

AIR CARGO

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On the Cover:

Ralph Cutié

Director and Chief Executive Officer
Miami International Airport

SUMMER ISSUE 2025

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President's Corner

Remarks by Alicia Lines



Alicia Lines

Greetings,

It was a true privilege to welcome so many of you to the 2025 CNS Partnership Conference. This year's event came at a time of important changes in the world's order, hence coming together as a community becomes so much more significant. CNS is dedicated to fostering an environment that

brings together industry leaders and promotes meaningful dialogue around emerging challenges, including infrastructure gaps, evolving regulations, and the transformative potential of technology and automation.

I'm grateful to Miami-Dade County Mayor Daniella Levine Cava and MIA airport authorities for warmly welcoming attendees to the city and sharing an overview of the capital investments that directly impact air cargo operations at the airport. Air cargo operations support thousands of local jobs and contribute to \$118 billion in economic impact. For example, MIA is projected to add 2,500 new permanent jobs with the construction of the Vertically Integrated Cargo Community (VICC).

One of the highlights for the CNS team was introducing the new Meet & Greet event. Designed as a speed-matching networking opportunity, it gave attendees a fresh and efficient way to connect. Your feedback from previous years directly shaped this initiative, and I'm proud to say it was a great success and will become a staple in the event's agenda.

We will continue to review your feedback to evolve and enhance the experience for next year—making it more informative, engaging, and interactive.

We know networking is the backbone of the CNS conference, but the panels and presentations offered several notable takeaways this year. Among them were AI use cases and pilot programs that highlight the technology's potential as a valuable ally in safety and operational optimization.

On the regulatory front, the discussion around ACAS yielded valuable insights into the new security requirements imposed by the U.S. government, and a particularly impactful panel, Women in Air Cargo created a welcoming space to celebrate diverse viewpoints—ones that drive innovation, resilience, and growth.

As we step into the second half of the year, many of you are preparing for the upcoming busy season. I want to take a moment to recognize the critical role you play. Because of your efforts, air cargo continues to drive global resilience: life-saving medicines reach communities in need, fresh flowers bloom on schedule, e-commerce delivers at lightning speed, and supply chains remain strong despite ongoing disruptions.

As one of our esteemed panelists mentioned, "In our world, uncertainty has become the new normal." The complexity and pace of air cargo operations demand adaptability, foresight, and collaboration—and I am confident in our community's ability to continue rising to the occasion.

Wishing you all continued success and a productive season ahead.

Warm regards,

Alicia Lines
President, CNS



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iata.org/ceiv-liba

Accelerating Innovation: AI Shifts Air Cargo into Second Gear

Notes from the Editor's Desk



Alexis Dames

"DIFFICULTIES MASTERED ARE OPPORTUNITIES WON."

—Winston Churchill

Esteemed readers of advanced standing will surely recognize the idiom "like a broken record"—a phrase that fittingly describes the ingeminated theme of this editorial: Artificial Intelligence (AI).

To say that AI advances rapidly would be an understatement. Among all emerging technologies, AI has developed at a staggering pace, with new models released every 6 to 12 months on average. In just the first half of 2025 alone, at least 20 unique AI models have been launched. This pace far surpasses that of other innovations such as the Internet of Things (IoT), Blockchain, e-Freight initiatives, and robotics.

The emergence of AI marks an epochal shift, transforming processes across the air cargo industry in expected ways: increasing operational efficiency, optimizing supply chains, enhancing data security, and improving compliance. At the 2025 edition of the CNS Partnership Conference, two cargo airlines showcased pilot AI projects that achieved remarkable improvements in both optimization and safety.

New Threats, New Realities:

However, AI also presents novel challenges—particularly in the realm of security—that industry leaders must consider. These include anticipating new training requirements and minimizing potential disruptions to maintain operational continuity. While not an exhaustive list, consider the following threats:

Fraudulent Documents: Generative AI now enables bad actors to produce highly realistic fake air waybills, customs declarations, cargo manifests, and bills of lading. These fakes can often slip past traditional OCR systems and trained human reviewers—especially during time-sensitive operations.

Deepfake Communications: As demonstrated by the viral Tom Cruise impersonator that circulated on social media, AI can now replicate voices and emails from known personnel (e.g., freight forwarders or customs brokers), enabling document fraud or misdirecting cargo.

