

AIR CARGO

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On the Cover

Paul Puopolo

Executive Vice President of Innovation
Dallas Fort Worth International Airport

SPECIAL CONFERENCE EDITION - SPRING 2024

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Resilience

Notes From the Editor's Desk



Alexis Dames
Vandenbrande

American General George S. Patton once famously wrote, "I don't measure a man's success by how high he climbs but how high he bounces when he hits bottom."

Certainly, General Patton was describing what today is commonly referred to as resilience. Hailing from the Latin word "resiliens," and first used with its modern definition in 1807, the

ubiquitous term is currently employed in all business sectors as a reference to the ability to quickly recover or adjust to change.

It's easy to find incredible examples of resilience in air cargo, chiefly those exhibited during the pandemic. At a time when all doors were closed, streets were empty, and hospitals were beyond capacity, air cargo stepped up to transport vaccines and protective equipment at an unprecedented scale. Which is why this year's conference theme, "Resilience Through Agility: Partnering for a Changing World", resonates so strongly with the values our industry works so hard to uphold.

Beyond the health crisis, air cargo has demonstrated resilience in many ways, especially when dealing with issues such as disruptions caused by weather events, economic shifts, geopolitical uncertainty, or changing market dynamics.

What is certain is that all companies and attendees convening in Dallas for the CNS Partnership Conference are prime examples of the power of resilience and cooperation.

This special conference issue highlights some of our esteemed colleagues who will be attending the confer-

ence such as Paul Puopolo, Executive Vice President of Innovation at Dallas Fort Worth International Airport (DFW); Stanislas Brun, Vice President Cargo at Etihad Cargo; Ryan Carter, Executive Vice President, Americas at AIT Worldwide Logistics; Fred Ruggiero, Vice President of Cargo, The Americas at Cathay Cargo; and a very special recap of Brendan Sullivan's momentous speech at the World Cargo Symposium in Hong Kong.

I hope this 2024 CNS Partnership Conference provides all of you with great insights that can catalyze new growth opportunities.

Alexis Dames Vandenbrande
Editor



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We welcome your comments, opinions and suggestions. The digital edition of this publication is available online at www.cnsc.net



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Training

From the Top - Paul Puopolo

Executive Vice President of Innovation Dallas Fort Worth International Airport (DFW)

by Alexis Dames



Paul Puopolo

About Paul Puopolo

Paul Puopolo serves as Executive Vice President of Innovation at Dallas Fort Worth International Airport. He leads DFW's Innovation function to identify, assess, and drive the collaborative development of new solutions and business models to create new growth and competitive advantage.

Mr. Puopolo is an experienced "intrapreneur" with multi-industry innovation, emerging technology, and direct-to-consumer background. Throughout his 16-year innovation career he has built and led corporate innovation teams within the healthcare, financial services, and airport industries. In these roles, he was accountable for developing business innovation strategies and portfolios to increase profitable growth, improve the consumer experience, and champion an innovative culture.

Since joining DFW, he and his team have received the 2021 Future Travel Experience Transportation Power List Outstanding Achievement Award; the 2022 Innovation Leader Impact Award; and nominated for the 2023 & 2024 Product

Development & Management Association's Outstanding Corporate Innovator Award.

Mr. Puopolo served as an active duty officer and pilot in the U.S. Navy (retiring after 22 years of service).

Focus: Thank you, Mr. Puopolo and all the team at DFW, for hosting this year's Partnership Conference. More importantly, congratulations on reaching 50 years of operations! During these five decades, what would you say are the most important milestones that shaped your cargo operation into its present form?

