



LATIN AMERICA
SUPPLEMENT

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THERE WAS REVENUE MANAGEMENT.
UNTIL THE DAY
THERE WAS ECS GROUP.

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LATIN AMERICA SUPPLEMENT

Your guide to the latest developments in the international airfreight industry



WHY ECS GROUP DANCES TO A SAMBA BEAT

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airfreight:
more than a
billion dollar
business**

**AFKLMP
Cargo:
building on
90 years in
the region**



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LATAM AIRFREIGHT: MORE THAN A BILLION DOLLAR BUSINESS

The count of countries in Latin America can fluctuate based on the chosen definition. Typically, there are 20 sovereign nations in Latin America, encompassing the Latin America and the Caribbean region. However, it's crucial to recognise that diverse definitions may encompass more or fewer countries.

As indicated by industry experts at India-based Mordor Intelligence, the Latin America airfreight industry is poised for growth, projected to increase from \$1 billion in 2023 to \$1.23 billion by 2028, with a Compound Annual Growth Rate (CAGR) of 4.22% during the forecast period.

The air trade in Latin America is on the rise, primarily due to capacity expansion and rising demand for fresh Latin American perishable goods worldwide. Nevertheless, outdated regulations and sluggish infrastructure development hinder the region from reaching its full potential. Economic instability, varying travel restrictions, newly imposed taxes, and limited government financial aid make for an uneven recovery from the COVID-19 pandemic-induced downturn.

In August 2022, data from the International Air Transport Association (IATA) showed a 9.0% increase in airline freight volumes in Latin America compared to August 2021, surpassing other regions. This growth is attributed to the introduction of new routes and expanded capacity. The region is also expected to invest more in air cargo aircraft in the upcoming months, with a 24.3% capacity increase compared to August 2021.

While some global airfreight corporations continue to face challenges, Latin American carriers outperformed other regions, experiencing a 13.8% increase in cargo volumes in May. This positive trend is fuelled by airlines in the region launching new routes, expanding capacity, and investing in more air cargo aircraft. Compared to May 2021, the region's capacity increased by 33.3%.

The airfreight sector currently confronts various challenges, including grounded aircraft, reduced routes and decreased demand, in contrast to the strong consumer demand of the previous two years. These challenges, including supply chain disruptions, ongoing conflicts, a sluggish global economy, and the possibility of a worldwide

recession, are anticipated to lead to a subdued fourth quarter in 2023.

E-commerce is experiencing significant growth in Latin America, particularly in cross-border e-commerce. This is attributed to the scarcity of physical retail space, limited product availability, widespread smartphone usage and cost savings. The industry is continually innovating to leverage technology and develop fraud protection and authentication solutions, which enable key players to identify online shoppers, including through biometric data.

According to the Mexican Association of Online Vendors (AMVO), the Mexican e-commerce market generated \$20.8 billion in revenue in 2021, marking a 27% increase from 2020. The top-selling products in the Mexican e-commerce sector included food delivery (72%), clothing (64%), electronics (55%), toys (51%) and beauty and personal care products (49%). Mexico's e-commerce market is anticipated to reach \$60.8 billion by the end of the year, with Mexico ranking as the second-largest e-commerce market in Latin America, following Brazil's 120% growth from 2020. Other significant e-commerce markets in Latin America include Argentina, Chile, Ecuador and Colombia.

In Latin America, social commerce is gaining momentum, with more than half of shoppers in Brazil, Colombia, and Mexico engaging in social commerce, which includes platforms like Amazon, Rappi or MercadoLibre. Payment flexibility is a key advantage of social commerce, with over 40% of customers in Brazil, Colombia and Mexico favouring this option.

There is a growing demand for consolidated airfreight in Brazil, where customs and border regulations rank 52nd globally in the E-freight Friendliness Index (EFFI). The air cargo transportation market has expanded due to the benefits it offers, including faster and safer product movement. Factors driving this growth include new businesses through bilateral agreements, international market expansion, increased investments, technological innovations and greater industry segment utilisation.

It must not be forgotten that Latin America accounts for only 3% of global air cargo. However, this diminutive size takes nothing away from the samba vibrancy of the sector in the region.

Editor:	James Graham
Associate Editor:	Chris Lewis
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International Sales Director:	Rosa Bellanca
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WHY ECS GROUP DANCES TO A SAMBA BEAT

“This expansive presence is fortified by an army of over 80 local heroes, strategically stationed across the region, forming the backbone of ECS’s unparalleled service delivery”





In the vibrant landscapes of Latin America, ECS Group stands out as a “dominant force”, strategically positioned in key markets including Brazil, Mexico, Argentina, the Dominican Republic, Peru, Chile, Ecuador, and Colombia.