Automated Fraud at Scale: The threat isn't just realism—it's volume. AI can now mass-produce thousands of slightly varied fake documents, like invoices or cargo receipts, in seconds. This automated flood can overwhelm manual inspection and legacy fraud detection systems, making it a capacity problem as much as a security one.

A large portion of the global air cargo industry still relies on legacy systems, which makes AI integration complex and costly. Furthermore, AI models depend on large datasets, which must be safeguarded against leaks of proprietary or sensitive information. The associated cybersecurity risks are real and persistent, with hackers targeting these systems for ransom, sabotage, or data theft.

Compounding this issue is a frequent underinvestment in human oversight—many organizations may choose to delay or avoid training and reskilling staff to recognize new vulnerabilities and AI-generated anomalies.

The Compliance Imperative:

And then, of course, there is the elephant in the room: Regulatory Compliance. AI adoption must align with established frameworks governing international aviation security (e.g., IATA, TSA), customs laws, and data protection regulations such as GDPR and CCPA. Navigating this terrain is not optional—it's critical.

AI in Military Logistics —A Glimpse into the Future:

Looking to other fronts, it's worth taking a brief look at the AI advancements currently underway within the military—developments that may soon influence the logistics strategies of the commercial air cargo sector. Historically, many of the innovations that have reshaped aviation and logistics—jet engines, radar, GPS, com-

posite materials, fly-by-wire systems, drones, and even supersonic flight—originated in military research before migrating into civilian use. Today, that pattern continues.

A notable example comes from an April 2025 MIT News article, which highlights a project led by MIT Lincoln Laboratory in partnership with the 618th Air Operations Center—the U.S. Department of Defense's largest logistics hub. The initiative, called Conversational AI Technology for Transition (CAITT), is part of a broader modernization effort known as Next Generation Information Technology for Mobility Readiness Enhancement (NITMRE).

CAITT leverages natural language processing (NLP) to streamline communications and workflows between pilots, crew members, and controllers within the Air Mobility Command. By enabling AI systems to interpret and respond to human language with precision, the military is enhancing speed, accuracy, and decision-making across complex logistics chains. These developments, while specific to defense, offer a glimpse into how AI could soon be applied in commercial air cargo—from automated communication flows and real-time coordination to predictive maintenance and adaptive routing.

As the quote that opens this piece reminds us: "Difficulties mastered are opportunities won." That is not just a sentiment—it's a strategy. The challenges AI brings to air cargo—security threats, legacy systems, regulatory friction—are not roadblocks, but signals. They point to inefficiencies ready to be solved, processes ready to be optimized, and competitive advantages ready to be claimed. The content we've prepared in this issue offers a strong starting point—equipping you with insights to better understand, prepare for, and ultimately capitalize on this pivotal technological shift.



Alexis Dames Vandenbrande,
Editor-in-Chief



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HAVE YOUR SAY!

Air Cargo

(not including dangerous goods or security-related training)

Training Survey



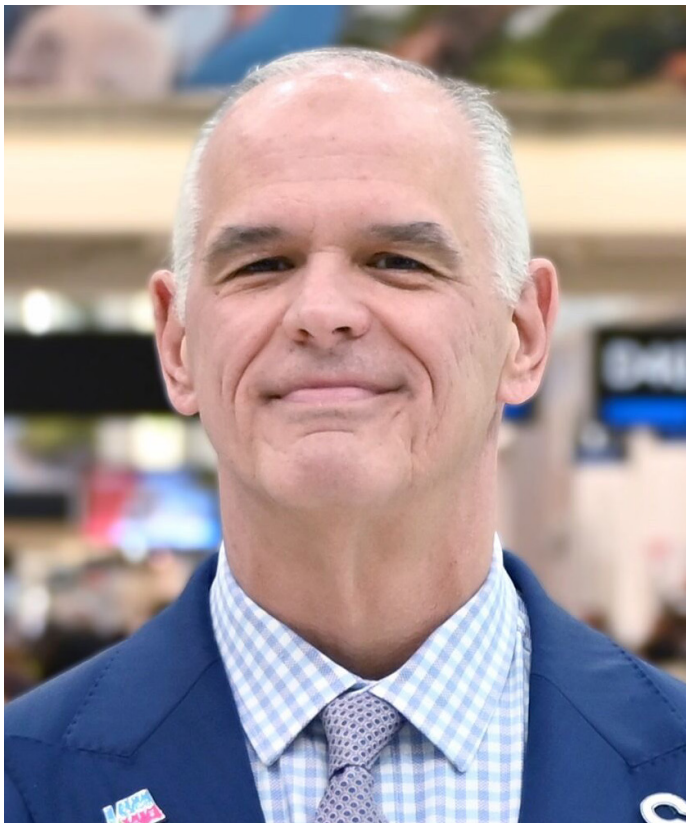
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From the Top - Ralph Cutié