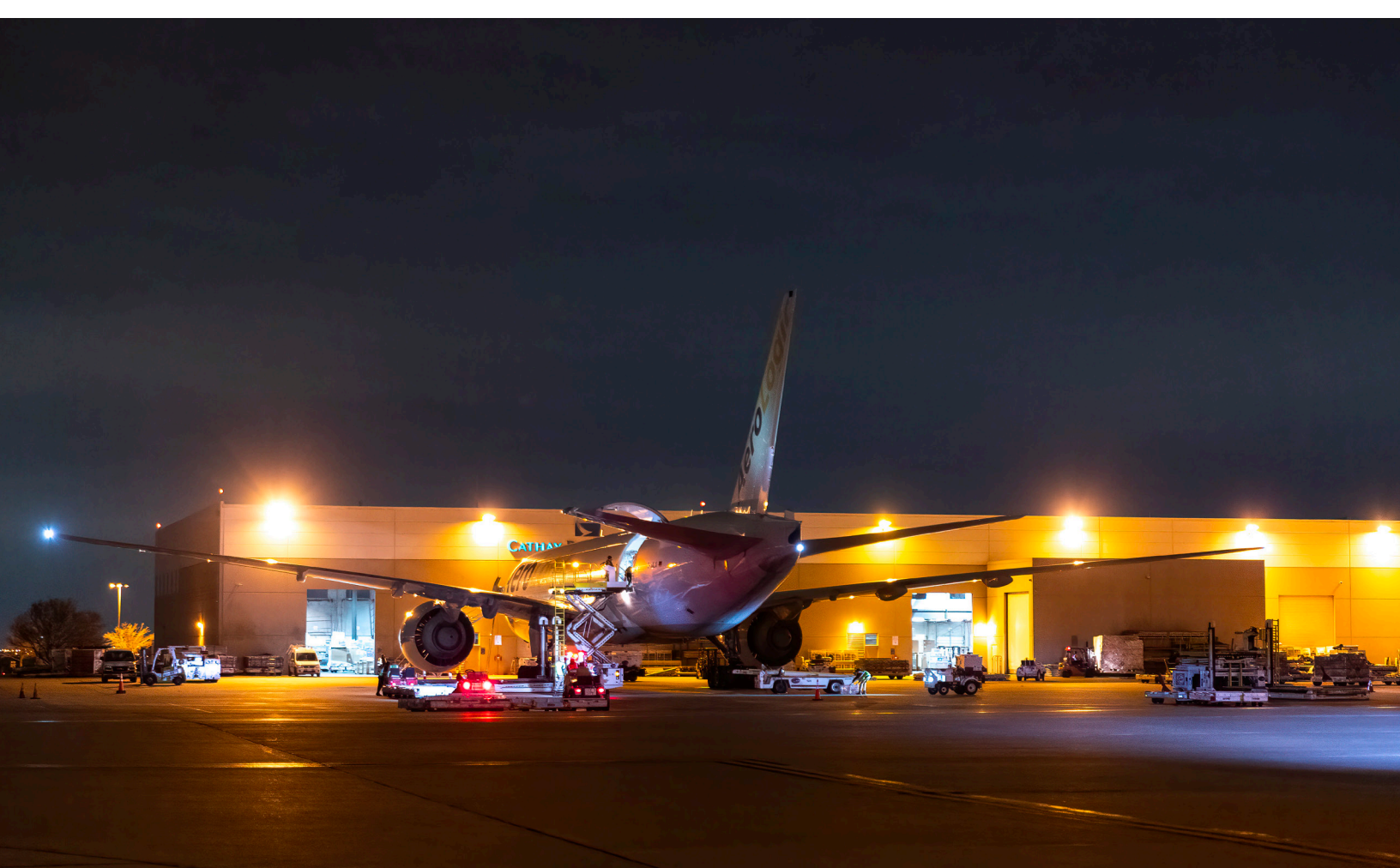
Puopolo: Reflecting on 50 years, a pivotal moment for our cargo operation emerged from a study about a decade ago, revealing cargo's significant economic impact—55% of the airport's total. This insight propelled us to enhance our cargo focus, beginning with a master plan that set the stage for our future strategy. We identified key growth areas, operational gaps, and the importance of technology. Notable milestones include establishing an airside cold chain facility, an IATA CEIV Pharma community, an air cargo community system, and the first airside Centralized Examination Station (CES) in the US.

Looking ahead, we're excited about constructing two new cargo warehouses and adding seven aircraft parking spots. Equally important, we formed a seasoned cargo team, pivotal in shaping our cargo business.

Focus: What takeaways about DFW would you like attendees to know at the end of the conference?

Puopolo: DFW prides itself on being future-focused and cargo-friendly, reflected in our significant investments like new facilities and increased aircraft parking, nearly doubling our capacity. Our dedicated cargo team, rich in expertise, is here at the conference to support your growth at DFW.

Additionally, our innovation team is at the forefront of exploring new technologies to address current challenges and anticipate future needs. We're committed to embracing new technologies and invite collaboration.



Focus: In 2023, DFW announced a comprehensive redevelopment of the Airport's 19th Street Cargo facility. What updates can you share about this project?

Puopolo: Our Cargo and Planning teams are making good progress on the 19th Street Cargo Redevelopment, with the final original building set for demolition next month. Construction is set to begin this year with an estimated completion date in 2025.

Focus: What are the top 3 priorities in the innovation pipeline at DFW?

Puopolo: Currently, autonomy and efficient mobility are some of my team's top priorities. It's not only about the vehicles but also the supporting technology. Given the likelihood of new mobility systems being electric or hydrogen-based, we are assessing the future demands for electricity at the airport and the needed alternative fuel infrastructure. Eighteen months ago, we evaluated and confirmed the business case for a 5G private network in collaboration with IT. This network is now being deployed at the airport in anticipation of future systems requiring enhanced network capabilities. More importantly, we're exploring what new business models this transition may unveil. We are also analyzing AI tools to determine how best to leverage this capability to make smarter, data-driven decisions. Additionally, we're collaborating with our Environmental Affairs Division (EAD) team to pursue sustainability goals and develop solutions aimed at achieving our net-zero carbon and zero waste objectives.

Focus: A well-known technology giant uses the term "moonshot" to refer to projects or ideas that are extremely ambitious and seek to achieve a monumental goal. Does DFW have any moonshot ideas or projects of its own?

Puopolo: While I wouldn't call it a moonshot exactly, we are looking very closely at emerging mobility models such as electric Vertical Take-Off and Landing (eVTOL). There's a lot that needs to happen in the market and regulatory spaces to make this commercially viable, but this technology could change how we think about regional and urban mobility.

We know the tech is proven, but the challenge now is around certification and airspace. To be prepared to support this new type of aircraft requires us to invest now to work through the infrastructure needs to ensure we're ready when the market develops. There are a lot of stakeholders that need to be at the table to make this happen, but we believe airports are uniquely suited to support this type of mobility and should be a leader in the discussion.

