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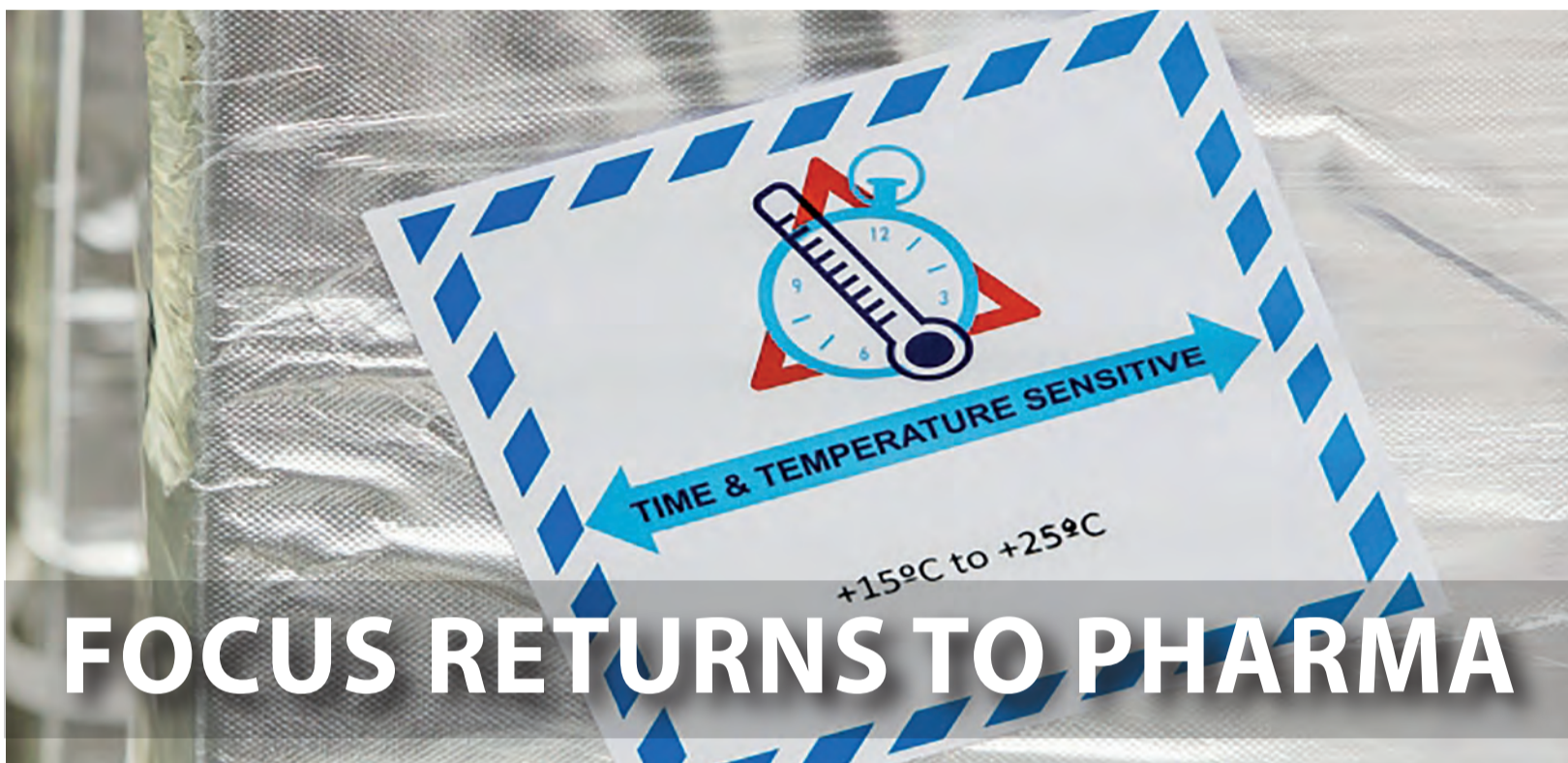


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FOCUS RETURNS TO PHARMA

Amsterdam Airport Schiphol's cargo team is gearing up to revive its Pharma Gateway Amsterdam platform in line with its updated Cargo strategy.

Due to a variety of circumstances, such as the COVID-19 pandemic, being slot restricted, and changes to its organisation, Schiphol's ongoing development as a key pharmaceutical gateway in Europe hasn't been in the spotlight.