Director & Chief Executive Officer

Miami International Airport (MIA)



Ralph Cutié

About Director Cutié

Ralph Cutié is the Director and Chief Executive Officer of Miami International Airport (MIA). He oversees operations at MIA and four general aviation airports in the Miami area, which together generate \$118 billion in business revenue and support nearly 700,000 direct, indirect, related, and induced jobs. MIA leads the way, handling more than 56 million passengers and 3 million tons of cargo annually, placing it among America's busiest international passenger and cargo airports.

Previously, Mr. Cutié served as Assistant Director for Facilities Management and Engineering, overseeing the largest and most diverse division within the Aviation Department, comprised of more than 440 employees and a budget of \$123 million.

Focus: MIA has seen five straight years of record cargo volume—what factors have fueled this surge, and how sustainable is this trend?

Cutié: MIA is coming off another record year for total air freight, surpassing the 3 million U.S. ton mark for the first time ever (3.008 million U.S. tons/ 2.73 million in metric tons), and extending the streak of its highest annual freight volumes to five years running (2020–2024). While MIA retained its top ranking in the U.S. for international air freight in 2024, it also moved up in the global rankings for this category from #6 to #5.

One factor that may have fueled this surge is that MIA has been home to many freighter airlines, which handled a large proportion of overall cargo movement (87% freighter by volume vs. 13% belly cargo). With global demand for expedited cargo movement rising during the pandemic—and continuing through the recent e-commerce boom—MIA was well-positioned to accommodate that growth through its freighter operations. Another factor may be MIA's extensive global route network and its strength as a regional hub for trade with Latin America and the Caribbean.

As in recent years, MIA currently has 95 airlines: 38 freighter airlines with 103 direct destinations and 57 passenger airlines carrying belly cargo with 172 direct destinations. This extensive air route network presents shippers around the world with access to many new markets and opportunities to conduct trade. It also provides flexibility for shippers as they navigate changes and disruptions in the supply chain.

Focus: The airport aims to handle over 4.5 million tons of freight by 2041—how does this goal align with global air cargo demand forecasts?

Cutié: Notwithstanding geopolitical and economic factors that may alter projected growth, MIA's aim of handling over 4.5 million tons of freight by 2041 seems to be within reach based on global air cargo demand forecasts. For the 5-year period from 2019 to 2024, MIA's freight volumes grew at a compound annual growth rate (CAGR) of 6.3%.

According to IATA's Air Cargo Market Analysis report from January 2025, global Cargo-Tonne-Kilometers (CTK) rose 3.2% year-over-year (YoY) in January. In order to reach its targeted forecast of 4.5 million tons in 2041, MIA would need to achieve a relatively modest CAGR of 2.4% between 2026 and 2041.

“MIA’s aim of handling over 4.5 million tons of freight by 2041 seems to be within reach based on global air cargo demand forecasts.”

Ralph Cutié

Focus: What role does MIA’s focus on perishable goods, like the Valentine’s Day flower rush, play in shaping its cargo marketing strategy?

Cutié: MIA is well established as the U.S. leader in perishables imports by air, accounting for approximately 68% of all U.S. air imports in this category. MIA’s top four import groups by volume were perishables categories and the airport continues to make perishables a focal point of our cargo strategy, even as other verticals pick up steam.

To that end, plans are now well underway to build a new \$140-million phytosanitary and cold chain storage facility adjacent to the airport in partnership with MIA’s sister port, PortMiami. That facility will provide a new option for treating perishables imports for pests and add to the approximately half a million square feet of on-airport refrigerated storage space already available at MIA.

The airport’s Marketing & Air Service Development team also continues to partner with U.S. Customs and Border Protection (CBP) and USDA on an annual perishables roadshow outreach program, which visits top overseas perishables trade partners to meet with growers, shippers and logistics companies to introduce and reinforce best practices that lead to a more efficient importation process in South Florida.

Focus: How is MIA leveraging its status as an IATA Pharma Hub to attract pharmaceutical shippers, and what new routes are you targeting?