Focus: How does DFW drive innovation throughout the organization?

Puopolo: We have a central Innovation team that collaborates with the business to de-risk ideas, focusing on the process, tools, training, and portfolio management. Over the last three years, we've developed a comprehensive innovation training program, starting with mandatory "Innovation Mindset" training for all new employees.

Additionally, we've created an Innovation Boot Camp for deeper learning in design thinking and practical tools, with over 300 employees already benefiting. We also host a monthly virtual "Wisdom Wednesday" meeting, open to all, spotlighting emerging technologies and airport initiatives like 5G, AI, LIDAR, and sustainability. These sessions foster a unified understanding and approach to innovation across DFW, emphasizing the necessity of embracing change, navigating uncertainties, and the continuous cycle of testing and learning.

Focus: How would you define DFW's approach towards innovation? Would you say it is closer to the mindset of a startup than that of an established organization?

Puopolo: We are neither a startup nor a tech giant. We are an airport—a highly operational, regulated, and complex environment where minimizing unnecessary risk is vital. So, how do we future-proof our organization and build resiliency? We coach an innovator's mindset to question, explore, and experiment. To do that, you need to define what innovation is for your organization. You can't simply copy someone else's model; innovation needs to be tailored to your organization. Our approach is both process- and culture-based. I've mentioned our culture efforts, but we also have a clear process for identifying and testing new solutions. Both process and culture are necessary to maintain a sustainable and successful innovation function.

Focus: What technologies or platforms do you use to identify new opportunities or better understand emerging trends or patterns?

Puopolo: DFW utilizes a diverse ecosystem of partners and platforms to track and interpret emerging trends, focusing on how they align with industry needs and our specific organizational context. We look at the combination of emerging technologies, driving forces and customer needs to identify new solutions. We prioritize innovations based on their potential short and long-term impact, balancing immediate challenges with future opportunities that align to ensure strategic foresight in our approach.



DFW team members attend an innovation bootcamp (2023). Photo courtesy of DFW.

Focus: How has DFW addressed digital transformation? What solutions have been implemented specifically for cargo operations?

Puopolo: Innovation and digital transformation are foundational to our strategic vision, propelling us to lead change actively. In the realm of cargo operations, a standout advancement is the DFW Cargo Cloud, developed in partnership with Nallian out of Brussels. This air cargo community system, alongside our truck slot booking system, has markedly improved efficiency within our cargo ecosystem—evidenced by around 300 slot bookings per week and significantly reduced truck wait times of 30-45 minutes. These advancements not only bolster our sustainability objectives but also benefit our trucking companies, cargo handlers, and freight forwarders. While we're encouraged by the current uptake, our goal is to expand adoption further, optimizing operational efficiency across the board.

Focus: What role do you see Artificial Intelligence having in the airport's cargo business or operations in the near future?

Puopolo: AI is set to revolutionize the supply chain by boosting transparency and collaboration, with predictive analytics and digital twins offering deep insights for rapid decision-making. At DFW, we're investing in AI to address labor challenges, meet demands for speed, and enhance safety. We look to work

with cargo tenants and partners who are ready to embrace AI and automation for operational transformation.

"At DFW, we're investing in AI to address labor challenges, meet demands for speed, and enhance safety."

Paul Puopolo

Focus: From your perspective as an executive at the Largest Carbon Neutral Airport in the world, how is sustainability factored into DFW's plans to scale and how does it play a part in your decision-making process?

Puopolo: Sustainability is integral to our strategic vision. Under our climate action strategy, we aim for net-zero carbon



Rendering of DFW's planned electric Central Utility Plant, also known as the eCUP. Photo courtesy of DFW.

emissions by 2030, with a roadmap including the construction of the airport's electric Central Utility Plant (eCUP), fleet electrification, and incorporation of renewable energy storage. We're committed to working alongside our partners and employees to reduce our environmental impact.

Focus: What background or skills are important for an Executive Vice President of Innovation to have? What do you enjoy most about your role?

Puopolo: Key for any leader, especially in innovation, are the fundamentals like listening, empowering, and vision-setting. Leading innovation requires focusing on both process and culture to apply new solutions effectively. It's important to think outside the box but it is also important to deliver viable solutions within our organizational constraints. Ambidextrous thinkers, lifelong learners, who can navigate technological advances and manage today's challenges are essential in this rapidly evolving environment.

Focus: If you had an opportunity to address the next generation of airport and cargo professionals, what advice would you give them?

Puopolo: Embrace an open, innovative mindset that questions, explores, and experiments. Even though you may be in a more operational role, companies will succeed based on their ability to adapt to the market. Technology is moving fast and

will have a big impact on how we operate and deliver on customer expectations. We need leaders who are open to learning and willing to take managed risks to grow the business.

About DFW

Dallas Fort Worth International Airport (DFW) is one of the world's busiest and most connected airports. Celebrating 50 years of service in 2024, DFW is proud to be not only a major port for North America but also a vital community asset. Centered between its owner cities of Dallas and Fort Worth, Texas, it serves as a major economic engine generating jobs and attracting businesses.