"The airport is working hard on updating its strategy for cargo and is aiming to designate pharma logistics as one of the most important verticals in its updated strategy," David van der Meer, Cargo Partnerships Director at Amsterdam Airport Schiphol, said. "This is also fuelled by airlines and forwarders indicating that pharma airfreight will continue to innovate and grow in the years to come."

Amsterdam Airport Schiphol's first step is to reach out to all current members of the Pharma Gateway Amsterdam platform.

"In recent conversations with VCK Logistics/Janssen, Kuehne & Nagel and Geodis among others, the cargo community has indicated to

Schiphol that the time is right to renew and upgrade our combined efforts to show the world that Schiphol is still the premier gateway for pharma logistics," van der Meer explained.



The airport has had a track record for many years now in this space, leading large pharmaceutical manufacturers to base themselves in The Netherlands. This has been mainly powered by Schiphol's strong network and smooth end-to-end cargo chain.

Without closing its eyes to slot constraints, the opportunities for shippers to select Amsterdam as their preferred gateway for pharma logistics remain open, with all parties involved in pharma logistics working together to improve quality and handling time.

The Dutch road infrastructure combined with the quality of the airport's network enables Schiphol to be a strong hub for pharma products.

"During the pandemic we have all seen how crucial supply security is for both The Netherlands and Europe," van der Meer stated. "Schiphol and its cargo community are eager to use their expertise and infrastructure in combination with the Smart Cargo Mainport Program to boost digitalisation and innovation and improve the handling of pharma products."

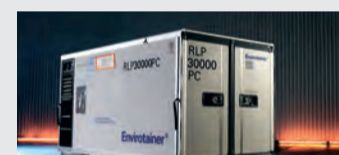
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**GLOBAL REACH.
LOCAL KNOWLEDGE.
YOUR CARGO IS OUR PRIORITY.**





TAKING HEALTHCARE LOGISTICS TO NEW HEIGHTS

THE growth of the pharma freight sector presents both challenges and opportunities for the logistics industry. After struggling with capacity constraints during the Covid pandemic, there has been a strong return of passenger travel which means additional belly capacity and airlines increasing frequencies across all regions.

This, coupled with the prevailing economic downturn and resulting decrease in orders across most industries, has resulted in pricing pressure as customers are seeking cost-effective solutions whilst still maintaining the standards and speed necessary for their healthcare goods.

Operating an extensive pharma network, AFKLMP encompasses at least 65 destinations with daily connections from the hubs in Paris and Amsterdam and 100 locations connected at least three times weekly.

"AFKLMP, as a mainly belly cargo carrier, closely follows the demand and challenges," Lauren Stolt, Global Head of Pharmaceutical Logistics at Air France KLM Martinair Cargo, said. "Our commitment to the pharmaceutical industry has led us to develop a range of specialised solutions."

"From passive solutions where we ensure that customer packaged Pharma shipments are transported and stored within the specified temperature range to Active solutions, sophisticated container solutions to ensure that your Pharma shipment is kept at a constant temperature and in a closed environment throughout the journey," Stolt added. "Together with this we offer end-to-end visibility through our digital platforms. We also provide personalised customer support to ensure that our pharmaceutical clients receive tailored solutions that meet their specific needs," she added.

Standards and strategic partnerships

AFKLMP understands the critical importance of adhering to stringent industry standards, especially in the pharmaceutical sector where efficiency and effectiveness is key.

To meet these requirements, AFKLMP has obtained various certifications and quality standards, including being the first airline to be International Air Transport Association (IATA) CEIV certified three times back-to-back.

"This certification ensures that our pharma operations maintain the highest standards of quality and integrity throughout the supply chain," Stolt stated.

Leveraging its relationships with CMA CGM and a joint venture with Delta and Virgin, AFKLMP has positioned itself as a trusted partner for pharmaceutical companies and forwarders.

"Together with our partners and suppliers, we ensure that we meet the demands of pharmaceutical logistics by expanding our network and product offerings as necessary. We have recently added Raleigh to our winter network, allowing us to cater to the above-average growth currently observed," Stolt explained.