“This expansive presence is fortified by an army of over 80 local heroes, strategically stationed across the region, forming the backbone of ECS’s unparalleled service delivery,” said the Group.

ECS Group takes pride in representing over 30 airlines, making it the go-to partner for a diverse range of carriers seeking comprehensive and tailored solutions. This extensive airline portfolio isn’t just a number; it is a testament to ECS’s versatility and industry trust, showcasing its ability to navigate the complexities of the Latin American air cargo market with finesse.

Fuelling ECS’s triumph in the region is the integration of cutting-edge technology from its Cargo Digital Factory. This technological prowess isn’t just a feature; it’s a commitment to innovation that provides ECS with a distinctive edge. Through the application of advanced tools, ECS optimises operations, enhances efficiency, and crafts solutions finely tuned to meet the unique demands of the Latin American air cargo industry.

The dynamism of the Latin American market is matched by the vigour and proficiency of ECS’s on-the-ground teams. These local heroes, armed with a profound understanding of the regional landscape, navigate market intricacies with agility. It’s not just about having a presence; it’s about having an impact and ECS’s teams ensure that every operation is a testament to their expertise.

As a teaser to further amplify its impact, ECS Group is gearing up for a game-changing announcement in December - the acquisition of a new GSA. This strategic move underscores ECS’s relentless commitment to expansion and strategic partnerships, further solidifying its position as an industry leader shaping the future of air cargo services in Latin America. Stay tuned for this significant milestone, as ECS continues to redefine the rules of the game.

PRIMEAIR



LATIN AMERICA'S GO-TO GSSA FOR OVER TWO DECADES

It's not enough to be in the right place at the right time. You have to be with the right GSSA in the right place at the right time. Let's check in with Miami-based PrimeAir, Latin America's premiere General Sales and Service Agent that's been serving the region for over 22 years.

Currently, there's a glut in air cargo capacity as airlines across the world that ordered new freighters during the pandemic are now struggling to fill them. All the while passenger carriers, responding to the strong recovery in travel, are deploying even more aircraft – and more belly-hold capacity.



Despite this, it's the right time to be in Latin America as air trade here is growing with demand for fresh perishable goods around the globe.

The Latin American air freight industry is expected to grow from USD 1.00 billion in 2023 to USD 1.23 billion by 2028, at a CAGR of 4.22 percent during the forecast period (2023-2028), according to the International Air Transport Association (IATA). In fact, Latin American carriers outperformed all other worldwide regions in May, in defiance of the general

declining trend with a rise in cargo volumes of 13.8 percent.

"Air cargo companies looking for the right place to deploy new service are finding Latin America highly desirable, especially considering the sizable year-round production of produce, fresh-cut flowers, and fish throughout the region," says Roger Paredes, CEO of Prime Group.

"As a trusted GSSA in the Americas for over two decades, we've gained a reputation for sustained reliability and high-quality service to our air carrier customers, including some of the most reputable names in global air cargo transport" adds Paredes. "This is precisely why PrimeAir is the go-to GSSA in Latin America."

Think Globally, Act Locally

Providing a global service combined with extensive local knowledge, PrimeAir customizes regional front-line services for airlines and other enterprises from across the globe. They specialize in commercializing air freight capacity, supervising complex local operations, and providing professional sales and marketing support.

PrimeAir's Miami headquarters – located in the "Gateway to Latin America"

– is the perfect point of contact for airlines from all across the world – while the company's hub stations in Ecuador and Colombia closely supervise the action on the ground throughout the region.

Broad Spectrum of GSSA Services

PrimeAir's specialty skills also include international certifications for reception and dispatch of aircraft, airport and cargo security management, and a thorough knowledge of international customs and trade rules. Be it in service to an ad hoc or long-term agreement, PrimeAir's broad spectrum of GSSA services also includes:

- Air Cargo Charters
- Warehouse Management
- Cold Storage & ULD Control
- Ramp Supervision & Ground Handling
- Data Analysis & Online BI Reporting
- Revenue Accounting & Yield Management
- Management Reports
- Representation at Industry Events
- Direct Mailings & Market Analysis
- Customer Service

Logical Alternatives for Customers

PrimeAir's local-market proficiencies also extend to the U.S. Stepping back to 2022, when a prominent Latin America-based cargo carrier wanted to enter the lucrative North American market, they knew they needed an established GSSA to help them feed new traffic between the U.S. and their South and Central American network.

