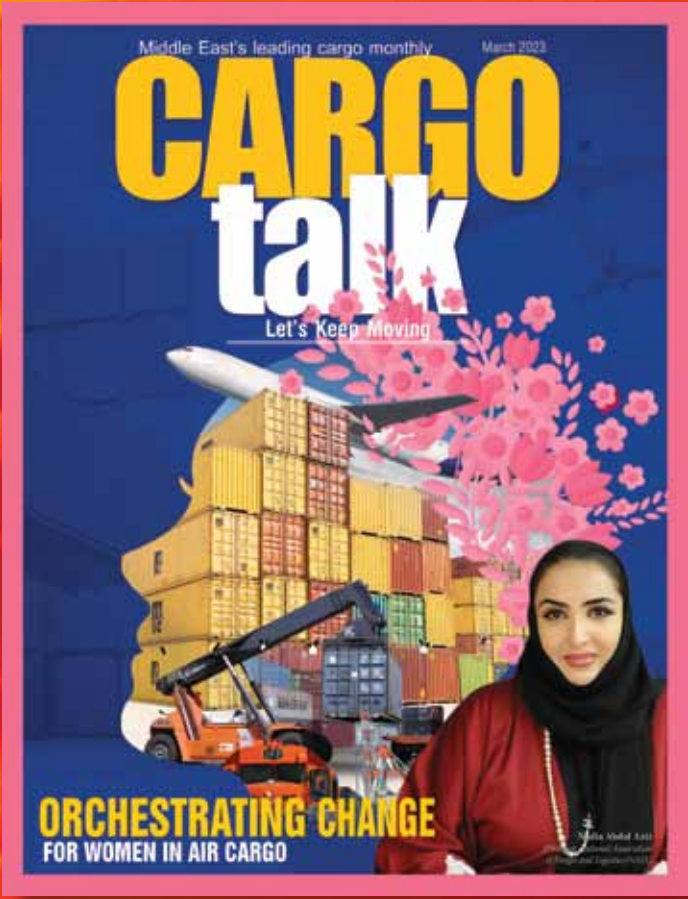
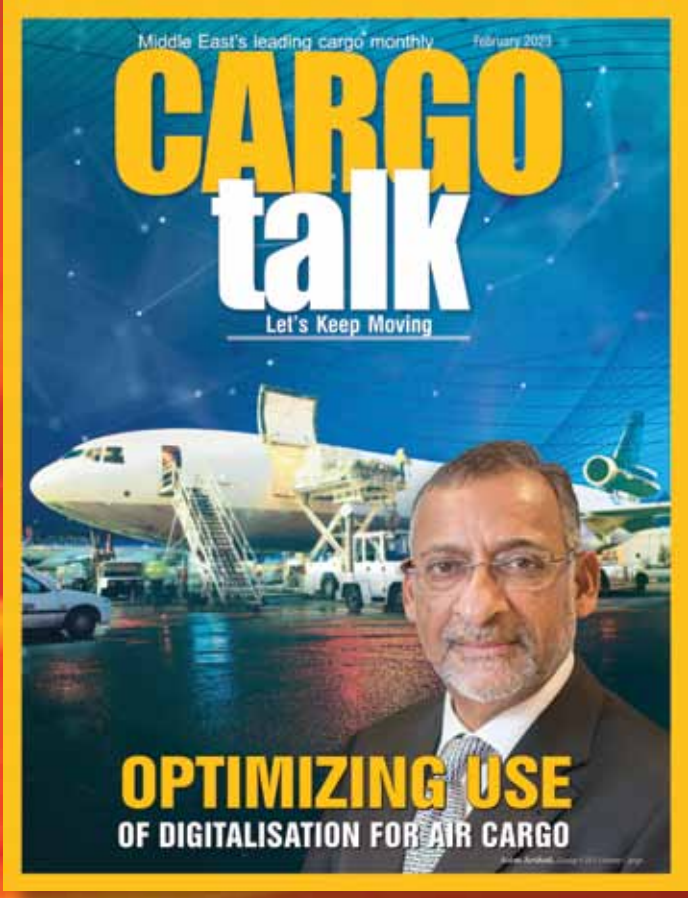
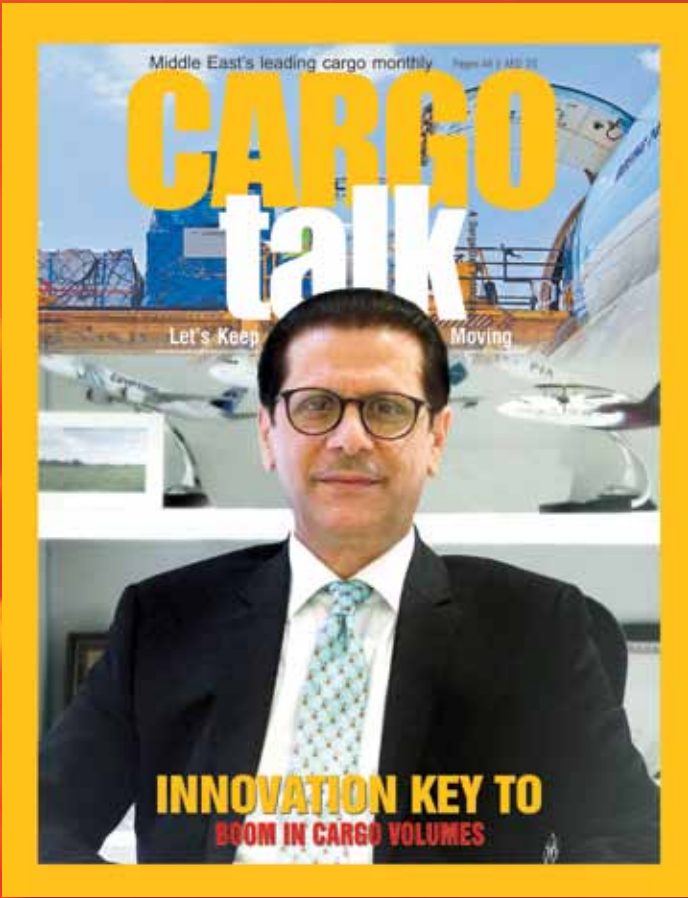
A Durga Das Publication

Let's Keep Moving

On the request of many of the industry professionals, DDPPL launched a much-needed publication on the Air Cargo industry in 2022 called CargoTalk Middle East. The publication has filled vacuum, felt by the industry, to get the latest

news and information. Like all DDP magazines, CargoTalk Middle East includes digital and video components, along with the printed magazine. The magazine analyses the news across various sectors and is presented to business offices in a printed format.





THE JOURNEY...

As the inaugural Arabian Cargo Awards 2023 begins an exciting new chapter, its pioneering a groundbreaking journey. These awards, dedicated to celebrating the often-overlooked heroes of the Middle East's air cargo and logistics community, are poised to have an impact on the diverse industries that define the landscapes of various GCC countries.

Regarded as the air cargo industry's equivalent of the Oscars, the Arabian Cargo Awards 2023 have called upon the best talents from all regions to participate in this prestigious ceremony, representing the highest accolades within the air cargo industry.

Join us as we get ready to honour the prominent figures in the air cargo and logistics sectors of the region. In October of this year, industry leaders will converge in the UAE to partake in an elegant black-tie event.

These awards are organized by Durga Das Publications (DDP), the exclusive B2B media company in the Middle East, boasting over 22 years of presence in the UAE and serving as the trusted source of news for both the air cargo and travel markets in the region.

The ongoing success of the India Cargo Awards, initiated in 2013, has paved the way for emergence of the Arabian Cargo Awards. This special evening of glamour and prestige is designed to acknowledge and pay tribute to the resilient achievers in the air cargo industry. These awards are a product of the industry, by the industry, and for the industry, created by those who have shaped it into the formidable force it is today.







SECTION 1

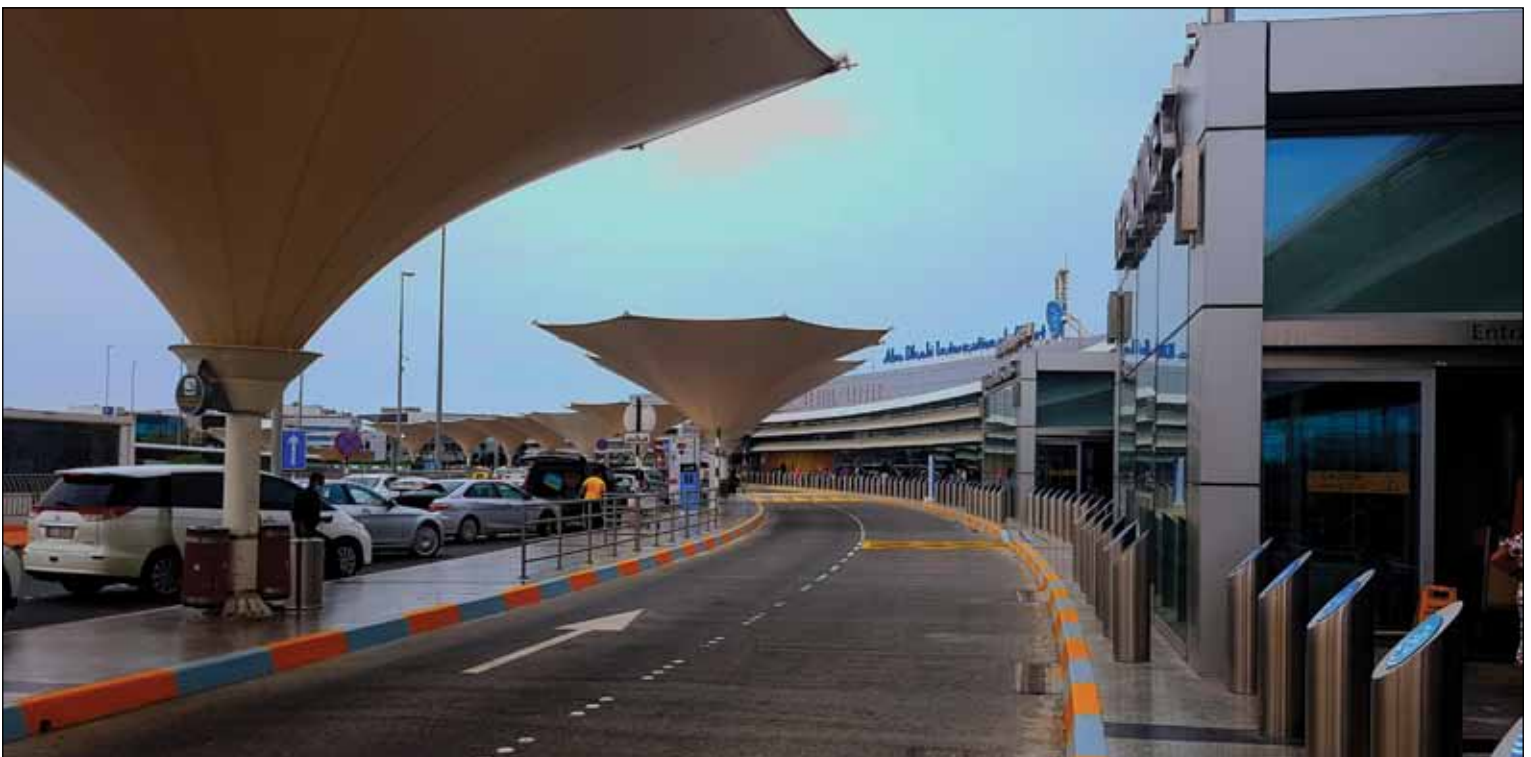
GREEN AIRPORTS: CREATING A SUSTAINABLE FUTURE