DFW is committed to providing exceptional customer service and in 2023 and 2024 was named the best large airport for customer satisfaction in North America by Airports Council International. A leader in sustainability, DFW is the world's largest and North America's first carbon-neutral airport. In 2023, DFW Airport served over 80 million passengers and offered more than 250 global destinations.



NOTE: For additional information, please visit: www.dfwairport.com

The State of Air Cargo

Brendan Sullivan Addresses the World Cargo Symposium in Hong Kong

by Alexis Dames



“We are all connected to an industry that matters. Air cargo is critical for the global economy. And it improves people’s lives.” These were the impactful opening lines delivered by Brendan Sullivan, IATA’s Global Head of Air Cargo, at the 2024 World Cargo Symposium (WCS). These words heralded a rousing speech that highlighted some of the key challenges and opportunities the air cargo industry faces at a global level.

Addressing the more than 1900 attendees who gathered in Hong Kong for the 18th edition of the WCS, Sullivan went on to add: “In extraordinary circumstances, this is clearly visible. During the pandemic, collectively, we brought medical supplies and vaccines to where they were needed. Air cargo delivers humanitarian aid in the wake of natural disasters such as earthquakes and floods. And today it is a vital alternative to Red Sea shipping lanes that face geopolitical disruptions.”

Sullivan, a prominent figure in the global logistics industry who was appointed Global Head of Cargo at IATA in 2021, continued his speech by emphasizing the vital role the industry

plays in sustaining the global economy. Further to this point, he referenced data from 2023, which indicates that 58 million tonnes of air cargo were transported in that year alone, constituting a remarkable 35% of the total value of goods traded internationally.

Moreover, Sullivan underscored how this significant movement of goods is more than just about numbers—it’s about people. The vast logistics network that supports air cargo fosters job growth across the globe, making it a fundamental pillar of economic prosperity worldwide. In this capacity, air cargo positively contributes to several UN Sustainable Development Goals.

“We work in an inspiring sector. Our success matters. And with volumes now firmly back to pre-pandemic levels, the challenge is to ensure that our growth is efficient, safe, and sustainable,” Sullivan remarked.

At the core of his message, Sullivan emphasized several key themes, which are summarized below:

Efficiency

Digitalization still provides the biggest opportunity for growth. While technology adoption has grown at a slower pace than expected, progress is evident. However, many paper-based processes await to be replaced with more efficient digital solutions.

Sullivan went on to highlight three key areas of efficiency:

Seamless sharing of digital information: ONE Record, the standard that enables efficient data exchange throughout the supply chain, has been adopted by two leading carriers and is gaining traction with stakeholders throughout the supply chain.

Digitalization of customs and trade facilitation processes: Countries like Brazil have adopted IATA’s Advance Cargo Infor-

mation standards and shown dramatic improvements in cargo release times. From days to hours.

Shipment tracking: Pharma and e-commerce shipments have increased the demand for real-time tracking information. “The updated IATA Interactive Cargo Guidance provides a common framework so that tracking devices can monitor the quality and accuracy of conditions of time and temperature-sensitive goods,” Sullivan remarked.

Addressing the challenges of digitalization, Sullivan mentioned three critical points: governments must implement global standards, supply chain partners must collaborate, and the industry must unite. To lead this alignment, IATA has launched the Digitalization Charter, which provides a framework for standardized practices, sustainability, ethical technology usage, and digital leadership.

Safety

Safety remains paramount in the aviation industry, with a commendable safety record in 2023, marked by just one fatal accident out of 30 accidents among 38 million flights. To better emphasize continuous safety efforts, special attention must be directed toward handling dangerous goods, notably lithium batteries. Notable developments in this area include the renewal of the Dangerous Goods Regulations (DGR) partnership with ICAO and the introduction of DG AutoCheck to enhance compliance verification. Progress in lithium battery safety includes the development of a new fire test standard –which is ready for approval–, enhanced incident reporting, guidance for e-commerce shippers, and increased participation in the CEIV Lithium Batteries certification. Strengthening regulations, particularly in Annex 18 of the Chicago Convention, is urged to ensure the safety and efficiency of air transport for dangerous goods. These efforts underscore a comprehensive approach to managing safety issues associated with lithium batteries through education, tracking, and operational solutions backed by stringent enforcement measures against rogue shippers.

Sustainability:

In addressing sustainability, the aviation industry has set an ambitious goal of achieving net-zero carbon emissions by 2050, with Sustainable Aviation Fuels (SAF) as a cornerstone of this decarbonization strategy. Recent milestones highlight a strong demand for SAF, including Virgin Atlantic’s historic transatlantic flight powered entirely by SAF and various airlines’ firm SAF purchase agreements. Partnerships between

airlines, freight forwarders, and shippers further support SAF utilization.

The challenge for SAF lies in its shortage of supply. As with other renewable energy sources, production incentives are the way forward. Governments are urged to follow positive examples such as the Singaporean government’s Sustainable Air Hub, to foster SAF production. Transparency in actual CO2 emissions data is crucial. Initiatives like CO2 Connect for Air Cargo and IATA Environmental Assessment (IEnvA) ensure consistency and accountability in emissions reporting. These initiatives exemplify the industry’s collective commitment to reducing its environmental impact.