PrimeAir accepted the challenge to represent their service, increase cargo volumes, and optimize operational efficiency. And business is taking off.

Today, all the extra cargo capacity compared to demand is putting downward pressure on rates worldwide, making this a good time for Latin American shippers and forwarders to double down on air freight – and a good time for air carriers to set up shop with a GSSA that knows the terrain, PrimeAir.





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LATAM CARGO CERTIFIES SUCCESS IN STANDARDS



“Consequently, it is with pride that LATAM Cargo acquired the status as the world’s first airline to attain the coveted CEIV Li-batt certification in September 2022”

LATAM Cargo, headquartered in Chile, has attained multiple certifications from the International Air Transport Association (IATA). These certifications signify its commitment to achieving excellence in the air cargo industry, says the carrier.

The air cargo sector presents a unique challenge in terms of benchmarking, making it difficult for organisations to identify short-term improvement opportunities and long-term strategic priorities. However, as an airline, LATAM Cargo takes on the responsibility of ensuring the sustainability of its operations.

In 2016, LATAM set a significant objective for LATAM Cargo: to establish itself as the preferred airfreight provider for the transportation of pharmaceutical products. Recognising the pivotal role this industry plays in global well-being, the vision was validated four years later. LATAM Cargo aspired to claim a premier position in the Americas, so it was imperative to demonstrate to customers an ability to not only meet but surpass the rigorous standards they demanded.

In 2021, the carrier expanded its focus to encompass the broader vision of sustainability. The LATAM Airlines Group committed to implementing a world-class environmental management system that would enhance the organisation’s performance and enable it to better manage and mitigate environmental impacts. As the cargo subsidiary of the group, it concentrated efforts on enhancing its environmental management practices, building upon the existing ISO 14001 certification.

The following year, it set its sights on elevating the compliance standards for shipping lithium batteries. In a world where lithium batteries have become ubiquitous, it is imperative that all industry stakeholders, including shippers and forwarders, as well as regulators and customs authorities collaborate to mitigate associated risks. Given a reputation for upholding high standards, they took it upon themselves to collaborate with IATA, with the aim to set a pioneering example and drive industry-wide initiatives.

In pursuit of these objectives, the certifications offered by knowledgeable partners with a global reach played a crucial role in ensuring that operational processes and strategic decisions align with industry best practices. For LATAM Cargo, the choice of IATA Certification was clear and unequivocal, says the carrier.

CEIV Pharma

In 2016, as part of a strategic mission to expand pharmaceutical transport business, LATAM Cargo initiated the journey towards becoming a Center of Excellence for Independent Validators on Pharmaceutical Handling (CEIV Pharma). This globally-recognised standard serves as an assurance to customers, guaranteeing safety, security, compliance and efficiency for the transportation of high-value pharmaceutical shipments.

Dedicated efforts commenced with an internal evaluation conducted in March of that year, culminating in the successful completion of the final audit by IATA in January 2017. This milestone positioned them as the first airline in the Americas to earn this certification. The airline secured recertification in March 2020. The airline is anticipating its second recertification audit, extending the PHARMA product’s certified status to an impressive six-year span.

CEIV lithium batteries first

Following CEIV certification, the decision was taken to take the lead as the pilot airline and cargo handling facility for the CEIV Lithium Batteries certification. The secure and responsible transportation of lithium batteries holds deep significance for the airline and the carrier was particularly drawn to the fact that this certification extends its applicability to organisations across the entire supply chain.

Consequently, it is with pride that LATAM Cargo acquired the status as the world’s first airline to attain the coveted CEIV Li-batt certification in September 2022.

LATAM Cargo also looked to acquire the prestigious IATA Environmental Assessment (IEnvA) certification, aligning itself with the overarching commitment of the LATAM Airlines Group to certify all its operations. IEnvA serves as an independent evaluator, meticulously assessing how aviation stakeholders continuously enhance their environmental and sustainability performance. While this terrain was relatively uncharted for LATAM Cargo, collaboration with IATA provided steady guidance, enabling it to successfully attain stage 1 certification in the autumn of 2021. The invaluable insights derived from the baselines shared by IATA were profoundly instructive, shedding light on the intricacies of environmental management and enhancing awareness of these critical aspects.

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“Capacity in Latin America has indeed been growing as many routes lost during the pandemic have resumed and in conjunction with newer aircraft by the main airlines serving the region.”