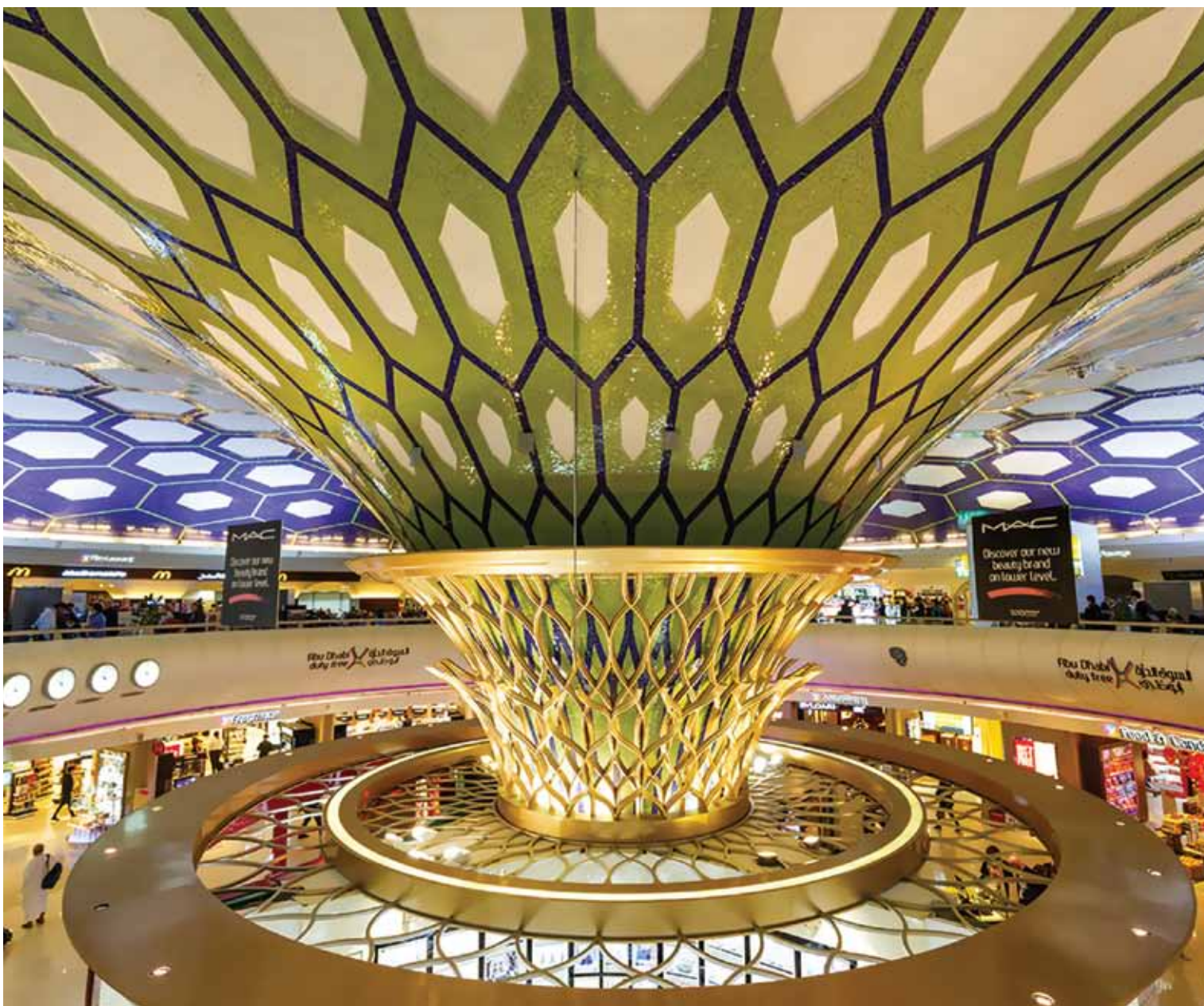


ABU DHABI INTERNATIONAL AIRPORT

His Excellency Sheikh Mohammed bin Hamad bin Tahnoon Al Nahyan, Chairman, Abu Dhabi Airports has recently announced that Abu Dhabi International Airport's new 'Terminal A' will become operational from November this year.

His Excellency Tahnoon Al Nahyan said, "It is an impressive and iconic building that elegantly blends Emirati culture and heritage with innovation and sophistication. The new airport will boost the nation's tourism and trade and enhance Abu Dhabi's standing as a global travel and commercial hub."





HAMAD INTERNATIONAL AIRPORT

Hamad International Airport continues to include sustainability in its growth strategy by implementing various measures to reduce waste, greenhouse gas emissions, and noise pollution. At the cargo facilities—several initiatives are in place such as recycling waste, reusing spreaders and wooden planks—we operate electric forklifts and majority of the tractors at the cargo terminal are electric as well.

1. Hamad International Airport through its fully automated warehouse facility, has a capacity of 1.4 tonnes million annually.

2. Cargo is a big revenue contributor, and we expect cargo movement to grow, therefore as part of Phase B of our expansion plan, which started January this year, Cargo Terminal 2 will become a dedicated transfer cargo facility to handle 3.3 million tonnes of cargo per year.

3. This cargo facility of the future will be a safe, smart, and green facility relying heavily on technology and automation for its material handling, and will offer faster storage and retrieval, and cargo processing, enabling us to offer shorter connection for the growing demand of transit cargo.

4. The new Cargo Terminal 2 will be built on Leadership in Energy and Environmental Design (LEED) rating framework, which is the most widely used green building rating system in the world. Available for virtually all building types, LEED provides a framework for healthy, highly efficient, and cost-saving green buildings.

For example, energy efficient air condition system, recycled water supply and waste management. Qatar's airport continually reviews its systems to identify areas of improvement for long-term efficiency and sustainability.





DUBAI AIRPORTS

Dubai Airports manages the operation and development of both of Dubai's airports—DXB and DWC.

As an operator of the Dubai International (DXB) and the Dubai World Central (DWC), the Dubai Airports delivers a world-class experience for customers by providing safe, secure, and environmentally responsible airports. The Dubai Airports works in partnership with airlines, passengers, and employees to drive the growth of

Dubai City as the world's emerging centre for trade, commerce, and tourism.

As an integrator, the Dubai Airports works in a bid to balance the interests of all stakeholders concerned in order to maintain aviation growth, protect operational resilience and ensure that service providers collaborate to provide a safe and secure service and improve customer experience, while maintaining a sustainable business.





OMAN AIRPORT

Oman Airport is a state-owned company, established in 2002, that manages all the airports of the Sultanate, including Muscat International Airport, Duqm Airport, Sohar Airport, Salalah Airport. The company has also expanded its services to include the management and operation of the PDO regional airports in the oil concession areas of Fahud, Marmul, and Qarn Alam.

1. The company's objective is to develop and enhance Oman's Airport with a focus on improving the overall travel experience. It also reflects the beauty and abilities that exist in the nation with its heritage and culture.
2. Additionally, the company managed to achieve

its objectives with the full support of its strategic partners and the collective efforts of its stakeholders. Inspiringly, the company promotes and believes in Omani talent.

Therefore, sustainable economic growth is achievable along with future projects that are expected to see the light.

3. One of Oman Airports' subsidiaries, initially formed in 1970, focused on ground handling, cargo, catering, and engineering services.

4. In 2020, the company rebranded to TRANSOM Handling to better reflect and redefine its business aspiration, pursue the objectives of being a global benchmark in hospitality, and elevate Oman's aviation industry to new heights.





SHARJAH AIRPORT

As the first airport in the UAE, Sharjah enjoys a range of destinations and passenger access. With the launch of phase one of the airport, His Excellency Sheikh Faisal bin Saoud Al Qassimi, Director, Sharjah Airport Authority, in an interview, elaborated further strategies and developments.

With the launch of phase one of the airport, Sharjah is well known in the Middle East and North Africa (MENA) region as being the cultural and industrial hub of the Middle East.

With the diverse culture of Sharjah and the rest of the UAE, Sharjah has managed to create a niche market with cultural tourism and the airlines that

operate through Sharjah embrace and encourage the multiculturalism. There was an overall increase in both aircraft and passenger and cargo movements for the last three quarters of this financial year.

The increase in new routes, flight frequencies and holiday season at Sharjah Airport contributed to the positive airline and cargo traffic. The Sharjah Airport in coordination with the various stakeholders of the airport, besides our strategic partners, are committed to ensure a pleasant travel experience for its crew, cargo handlers and passengers, while simultaneously maintaining the blemishless reputation of the airport's efficient, hassle-free and speedy procedures.







