ACW
AIR CARGO WEEK
The weekly newspaper for air cargo professionals

No. 1,262 | 08 January 2024

VISIBILITY IN A RAPIDLY CHANGING INDUSTRY

With today's fast-paced market, real-time information allows companies to make better commercial decisions and support a range of use-cases such as: pricing and revenue management, business development, network design, carrier management, market trend analysis and much more.

Seeking to deliver that visibility, Rotate has launched a unique real-time air cargo capacity and market intelligence tool. The tool provides insight into the supply side of the air cargo market.

"The data has been filtered, cleaned, and enriched to deliver unique real-time insight into changes and trends in air cargo capacity across the world," Ryan Keyrouse, Co-Founder of Rotate, stated. "To further support air cargo companies, Rotate has placed a strong focus on ease-of-use to allow all users to navigate the platform easily and quickly."

Changing demands

Data has grown into a commodity. The need for real-time market information is a long-standing request from the air cargo industry. Information from a week ago is already considered to be out-of-date, hence having access to live capacity data allows companies to immediately respond to opportunities in the market.

"We want to democratise the availability of high-quality market data and are therefore taking a pioneering approach by offering access to our Live Capacity dashboards for free to the air cargo industry," Keyrouse stated. "Airlines, airports, handlers, forwarders, OEMs, GSAs, and other industry-related companies can register to access the tool, free-of-charge.

Our belief is that the real value is not the market data itself, but rather in the interpretation and the analysis of this data, which drives actions and better decisions," he continued. "Our team has worked closely with customers to develop an in-house dashboard and analytics environment, focusing on ease-of-use and flexibility so all users can easily gain access to the wealth of insights in the data."

Pace of change

The industry is rapidly digitising and air cargo companies' desire to explore technological innovations is clearly there. However, for a number of reasons air cargo companies cannot leverage digitalisation as they would desire.

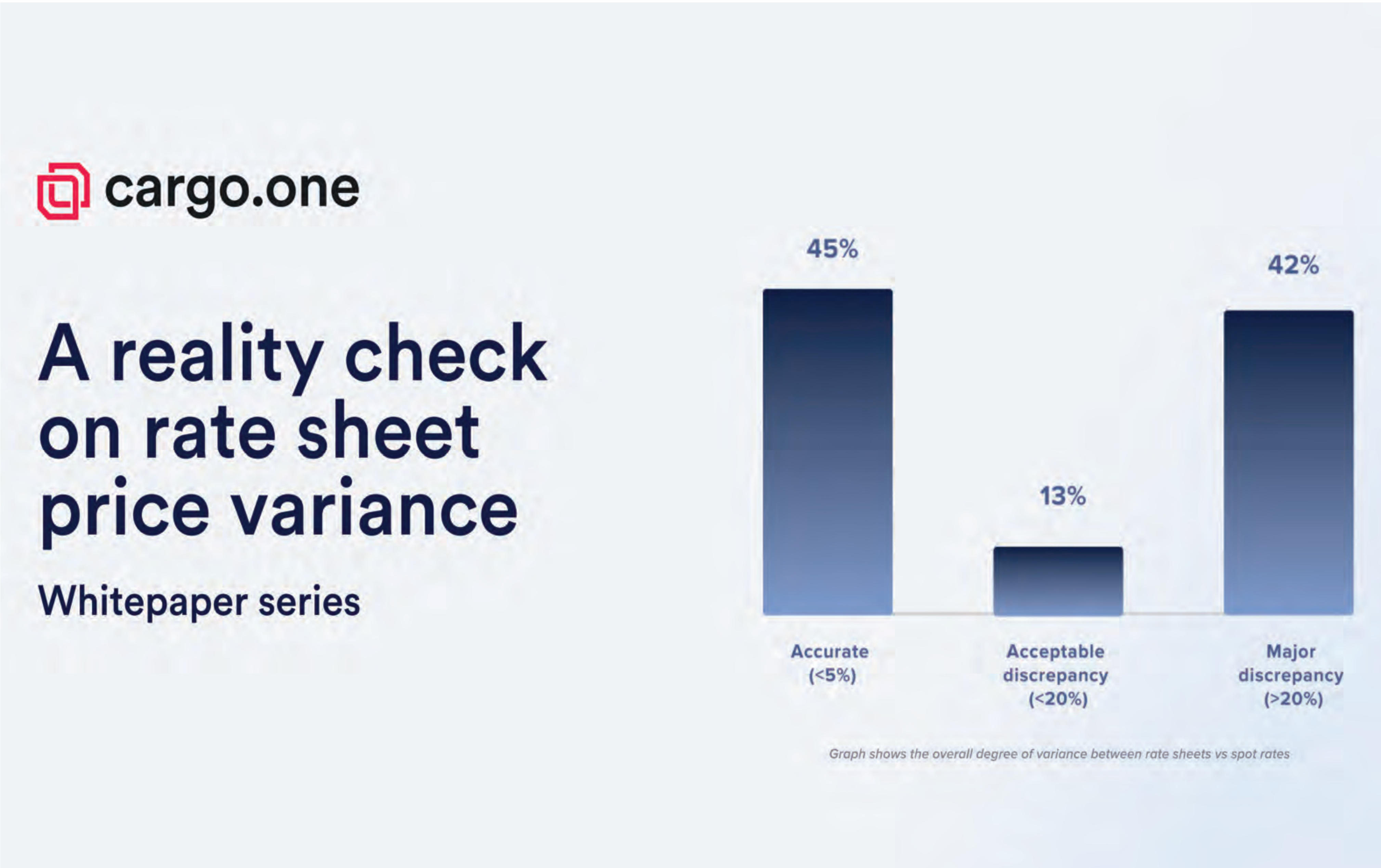
This is where the provision of detailed, real-time information comes in, helping airlines turn investments in data and technology into action.