People:

People are integral to advancing air cargo capabilities, with support for key initiatives vital for industry progress. These include IATA’s Competency-Based Training and Assessment (CBTA) Center, which fosters continuous learning and trained over 75,000 air cargo professionals last year. The Future Air Cargo Executive (FACE) program facilitates networking and idea exchange among young executives, while the IATA 25by2025 initiative seeks to boost female representation, particularly in leadership roles. With half the world’s population being female, leveraging this talent pool is essential for industry advancement, urging participation in the 25by2025 pledge.

In his closing statement, Sullivan addressed how challenging it is to condense a year of progress and topics into a short report. He added, “We are an industry that is active on many fronts. And together, our actions are transformative for a critical global industry. And that is important. For any industry to survive, change is essential. And constant change for anyone is never easy. But it is absolutely worth it when that change delivers 60 million tonnes of cargo that powers economies, improves the lives of people and genuinely makes our world a better place. And that is what inspires us to make our industry more efficient, ever safer, and on target for net zero carbon emissions by 2050.”

About IATA

IATA (International Air Transport Association) represents some 320 airlines comprising 83% of global air traffic.



NOTE: To read Brendan Sullivan’s Speech at the World Cargo Symposium in Hong Kong, please visit:
<https://www.iata.org/en/pressroom/2024-speeches/2024-03-12-01/>

Stanislas Brun Vice President Cargo Etihad Cargo



Stanislas Brun

About Stanislas Brun

Stanislas joined Etihad Cargo in 2024 as Vice President Cargo. In this role, Stanislas leads cargo commercial operations, including scheduled and charter flights, revenue management and network planning. He is focused on enhancing Etihad Cargo's value propositions and strengthening partnerships with regional and international customers.

Stanislas has an extensive background in global airfreight operations and a deep understanding of the aviation sector. In his 25-year career, Stanislas has effectively developed and executed change management and business development strategies, and he has built high-performance teams across international markets.

Prior to joining Etihad Cargo, Stanislas played a pivotal role in leading the air cargo operations of Geodis as the logistics and

supply chain solutions provider's Senior Vice President Global Airfreight. He has also held senior leadership roles with international airlines, including Air France KLM, spanning key markets, including Europe, the Middle East and India.

Stanislas holds an Executive MBA from Montpellier Business School.

Focus: How many times have you attended the CNS Partnership Conference?

Stanislas: Etihad Cargo has been attending the CNS Partnership Conference since 2022.

Focus: What has been your biggest breakthrough or lesson learned from the conference?

Stanislas: The CNS Partnership Conference has provided a positive platform for facilitating direct interactions with multiple partners and customers at a single event. This year's agenda features a panel discussion on digitalization and a focus for the conference is innovation, which are key areas of focus for Etihad Cargo for the year ahead, and we will continue to connect with our partners at these events so we can leverage technology to improve the customer experience.

Focus: How would you assess communication between stakeholders in our industry?

Stanislas: Partnerships and communication are critical to our sector's success. Traditionally, the air cargo industry operated in silos. However, the pandemic changed how we work and reinforced the importance of working together. At Etihad Cargo, we understand that effective communication is important to the success of air cargo operations. We are dedicated to continuously improving our engagement with partners and customers, aiming to create a more integrated and responsive air cargo community.

By facilitating direct interactions and understanding between all parties involved, conferences and exhibitions have been essential in moving away from a siloed approach towards a more collaborative and united air cargo industry. This change has been particularly evident in how we've adapted to the new

ways of working, bringing us closer together and enabling us to enhance our products and launch solutions to benefit our customers.

Focus: What are your top considerations when selecting a service provider?

Stanislas: Etihad Cargo prioritizes working with partners that align with our vision and core values, including quality, safety, innovation, sustainability, and digitisation, and share our commitment to making a real difference in the air freight industry, helping us to meet our ambitious growth targets. Our partners are not just service providers; they share our goal of redefining air cargo services.

We select partners that adhere to our robust standards, ensuring that every process is seamless, secure and upholds our rigorous quality benchmarks so we can continue to deliver on our promises. This commitment is demonstrated by requiring that our partners hold appropriate certifications, reflecting their compliance with safety and operational standards.

Innovation and sustainability are key drivers of our partnerships. We engage with organisations that are not just receptive to innovation but are proactive in developing and implementing solutions that enhance operational efficiencies and improve the customer experience. Our aim is to collaborate with partners that share our vision for a more efficient, sustainable, and responsive industry.

Focus: How important are people and relationships in this industry?

Stanislas: Our industry is consolidated, making it essential to maintain beneficial working relationships that enable Etihad Cargo to adapt, innovate, and remain resilient in the face of challenges. Our strategic focus on building strong partnerships and engaging with industry leaders, technology innovators, and other air cargo carriers demonstrates the importance we place on relationships. These collaborations not only expand our capabilities but also enhance our operations with the flexibility needed to navigate industry pressures and global disruptions effectively.

By working with partners like SF Airlines and Astral Aviation, we extend our reach and expand our service offerings, demonstrating how collaboration can lead to mutual growth. These relationships enable us to share knowledge, resources, and ideas, improving our ability to respond to customer needs and market dynamics quickly.

Focus: What would you like your peers to know about your organization in 2024?