SECTION 2

GUEST COLUMNS



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SUSTAINABLE DEVELOPMENT IN CARGO AT GCC AIRPORTS

Expect cargo capacity in the market to continue to be restricted in the near to mid-term, and air freight rates to remain high in the near term, says **Nasir Khan, CEO, Naboodah Travel**. Firms must embrace solutions to help overcome difficulties and maintain operations. Logistics faced hurdles due to disruptions of global supply chains.



NASIR KHAN
CEO
Al Naboodah Travel

Sustainable development is a key factor for the air cargo industry. The world is facing urgent environmental challenges, and airports, airlines, and cargo companies are leading the way in implementing sustainable practices. They are striving to minimize their ecological footprint. Their vision for the next five years is to enhance their quality and sustainability, rather than focusing on volume.

Logistics firms play a vital role in value chains, both within and across borders. They enable trade and commerce and help businesses deliver their products to customers.

Logistics faced many obstacles due to the disruption of global supply chains, limited cargo capacity, broken links, and the drop in world trade and business. However, the

industry adapted swiftly to meet the global demand for service continuity. Industry players adjusted their fleet capacities and restructured their operations to cope with the changing trade and consumer patterns in the midst of the most difficult circumstances. Companies had to adopt innovative solutions to help overcome challenges and keep operations running.

AIR FREIGHT

According to the latest report from the International Air Transport Association (IATA), air freight volumes in 2022-23 increased by 8.7 per cent compared to the previous year, reaching a new record high of 62.3 million tonnes. This growth was propelled by robust demand from the e-commerce, pharmaceutical, and manufacturing sectors, as well as the recovery of global trade after the pandemic.

However, as shippers and governments increasingly rely on air cargo for essential goods, air freight rates have surged. In mid-April, there was an uptick in capacity along with a rebound in transported volumes. Air freight stands as a vital component of the

“Industry players re-purposed their fleet capacities and re-engineered their ops to adjust shifting trade patterns amidst challenging circumstances.”

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CURRENT TRENDS

■ Air freight rates will continue to remain elevated

Air freight rates continue to be inflated as passenger aircraft belly hold cargo capacity remains restricted, and the introduction of new aircraft into the market is slow. Sentiment in the air cargo industry indicates that air freight rates are expected to continue to increase in the near term, but surcharges from cargo carriers are likely due to network disruptions, surging fuel prices and the war in Ukraine.

- With airspace closed due to Russia-Ukraine war will bolster air cargo capacity restrictions
- According to the latest statistics from IATA, air cargo demand in March 2023 was 12 per cent higher than the pre-pandemic levels in March 2019, while freight capacity was still 9.7 per cent below the same period.
- Increasing Pharmaceutical and Healthcare Driving the market

The KSA pharmaceutical market is considered one of the fastest-growing markets, with strong export potential to serve MENA and Organization of Islamic Countries (OIC).

global supply chain, providing speed, reliability, and flexibility to customers transporting their goods across borders and continents. According to IATA, air freight constitutes 35 per cent of the value of world trade, despite representing a small volume. In 2023, the air cargo industry is poised to encounter fresh challenges and opportunities as it adjusts to the evolving demands and expectations of customers and stakeholders.

Several key trends and opportunities for the air cargo industry in 2023 include:

Increased Dedicated Air Cargo Capacity: COVID disrupted the passenger aviation sector, drastically reducing belly-hold capacity for air cargo. To compensate for this loss, many airlines have converted passenger aircraft into freighters or have maximized the utilization of existing freighters. This trend is expected to persist this year, driven by the sustained demand for air cargo, particularly in e-commerce, pharmaceuticals, and perishables.

Current Global Logistics and Cargo Operations in the Middle East: The Middle East region serves as a strategic hub for air cargo, linking Asia, Europe, and Africa. The region experienced both positive and negative impacts from the pandemic. On one hand, there was a surge in demand for medical supplies, humanitarian aid, e-commerce, and express deliveries. On the other hand, challenges arose due to travel restrictions,

border closures, and geopolitical tensions. To surmount these obstacles, the air cargo industry in the Middle East embraced innovative solutions such as digitalization, automation, and collaboration. These strategies enhanced efficiency, quality, and resilience, enabling the industry to provide essential support to customers and partners. In 2023, the air cargo industry will persist in its commitment to excellence, serving customers with dedication, integrity, and hospitality. Leveraging its dynamism, efficiency, and quality, the industry will navigate the ever-changing and challenging cargo market requirements.





ROLE OF WOMEN IN LOGISTICS & FREIGHT FORWARDING

The aviation and logistics industry and IATA improve female representation in air cargo by 25% by 2025. Closer home, women in logistics are working behind the scenes to improve the dynamic. **Nadia Abdul Aziz, President, NAFL**, is active voice for Women in Logistics & Transport and heads WILAT NGO for the Middle East.



NADIA ABDUL AZIZ
President, National Association Freight and Logistics (NAFL)



Empowering women in the supply chain logistics industry through capacity building, certified trainings, networking events, mentoring and coaching. She assisted in hosting CILT event in 2015 in Dubai-UAE and sponsored the “Inspiring Women’s Award at Burj Al Arab in 2015.”

The NAFL was the Arabian Gulf’s first national freight forwarders association. Founded in February 1992 in Dubai, United Arab Emirates, NAFL was formed primarily to bring together in one body all the major players in the United Arab Emirates (UAE) freight forwarding, logistics and shipping industry.

Broadly speaking, its main goal is to ensure the UAE’s leading position and Dubai’s pre-eminence in the international freight and transportation fields. NAFL

is a member of FIATA, the International Federation of Freight Forwarders Associations (IFFFA), based in Zurich, Switzerland.

In February 1992 as mandated by the Government of Dubai to respond to the need to bring together the increasing number of freight and logistics service providers in the UAE.

NAFL, previously named National Committee of Freight Forwarders (NCFF), is the first national association of freight forwarders to be established in the Arabian Gulf. The National Association of Freight and Logistics (NAFL) was founded in Dubai and remains to this day, a pillar of support for small and medium size enterprises who wish to keep the UAE and the GCC region.

Having been in the logistics industry for more than 20 years, it is remarkable to see the roles that women have taken in this field. I take part in the Chartered Institute of Logistics and Transport (CLIT), which focuses on women in logistics and transport. The UAE is in the forefront when it comes to empowering women.

I have learnt that import and export procedures and supporting functions

“

At the NAFL, we facilitate a lot of training courses which help young people and entrepreneurs who are looking to sharpen their skills.”



differ from continent to continent. I feel privileged to be a part of an industry that literally 'moves the world.' Logistics industry contributes 14 per cent of a country's Gross Domestic Product (GDP) and if we include all service providers and modes of transport, it is an industry with the largest human capital. The past half-century has seen an increase, internationally, in the level of female participation in the workforce, with developing countries seeing more than half of women of working age employed.

This increase is evident in the logistics industry, which shows a steady rise over the past 20 years. The industry needs women in leadership positions where they can be strong role models and inspire the next generation to follow their footsteps.

Although the logistics industry is a growing one and has several opportunities for advancement, there are not many women who join the field. While the demand for qualified personnel exceeds the supply in the logistics and supply chain sector, it has become imperative in order to attract and include

Having been in the logistics industry for 20 years, it is remarkable to note the roles that women have taken in this field. The industry needs more women in leadership positions

women, especially as they are good at multitasking, an ability that enables them to handle a myriad of tasks. These include planning, implementing and controlling the flow and storage of goods in the supply chain management. My advice to women is to work hard and be consistent when you are committed to your career. From the perspective of employers, they are always looking for qualified trainees. Logistics may not be the most glamorous industry, but it is the most reliable. People count on us to get the work done.





OUR CORE STRENGTH LIES IN DELIVERING PROMISES

With over 60 years of experience, Orient Cargo has honed its experience and expertise to provide solutions to the most and challenging logistics dynamics. Our dedication to going beyond borders has allowed us to offer logistics solutions that span the globe, says **Asim Arshad, CEO**.



ASIM ARSHAD
CEO
Orient Cargo

Our journey at Orient Cargo began over six decades ago with a simple yet resolute ideal: to deliver exceptional value to our clients. It was this commitment to service and penchant for innovative solutions that propelled us to evolve into a regional powerhouse in integrated cargo and logistics services, with a strong presence in the UAE.

Today, as we stand at the forefront of the logistics industry in the UAE, we reflect on our remarkable growth and accomplishments. We take pride in being recognized as one of the largest logistics service providers in this market. Our success can be attributed to comprehensive suite of

logistics solutions, encompassing integrated ocean, land, air transport, project logistics, warehousing services, and integrated supply chain management.

Our dedication to going beyond borders has allowed us to offer logistics solutions that span the globe. This global reach has been made possible through strategic alliances with organizations such as The International Federation of Freight Forwarders Associations (FIATA), The World Cargo Alliance (WCA) and National Association of Freight & Logistics (NAFL).

Our core strength lies not only in the ability to deliver on promises but also in the track record, deep-rooted knowledge of the regional business landscape, and, most importantly, our unwavering commitment to professionalism.

With more than six decades of evolution and transformation, we at Orient Cargo have honed our experience and expertise to provide solutions to the most intricate and challenging logistics dynamics, ensuring that customers' freight reaches its destination

“When the freight and logistics is undergoing transformations on a global scale, our clients demand cost-effective and expedited results.”



punctually and in safe and impeccable condition. When the freight and logistics industry is undergoing transformations on a global scale, our clients demand cost-effective and expedited results. In response, we strive to provide vertical integration and supply chain design, forging long-term partnerships that lead to market leadership for ourselves and our clients.

We must express our gratitude to our loyal clients who have consistently placed their trust in us. Their support is invaluable in our journey towards becoming a logistics service provider, with international presence. Rest assured, we remain steadfast in our commitment to always delivering the finest service.

In conclusion, we extend our regards to all our partners,

The support of our consumers is invaluable in our journey towards becoming a logistics service provider, with international presence

clients, and stakeholders among others. Orient Cargo is not merely a logistics service provider; it is a promise of excellence, innovation, and reliability. As we continue to evolve and lead in this ever-changing industry, we pledge to deliver the best service, today and always.