"The air cargo industry has long been investing in digital and technology solutions, which have led to ever-increasing amounts of data being produced and stored every day. The true challenge, now, is not in collecting more data; it is in putting that data to good use and formulating real actions that improve commercial and operational decisions," Keyrouse explained. "This is what Rotate is focusing on."

"By closely operating with the air cargo companies, Rotate follows a co-development approach as we always build our solution on close cooperation with our customers," he added. "This allows us to perfectly capture and solve the real-world complexities within air cargo, while at the same time help steer towards a practical and real solution."

INSIDE

Rate sheet price variance under scrutiny



RATE sheets have long served as a convenient way to obtain a rapid price overview for a shipment. However, rate sheets can be compiled by airlines months before and in the face of an increasingly dynamic and unpredictable market, their effectiveness is now under scrutiny.

Digital booking platform cargo.one recently released a study that it hopes will help freight forwarders to bolster their rate intelligence. The data analysed the market prices for 10,000 origin and destination pairs in order to examine the degree of variance between rate sheets and available spot rates for the same shipment. Air Cargo Week sat down with the study's author Victor Landau, VP Product at cargo.one, to explore the key findings.

Studying rate sheets

"Rate sheets have been an important mainstay of airfreight quoting for decades, but their reliability and practicality have increasingly been in discussion in the forwarding community. As cargo.one is a very analytical, data-driven team, we were keen to investigate what price trajectory data could inform us all on the issue.

Our study examined almost one million data points of rate sheets and available dynamic spot rates from our huge breadth of market offer data, across a sample of our airline partners. We analysed the extent to which rate sheet prices diverge from available spot rates. This is quite unique research and it's an important topic for forwarders in relation to how they rate set and quote, particularly if their win rate is suffering as a result."

Key trends

"While rate sheets provide a ballpark figure for rates, these can often be inaccurate, usually on the side of overpricing. Firstly, rate sheets can be up to 1000% deviated from spot rates around one week before departure. For example, 40% of the time, rate sheet rates will be more than 50 cents / kg different from the dynamic rates available in the market. Some 60% of the time, rate sheet prices will be more expensive than spot rates, and in 28% of the time, they will be more than 1 Euro / kg more expensive.