Stanislas: I would want my peers to know that Etihad Cargo's focus for 2024 is further enhancing our direct connectivity with our partners and customers, leveraging technology to strengthen our partnerships and make doing business with us even easier. These are the pillars that will enable us to grow, deliver on our promises and remain the air cargo partner of choice. By remaining customer-focused, agile and adaptive, we are confident 2024 will be another strong year for the carrier.

Focus: What are the top three challenges your industry segment is currently facing?

Stanislas: Firstly, there is the challenge of managing yields. Etihad Cargo's objective is to balance profitability with competitive pricing, a task that becomes particularly complex as demands and operational costs vary. Our investment in new technology and infrastructure is essential to maintain our competitive edge.

Furthermore, Etihad Cargo continuously evaluates our network to address capacity issues on high-demand routes. The surge in e-commerce and shifts in global trade patterns have increased the demand for certain routes. Etihad Cargo's partnerships, including those with SF Airlines and Astral Aviation, are invaluable in this regard. They expand our network, enhance our flexibility, and ensure we can accommodate fluctuations in demand efficiently.

Additionally, the air cargo market is subject to disruptions, from geopolitical shifts to environmental challenges. These situations require rapid responses and adjustments in routing and operations. Etihad Cargo's investment in advanced technology and strong partnerships help us manage these disruptions efficiently.

Focus: In what areas do you see the most opportunity for growth?

Stanislas: Heading into 2024, Etihad Cargo has identified huge potential in sectors like pharmaceuticals, express cargo, and e-commerce. There's a growing appetite for express delivery across the board, especially for high-value items like electronics. Etihad Cargo's newly launched SecureTech product, which ensures the safe transport of lithium-powered electronics, is just one way we're stepping up to meet these needs. And with a 51% jump in electronics shipments this year, it's clear we're on the right track.

E-commerce isn't slowing down either. Etihad Cargo is doubling down on this trend by extending dedicated charters with

our key partners right through to December 2024, showing our deep commitment to serving this booming sector.

Looking forward, Etihad Cargo isn't just aiming for growth; we're gearing up for an ambitious expansion of our global network and a significant increase in capacity on critical routes. We will be working closely with our partners and customers, understanding their needs and exploring new opportunities together.

Focus: Where do you see the most opportunity for collaboration?

Stanislas: At Etihad Cargo, we're all about innovation, which is where we see the most exciting collaboration opportunities. Innovation holds transformative potential for the air cargo industry and its customers, driving efficiency, enhancing service quality, and opening up new markets.

In partnership with Rotate, Etihad Cargo has introduced Sales Cockpit, a first-of-its-kind digital sales optimisation tool designed to enhance customer service in the face of fluctuating yields. Developed through over 6,000 hours of collaborative effort, this tool leverages data and machine learning to provide customised recommendations, helping our commercial teams to have more meaningful customer engagements.

The global deployment of Sales Cockpit empowers Etihad Cargo's teams with real-time insights, improving efficiency and strengthening customer relationships. This initiative highlights Etihad Cargo's dedication to digitalisation through partnerships, offering significant advantages to both our customers and the industry, and setting a new standard for data utilisation in the air cargo sector.

Focus: How far along is your organization in the digital transformation path?

Stanislas: Etihad Cargo has made great progress on its digital transformation journey, collaborating with service providers and leveraging advanced digital tools and technologies to enhance efficiency and elevate customer service. We have enhanced direct connectivity to offer our customers a seamless, more convenient booking process and help us to achieve greater operational efficiencies.

Innovations such as our state-of-the-art Cargo Control Centre, which features automated messaging and live tracking of trucking services, are streamlining our operations and empowering our customers with timely, accurate information to enhance their experience.

We have also made improvements to our digital interface, sim-

plifying direct interactions with our customers. This includes the establishment of direct API connections with leading forwarders, a capability we plan to expand. Our online booking platform has been enhanced with features tailored to our customers' needs, like specialised cargo options and advanced self-service capabilities, leading to increased online engagement, especially in key markets such as India, China, and Thailand.

We've also invested in developing sophisticated tools like Sales Cockpit and Instant Offer Rate (IOR) tool to streamline the booking process and refine our sales strategy, elevating the overall customer experience.

Focus: What is your personal Motto as a leader?

Stanislas: My personal motto is putting the customer first and this is deeply rooted in a customer-centric philosophy, aiming to inspire my team by fostering a culture of excellence, reliability, and partnership. This approach drives our strategic decisions and development processes, ensuring we continuously innovate and improve our services. Leading with a focus on strengthening customer engagement and expanding our infrastructure and global networks, we aim to adapt and respond to our customers' evolving needs proactively

Focus: How do you envision the market in the near future, and what are your estimates for developments beyond 2024?

Stanislas: In 2024, the development of the air cargo industry will be driven by a strengthened commitment to customers and partners. Etihad Cargo will continue to build relationships, embrace technological advancements, and put customer needs first. With a focus on remaining adaptable and customer-centric, Etihad Cargo will remain the air cargo partner of choice.



NOTE: For additional information, please visit: <https://www.etihadcargo.com>

Ryan Carter

Executive Vice President, Americas
AIT Worldwide Logistics



Ryan Carter

About Ryan Carter

Ryan Carter is the executive vice president, Americas, for AIT Worldwide Logistics, overseeing the Americas region, global air and ocean products, and the company's home delivery business unit in the U.K.