SKY'S THE LIMIT FOR WOMEN

Women make up 20% of the aviation sector in Middle East and 12% of them are educating themselves and will shortly join the workforce, says **Dr. Eng. Suaad Al Shamsi**. She is a leading personality in the aviation sector from GCC. If a woman can run a house, she can run a department and a company in any industry as well, she adds.



Dr. SUAAD AL SHAMSI

First female aircraft engineer-technical advisor in UAE, Owner of Top Takeoff Programme, Dream High Programme Founder of Women in Aviation, Middle East

The Middle East has become a pivotal player in the international aviation. This development is fueled by accelerated growth in the civil aviation of the region. The Middle Eastern region has steadily evolved into a center of regional cooperation and one that allows conducive business growth. The aviation industry in the region, one that has historically been a pillar of growth for countries in the region, has not only developed into a core contributor to the economy in terms of employment, but has also helped draw tourists and business to the region.

WOMEN IN AVIATION INDUSTRY

As there is a need for innovation and meeting the needs of one of the widest consumer bases globally, it can be imperative for the airlines to take some action. With this in mind, we are going to take an in-depth look at women in aviation and how things are shaping up for the future.

The Women in Aviation General Assembly regularly meets its members to discuss aspects of the group. Recently, the group met on 19 May 2022 at Dubai World Trade Centre. Attendees from various sectors such as engineers, aviators, managers, faculty members and CEOs were present to offer their support.

It is estimated that women make up 20 per cent of the aviation sector and 12 per cent of them are educating themselves and will shortly join the workforce.

Another leading personality from the GCC countries who is making rapid strides

“

My strategy is to make sure that we plan successful summits, which can support women and create a positive outcome that can help the industry as well.”

in the field is Dr. Eng. Suaad Al Shamsi. “As one of the founding members of the Women in Aviation in the Middle East, my strategy is to make sure that we plan successful summits, which can support women and create a positive outcome that can help the industry as well,” Dr. Shamsi said.

As I said in my address, if a woman can run a house, she can successfully run a department and a company in any industry as well

Discussing the diverse roles of women in the aviation industry in the UAE, Dr. Shamsi added, “There are many uncommon roles for women in the aviation industry. My role, to cite an example, keeps changing from that of a consultant to advisor. I was earlier an aircraft engineer. There are a lot of women in leading roles who are decision makers. Few people think that a woman is not suitable for the aviation industry, but as I said in my address, if a woman can run a house, she can successfully run a department and a company in any industry as well.”



Captain Aisha Al Mansoori, UAE's first female captain of a commercial airline



Major Mariam al-Mansouri, UAE's first female fighter pilot



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THE GROWTH OF WESTJET FORMIDABLE IN MIDDLE EAST

My experience of working with two Middle Eastern carriers and the knowledge that I have accumulated over the years has provided me with a solid foundation in the field of air cargo logistics and its intricate nuances, says **Kirsten Ven De Bruijn, Executive Vice President, Cargo, WestJet.**



KIRSTEN VAN DE BRUIJN
Executive Vice President Cargo
WestJet

The WestJet group of companies offers scheduled service to more than 100 destinations in North America, Central America, the Caribbean and Europe and 175 destinations in 20 countries through scheduled service to more than 100 destinations in North America, Central America, the Caribbean and Europe and to 175 destinations in 20 countries through our airline partnerships.

As WestJet Cargo continues to grow, so too will its team, network and flight plans. To learn more about how the WestJet Cargo can fulfill shipping needs, or to discover incredible employment opportunities, visit WestJet Cargo.

Venturing into a new business line centered around dedicated freighters has proven to be a formidable undertaking. Despite having established infrastructure for belly cargo over our entire 27-year history, the intricate logistical framework that had

to be conceived and executed operationally has presented us with a remarkable journey. The establishment of a fresh cargo freighter operation is a unique and singular experience for which I am deeply appreciative to have had the opportunity to oversee. Over the past year, I have acquired knowledge beyond my wildest expectations, encompassing everything from aircraft modifications to technical proficiency and the complexities of logistics.

MIDDLE EAST CARGO OPERATIONS

Middle Eastern carriers have demonstrated a strong track record of successful investments in air cargo over an extended period. The operational achievements in the Middle East are undeniably impressive, leaving me with unwavering confidence in the region's continued growth in this sector. My experience working with two Middle Eastern carriers and the knowledge that I have accumulated over the years have provided me with a solid foundation in air cargo logistics and its intricate nuances. I hold the firm belief that Middle Eastern airlines will remain at the forefront of the air cargo industry for many years to come.

“

The establishment of a fresh cargo freighter operation is a unique and singular experience for which I am deeply appreciative.”



INNOVATION IS PART OF ETIHAD CARGO'S DNA

Digitalization and increased adoption of advanced technologies are revolutionizing air cargo in the region as well as internationally. While Etihad Cargo's fleet has expanded, the core principle is to take a customer-centric and collaborative approach to provide world-class air cargo solutions to the carrier's partners and customers.



LEONARD RODRIGUES
Head of Revenue Management &
Network Planning, Etihad Cargo

As the cargo and logistics arm of Etihad Airways and the national carrier of the United Arab Emirates (UAE), Etihad Cargo has expanded its international network to serve more than 70 destinations since its establishment nearly 20 years ago.

the carrier's partners and customers.

With an eight-strong premium product range, Etihad Cargo tailors the products and services it provides to its customers and partners in order to maximize cargo capacity across our global network. Innovation is part of Etihad Cargo's DNA, and we have added

“

Our loyal customers are at the heart of everything we do, and we are committed to remaining their air cargo partner of choice through innovation and continuous improvement.”

While Etihad Cargo's fleet has expanded, the core principle is to take a customer-centric and collaborative approach to provide world-class air cargo solutions to

new features and enhanced our product range. Our unique product portfolio has enabled the carrier to offer our partners and customers a range of products that can



“

Our unique product portfolio has enabled Etihad Cargo to offer our partners and customers a range of products that can be customized to their unique needs.”

The location of Abu Dhabi makes it a natural gateway between Europe, Asia, Africa and the United States of America (USA). Etihad Cargo's hub at Abu Dhabi International Airport is within a four-hour flight radius of approximately one-third of the world's population, allowing quick and efficient access to these key markets.

Supported by a strong economy and trade, the modern infrastructure at the Abu Dhabi's multimodal airport, including a dedicated cargo terminal, has been pivotal in enhancing connectivity between the Middle East and the rest of the world. This has given Etihad Cargo a strong foundation to build on, and we are committed to going even further.

Digitalisation and increased adoption of advanced technologies are revolutionizing air cargo in the region as well as internationally. Our customers are at the heart of everything we do, and we are committed to remaining their air cargo partner of choice through innovation and continuous improvement.

Since embarking on our digitalization journey way back in 2018, we have simplified interactions with our customers, partners and stakeholders and continue to provide them with a seamless end-to-end experience during all touchpoints throughout their cargo's journey.

We have also developed an enhanced booking portal, rolled out Artificial Intelligence-powered solutions in order to boost cargo capacity and also launched Sales Cockpit, a sales optimization tool, in a bid to improve the customer experience.

be customized to their unique needs. Utilizing our dedicated freighters, wide-body and narrowbody aircraft, we understand that we have to be creative, and evaluate Etihad Cargo's fleet and network, enhance our road feeder services trucking networks, and cooperate with interline partners so that we can offer connectivity between online and offline destinations, meet the capacity needs of our customers, and remain the air cargo partner of choice.

AIR CARGO IN UAE, MIDDLE EAST

The air cargo sector is a dynamic one, and the industry is evolving at a rapid pace, especially in the United Arab Emirates (UAE).



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THE FUTURE OF WAREHOUSING

Warehousing in the Middle East is tied to sustainability, as businesses recognize the need to operate in an environmentally eco-friendly manner. Warehouses are becoming hubs of innovation, in terms of efficiency and automation and commitment to sustainability, says **Abhishek Ajay Shah, Co-founder and Group CEO, RSA Global**.



ABHISHEK AJAY SHAH
Co-founder and Group CEO
RSA Global

KEY TRENDS

The future of the warehouse industry in the Middle East is poised for transformation driven by changing consumer behaviour in the region. Warehouse automation and micro-fulfilment centers (MFCs) are some of the key trends that are reshaping the warehousing landscape. The rise of MFCs and dark stores are revolutionizing last-mile delivery (LMD), offering efficient solutions for the expanding retail and e-commerce sectors. Businesses are all about providing quality and affordable products to the market. Automation technology is paving the way for customizable cloud-based platforms that enable firms to streamline their operations and reduce operational costs. The surge in online shopping is expected to continue. This will necessitate improvements in LMD operations, real-

time order and shipment tracking systems, and other innovations to meet the growing demand for faster deliveries. Another one of the trends is the integration of AI with other automation and order management systems that enables predictability in terms of market changes, consumer demands, weather patterns, and other factors affecting the supply chain.

The future of warehousing is tied to sustainability, as industries and businesses recognize the need to operate in an environmentally responsible manner. Warehouses are becoming hubs of innovation, not only in terms of efficiency and automation but also in commitment to sustainability. From adoption of energy-efficient technologies such as LED lighting, solar panels, and optimization of supply chain routes for reduced emissions, warehouses are contributing to environmental conservation. Sustainable warehousing practices extend to waste reduction, recycling, and eco-friendly packaging solutions. With growing emphasis on sustainability in the global supply chain, warehouses are poised to play a vital role in minimizing CO₂ footprint

“

Automation tech is paving the way for customizable cloud-based platforms to enable firms to streamline their operations and reduce operational costs.”

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and fostering a greener, eco-conscious future for logistics and distribution. The warehouse industry is on the cusp of significant change, driven by technology, e-commerce growth, sustainability initiatives, and a commitment to innovation. These developments are poised to enhance operational efficiency and strengthen the region's position as a key player in the global logistics landscape.