"Secondly, airline choice, weight break and time to latest acceptance time are big factors in the divergence of rates. The data underlines that contrary to the general perception with forwarders, some airline rate sheets are a lot more reliable than others. Even among the largest and most agile and equipped airlines, the extent of price deviation between rate types was very different.

"Freight forwarders need resources to sharpen their market view and better predict the actual rates required. They are likely to be uncompetitive if their quoting does not follow prevailing market rates more closely."

Recommendations

"Our study also tested cargo.one's new live estimates rate guidance feature to the exact same level as we did rate sheets. These rates use back testing against actual recent searches, and actual rate sheets to derive a substantiated estimate of the best market rate for a shipment. Live estimate rates are within a 20% difference of the actual available spot rate some 85% of the time, while rate sheets are that close only 58% of the time.

"We found that live estimates hold strong accuracy that is agnostic of specific airline or the time from LAT, and they can handle a large volume of quoting requests. This makes these a valuable resource for quoting agents to draw upon."

Different approach

"Above all, the data shows that forwarders have much to gain in general from increasing their visibility and usage of spot rates. However, spot rates alone also have their drawbacks – requiring tens of seconds to load, which can restrict the process of generating quotes at speed.

Forwarders clearly need access to a solution that combines the convenience of rate sheets with the accuracy of live spot rates. Within their daily rate intelligence, I advise agents to combine rate sheets, live estimates and live spot rates, to achieve the optimal balance for scale and speed, and allow cross validation between rate sheets and market data. This approach will deliver far stronger accuracy for quoting."

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www.aircargoweek.com • www.azfreight.com

Annual subscription rates: £100 • €120 • US$140

Printed by Warners Midlands plc. The Mailing, Manor Lane, Bourne, Lincolnshire PE10 9PH

The future of air cargo: How heavy equipment is transforming air transport

EVERY day, heavy equipment that consists of construction, mining, forestry, and industrial machinery is transported all around the globe.

With a weight between 20 to at times, 1000 tons, it's an incredible feat that these machines are capable of being transported at all, let alone by air cargo.

But with a rough 2023 and demand at historic lows, what is the future of air cargo, and how is heavy equipment shipping helping to move the industry forward?

Problems that heavy equipment shippers face

The biggest problem when dealing with heavy equipment is safety. Not only can the heavy equipment in question weigh tonnes, but at times there is potential for the item to move during transit if it is not secured properly.

Heavy equipment can potentially be worth millions, adding more risk to the equation. Heavy transport also requires a trained staff at all times that understands how to navigate moving objects that weigh up to 1000 tonnse. This can cause delays if the proper staff is not there to offload the heavy equipment in time.

Another problem that heavy equipment shippers face is the high cost that comes into play when transporting heavy equipment via airfreight. Air is not the best way to ship heavy equipment as it's the less economical choice over sea, but there are times when deadlines must be met.

Joe Webster from A1AutoTransport says: "While air transport for heavy equipment is not our first solution for our customers, it sometimes is a necessity. A company may have a deadline and need a certain piece of equipment as soon as possible, and air transport is the only way to solve these logistical matters".

With a high focus on safety and the necessity for efficiency during shipping to reduce costs, heavy equipment shippers have brought a new way to look at the air cargo industry as they work around the problems they face.

A need for efficiency

With technology reshaping all industries, not just air cargo, the future is looking at integrating artificial intelligence in, whether with open arms or not.

Humans are limited when it comes to examining complex matters like supply chain logistics. When it comes to heavy equipment shipping, every second and every penny saved matters, and AI can help further the advancement of complex problems that aren't able to be solved by the human mind.

Inefficient logistical planning can have a ripple effect, and end up costing businesses up to 25% more over the long run factoring in delays. With the ability of cost-saving algorithms, it's now possible to think about heavy equipment shipping in a new way.

How items are transported together, what times they will be delivered, and even factoring in unpredictable events can all help bring down prices and provide a better transport experience.

For example, it may not be possible to do every single cost-benefit analysis even with a large crew, but AI can streamline this process, and make it easier for heavy equipment shippers to be more efficient, thus leading to more innovations in the air cargo space.