Over the course of his nearly 30-year career, Ryan has gained a reputation in the supply chain industry as an accomplished senior level executive with a consistent history of successful strategic and tactical leadership.

Before joining AIT in 2015, he served in various management roles at CEVA Logistics with an emphasis in operations, sales, and business transformation.

Ryan holds degrees from University of Tennessee and Royal Melbourne Institute of Technology in business and supply chain management, respectively.

Focus: How many times have you attended the CNS Partnership Conference?

Carter: This is my third time attending the event.

Focus: What has been your biggest breakthrough or lesson learned from the conference?

Carter: It's all about the importance of maintaining your professional network and relationships. I'm amazed by the depth of the relationships that have been built at this conference over the years.

Focus: How would you rate communication between stakeholders in our industry?

Carter: I believe the importance of communication has been somewhat devalued, in part because we're so reliant on email. While email is a helpful tool to communicate, it's not always communication, and sometimes we confuse the difference between the two.

Focus: What are your top considerations when selecting a service provider?

Carter: The key factors for us are consistency in service, support on a global level, data quality and accuracy, and financial competitiveness.

Focus: How important are people and relationships in this industry?

Carter: People and relationships are paramount! We aren't making widgets; we're a service provider. In a service industry, it's the people who make the difference.

Focus: What would you like your peers to know about your organization in 2024?

Carter: We are a growth organization and we have remained true to our core values by investing resources to ensure they're incorporated throughout every aspect of the company's business including decision-making, evaluat-

› Industry Perspective Questionnaire - Ryan Carter, Executive Vice President, Americas, AIT Worldwide Logistics

ing potential acquisition targets, goal setting, performance reviews, recruiting, sales and operations strategy, and more.

Focus: What are the top three challenges your industry segment is currently facing?

Carter: Geopolitical impacts, shifting supply chain demands on service providers, and data visibility across the entire supply chain.

Focus: Where do you see the most opportunity for collaboration?

Carter: There's a great opportunity to close the gap between logistics consumers and supply chain stakeholders across all modes of transport, moving towards collaboration that is better integrated and more flexible.

Focus: How do you inspire others in your organization?

Carter: As a people leader, it's not my role to tell teammates

what to do; instead, my job is to provide opportunities (through coaching, mentoring and training) in a productive environment that allows the team to grow and succeed together.

Focus: How do you envision the market in the near future, and what are your estimates for developments beyond 2024?

Carter: I anticipate demand and capacity trending towards more normalized, sustainable levels. Decreasing volatility in the supply chain should provide some price relief for consumers. I also expect more shippers will embrace a best value model (balancing time, quality and price) as opposed to basing their transportation decisions strictly on pricing.



NOTE: For additional information, please visit: <https://www.aitworldwide.com>



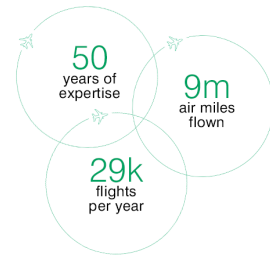
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Fred Ruggiero

Vice President of Cargo, The Americas Cathay Cargo



Fred Ruggiero

Focus: How many times have you attended the CNS Partnership Conference?

Ruggiero: 12 times.

Focus: How would you rate communication between stakeholders in our industry?

Ruggiero: I would say that it is very good, or at least I "believe" it is very good. Like many things, the more you put into it, the more you get out of it.

Focus: What are your top considerations when selecting a service provider?

Ruggiero: While pricing is a consideration, it is not the sole driver of selecting a service provider. We put a lot of stock into the relationship we have with the key stakeholders such as their reputation and their integrity in the industry.

Focus: How important are people and relationships in this industry?

Ruggiero: People and relationships in this industry are extremely important. This industry is a people business, and if

I, or my firm, cannot have an open and an honest relationship with our industry partners, then the chances are that the relationship will not last very long.

Focus: What would you like your peers to know about your organization in 2024?

Ruggiero: Every shipment matters to us, because it matters to our customers. As the most customer-centric air cargo service brand in the world, we understand that each shipment has its own requirements.

Focus: What are the top three challenges your industry segment is currently facing?

Ruggiero: In no particular order, the safe and secure transportation of lithium batteries and other dangerous goods, the environment and overall security.

Focus: In what areas do you see the most opportunity for growth?

Ruggiero: The world will always be in a need for the transportation of high-quality food and pharmaceutical products, and air cargo is the best solution to handle that need.

Focus: Where do you see the most opportunity for collaboration?

Ruggiero: Without a doubt, the greatest opportunity for collaboration is the IATA One-Record standard.

Focus: How far along is your organization in the digital transformation path?

Ruggiero: Cathay Cargo has been quite progressive in digitization. But when it comes to digitization, no matter how progressive you are, we all have a long way to go.

Focus: What is your personal Motto as a leader?

Ruggiero: I treat my team as I want to be treated, and together we treat our customers how we want to be treated... always with respect and dignity.