Cutié: Since establishing an IATA CEIV Pharma Hub community almost 10 years ago, MIA continues to actively promote

the expertise of our nine partners at MIA: five airlines, two ground handlers, and two freight forwarders who all have the CEIV certification. MIA also leveraged its status as a pharma hub airport when it co-founded the Pharma.Aero association approximately 10 years ago. Since that time, MIA has sought new opportunities for growing pharma trade with Europe, Asia, the Middle East, and Africa.

More recently, MIA has worked with HKG and Pharma.Aero to validate the MIA–HKG Pharma trade lane, and to leverage the critical SJU–MIA corridor, supported by significant pharmaceutical production originating in San Juan, Puerto Rico.

Focus: How is MIA positioning itself to capture cargo traffic from fast-growing alternative markets like Southeast Asia or Africa?

Cutié: MIA recognizes the importance of air service development, given that with each new market served, new trade and business opportunities are created. Asia and Africa are underserved markets for MIA, and the airport is working diligently to attract new carriers from both regions. MIA participates in the biennial Air Cargo Africa conference and meets with African carriers to develop air service whenever possible. MIA is also actively working with Asian carriers to establish air service at the airport.

As a major transshipment hub, MIA is increasingly attractive to Asian carriers who seek to ship e-commerce to the approximately 80 markets in Latin America and the Caribbean that the airport connects. The appeal for shipping in-transit goods through MIA is only growing. In 2024, the percentage of total cargo at MIA that was in transit reached 49%, an 8% increase over the previous year.

Focus: What challenges does MIA face in expanding cargo infrastructure and security while maintaining 24/7 operations for passengers and freight?

Cutié: In July 2024, the Miami-Dade Board of County Commissioners approved a lease agreement for the construction of a vertically integrated cargo community (VICC) at MIA. The current VICC concept is for a nearly 800,000-square-foot facility on 11 acres of airport land, with \$400 million in private investment. This development would increase the airport’s total cargo capacity by at least 50% or 1.5 million tons annually.

Focus: At this year’s CNS Partnership Conference in Miami, attended by prominent air cargo industry leaders, what main takeaway will Miami International Airport convey to position itself as the premier cargo hub in the Americas? *Cont. on page 11.*



MIA serves as a major transshipment hub for Asian carriers such as Cathay Pacific Cargo and China Airlines Cargo, which transport e-commerce goods to Latin America and the Caribbean. Photos courtesy of Miami International Airport.





Bird's-eye view of MIA — a global hub aiming to handle over 4.5 million tons of freight annually by 2041. Photo courtesy of Miami International Airport.

Cutié: With MIA's extensive route network, robust cargo operations, and status as a major global transit hub—where 49% of its total air freight is in transit—it offers flexibility and opportunities to navigate change and uncertainty in the global supply chain.

Focus: The \$9 billion modernization plan includes cargo upgrades—how much of that budget is dedicated specifically to air cargo enhancements?

Cutié: In addition to the VICC, our capital improvement program currently includes 11 approved projects to modernize various cargo and non-terminal buildings, with a total estimated cost of \$100 million.

Focus: With e-commerce driving air cargo growth globally, how is MIA positioning itself to capture more of this market in the Americas?

Cutié: MIA's Marketing & Air Service Development team is actively engaging e-commerce companies, their logistics subsidiaries/partners, and other supply chain stakeholders to promote MIA as an ideal distribution hub for e-commerce shipments, particularly moving from Asia to Latin America and from Latin America to the North American market.

MIA's geographic location, connectivity, cargo facilities, and foreign trade zone (FTZ) magnet site status collectively make us a natural hub. Notably, MIA is also collaborating with CBP on the creation of a centralized examination station (CES) that will expedite the screening process for e-commerce shipments. The CES will be key to facilitating the movement of e-commerce goods as volumes continue to rise.

About Miami International Airport

Miami International Airport (MIA), located on 3,230 acres of land near downtown Miami, is operated by the Miami-Dade Aviation Department and is the property of Miami-Dade County government. Founded in 1928, MIA is America's busiest airport for international freight and second busiest for international passengers, offers more flights to Latin America and the Caribbean than any other U.S. airport, and boasts a lineup of over 90 air carriers. MIA is also the leading economic engine for Miami-Dade County and the state of Florida, generating business revenue of \$118 billion annually and approximately 60 percent of all international visitors to Florida.



Note from MIA: After Director Cutié granted the interview, the developer was unable to meet the requirements outlined in the agreement and has since terminated the lease. Under the leadership of our mayor, we are now exploring other options for the site.