Focus on safety

The global construction industry is set to more than double in size between 2020 and 2030, and with that statistic in mind, that means that more heavy equipment is going to need to be shipped worldwide.

With only a limited amount of people able to safely move heavy equipment, it can cause delays and fines as the shipments wait to be unloaded by trained staff.

As the demand for heavy equipment shipping increases, the airfreight industry must work towards employing more heavy equipment transportation operators to ensure safety during transit.

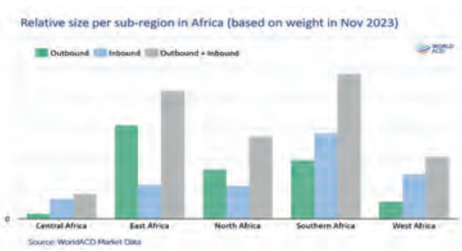
As these are not typical objects, and with more of them being shipped every day, the necessity for safety for the crew that is moving heavy equipment must be taken seriously as the airfreight industry advances into 2024 and beyond.

With better-trained staff, fewer incidents happen on the worksite, and fewer businesses will have to pay as more staff means fewer logistical problems down the road. Keeping everyone alive must be the priority for everyone involved in not only heavy equipment shipping, but any transport job where lives are at stake.

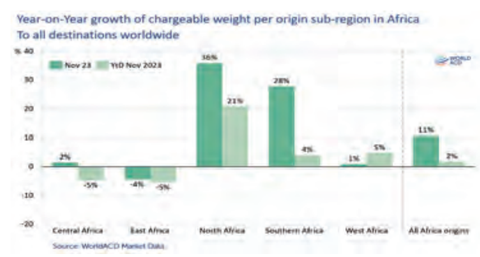
African airfreight market set to continue growing

THE airfreight industry plays a key role in Africa due to the vast and challenging geography of the continent, connecting businesses and supporting economic growth. As opportunities increase and focus increasingly turns to the region, the demand for airfreight services is only likely to grow.

Based on the largest and most comprehensive air cargo database in the industry, WorldACD recently conducted thorough analysis of international air freight to and from Africa. WorldACD's unique product-level and agent-level market data enables to provide the most accurate and up-to-date market data, based on 2 million worldwide shipments per month. According to WorldACD Market Data, worldwide air cargo originating in Africa continues to grow: overall tonnages from Africa increased +2% Year-to-Date Nov 2023 compared to the equivalent period in 2022.

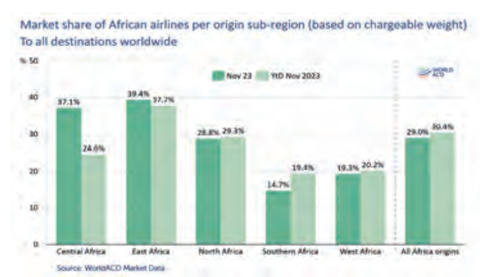


Figures of November 2023 indicate that both sub-regions East Africa and North Africa have seen higher volumes outbound compared to inbound. Sub-regions Central Africa, Southern Africa, and West Africa on the other hand, experienced similar directional imbalances, albeit in the opposite direction, with inbound tonnages exceeding outbound tonnages. Central Africa accounts for roughly 2% of the total outbound and inbound tonnages from and to Africa. In comparison, outbound and inbound tonnages from and



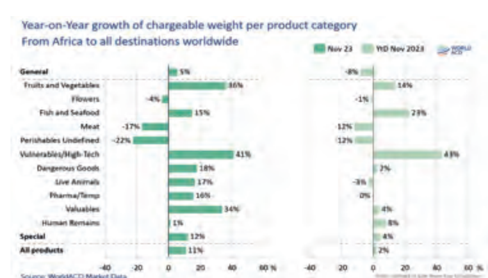
to Southern Africa account for over 40% of Africa's total chargeable weight in November 2023.