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**HAE GROUP
AMERICA**

Industry observers have noted that the air trade in Latin America is growing, with an increase in capacity addition and demand for fresh Latin American perishable goods across the globe. However, archaic regulations and slow growth in infrastructure are hindering the continent from realising its full potential.

There is something in this observation, considers Felipe Campillo, HAE Group regional director Spanish Latam.

He says: “Capacity in Latin America has indeed been growing as many routes lost during the pandemic have resumed and in conjunction with newer aircraft by the main airlines serving the region. However, high inflation in some countries, the rise of the dollar and new taxes on e-commerce mean that improvement is in some markets slower than we would like.

“Despite these problems, the demand for perishable products from the region to the world has increased at considerable levels in markets such as Colombia, Chile, Ecuador or Peru; countries that must struggle to include air capacity to transport these products.”

The UK-based aviation group opened its first office in the region after it raised their flag in Brazil in 2010 and a year later Chile office made its debut in the market. In 2019 Argentina came onboard.

Opportunities

Campillo says: “We are constantly looking at all markets



UP SUPPORTS LATIN AIRFREIGHT

in the region for opportunities. We are part of a global group of companies and always encouraged to grow. We also have a number of sister companies in the region specifically as is the case of Colombia and Ecuador, where one of our flagship products such as HAE Solutions is managed by one of them on our behalf."

Latin America airfreight witnessed a significant growth rate in 2021/22. The growth is mainly attributed to the offering of new routes and capacity. Is this the experience of HAE Group?

Campillo agrees: "It is. Airlines we represent in the region reinstated routes and capacity in this period and in this way, they gave greater alternatives to the markets to be able to transport their products.

"Most airlines are recovering from what they experienced during the pandemic and as they recover the routes that were frozen, they are reincorporating aircraft to the fleet and in many cases, already thinking about the future, investing in new aircraft that will serve new destinations that will be served from the region to the world.

Safe place

Given the poor reputation of many cities and regions in Latin America, is cargo security a major issue for players like HAE Group? Campillo refutes that this cliché has much relevance for airfreight in the region.

He says: "I would not describe aviation security in the region as the major issue; compliance is high. But it is true that it is a

task on which much more emphasis must be placed to get rid of that reputation. Security is an issue that is top of everyone's mind around the world; however we have seen this year serious failures in events that occurred with the transportation of valuables at the airports of Santiago and Toronto.

"In general, the region is a safe place to do business and security has been constantly improving with more controls not only on the cargo being transported but also on access to the terminals."

Traffic flows

HAE Group's focus is not only on GSSA activities as we know it, but also on being an air cargo solutions provider for customers, considers Campillo. "We see a possibility to expand our product HAE Solutions in the region. HAE Solutions offers not only point-to-point freight forwarding options but also EXW, DDP, DPU through our offices in different regions of the world."

In Latam, its client airlines mainly move e-commerce, pharma, technology and from our countries, mainly perishables, flowers, salmon and fruits."

The number of staff in the region has remained stable for some years, without major movements and will increase as the business requires it, he adds.

"As we come out of the pandemic all service providers in the region need to broaden their base of services, find new options for their customers and embrace new concepts such as digitalisation. HAE is ideally placed having deployed these strategies across the world."



"I would not describe aviation security in the region as the major issue; compliance is high"



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AFKLMP CARGO: BUILDING 90 YEARS IN THE REGION



In no way can AFKLMP Cargo be described as a new arrival in the Latin American region. You have to go back almost ninety years, during the reign of Queen Wilhelmina of the Netherlands, to witness the arrival of KLM at Curacao in 1934.

In the span of time since, KLM has become a part of the Air France KLM and Martinair (AFKLMP) grouping that now reaches many parts of the region.

While there was no chance that Enrica Calonghi, director South America AFKLMP Cargo, could have seen the first flight, she now completely builds on that first flight to take charge of a cargo operation very much grounded in the present.

She says: "Our first flight on KLM to the region was Amsterdam - Curacao in 1934. It marked the start of our so-called 'West Indies Company', providing flights within the Netherlands Antilles, Suriname and neighbouring countries. They were mainly driven to provide mail transport."

Capacity demand

Industry observers comment that the air trade in Latin America is growing, with an increase in capacity addition and demand for fresh Latin American perishable goods across the globe. However, archaic regulations and slow growth in infrastructure are hindering the continent from realising its full potential.

This is a point of view that Calonghi agrees with. She notes: "Yes, the statement reflects some of the dynamics we experience within the air trade industry in this area. The region is known for its production of fruits, vegetables, flowers, even though climate changes have hampered the production in the recent months. It is also true that there has been an increase in capacity touching this area."