CNS CASS Domestic: Bringing Billing and Settlement to the U.S. Domestic Air Cargo Market

by CNS

In a continued effort to streamline operations and foster efficiency in the air cargo ecosystem, **Cargo Network Services (CNS)** is proud to introduce **CASS Domestic**, a new solution designed specifically for the U.S. domestic air cargo market.

CASS Domestic is an extension of the globally recognized **Cargo Accounts Settlement System (CASS)**, now tailored to meet the needs of the domestic U.S. air cargo industry. It provides a centralized platform for billing and settlement between freight forwarders and airlines operating within the United States, ensuring accuracy, transparency, and efficiency in financial transactions.

CNS CASS Domestic began operating at the end of 2024, progressively incorporating airlines and transactions to ensure process stability and functionality. Today, the system is fully operational and available for all industry participants.

CASS Domestic automates and consolidates the financial processes involved in domestic air cargo transportation. By managing billing and settlement centrally, it reduces administrative burdens and manual reconciliation, improves cash flow and payment certainty, ensures data consistency and compliance, enables scalable growth for participating partners. It's designed to meet the realities of the U.S. domestic market — fast, competitive, and efficiency-driven — offering all partici-

pants a modern solution for an age-old challenge.

Whether you're a domestic airline or freight forwarder, participating in CASS Domestic brings tangible benefits:

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For agents: Streamlined payment processes, consolidated invoicing, and access to a trusted, standardized platform recognized worldwide.

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CASS Domestic is powered and managed by **Cargo Network Services (CNS)**, the U.S. subsidiary of IATA. With decades of experience operating the global CASS system, **CNS** is uniquely positioned to adapt this proven model to the domestic U.S. market, ensuring compliance, neutrality, and operational excellence.

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- Improves efficiency and reduces billing and settlement cost
- Paperless distribution of invoices
- Internet base single platform
- Standard e-output and reports
- On-line dispute resolution
- Data security



CNS Domestic Benefits

To Freight Forwarders

- Simplification – one invoice and one payment instead of individual invoices and payments to individual airlines, lowering in-house process expenses
- Standard e-output and reports
- Easy on-line dispute resolution
- Easy reconciliation
- Data security

Global Services Contracts – Going to Market with the Best Strategy for Your Case

by Jonathan R. Todd, Robert Pleines, Jr., J. Philip Nester, Christopher C. Razek, Megan K. MacCallum, Vanessa I. Gomez



Jonathan R. Todd



Robert Pleines, Jr.



J. Philip Nester



Christopher C. Razek



Vanessa I. Gomez



Megan K. MacCallum

Global transportation and logistics services can represent some of the largest expenses—and even the highest-value single contracts by spend—for enterprises with high traffic volumes. Among mature buyers and sellers of goods, the common practice is to contract for services rather than buying on the spot market under ad hoc supplier paperwork. Contracting under one's own templates

is both permitted under the applicable legal regimes and also a sensible approach to supply chain management. It allows the buyer of the transportation or logistics services to tailor terms to company policy and the precise needs of its inbound or outbound supply chain. The structure used in approaching global and domestic service can also vary widely based upon each particular use case.

Single-Service or Jurisdiction Contract Structures

Some procurement fact patterns benefit from single-use contract structures specific to a particular mode, geography, facility, or other unique practical application. For example, it is common that ocean carrier service contracts stand alone due to the degree of regulation for that mode and historic industry practice. An ocean contract can be incorporated in a Master Services Agreement (MSA) although doing so may be cumbersome for negotiation and contract administration over its lifecycle. In the United States the same can be said for rail carrier agreements. Sensitive cargoes such as the transportation of temperature-controlled goods or bulk hazardous materials, hazardous waste, or dangerous goods are other common examples. The degree of regulation for those movements and the need for special handling often require targeted terms not suitable for broad-based contracts.

Multiple-Service or Jurisdiction Contract Structures

Other procurement fact patterns instead benefit from more complex contract structures. It is increasingly common to go to market with regional or global MSAs that establish the enterprise-wide terms for transportation and logistics services in a largely mode-agnostic fashion. The immediate benefits of doing so include: achieving harmony of terms across the portfolio of service providers and facilitating ease of adding or removing services, modes, and regions subject to the MSA. Those unique expressions of service often take the form of Scopes of Work (SOW), Service Schedules, and similar contractual tools that can be added to or removed from an existing

MSA. Ancillary services—such as supply chain consulting or web-based transportation management system licenses—can also be easily added. Enterprises with high degrees of vendor management often add Service Level Agreements or Key Performance Indicator terms under the MSAs.