Air cargo originating in Africa continues to grow. Chargeable weight from North Africa in 2023 (YtD Nov) increased +21% compared to YtD Nov 2022. Southern Africa and West Africa have seen YoY growth of +4% and +5% respectively. However, outbound



tonnages from both Central Africa and East Africa decreased -5% compared to YtD Nov 2022. The chargeable weight of all African origin regions (YtD Nov 2023) increased +2% compared to the YtD Nov 2022.

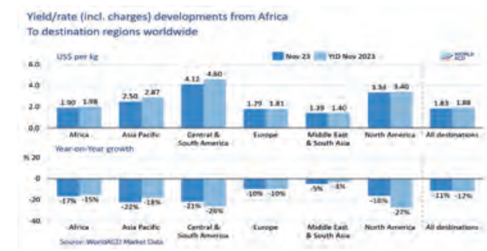
African airlines account for +30% of total outbound air cargo from Africa. The market share of African airlines per sub-region varies



from 19% and 20% in Southern and West Africa, to 25% and 29% in Central and North Africa. African airlines had a market share of 38% of total outbound chargeable weight from East Africa.

Zooming in on individual air cargo product categories is crucial for understanding rates and the development of air cargo markets. This is also the case for Africa, where 80% of outbound business and 30% of inbound business relates to special products.

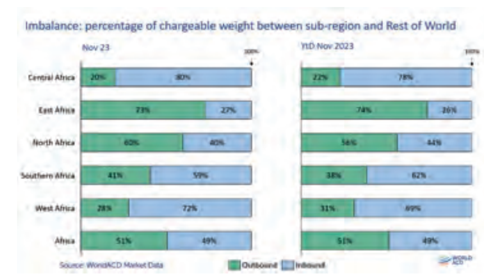
Most special product categories have shown positive YoY growth rates for Africa's outbound air cargo business. Total outbound tonnages of fruits and vegetables from Africa have increased +14%, and +23% in the category of fish and seafood. Several product categories show decreased YoY growth,



ranging from flowers -1% and live animals -3%, to meat and perishables undefined both -12%.

Overall special product growth from Africa was up +4% YtD Nov 23, whereas the general cargo from Africa decreased with -8%

USD yield/ rates from Africa have fallen significantly with -12% (YtD Nov 2023), with decreases to all destination regions. Outbound air cargo yield/rates to the



Middle East & South Asia decreased -3%, whilst rates for North America and Central & South America decreased -27% and -26% respectively. Rates from Africa to Europe decreased -10% and Asia Pacific -18%. Similarly, rates within Africa decreased -15% YoY.

Directional imbalances of worldwide trade are among the biggest challenges to overcome in global supply chains. Airlines operating in Africa also face challenges due to this imbalance between outbound and inbound. In some of Africa's sub-regions only a relatively small percentage of air cargo is meant for export (outbound business).

Roughly 31% of West Africa's total chargeable weight YtD Nov 2023 was accounted for by outbound, whilst the remaining 69% was inbound. In Central Africa, outbound represents an even lower percentage of 22% compared to 78% inbound. On the other hand, inbound in East Africa accounts for as little as 26% of the total chargeable weight, against 74% outbound. North Africa is the most balanced sub-region of Africa given its 56% inbound vs. 44% outbound ratio. In other words, directional imbalances vary from sub-region to sub-region in Africa, but the share of outbound and inbound in total tonnages from and to Africa as a region (YtD Nov 2023) is balanced with 51% vs. 49%.

Driving sustainability through visibility

SUPPLY chains generate around 60% of all carbon emissions globally. With pressure mounting on the industry to move towards a greener future, freight forwarders have the ability to help their customers ship their goods in more sustainable ways.

From pallet packaging, ensuring container fill is maximised or offering the most efficient transport modes, small changes can have a significant impact on the industry and the planet.

With both sustainability and supply chain visibility increasingly key priorities for companies in the logistics space, digital freight forwarder Zencargo has partnered with carbon measurement platform Pledge.