In the past, the Middle East was viewed as a transit point. But today, it stands as a global hub of aviation. Dubai, Abu Dhabi, and Doha have become synonymous with luxury travel, unrivalled customer experiences, and latest infrastructure. The investments made in these airports and airlines signify the Middle East's commitment to being at the forefront of the aviation industry. For instance, the expansion of Al Maktoum International Airport in Dubai and the Hamad International Airport in Doha are testament to positioning the Middle East as the nexus of global

In the past, the Middle East was viewed as a transit point. But today, it stands as an international hub of aviation—be it Dubai, Abu Dhabi, and Doha airports

travel. However, the evolution is not just infrastructural; it cultural and social too. This brings us to an exciting aspect of this evolution: women's increasing involvement in the aviation sector. The aviation industry has evolved from being a mere transit point to a global aviation powerhouse and supply chain hub. We live at an exciting time where we can witness the role and impact of women being at the core of what steers the industry toward growth and innovation.



A city skyline, likely Dubai, is shown across a body of water. The skyline includes several tall skyscrapers and a prominent building with a glass dome. Overlaid on the entire image is a complex network of glowing yellow nodes connected by thin white lines, resembling a digital or data network. The background is a clear blue sky.

SECTION 3

SMART LOGISTICS CITIES IN THE GCC



DUBAI SOUTH



LOGISTICS DISTRICT

Dubai South's Logistics District was formed as part of Dubai South's key offering to provide leading solutions to the global supply chain system. The 18 square kilometer district facilitates movement of goods through the logistics corridor, allowing cargo to be moved from port to airport in just 20 minutes.

The advanced infrastructure includes warehouse facilities and enables flexible storage systems to support a seamless flow of goods, products, and services.

In addition, the district comprises a purpose-built e-commerce zone, EZDubai, a 920,000 square meter zone dedicated to enhancing e-commerce facilities in the UAE

and nearby region with its range of business solutions for multinationals (MNCs) and small and medium enterprises (SMEs). It consists of six dedicated areas serving the various types of e-commerce business needs such as last mile centers, e-fulfilment centers, repair & return centers, supply centers, and office solutions.

LOGISTICS COMPLEX

Positioned within the dedicated contract logistics zone, Logistics Complex is a multi-tenanted warehousing facility designed specifically for companies that require both short and long-term storage solutions. Logistics Complex represents a cost-effective solution for smaller companies that require the scope to expand their operations in the future. An extremely flexible design allows the clients to combine, modify or customize units, with the advantage of cross docking—all within one building.

THE DUBAI SOUTH STORY

A hub for innovation with a progressive

“

The 18 sq. km., district facilitates movement of goods through the logistics corridor, allowing cargo to be moved from port to airport in just 20 minutes.”

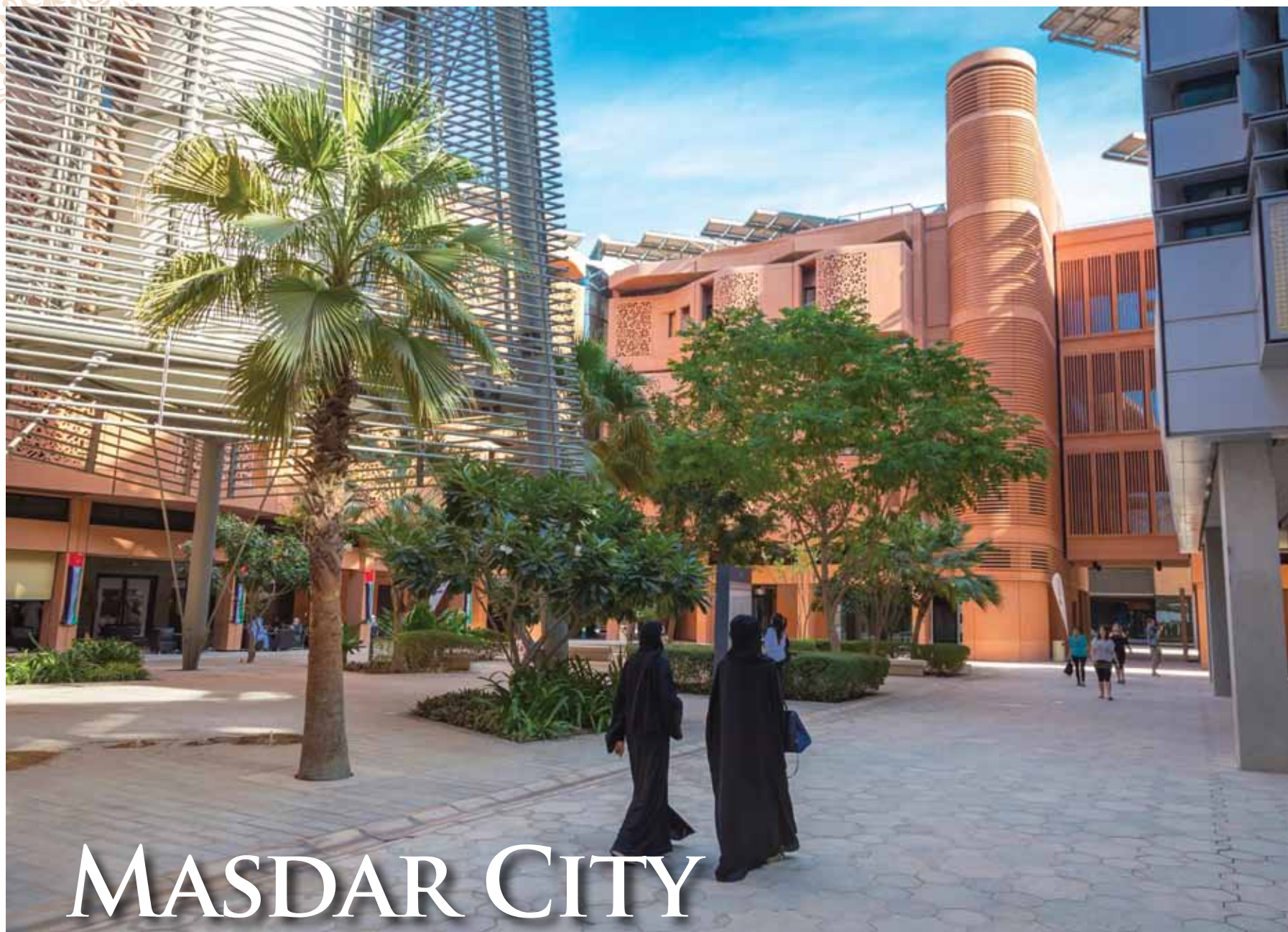


outlook towards the future, Dubai South district was realised as a continuation of the vision of His Royal Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, who dreamt of a future for the emirate and paved a path towards it through Dubai Plan 2021.

- To become a pivotal hub in the global economy
- To position the emirate as a leading centre for trade and investments
- To boost Dubai's status as the aviation capital of the world
- To become a city of happy, creative and empowered people
- To build a smart and sustainable city

Spanning 145 square kilometers and home of the Al Maktoum International Airport, Dubai South district was established between the cities of Dubai and Abu Dhabi as well as in proximity to the Jebel Ali seaport, which acts as a keystone of connecting the region and the world.





MASDAR CITY

Tipped to be ‘the world’s most sustainable city,’ Masdar City is a pioneer in sustainability and a hub for research and development (R&D), spearheading the innovations to realize greener and sustainable urban living.

The city is also home to a rapidly growing clean-tech cluster, business free zone and residential neighborhood with restaurants, shops, and public green spaces.

IDEAL LOCATION

Located on the crossroads of the Middle East and Asia, the city connects seamlessly to a strong logistics and transport network.

Masdar City Free Zone is a powerful business enabler and incubator. More

than 800 companies from six continents operate from Masdar City ranging from multinationals such as Siemens, Honeywell, Lockheed Martin, to regional corporations, small and medium enterprises and startups.

Masdar City also hosts the International Renewable Energy Agency (IRENA) HQ, the first intergovernmental organization to be located in the Middle East.

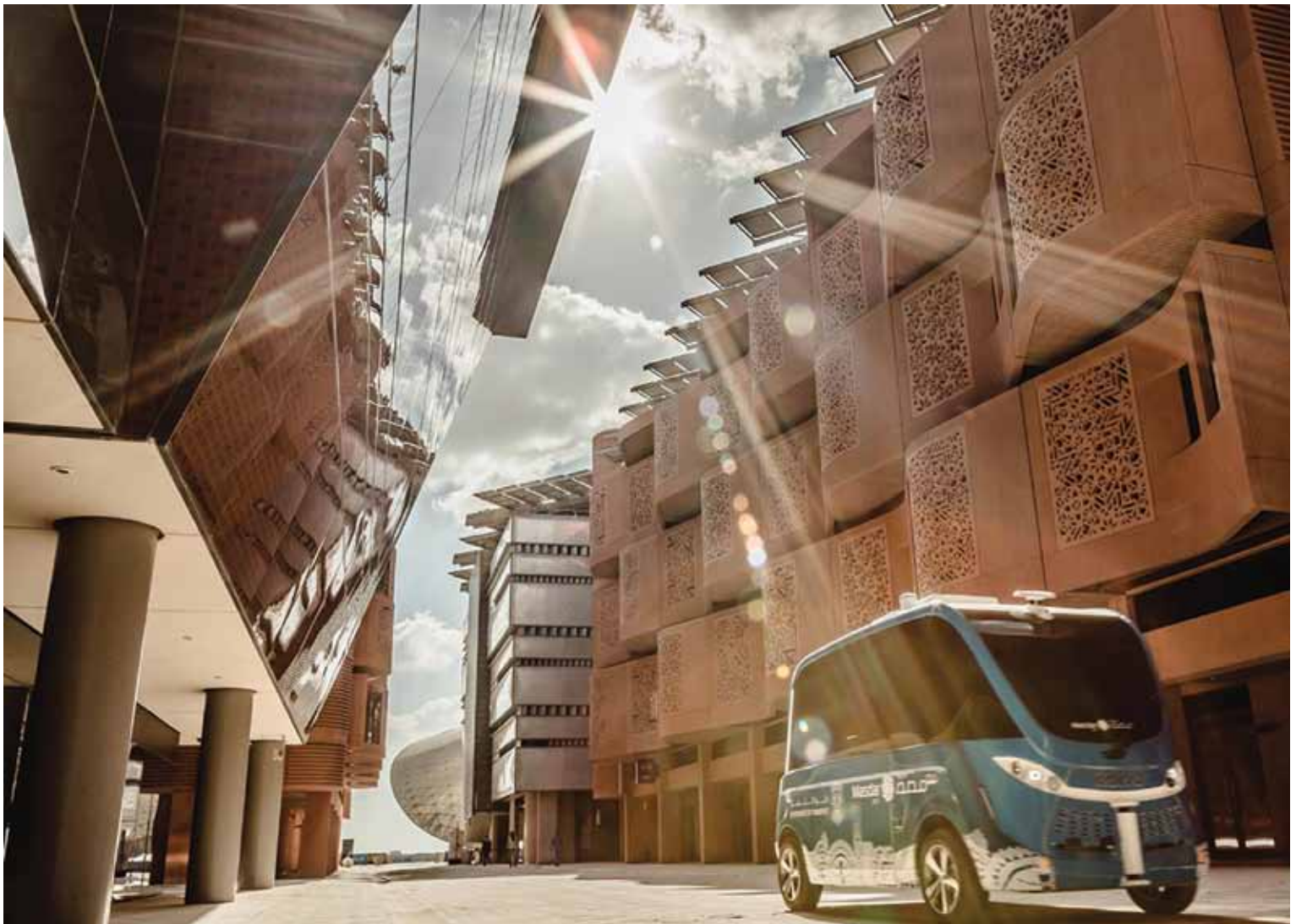
Since its inception in 2008, Masdar City has defined itself by following the same visionary approach. Built on the pillars of innovation and research, the City is a living testament to how fresh innovative ideas and collaboration can help mould a distinctive and inspiring urban ecosystem.