Investment and innovation

Balancing speed and safety in pharmaceutical logistics is paramount. AFKLMP looks to achieve this by offering numerous services, such as its recently launched Cargo Plus service. This new 'plus' service is intended for shipments requiring extra priority. This, coupled with implementing strict temperature controls, employing dedicated handling procedures, and collaborating closely with partners to optimise supply chain processes ensures they prioritise safety without compromising the efficiency of operations.

"The future of pharmaceutical logistics is filled with promise and potential. With the continued growth in demand for specialised services, such as personalised medicine, clinical trials with a focus on rare disease and orphan drugs, we are exploring innovative solutions," Stolt outlined. "We are working with all parties in the pharmaceutical chain for enhanced transparency and security, as well as further advancements in cold chain and digital spaces."

AFKLMP's goal is to remain at the forefront of pharmaceutical cargo operations and provide clients with cutting-edge solutions that meet their evolving needs by close collaboration with all parties in the cool chain.

"We've made significant investments in infrastructure and digital technology to ensure the seamless handling of pharmaceutical cargo. This includes temperature-controlled warehouses, state-of-the-art cargo facilities at our hubs Amsterdam and Paris as well as advanced tracking systems that supply real-time monitoring and visibility," Stolt highlighted. "Our current and continued investments are aimed at guaranteeing the integrity of pharmaceutical shipments from start to finish."

Technological transparency

Data analytics and real-time monitoring are crucial

in maintaining the integrity of pharmaceutical cargo. AFKLMP's commitment to temperature control and monitoring is visible through the customer portal myCargo.

This platform provides customers with real-time access to their pharmaceutical bookings allowing them to track their shipment in real-time and make changes when needed. This level of control ensures that customers always have visibility into the status of their pharmaceutical cargo.

Furthermore, AFKLMP is continuously enhancing its digital pharma offerings, such as online booking for Dry Ice shipments and Active containers. Most recently they've introduced real-time tracking of Envirotainer Active containers via the myCargo platform and there is more in the pipeline for 2024.

"This dedication to technological advancements ensures that pharmaceutical cargo remains not only safe and secure but also well-managed and transparent throughout the logistics process," Stolt said.

Minimised impact

AFKLMP is committed to sustainability and has taken several steps to minimise the environmental impact of its operations. These initiatives encompass a multifaceted



approach, ranging from investing in fuel-efficient aircraft and optimising flight routes to adopting various sustainable measures for ground handling; such as the introduction of eco-friendly solutions like carton beams and lightweight ULD (Unit Load Device) nets, transitioning towards electrical equipment, and implementing effective waste management strategies.

"We are actively exploring sustainable packaging solutions to further enhance our eco-conscious efforts," Stolt stated. "These efforts are further complemented by our Sustainable Aviation Fuel (SAF) programme."

Most recently, AFKLMP unveiled its 'goSAF' proposition, a development that empowers customers to play a direct role in environmental conservation. Through the myCargo portal, customers can effortlessly purchase a SAF contribution at the booking level, resulting not only in a reduced carbon footprint at the Air Waybill (AWB) level but also symbolising steadfast commitment to the cause of environmental sustainability.

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Connecting the cold chain



BOASTING a global presence with over 66 service centres strategically positioned worldwide, Envirotainer offers innovative and reliable cold chain solutions for the transportation of temperature-sensitive pharmaceuticals.

With the largest fleet of containers, totalling more than 7,500, Envirotainer offers a comprehensive portfolio that spans a diverse range of options for customers.

"We have a global reach with uncontested capacity. For almost 40 years, we have been driving the development of different types of cold chain solutions in the market," Niklas Adamsson, COO of Envirotainer, said. "The market has matured now and we have evolved by designing and producing better solutions to serve the market and improve our capabilities."

The company's new generation of containers, Releve, is the latest example of the company's approach, providing an offering to meet the strictest requirements in pharmaceutical air freight.

With up to 170 hours of battery life, it has the ability to maintain the temperature and protect the shipment, while also providing live updates through its connected monitoring service. This provides insight into the condition, location and progress of the shipment worldwide 24/7.

Sustainable set-up

In response to the growing focus on sustainability in the industry, Envirotainer ensures that 100% of the electricity used in its production facilities for pharma logistics is sourced from renewable energy.

Envirotainer has also contributed to sustainability by offering leased solutions that are reused hundreds of times, reducing reliance on single-use solutions that contribute to environmental waste.