With Zencargo's centralised platform, customers gain better visibility of their inbound supply chain and can adapt their strategies to reduce their emissions. Through the system, customers measure their CO2 footprint using established methodologies like the Global Logistics Emissions Council framework and take direct action to reduce emissions through smarter planning, supplementing this with decisions to support offsetting initiatives to bridge the gap to their sustainability goals.

Origin to destination

The partnership between Zencargo and Pledge aims to provide visibility across all shipments for customers and help them make data-driven decisions for improving supply chain sustainability.

The platform allows for inbound measurement of a shipper's CO2 footprint at a shipment level. It can also retrospectively measure CO2 emissions for historical shipments executed by Zencargo.

The analytics the platform provides include mode, trade lane and transport legs. Zencargo's in-platform reporting capabilities allow businesses to export any data via the platform on a monthly or cumulative basis.

"The data that freight forwarders should have on their customers should enable them to give them actionable insights and advice on more sustainable routes and options," John Smith, Global VP of Operations at Zencargo, stated.

This was all visible in the support given to B-Corp and a British footwear company, measuring their greenhouse gas emissions. The data contributed to scope 3 emissions reporting for shipments since 2019, covering air, sea, and road movements facilitated by Zencargo. The solution reduced manual data input minimising discrepancies, centralised storage for benchmarking and offered scalable emissions tracking as operations grew.

Industry pace

While there has been progress in recent years towards a greener industry, the pace of change in the airfreight industry is not yet fast enough to meet the targets set by many governments and organisations.

To speed up the transition to a greener future, Zencargo is clear that businesses need to be investing in green and innovative technologies to help tackle supply chain emissions.

"In today's world, sustainability is not just a nice-to-have; it's a business imperative. With the increasing stringency of environmental regulations, businesses that fail to prioritise sustainability risk significant liabilities, including fines, reputational damage, and lost market share," Smith stated.

"To effectively promote sustainability, organisations must enhance education and awareness programmes. These programmes should emphasise the urgency of sustainability while empowering individuals to build persuasive business cases for sustainable practices. By equipping individuals with the knowledge and tools to articulate the benefits of sustainability, organisations can foster a culture of environmental responsibility and drive meaningful change from the top down as well as the bottom up.

"One way to start is to have the necessary tools to track and report on CO2 emissions in the supply chain to help understand offsetting and insetting opportunities to help build towards a more sustainable future," he added.

NORTH AFRICA ATTRACTS THE AVIATION INDUSTRY

"In the coming years, the government are planning to create a new free logistics area close to the airports and ports, which will make sure the country is ready to act as a hub"

North Africa is an increasingly attractive market for the airfreight industry, showing buoyant growth during an otherwise relatively flat year. Data shows that North Africa was one of just five sub regions to grow in the first six months of 2023, surging 21% year-on-year.

The strength of the North African airfreight market was in contrast to the 19% year-on-year declines seen in the United States and Southeast Asia, 14% drop in Northeast Asia and 13% fall in the Gulf region.

Based out of Tunisia's capital city, freight forwarder Tunis is riding this wave of growth despite intense pressure in the market from international airlines and their partners.

"Airlines are in hard competition from Emirates, Qatar Airways, to others with aggressive sales force. Recently, Ethiopian Airlines Cargo, in partnership with Poste Air Cargo, opened new routes to connect Tunisia to more than 84 destinations in Africa which offer more capacity and solution to Tunisian Economic operators," Montasser Channoufi, founder and CEO of Africa Transport & Logistics Solutions (ATLS), said. "Capacity of airlines is following the demand growth."

Strength in diversity

While increasingly hotly contested, the African airfreight presents a diverse range of opportunities in the cargo sector. Perishable items, such as fresh fish, automotive goods travelling to major hubs or oil and gas being moved, the options are vast for cargo handlers.

Europe is naturally a key market for export, given its close proximity to Tunisia, with North African exporters seeing them as part of the region's ecosystem. France, Germany, Italy and Spain are all hot export markets for ATLS, while inputs mainly come from the Asia-Pacific region. However, new markets are opening in Africandestinations.