Bridging Disparate Legal Regimes

The legal regimes that developed over centuries in the transportation and logistics sectors are as varied and nuanced as the modes and geographies they serve. Each mode, whether air, ocean, surface, or warehousing, operates under distinct legal liability regimes, often influenced by international treaties, national regulations, and industry practices. By clearly defining liability terms and conditions in transportation contracts, shippers and carriers can mitigate risks, ensure proper coverage, and establish clear protocols for claims and compensation.

This contractual clarity helps parties navigate the complexities of different liability schemes, enhances predictability, and protects interests in the event of loss or damage. It can be accomplished with confident global contracting strategies that lower friction when negotiating during bid processes, allow for harmony of terms, and facilitate ease of updating services.

Developing the Best Contract Structure

There is no one-size-fits-all supply chain. The same principle stands true for supply chain contracting. Despite the factually intensive nature of transportation and logistics procurement, particularly on a global scale, the various applicable legal regimes allow for negotiating most terms and for developing novel structures in support of strong administrative practices.

Those factors may weigh in favor of singular contract templates on a service, mode, or geographic basis (or even, as we mentioned, on a facility-by-facility basis) or they may instead weigh in favor of a global transportation and logistics MSA style approach. Firmly understanding the industry-specific legal landscape across the geographic territories is the first step to unlocking the creativity required for dynamic contracting structures.

Benesch Law's Transportation & Logistics Practice Group is experienced in practical strategies for managing risk and administrative burden in all types of global supply chain related functions.

About the Authors

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About Benesch Law

Benesch is an AmLaw 200 business law firm with over 420 attorneys and offices in Cleveland, Chicago, Columbus, New York, San Francisco, and Wilmington. Benesch was named Transportation Law Firm of the Year by Best Lawyers® "Best Law Firms" for 2025. The firm also received this recognition in 2014, 2016, 2017, 2020, 2022 and 2023. Only one law firm per practice area in the U.S. receives this recognition each year, making this award a particularly significant achievement. For additional information, visit www.beneschlaw.com.



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

The U.S. De-minimis Exception & China

by Bob Imbriani, Executive VP, International Team Worldwide,
President Airfreight Forwarders Association (AFA)



Bob Imbriani

What is a de-minimis exception?

It is a value set by an importing country for shipments—generally to individuals—below which no duties, taxes, or fees are assessed. In most cases, goods that meet this threshold can enter the country using a simplified entry process or manifest filing.

The U.S. de minimis exemption, a trade rule, allows low-value imports to enter the country duty-free and without requiring formal

customs entry. This exception in the U.S. has a threshold, \$800 per shipment, that determines the eligibility for the exception. The exception was a significant factor in the growth of online e-commerce especially for sellers in China, who could ship goods to U.S. customers without paying duties or processing fees. The U.S. has had one of the highest levels of de minimis value to qualify for this exception. Some countries are set as low as the equivalent of \$10.00. Some have no value exception and very few, if any, are higher than in the U.S.

There have been various attempts to lower the U.S. de minimis value limit, but none have been successful so far. So, what has changed? The volume of e-commerce has grown significantly over the years, especially for shipments originating from China. In 2024, it is estimated that 1.4 billion e-commerce shipments entered the U.S. under the de minimis exemption. While it is difficult to determine the exact number that originated in China, estimates suggest that over 60% came from China or Chinese-based platforms.

There are many concerns regarding these shipments, including accurate product descriptions and declared values, compliance with requirements from other government agencies—such as the Food and Drug Administration—entry of contraband, multiple shipments to the same buyer or consignee on the same day, and various other regulatory and security issues. Additionally, there is the concern of lost revenue to the U.S. government.

Concerns have grown in recent years due to the purchase of “ghost gun” parts through e-commerce and the ongoing “fentanyl crisis.” While there is some concern about actual fentanyl being trafficked via e-commerce, the greater concern lies in the online purchase and shipment of precursor materials and equipment used to manufacture fentanyl. These and other related issues—particularly those involving shipments from China—have prompted the Administration to take action. **New rules have effectively removed the de-minimis exception for e-commerce shipments from China.** Under an executive order, the new U.S. e-commerce rules for China, effective May 2, 2025, primarily involve the end of the de minimis exemption for small shipments from China (including Hong Kong). This means that shipments previously duty-free and valued at \$800 or less will now be subject to tariffs, either at the standard rate or a special flat duty (e.g., 30% or \$25 per package). These rules apply to e-commerce shipments sent via the postal service, as well as traditional cargo and courier services.