Masdar City is open to everyone. It brings together residents, students, academics, entrepreneurs, business leaders and investors in a collaborative environment that enables all to live, learn and grow.

Masdar City, the new ‘green print’ for future cities and sustainable living. More images can be found at: <https://masdarcity.ae/discover/gallery>.

“

Located on the crossroads of the Middle East and Asia, Masdar city connects seamlessly to a strong logistics and transport network.”





SECTION 4

LOGISTICS & WAREHOUSING



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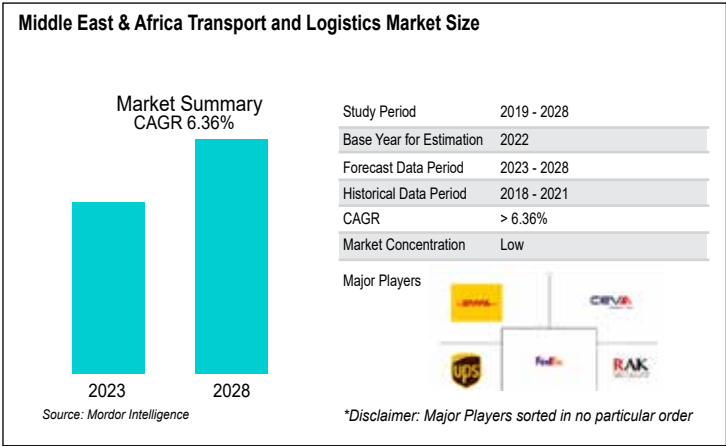


EXPONENTIAL GROWTH OF AIR TRANSPORT IN MIDDLE EAST

In the Middle East, the vast number of airport capital expansion programmes are led by demand coming from the growth of domiciled carriers. e-commerce industry is growing due to the high levels of internet penetration and the rising GDP of many countries, including the Kingdom of Bahrain and KSA, states **Morodor Intelligence report**.

MIDDLE EAST & AFRICA TRANSPORT AND LOGISTICS MARKET ANALYSIS

The Middle East & Africa Transport and Logistics Market size is estimated at US\$ 153.79 billion in 2023 and is likely to reach US\$ 209.32 billion by 2029, growing at a CAGR of 6.36 per cent. During the past decade, globalization and technology boosted the supply chains and competitiveness in Africa.



Currently, the most important countries in terms of logistics are Algeria, Angola, the Democratic Republic of Congo, Egypt, Ghana, Kenya, Mozambique, Nigeria, South Africa, and Tanzania. Some of them own key ports in the continent. For example, Barra owns Dande and Lobito in Angola, Lekki in Nigeria, Musoma in

Tanzania, and Lamu in Kenya. The political instability of some countries is likely to make territorial integration inappropriate in the short term. Domestic markets are predominant in this zone as there is little interaction among regions, which has led to a stagnation in trade. The

Despite a sustained decline over the past few years, the Middle East and Africa is fast becoming a region of automotive and supply chain opportunity

economy is dependent on mining, which represents a third of the GDP. Morocco is a stable partner.

Meanwhile, Egypt and Algeria have the highest production values. They are known for their little global interaction and lack of developed logistics corridors. African logistics firms are going beyond megacities and are looking to connect rural communities to regional supply chains. While megacities are attracting millions of young Africans, its population remains predominantly rural.

Despite a sustained decline over the past few years, the Middle East and Africa is fast becoming a region of automotive



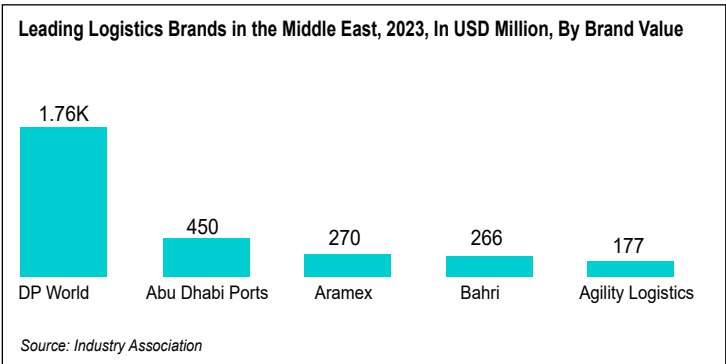
Cargo & Freight • Logistics & Transport • Procurement • Supply Chain
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and supply chain opportunity. Automakers such as VW, Toyota, GM, Groupe PSA, and Mercedes-Benz are investing in the local assembly, ranging from North African countries. The region also has some notable logistics developments.

MIDDLE EAST & AFRICA TRANSPORT AND LOGISTICS MARKET TRENDS

Development of Logistics Infrastructure: The Middle East and Africa is likely to grow significantly, with the Middle East witnessing growth annually in terms of air transport. Cargo volumes are estimated to double in most countries of the region.



At such levels, several challenges and opportunities arise. For airports in Africa and the Middle East, this presents an opportunity to capitalize on the growth potential and prepare for change, keeping the airlines and consumers at the heart of development and how it serves the national interest.

In the Middle East, the vast number of airport capital expansion programmes are led by demand coming from the growth of domiciled carriers. However, there is also geographic proximity to major source markets, such as the Indian subcontinent and intercontinental traffic flows and the MENA regional travel. This factor and a favourable regulatory environment and governments, which have understood and harnessed the value of aviation, have led to the development of airport hubs that are catering to some of the largest movements of passenger and cargo traffic globally.

Airports in the Gulf have led this trend, with Dubai, Abu Dhabi, Bahrain, Doha, Muscat, and Jeddah investing billions of US dollars in infrastructure and focusing on improving the passenger experience. This investment is due to the close symbiotic ties the airports have with domiciled carriers such as Emirates Airlines, Etihad Airways, Qatar Airways, and Saudi Arabian Airlines, which enable stakeholders in the value chain to work together and develop an end-to-end experience, serving the industry and the respective local economies.

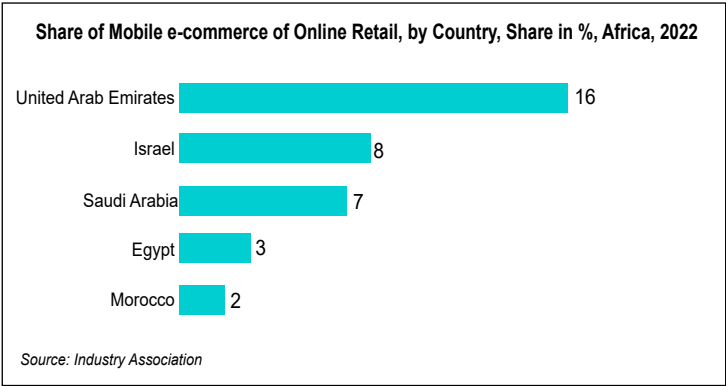
Like their global peers, airports in the Middle East aspire



to overcome project development challenges through effective stakeholder collaboration, capitalizing on digitization, the airport retail revolution, and non-aeronautical opportunities. In addition, they aim to create personalized experiences by offering guests a sense of place with enough capacity. The Middle East airport developers also strive to achieve green building credentials through global certifications and those developed by national programmes, while working toward ACI carbon accreditation.

MEA LOGISTICS MARKET: LEADING LOGISTICS BRANDS

e-commerce driving the logistics industry: Digital adoption in MENA has not followed the path typically seen in other markets. As consumers move online, businesses usually follow suit, enabling a gradual development of the digital ecosystem in areas such as media and e-commerce. The MENA region’s experience has been different.

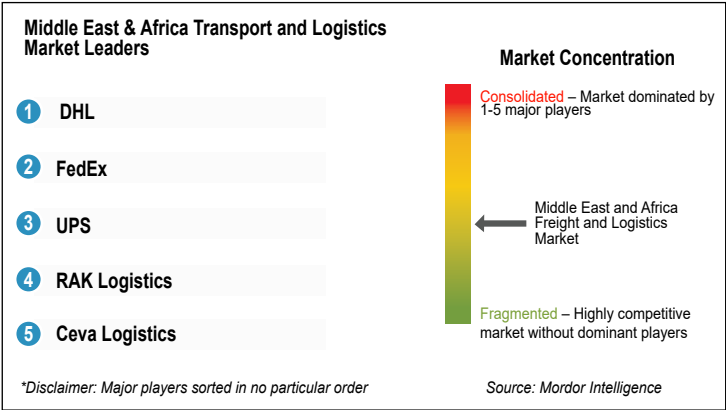


The e-commerce industry across the Middle East is growing rapidly due to the high levels of internet penetration and the rising GDP of many countries, including Bahrain and Saudi Arabia.