"It depends on the global situation in the market," Channoufi explained, highlighting the importance of being ready to adapt to a sometimes unpredictable environment. "We are well organised to be flexible, adapting to last minute changes to fulfil the demands of our partners and clients."

Africa's infrastructure issue

Despite the clear interest in the region and the potential it provides, Africa remains a tricky market in the airfreight sector due to the limited facilities in the region.

Tunisia, for example, has seven international airport but only one main international airport in use at the moment for 95% of air cargo traffic " Tunis Carthage Airport", limiting the amount of flights that can go in or out of the hub. Regional authorities have noted the challenges around this already, looking to rectify it through the addition of other facilities in the near future.

"In the coming years, the government are planning to create a new free logistics area close to the airports and ports, which will make sure the country is ready to act as a hub," Channoufi highlighted. "In the next five years, Tunisia will be the gate to Africa."

Multimodal moves

With the risk of instability and the challenges around infrastructure, multimodal transportation has become a crucial element of operations. In North Africa, there is a new route being created that will cross domestic countries into sub-Saharan countries, creating opportunities for sea to road to air.

"We still have a lot of work to do," Channoufi stated. "There is not a lot of integrated connections, so that's one of the things we are working together to lift, linking new solutions."

RESILIENCE IN THE FACE OF REGIONAL INSTABILITY

After Niger's military leaders seized control in August 2023, the country's airspace was closed. The move came "in view of the threat of intervention from neighbouring countries" after the Economic Community of West African States (ECOWAS) threatened military action to restore Mohamed Bazoum to power. Months on from the coup d'etat, Niger has reopened its airspace, as ECOWAS continues to impose sanctions and economic pressure on the country.

Despite the challenging circumstances, Niger Air Cargo (NAC), a subsidiary of ECS Group, expects to see the region rebound

steadily throughout the next 12 months. Although acknowledging shifts in cargo demand and trade patterns during the disruption in the country, NAC has reaffirmed its commitment to the region.

"NAC remains steadfast in providing a freighter solution not only to Niamey but to the entire region, contributing to the economic recovery and development of the area," Adrien Thominet, ECS Group's CEO, said.

"As we anticipate the return of volumes in the year ahead, our assessment aligns with an outlook similar to that of 2023. While challenges and uncertainties persist in the global landscape, we are optimistic about the resurgence of cargo volumes in the region.

"Niger Air Cargo is well prepared to navigate the evolving dynamics, leveraging our experience, infrastructure, and commitment to providing top-notch cargo services. We foresee continued growth and resilience in the air cargo sector, and NAC is poised to play a leading role in contributing to the region's economic development through reliable and efficient freight solutions," he explained.

Cargo connections

Niger Air Cargo's unique positioning is demonstrated by having a local Air Operator Certificate (AOC), granting it traffic rights to all surrounding countries.

"The local AOC serves as a gateway, facilitating increased access not only to Niger but also to neighboring regions. This capability positions NAC as a reliable and comprehensive cargo solution provider for the broader geographical area," Thominet highlighted.

The B747 service from Europe to Niger will see Niger Air Cargo transporting a diverse range of key cargo types; including the transportation of energy and drill equipment, facilitating crucial operations in the region. Additionally, the carrier will handle consolidations, catering to the varied needs of clients.

More than 4.3 million people, or 16% of the country's population, require humanitarian assistance in Niger, the Directorate-General for European Civil Protection and Humanitarian Aid Operations (ECHO) stated towards the end of 2023. The UN has previously warned that regional sanctions and the border closure had a significant impact on the country's supply of vital food and medical supplies.

As such, human relief efforts and medical supplies are prominent among the cargo types NAC transport. "This underlines our commitment to supporting essential services and humanitarian initiatives in Niger and beyond," Thominet added.

Adapting amid volatility

Naturally, given the ongoing geopolitical situation in Niger and other African nations, logistics companies have to be braced for change, sometimes at incredibly short notice. Domestic and international policy changes can reverberate throughout the supply chain, requiring logistic providers to adapt their operations to ensure minimum disruption to supply chains.