This will require shipments to undergo a more formal entry process and review, eliminating manifest clearance. In September 2019, U.S. Customs and Border Protection created a new entry type—Type 86—with a daily \$800 value cap. The exception is aggregated based on the date of arrival. Pursuant to 19 U.S.C. § 1321(a)(2)(C), eligible shipments “imported by one person on one day” may be exempted from duty and tax (see also 19 C.F.R. § 10.151). The “date of importation” is defined by 19 C.F.R. § 101.1 as the date of arrival. This exception will no longer apply to e-commerce shipments from China.

It is important to note that under a separate initiative, U.S. Customs & Border Protection is enforcing the “imported by one person on one day” rule for e-commerce shipments from all origin countries. While this will be a difficult rule to enforce, it is considered an important element of the e-commerce de minimis exception.

E-commerce has become a major portion of air cargo both internationally and domestically, not only for integrators (Fed Ex, UPS, DHL, etc.) but for airlines and some forwarders as well. Major changes to e-commerce rules will have a ripple effect in many areas of logistics and the supply chain. As with all the elements of the new Tariff initiatives, changes and modifications are inevitable, trade discussions with China may very well include a negotiation for changes to this rule.



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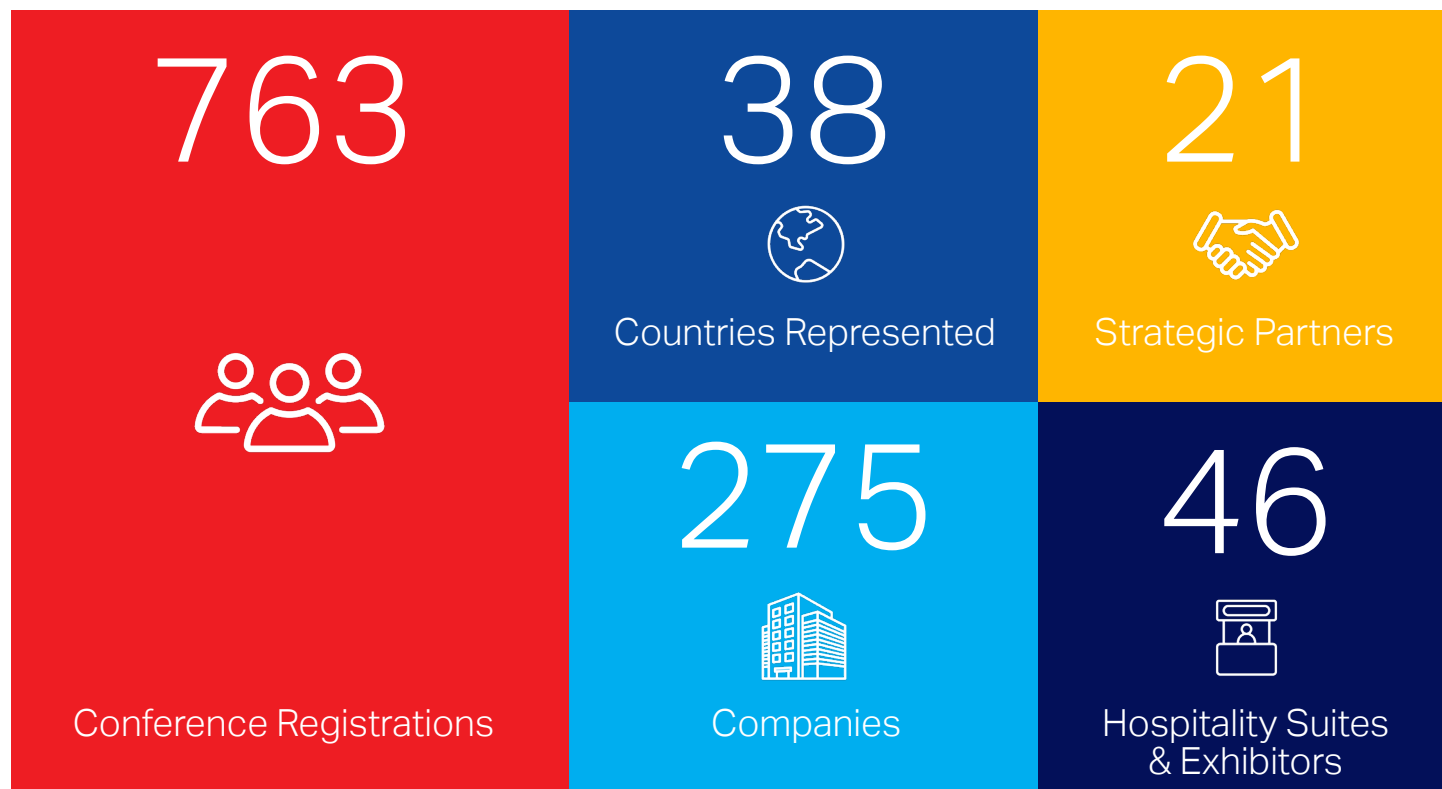
PARTNERSHIP
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2025 Partnership Conference Recap