While most of the Middle-East’s imports come from China, an increasing number of shoppers in the region also purchase from different markets. Across the Middle East, Amazon and eBay are used just as frequently as the local sites, such as Cobone, Souq, and Sukar. The purchasing power of the Middle East comes largely from an extremely young population. In Saudi Arabia, over 55 per cent of the population is under 30 years. Young, digital-savvy shoppers are driving smartphone use in the region to over 65 per cent and internet penetration to 90 per cent in the UAE, Kingdom of Bahrain, and Qatar. As a result, e-commerce is growing steadily.

MIDDLE EAST & AFRICA TRANSPORT AND LOGISTICS INDUSTRY OVERVIEW

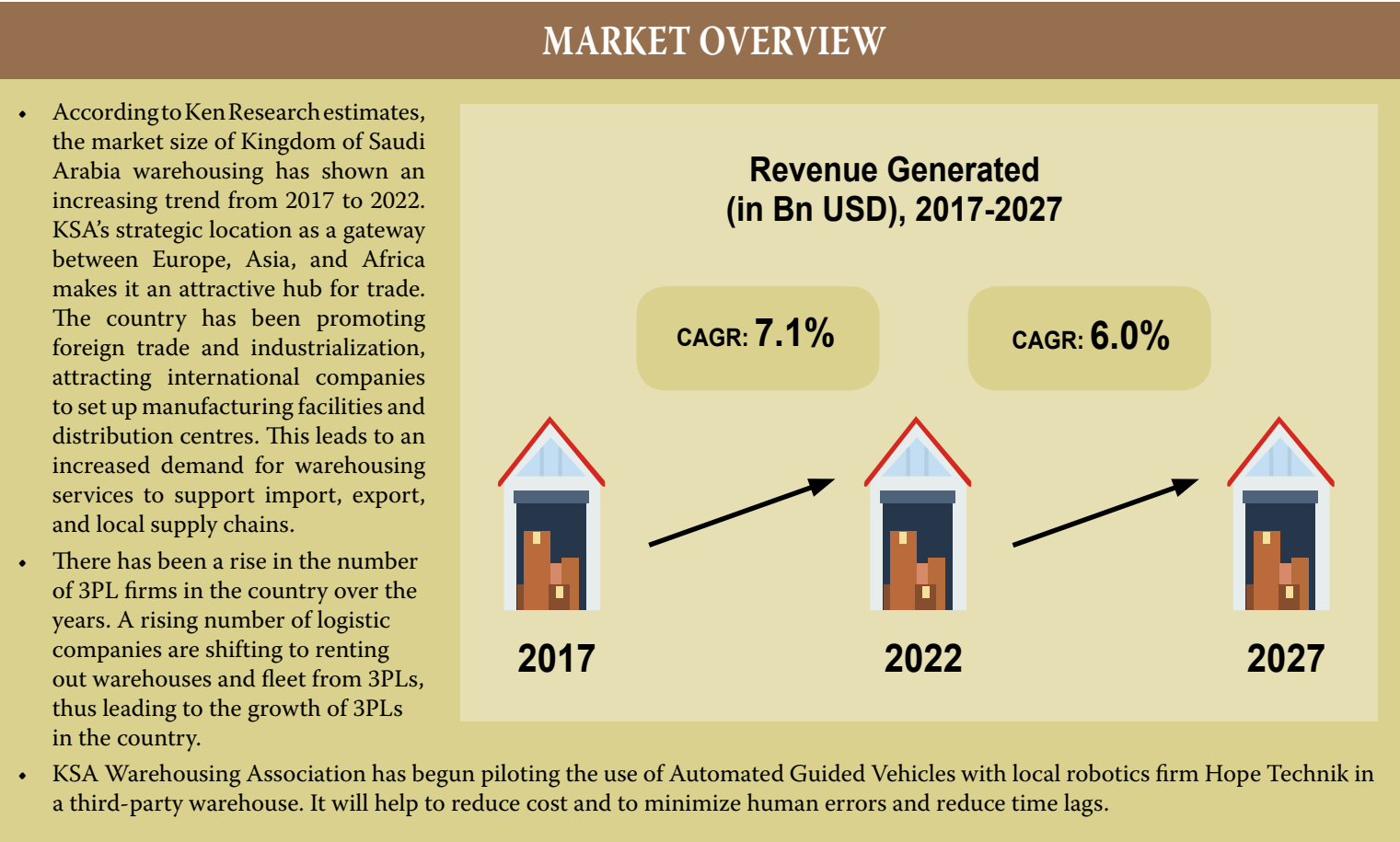
The Middle East and African freight and logistics market is fragmented, with the presence of global and local players. The market is dominated by players such as DHL, FedEx, and UPS. The market is expected to grow during the forecast period due to growing e-commerce and growing infrastructure in the region.





UPWARD TREND IN KSA's LOGISTICS & WAREHOUSING

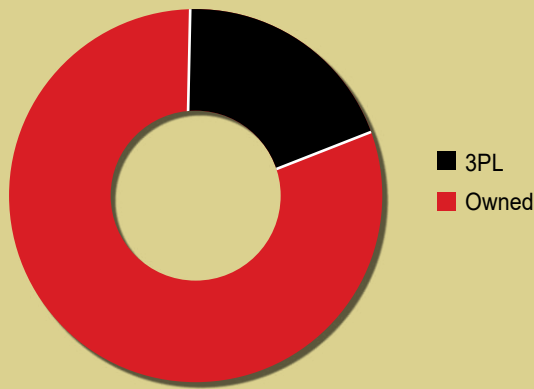
The Kingdom of Saudi Arabia's (KSA) strategic location makes it an attractive hub for trade and warehousing. There has been an upward trend in 3PL companies in the Kingdom, which has led to an increasing demand for warehousing services in order to support import & export facilities and local supply chain.



KEY TRENDS BY MARKET SEGMENT

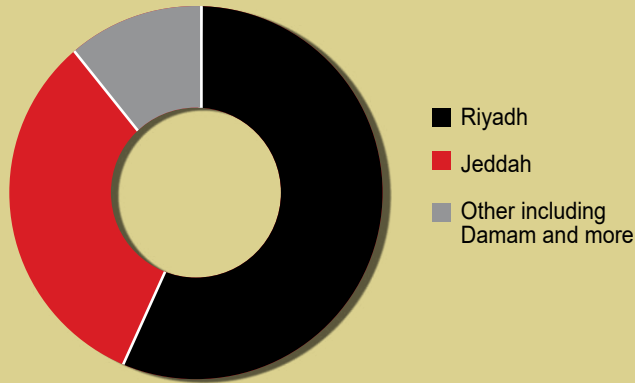
- **By Ownership:** Owned companies dominated in warehouse market in Kingdom of Saudi Arabia, 2022.

KSA warehouses market revenue by ownership in 2022



- **By City:** Jeddah is a popular city for logistic service providers in the KSA due to supportive infra, manpower, location near Mecca and Medina and the port.w

KSA warehouse market segmentation by city, 2022



COMPETITIVE LANDSCAPE

- Kingdom of Saudi Arabia warehousing market is highly fragmented with many organized and unorganized small players concentrated in major cities such as Riyadh, Jeddah, and Dammam. Some of the top players are LSC Logistics, Agility Logistics, and Almajdouie Logistics.

Competitive Landscape

The market is highly fragmented with major players dominating the same



FUTURE OUTLOOK

- Market Size of KSA Warehousing is expected to show an increasing trend from 2022 to 2027. The rapid shift of the distribution of food products from traditional markets toward supermarkets and convenience stores is increasing the need for reefer trucks as major distributors hire 3PL for shipping via insulated trucks. There are important elements that have fuelled the expansion of cold storage facilities and cold storage logistics in the Kingdom, including the adoption of advanced technologies such as automation and warehouse management system to improve functionality and efficiency.





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EXPANDING WAREHOUSING LANDSCAPE IN UAE

Owing to the robust demand in the quarter (April-June 2023), average rental rates in Abu Dhabi and Dubai increased by 6.4% and 19.0%, respectively. The lack of supply in the UAE’s industrial and logistics market shows that growth in rentals will continue, said **Anshuman Magazine, Chairman & CEO, India, SEA, MEA, CBRE**.



ANSHUMAN MAGAZINE
*Chairman & CEO, India
SEA, MEA, CBRE*

The Industrial and Logistics sector in the United Arab Emirates (UAE) region has witnessed strong growth momentum in the April-June 2023 period. In Abu Dhabi, the total rental registrations in the sector saw a growth of 18.8 per cent. During this period, new registrations increased by 8.2 per cent, and renewed contracts grew by 26.2 per cent.

In Dubai, a total of 2,248 rental transactions were recorded during the same period, showing an increase of 3.6 per cent compared to the corresponding period last year. During this period, renewals grew by 22.5 per cent, while new registrations declined by as much as 24.9 per cent. Owing to the robust demand in the quarter(April-Jue 2023), average rental rates in Abu Dhabi

and Dubai increased by 6.4 per cent and 19.0 per cent, respectively. Average rents in Abu Dhabi stood at AED 393 per square metre and in Dubai at AED 41 per square foot. The lack of supply in the UAE’s the industrial and logistics market indicates that rental growth will continue in most parts.

In Kingdom of Saudi Arabia, Riyadh, Khobar, and Dammam, have witnessed a rental surge during April-June this year. Dammam and Khobar recorded the highest average rent at SAR 250 per square metre, indicating a 20.2 per cent increase in rentals in Khobar and 18.7 per cent in Dammam compared to the April-June 2022 period.

The average rent in Riyadh notably improved by 36.9 per cent at SAR 198 per square metre. In Jeddah, average rents softened by 10.4 per cent during the quarter, with average rents currently at SAR 181 per square metre. Overall, a decrease in rent was recorded annually, but a 1.1 per cent increase was observed on a quarterly basis. While year-on-year growth appears promising, the April-June of this year quarter indicated signs of stabilization.

“In Dubai, 2,248 rental transactions were recorded during the first quarter, showing a rise of 3.6% compared to the corresponding period last year.”