"Our ability to keep offering operations in Niger amid challenging circumstances reflects the resilience and adaptability ingrained in Niger Air Cargo's approach. The flexibility in our operations is attributed to the dedicated teams within our ops and charter divisions," Thominet highlighted.

To achieve that resilience NAC has built a strong presence on the ground, recognising that it is an irreplaceable asset if you wish to have a deep understanding of the environment and key connections to regional authorities.

"This local presence enhances our agility in managing operations efficiently, ensuring the uninterrupted flow of cargo and the smooth functioning of supply chains, even in tricky environments," Thominet added.

"While the origins of the flow may have undergone some changes, our operations remain stable, and we are adeptly managing any adjustments required. There are no significant operational issues to hinder our flights, showcasing the resilience and adaptability of our operations," he continued. "With a poised and responsive approach, we are well prepared to navigate the dynamics of the return and ensure the continued success of the route."

"As we anticipate the return of volumes in the year ahead, our assessment aligns with a outlook similar to that of 2023"

AFRICA'S GROWING POTENTIAL

WHILE other regions faltered throughout 2023, cargo carriers across Africa enjoyed a strong showing, with plenty of untapped potential remaining.

Africa has predominantly served as an import market, particularly from the Far East into the continent. However, there has been a dynamic shift with growing markets adapting to changing demands. Each country undergoes a transformation in the products it specialises in.

Take South Africa, for instance; a decade ago, it was a major supplier of melons to Europe. Over time, this shifted to string beans and, more recently, berries. These changes are largely influenced by seasonal variations. In the case of Nairobi, their specialisation lies in flowers, predominantly roses.

Market preferences evolve and Morocco is a noteworthy example, embracing farming and developing into a hub for organic produce. This shift is reflective of global trends, with perishable items like apricots finding their way into markets, such as the UAE.

"Africa has always been developing. You're going to have these flows of pharmaceuticals and technology companies moving into Africa. You might see market changes with what's happening globally," Grant Kemp, Etihad Cargo's Area General Manager – EMEA region, stated. "This is why I love Africa – nothing is stable. Africa is Africa."

Passengers open the door

When considering the development of the airfreight industry in Africa, Etihad Cargo, as a primarily passenger airline, examines flows across the region to identify the best routes to service for customers and cargo.

"Expanding across Africa, Etihad Cargo has selected key destinations within emerging markets to meet the rising demand," Kemp added. "We're reliant on passenger aircraft, as we only have five freighters, but through 2024 we'll see a lot more diversity within product movement."

When it comes to cargo destinations within Africa, South Africa is by far the strongest. Kenya stands out as a close second for imports, with Nigeria being a potential candidate.

"For instance, looking at Egypt and Ethiopia, which is the largest growing country, we don't necessarily focus solely on flocking to these locations. Instead, we are exploring the possibility of supporting Nairobi as an outlier. For Kenya, Etihad Cargo has recently announced the initiation of daily passenger flights to Nairobi and three times a week to Mombasa," Kemp highlighted.

Multimodal moves to avoid disruption

Given the risk of instability and disruption to the supply chain in African nations, be that through conflict or, as seen during Covid, border closures for medical reasons, cargo carriers need to be ready to adapt at short notice to keep cargo flowing.

Etihad Cargo has strategically established a "spider web" network. To illustrate, consider Johannesburg and South Africa as key components of this network, intricately connected through various trucking operators, allowing for a seamless flow. Ground operators play a pivotal role in operations, navigating the complexities, particularly in Central Africa amid instability and security concerns.

This approach seamlessly aligns with Etihad Cargo's approach toward partnerships in the region, such as the collaboration with Astral Aviation. This strategic alliance taps into the invaluable on-the-ground knowledge possessed by regional operators. Collaboration allows Etihad Cargo to penetrate markets where their partners have expert knowledge.

"I've set up the region spider web," Kemp outlined. "Communicating with partners is one way to tap into markets and steer clear of potential hurdles. Local airlines and experts will open up Africa for us."

Five years down the line, we'll probably bring about 10 new destinations into Africa, as we receive more demand," he continued.