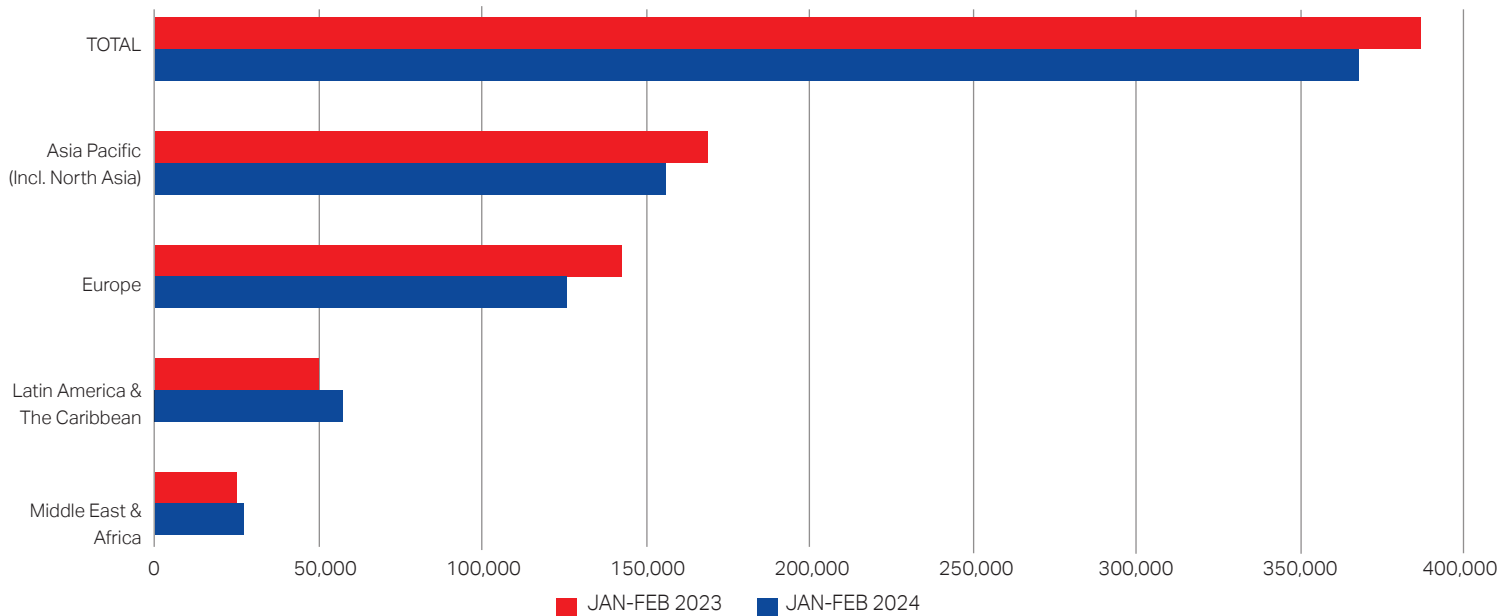
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NOTE: For additional information, please visit: <https://www.cathaycargo.com>

CASS-USA Market Monitor appears in every issue of CNS Air Cargo Focus Magazine. The Market Monitor is designed to highlight market trends till the most recent data month available. It provides both the year-to-date activity and monthly air cargo traffic trends originating from the United States to other regions based on CNS CASS-USA data. Additional detailed reports are available to CASS-USA Participating Carriers and CNS Endorsed Agents.

WEIGHT IN TONS



Jan-Feb 2024 Weight in Tons		Jan-Feb 2023 Weight in Tons		Jan-Feb 2024 / Jan-Feb 2023	
Region	Jan-Feb 2024	Region	Jan-Feb 2023	Region	% Change
Asia Pacific (incl. N. Asia)	156,467	Asia Pacific (incl. N. Asia)	169,322	Asia Pacific (incl. N. Asia)	-7.6%
Europe	127,003	Europe	142,991	Europe	-11.2%
LatAm & The Caribbean	58,123	LatAm & The Caribbean	50,334	LatAm & The Caribbean	15.5%
Middle East & Africa	27,240	Middle East & Africa	25,456	Middle East & Africa	7.0%
Total	368,832	Total	388,113	Total	-5.0%

Jan-Feb 2024 Shipment Count		Jan-Feb 2023 Shipment Count		Jan-Feb 2024 / Jan-Feb 2023	
Region	Jan-Feb 2024	Region	Jan-Feb 2023	Region	% Change
Asia Pacific (incl. N. Asia)	156,135	Asia Pacific (incl. N. Asia)	157,644	Asia Pacific (incl. N. Asia)	-1.0%
Europe	126,672	Europe	132,099	Europe	-4.1%
LatAm & The Caribbean	56,750	LatAm & The Caribbean	51,556	LatAm & The Caribbean	10.1%
Middle East & Africa	36,307	Middle East & Africa	35,847	Middle East & Africa	1.3%
Total	375,864	Total	377,146	Total	-0.3%

FEBRUARY 2024

In February, US export revenue decreased by 30% YOY, compared to a decrease of 27% in January. Yields were reported to decrease by 24% YOY in February, compared to a decrease of 26% in January. US Tonnage to Asia Pacific and North Asia decreased by 14% YOY in February and remained stable in January. Export tonnage to Europe decreased by 12% YOY in Feb-

ruary, compared to a decrease of 11% in January. Overall YOY results for Jan-Feb 2024 statistics reflected 29% decrease in revenue, a 5% decrease in tonnage and a decrease in yield of 25%.





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