SEASONALITY LIFTS VOLUMES, LESS BUMPY ROAD AHEAD

Air cargo volumes for September are on par with the same period last year but cargo capacity, on the other hand, grew at its slowest pace in the past 11 months. The cargo market is entering a new phase where parties are not expecting it to go much higher or lower, says **Niall van de Wouw**, Chief Airfreight Officer, Xeneta.



NIALL VAN DE WOUW
Chief Airfreight Officer
Xeneta

Increasing shipper and freight forwarder confidence in a more stable global air cargo market led to a higher commitment to longer-term freight contracts in September as a drop in capacity and traditional month-over-month seasonality pushed volumes up 6 per cent, according to the latest weekly performance data from CLIVE Data Services, part of Xeneta.

The number of shippers committing to air freight contracts of over 6 months in Q3 2023 rose to 34 per cent from 28 per cent

in the previous three months, Xeneta stated, as the industry comes to terms with a new baseline for the general air cargo market.

“This is not a peak season, it is a sign that airlines, freight forwarders, and shippers are finding more common ground to reach longer-term agreements. We previously referenced no macro and market currents to support an expectation of a peak season, and this is still the case. We also said if there was to be an uptick in rates, we would expect this to be driven by the supply side than the demand side, and this also still holds true. The general air cargo market is entering a new phase where parties are not expecting the market to go much higher or lower. It is finding its feet again. We see more longer-term contracts being signed and this only happens when people feel more comfortable about the now and the foreseeable future. It

“

This is not a peak season, it is a sign that airlines, freight forwarders, and shippers are finding more common ground to reach longer-term agreements.”

is easier to make a commitment now than when the market is on a sharp downward or upward trajectory. There is a firmer floor in place,” said Niall van de Wouw, Chief Airfreight Officer, Xeneta.

The global general air cargo spot rate edged up over 2 per cent month-over-month to US\$ 2.23 per kg in September, with the growth especially accelerating towards the end of the month. This upward trend continued in the week ending 1 October 2023 as the average global air cargo spot rate rose more than 10 per cent from three weeks ago.

September air cargo volumes were on par with the same period last year but global air cargo capacity, on the other hand, grew at its slowest pace in the past 11 months. It ticked up 5 per cent from a year ago, but adjusted down slightly compared to a month ago as passenger belly capacity began to be gradually eased out of the market as summer travels in the Northern hemisphere cooled down.

Niall van de Wouw added, “The global air cargo market is still muted and has been flat at a global level now for three months in a row. September produced no surprises, with traditional seasonality pushing up demand over what we saw in August, and we would expect a similar trend in October with less capacity flying around. But in my conversations with shippers, forwarders, and airlines, I still hear very little hope of demand growth before Q3 2024 and for that to happen, we still need to see stronger consumer confidence and economic activity.”

As capacity demand and supply continued to rebalance, the global dynamic load factor, which measures cargo load factor based on both volume and weight perspectives of cargo flown and capacity available, grew to 58 per cent in September, up 2 per cent points from a month ago.

However, the load factor stayed below last year’s level by 2 per cent points. Looking at regional lanes in September, air cargo spot rates on most top trade corridors head north in September. With



cargo rushing out of China ahead of the Golden Week holidays from 1 October, the China to Europe cargo spot rate grew more than 11% from a month ago to US\$ 3.19 per kg in September. Similarly, China to US spot rate rose more than 9 per cent to US\$ 3.63 per kg month-over-month.

Staying in the region, Southeast Asia to Europe and to the USA spot rates grew considerably by over 22 per cent month-over-month (to US\$ 2.29 per kg) and 16 per cent (to US\$ 3.14 per kg) respectively. Within the region, Vietnam spot rates to Europe and the US rocketed over 54 per cent and 32 per cent to US\$ 3.00 per kg and US\$ 3.70 per kg, respectively. These higher growth ratios are partially due to rates growing from a low base and, on these trades, returning air cargo spot rates to the pre-pandemic levels seen earlier this year.





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RISE IN CARGO DEMAND ON MIDDLE EAST-ASIA ROUTE

Cargo capacity, measured in available cargo tonne-kilometers, rose 9.7% compared to July 2022, which was a slower rate compared to double-digit growth recorded between March and May, says **Willie Walsh, Director General, IATA**. Middle East carriers experienced a 1.5% year-on-year increase in cargo volumes, he adds.



WILLIE WALSH
Director General
IATA

IATA released data for July 2023 global air cargo markets showed recovering growth rates since February. July air cargo demand tracked 0.8 per cent below the previous year's levels.

Although demand is now flat as against 2022, this is an improvement on recent months' performance that is significant given the decline in international trade volumes and increasing concerns over the Chinese economy.

- Middle Eastern carriers experienced a 1.5 per cent year on year increase in

cargo volumes in July 2023. This was an improvement on the previous month's performance (0.6%). The demand on Middle East-Asia routes has been trending upward in the past two months. Cargo capacity increased 17.1 per cent compared to July 2022

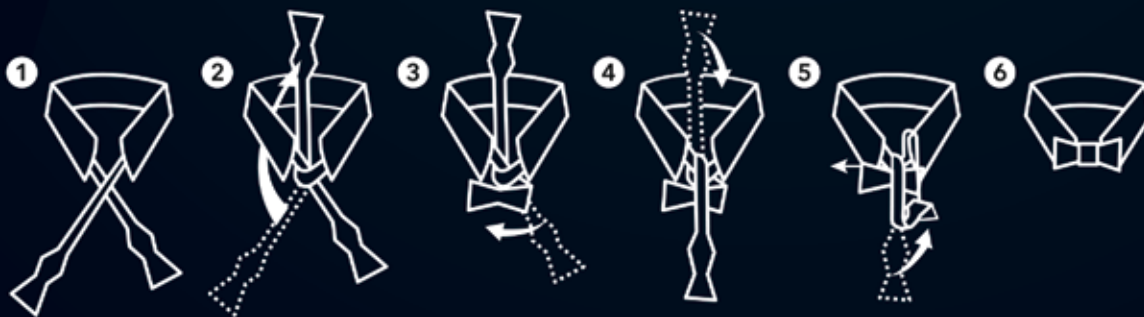
- Global demand, measured in cargo tonne-kilometers (CTKs), tracked at 0.8 per cent below July 2022 levels (-0.4% for international operations). This was a significant improvement over the previous month's performance (-3.4%)

- Capacity, measured in available cargo tonne-kilometers (ACTKs), was up 11.2 per cent compared to July 2022 (8% for international operations). The strong uptick in ACTKs reflects the growth in belly capacity (29.3% year on year) because of the summer season

“

Although demand is now flat as against 2022, this is an improvement on recent months' performance that is vital given the fall in global trade volumes.”

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GET REALLY HEAVY
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OPERATING ENVIRONMENT

- In July, both the manufacturing output Purchasing Managers Index (PMI) (49.0) and new export orders PMI (46.4) were below the critical threshold represented by the 50 mark showing a decline in global manufacturing production and exports.
- International cross-border trade contracted for the third month in a row in June, decreasing 2.5 per cent year on year, reflecting the cooling demand environment and challenging macroeconomic conditions. The difference between the annual growth rates of air cargo and the international goods trade narrowed to -0.8 percentage points in June. While air cargo growth is still lagging behind world trade, the gap has been the narrowest since January 2022.
- In July, the international supplier delivery time PMI was 51.9, signalling fewer supply chain delays. All major economies, except China, had Purchasing Managers Index above 50. The USA, Europe, and Japan recorded PMIs of 54.2, 57.7, and 50.4, respectively.

• Inflation saw a mixed picture in July, with the increase in consumer prices in the USA picking up pace for the first time in 13 months. In China, both consumer and producer prices declined, pointing to a possible deflationary economy.

“Compared to July 2022, demand for air cargo was basically flat. Considering we were 3.4 per cent below 2022 levels in June, that is a significant improvement. And it continues a trend of strengthening demand that began in February,” said Willie Walsh, Director General, IATA.

He further added, “How this trend will evolve in the coming months will be something to watch out for carefully. Many fundamental drivers of the air cargo demand, such as trade volumes and export orders, continue to remain weak or are deteriorating. And there are growing concerns over how the Chinese economy is developing. At the same time, we are seeing shorter delivery times, which is normally a sign of increasing economic activity. Amid these mixed signals, strengthening cargo demand gives us good reason to be cautiously optimistic.”

Global air cargo market in detail - July 2023

	World share ¹(%)	July 2023 (% year-on-year)				July 2023 (% ch vs the same month in 2019)			
		CTK (%)	ACTK (%)	CLF (%-pt) ²	CLF (level)³ (%)	CTK (%)	ACTK (%)	CLF (%-pt) ²	CLF (level) ³ (%)
TOTAL MARKET	100.0%	-0.8%	11.2%	-5.1%	42.1%	-2.4	3.7	-2.7	43.2
Africa	2.0%	2.9%	11.0%	-3.3%	41.7%	5.3	-20.3	10.8	44.6
Asia Pacific	32.4%	2.7%	26.0%	-10.4%	45.7%	-6.1	5.5	-5.8	46.8
Europe	21.8%	-1.5%	5.3%	-3.3%	47.2%	-12.9	-8.7	-2.3	47.6
Latin America	2.7%	0.4%	10.0%	-3.1%	32.2%	3.8	12.7	-2.9	33.7
Middle East	13.0%	1.5%	17.1%	-6.3%	41.1%	5.2	6.6	-0.6	44.6
North America	28.1%	-5.2%	0.5%	-2.2%	37.0%	8.1	10.5	-0.8	37.4
¹% of industry CTKs in 2022		²Change in load factor		³Load factor level					
Note: the total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in w hich the carrier is registered; it should not be considered as regional traffic. Historical statistics are subject to revision.									



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Please contact:

Editorial:

abigail@ddppl.com, +971 52 920 8678

Advertising:

rajith@ddppl.com, +971 52 920 8684 | crisna@ddppl.com, +971 55 4704 200



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The background is a dark, gradient field with flowing, wavy golden lines. Numerous bright, multi-pointed starbursts are scattered across the composition, particularly along the golden curves. A dense, semi-circular cloud of fine, multi-colored dots (gold, red, blue, green) is located in the upper-left quadrant. In the top-right and bottom-left corners, there are patterns of horizontal rows of small, golden dots.

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