"We have developed one of the most sustainable solutions because our key mission is to ship as much pharma as possible with the lowest carbon footprint," Adamsson said. "That's a goal I'm picking up from conversations with our customers."

Envirotainer recognises that sustainability does not come simply though, acknowledging that it requires a larger strategy that seeps into all aspects of a company's operations.

"It's about providing the most sustainable packaging solutions but also that we work very closely with airline partners and freight forwarders to make sure that we have as efficient a supply chain as possible," Adamsson explained. "No one can fix it on their own. It's really an industry joint effort that is required."

Minimising risk

With pharmaceutical goods, and perishable cargo in general, any disruption has to be avoided or the shipment could be spoiled. Labour shortages, strikes, environmental challenges and other unexpected delays can be disastrous if the right measures aren't in place.

"If there is a delay in the customs process, or any

disruption, the risk exposure with Envirotainer's Releve solution is very, very small," Adamsson highlighted. "If something is about to go wrong, we are able to catch that right away in real time. And then, boots on the ground can interject and do something in order to mitigate that potential problem."

For Envirotainer, that's why technology is key, making sure that any disruptions in the supply chain are handled in a way which makes sure the pharma reaches the customer.

"Everyone is playing a part with technology and our equipment is state-of-the-art when it comes to line monitoring and sensor data," Adamsson said. "That's why we ensure an open approach to data sharing — in order to mitigate or minimise any disruptions in the supply chain."

Strategic growth

Envirotainer's approach is driven by agility, following the customers they have and identifying the key markets they need to serve to support their work, as seen in the recent growth of the company's station network.

"It's a very market-driven and customer-driven approach," Adamsson explained. "By teaming up with va-Q-tec, a pioneer of sophisticated solutions and services for temperature-controlled supply chains, Envirotainer has secured an even better reach and operational excellence to meet the growing global demand." Mainly working with regional players has provided Envirotainer with the opportunity to be more connected to the markets they operate in, understanding the on-the-ground situation first-hand.

"It's a win-win situation. We are able to expand with the regional players and they are able to serve their markets better," Adamsson stated. "Some of these players are both regional and global. It's one of the fascinating parts of our business. Any movement involves several players in different regions because of our global footprint."

Pharma future

Envirotainer is clear that pharma will remain a key market segment going forward, only growing in size.

"We see that in all regions, especially in the more developing parts of the world. The Asia-Pacific region, China, etc., is a booming market segment," Adamsson said. "We can expect that this growth we've seen in recent years will continue in the future."

To meet this opportunity, Envirotainer is focusing on investing in terms of capabilities and capacity to make sure it has the ability to serve the market ensuring they stay ahead of the curve through their sustainability and digitalisation efforts.

"We don't want to be in a situation in a few years where the market has been growing and we're not able to serve it. So our strategy is very clear — build capacity in line with the growing pharma industry," Adamsson stated.

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KEEPING IT COOL IN THE MIDDLE EAST

“Dubai has become a shining star for health and medical facilities”

Emirates SkyCargo has sought to position itself as a leader in pharmaceutical transportation with a robust and innovative approach to its operations.

The carrier's commitment to pharmaceutical transportation dates back several years, with a significant leap in its offering when the airline enhanced facilities at both Dubai International Airport (DXB) and Dubai World Central (DWC).

These state-of-the-art facilities are among the largest globally, allowing the airline to serve a large majority of the world's population through swift deliveries, with 2.5 billion people living within a four hour flight from Dubai.

“The thing is that, whatever is going on in the world, there's two things that keeps moving: Food and pharma. Those are the two biggest products that we move” Julian Sutch, head of Emirates SkyCargo's pharmaceutical division, stated.

It's clear that the United Arab Emirates, and wider Middle East region, has embraced the opportunity to become a hub for pharmaceutical operations.

Health and manufacturing have been growing sectors in the region, reflected in the role the UAE played in delivering vaccines around the globe, with the region receiving some of the first shipments in the world.

“The UAE has been a step ahead of the others for some time now and Dubai has become a shining star for health and medical facilities,” Sutch stated. “We're here to help develop the country's vision.”