"The challenges that you highlight on archaic regulations are valid concern. The outdated and cumbersome regulations can significantly hinder the industry potential for growth and development, increase the costs and give operational difficulties for day-to-day operations. This can be more evident in some countries than in others."

"Regarding the infrastructure, I find in South America better

warehouses than in other parts of the world, with modern technologies and streamlined processes. However, to realise its full potential, addressing the regulatory challenges is crucial."

AFKLMP Cargo's exports and imports volumes from/to the region are quite balanced. What is different is the type of volumes: on export mainly flowers, fruits and vegetables; on import mainly pharmaceuticals and machinery.

She adds: "We were expecting a decline in exports during the pandemic; however the demand of flowers and fruits was extremely strong in the years 2021/2022. We took full benefit of this and decided, as a group, to stay in the area with full freighters and converting passenger aircraft to facilitate cargo only flights on board of which we brought tonnes of COVID-19 vaccines."

Optimism and launches

It is said that airlines in this region have demonstrated optimism by launching new routes and capacity, and in certain cases investing in more aircraft for air cargo in the coming months. Can this be AFKLMP Cargo's experience as well?

She says: "In 2020, Air France KLM Martinair Cargo represented more than 30% of the offered capacity in this area; in some countries we reached more than 50% of the offered capacity."

"In the recent months, thanks also to the performance in other regions, there is great optimism in this area and more capacity is being added. Our Group was there during the pandemic and believes a lot in this region. We are here to stay and to continue connecting business between Central and South America to the world."

The e-commerce market is expected to grow in the region to \$60.8 billion by the end of the year, according to Americas Market Intelligence. According to the Brazilian E-Commerce Association, Mexico is the second largest e-commerce market in Latin America in 2021, up 120% from 2020, behind Brazil. Other large e-commerce markets in Latin America are Argentina, Chile, Ecuador and Colombia. Is AFKLMP Cargo able to take advantage of this business?

"With its large population, Brazil has one of the most developed and



country.”

Calonghi has spotted some trends in the region that will be profitable in the coming years. She notes: “I think the region has a big innovation heart that connects well with our digitisation ambition. Supporting our customers in digitalisation is key to improving the logistic chain, and we are proud to offer a state of the art, robust and customer friendly digital structure, which supports the dynamic trend that we see in this year.

“Another trend that we see is on the importers of fruits and vegetables in Europe: some supermarkets have already commented on the sustainability of sending these products via air.

“Sustainability is at the core of Air France KLM Martinair Cargo’s mission, and we are proud to say that we have been one of the first airline groups to introduce a Sustainable Aviation Fuel (SAF) programme, paired with our “goSAF” proposition, enabling customers to purchase SAF on a booking level. Mind, this is not a commercial proposition, it is a way to collaborate in reducing the carbon footprint and creating a more sustainable airfreight of the future.”

“Security is indeed a significant concern in the area”



extensive e-commerce markets in South America, thanks to a rapid growing internet user base. The country has a robust infrastructure to support online retail, and many services and products available through e-commerce platforms. For this reason, the country has dedicated full one-branded freighters services. Indeed, also Argentina, with its significant e-commerce presence, Chile, a well-established e-commerce market, and Colombia, where e-commerce steadily grows. All these countries boosted significantly during the pandemic period, due to restrictions and safety concerns, further accelerating the growth of digital retail market,” observes Calonghi.

“We are receiving high-end e-commerce, at the same time our main import in Latin America continues to be pharmaceutical products, which is our focus product, with great investments in both our hubs in Amsterdam and Paris.”

The carrier is not self-handled in South America. It partners with local or global Ground Handling Agents to support it in the handling of inbound and outbound cargo into and from the region. To name a few, these include Global Handers, Menzies and Swissport as well as local handling agents like Aerosan and Saasa.

Road Feeder Service (RFS) in South America can vary from country and from region. The quality and the efficiency of road transportation depend on multiple factors, including infrastructure, regulations, and security. In Brazil, AFKLP has feeder services subcontracted with trucking companies that works well. However, it lacks this in Colombia, where infrastructure and timing are more challenging.

‘Big innovation heart’

Given the poor reputation of many cities and regions in Latin America regarding security and crime, is cargo security a major issue for Calonghi?

“Security is indeed a significant concern in the area. For this reason, we have invested in all airports in collaboration with security companies, that provide a dedicated service of security monitoring and detecting any irregularities before the cargo is leaving its origin

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