Growth trajectory

India stands out as a critical market for Emirates SkyCargo, representing 30% of its business, primarily, moving 500-600 tonnes of pharmaceuticals weekly. Europe follows closely, accounting for 20-25% of the carrier's pharma exports, while the US has emerged as a rapidly growing market, prompting the opening of a dedicated pharma facility in Chicago.

“India and Europe make up a majority of our business. But then the US has been a very, very fast mover for us,” Sutch highlighted. “For the developing world, we have significant capacity and network in Africa.”

The airline credits its swift response to the Covid pandemic to its current position in the market. Emirates SkyCargo swiftly responded to the global health crisis by reallocating significant capacity to transport essentials, turning passenger planes into freighters and using their global network of hubs to secure a larger market share.

“Since 2016, we have had double digit growth every year in our pharma division but the pandemic took it to another level,” he continued. “I had relationships with pharmaceutical manufacturers and those went into overdrive during the pandemic, having weekly calls to find out where they're manufacturing and the capacity they need.”

“Once customers have had a taste of Emirates, its quality and service, it's very difficult for them to then give it up and move back to other carriers,” he added.

Ice cold innovation

While Dubai's warm climate presents a challenge for pharmaceutical transportation, Emirates SkyCargo has sought to embrace innovative solutions to tackle this situation.

“The disadvantage that we have overcome is that, of course, it's relatively warm in the summer, which is not great for pharmaceutical cargo,” Sutch said. “So, we've worked to mitigate that by building the biggest temperature control infrastructure in the world.”

“Suppliers are out there looking for the best technology out there, installation technology and cooling technology, to make sure that they can be have a great offering to the market,” he added. “There's huge wastage every year from pharma not making it in the right condition, so our goal is to make sure we build better infrastructure.”

The airline's investment is visible in the fleet of cool dollies that safeguard pharma goods during the crucial transition from one aircraft to another or back and forth from their facilities.

This has also been combined with targeted measures to fit Emirates SkyCargo's global network, providing temperature controlled covers over all shipments to protect cargo globally, even when facilities are limited.

“In Dubai, we have everything under control. However, there are many places around the world where treatment needs to go to patients, so that means we need the infrastructure there,” he explained. “You're only as good as your whole supply chain, so our big focus has been to partner with handlers and improve global infrastructure.”

There are two elements Emirates SkyCargo focuses on here to address this: Ground handling infrastructure and potential suppliers. After identifying potential opportunities, the carrier will work with partners to build up the set-up to allow them to deliver their desired service level.

Digital power

Digitalisation has also played a key role in supporting swift operations in locations where infrastructure is limited, providing customers with real-time notifications and presenting digital documentation to streamline clearance processes.

“As soon as that aircraft lands, it needs to be cleared, especially with pharma,” Sutch said. “People send things by air because they want swift deliveries, so speed is everything.”

This is just one element of Emirates SkyCargo's work to transition into the digital space, with the carrier also embracing online booking platforms to increase their connection to existing and potential customers.

“The world's gone digital but cargo has always been slightly behind the game. We should really know from when the pharmaceuticals are picked up from the manufacturer to when they are handed over to the patient, what temperature it's at and the equipment used,” Sutch explained. “Digitalisation will create a window of vision, so we can see everything at once.”

500 lb)
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EFFICIENT TRANSPORT FOR AN EVOLVING MARKET

Amid growing demand for air transportation of pharma and healthcare products, ensuring the safe and efficient transport of life-saving drugs and vaccines has never been more critical.

Sonoco ThermoSafe looks to meet the opportunities presented by this evolving market segment by offering a full range of packaging solutions; including parcel and bulk systems, and for any temperature range including refrigerated, frozen and controlled room temperature shipments (CRT).

ThermoSafe is a division of Sonoco, a global organisation with more than 20,500 employees in 300 operations across 32 countries. With operations in the Americas, Europe and Asia, Sonoco ThermoSafe is continuing to build on 120+ years knowledge and experience.

"When customers need to launch new products, set up new clinical sites, or start commercial distribution, ThermoSafe is trusted to provide a reliable thermal packaging solution," Gary Morgan, General Manager, Sonoco ThermoSafe Europe stated. "In temperature assurance packaging, working with a global supplier that has a manufacturing global footprint like Sonoco ThermoSafe means the resources and flexibility are in place to meet increased demand through any disruption."

Evolving model

The need for time and temperature supply chain controls has long been established for healthcare shipments. What's new is the volume of products, and type of products, that require critical logistics handling at every step in the supply chain, especially at the lower temperature ranges.

"It's interesting to see the choice of transport mode changing. The move from air to ocean started years ago seeking cost-controls, however during the pandemic, air saved the day by getting vaccines to the world quickly," Gary Morgan said.

The post-pandemic supply chain disruptions also drove modal decisions. As the markets have balanced out, there is a definite shifting back to ocean when possible, to reap not only costs savings, but with a view on sustainability gains as well.

The other shift is in personalised medicines for both finished product and clinical trials. Direct-to-patient shipments are driving more parcel or small packaging.

Partnerships support pharma shipments

Sonoco ThermoSafe works with pharmaceutical shippers, forwarders and with global airlines to ship time and temperature sensitive healthcare airfreight around the world. The Pegasus ULD is a new class of airfreight that combines a ULD with passive cooling technology.

Previously, all passive containers required additional nets, straps or pallet sheets. That's why Sonoco ThermoSafe set out to innovate and create the safest and most user-friendly Temperature Control Container (TCC) solution available, to reduce the risks and ensure valuable pharmaceutical products arrive in perfect condition.

As an Advanced Passive container, it uses Phase Change Materials (PCM) the same as the coolants that some passive packaging do, but as a ULD ground handling operations are drastically simplified. The Pegasus ULD fits payload 1 US or 1 EU pallet and maintains the temperature range of 2-8°C for 13+ days.

The Pegasus ULD is approved to fly on Air Canada Cargo, American

Airlines Cargo, Asiana Cargo, Cargolux, Cathay Cargo, Delta Cargo, Emirates SkyCargo, Korean Air Cargo, LATAM Cargo, Qatar Airways Cargo, Saudia Cargo, Singapore Airlines Cargo, Swiss World Cargo, Turkish Cargo and United Cargo.

"With the combined high performance, streamlined airline and forwarder operations as a ULD and cost-effectiveness of passive solution the Pegasus ULD is a unique TCC that ensures pharmaceutical shipments arrive in-temperature and in-specification. Together with partners we are delighted to support pharmaceutical shipments into the APAC region and around the world", says Federico Lupp, Director of Business Development – EMEA & APAC for Sonoco ThermoSafe's Bulk Rental Group.

Digitalisation and managing disruption

Pulling in shipment visibility, temperature and other data points is vastly critical to proving quality control of medicinal products and safe delivery of your high-value products, while at the same time cutting lost revenue due to spoiled products.

From a sustainability perspective, real-time shipment tracking data is being used to minimise spoilage and avoid thermal packaging ending up in a landfill.

"We are often discussing with customers how avoiding spoilage is critical, but sometimes this leads to over-engineering and ultimately more packaging, that isn't necessarily needed," Vivian Berni, Director of Product Management at Sonoco ThermoSafe said. "It's important to evaluate risk management data to find the balance between product protection, sustainability, and costs."

The information provided through digitalisation plays into Sonoco's method for managing disruption - communication, collaboration and contingency.

No one partner can get a product from A to B by themselves. They rely on data systems and automation to give real-time visibility of a shipment, but when something goes wrong, strong partnerships and understanding of processes can help rectify a situation more quickly.

"For example, if there is a weather delay in Doha, the forwarder and airline are executing against contingency plans to determine next steps. The pharma shipper can rely on the Pegasus ULD telemetry data to be assured their product is within temperature range and know of their shipment's next movements," Vivian Berni highlighted.

Areas of opportunity

Recently, Sonoco ThermoSafe customers are shipping airfreight into the Asia Pacific region more frequently. This has been powered by the increasing number of clinical trials and life science shipments in the growing pharmaceutical region.

"With the long distance between APAC, Europe and the Americas, airfreight is a necessary mode of transport that often requires TCCs," Federico Lupp explained. "The Pegasus ULD is doing a great job in fulfilling these needs, especially with the 300+ tested performance on using this container."

Integrated onboard telemetry on the Pegasus ULD provides real time data points on location, internal and external temperature, light, tilt, pressure, and impact. This real-time information allows for quicker decision-making. Pooling the information together could help avoid a transit location with a security issue or change lanes that may be risking compliance.

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