The 34th CNS Partnership Conference brought together the global air cargo community for three days of dynamic dialogue, collaboration, and connection at the JW Marriott Miami Turnberry Resort & Spa in Aventura, Florida. From May 13 to 15, 2025, industry leaders, innovators, and stakeholders gathered to explore the future of air cargo, exchange insights, and build lasting partnerships. Take a look back at some of the most memorable moments from the conference, capturing the spirit of collaboration and innovation that defined this year's event. **Don't forget to save the date for the next edition of the CNS Partnership Conference, taking place May 18–20 in the beautiful City by the Bay—San Francisco.**

At a Glance: Conference Statistics



Not shown in the graphic are the conference's seven sponsors, who played a key role in supporting the event.

After a sun-soaked day of pre-conference activities—including Top Golf and sailing that offered the perfect setting for informal networking—the **CNS Partnership Conference** officially launched with two days of dynamic programming. The event brought together top leaders and innovators in the air cargo industry for engaging panels, presentations, and meetings.

The conference opened with welcoming remarks by CNS President Alicia Lines, who remarked, **"We thrive on bringing people together to network,"** followed by a keynote address from Miami-Dade County Mayor Daniella Levine Cava. The mayor highlighted the county's \$9 billion Capital Improvement Plan, which includes the upcoming Vertically Integrated Cargo Community (VICC) at Miami International Airport. She also celebrated the airport's record-breaking cargo performance, especially in the import of fresh-cut flowers—more than 90% of all such blooms entering the U.S. arrive through MIA. Mayor Levine also noted that 49% of all cargo processed at the airport was in transit to third countries, reinforcing MIA's growing role in global trade.

One of the most talked-about issues during the conference was the impact of **tariffs** on the air cargo industry. Brandon Fried, Executive Director of the Airforwarders Association, noted that **"policy unpredictability is a dangerous destabilizer,"** and emphasized that **"we should be freezing tariffs, not freezing trade."** His remarks echoed a broader concern among industry leaders about how shifting trade policies could disrupt global supply chains.

Technology and innovation also took center stage, particularly discussions around the use of artificial intelligence (AI). Two pilot programs—one by LATAM Cargo and the other by American Airlines Cargo—offered a compelling glimpse into how AI is transforming operations. These systems are being used to track critical safety events and optimize capacity planning by addressing underbooking and overbooking scenarios, ultimately enhancing both sales and efficiency. FedEx provided further details about another groundbreaking innovation: the use of digital twins to simulate packages and entire logistics networks. These virtual models help FedEx forecast and respond to weather-related disruptions through real-time rerouting—an especially vital tool for the e-commerce sector, which, according to figures provided by the CEO of SmartKargo, moves approximately 110 million packages across the U.S. each day.

Sustainability also remained a key focus throughout the panels. One notable initiative was shared by avianca cargo: by replacing traditional plastic pallet covers with biodegradable

alternatives, the airline is preventing the equivalent of over 3.2 million plastic bottles from entering landfills—a significant step toward greener operations. Several discussions also addressed the current challenges surrounding the availability and adoption of Sustainable Aviation Fuel (SAF), which is essential for reducing aviation's carbon footprint.

Additional sessions explored the future of air cargo through themes of **collaboration, compliance, and leadership**. A panel featuring leaders from Amazon Air, avianca cargo, and International Bridge highlighted how strategic partnerships are enabling innovation, efficiency, and improved customer experience. Another session on the handling of dangerous goods focused on best practices to manage risks posed by hidden hazardous materials. The MIT-LATAM-Airbus study detailed emission-reduction policies to help Latin America achieve net-zero CO₂ emissions by 2050, while LATAM Cargo and IATA emphasized how certification programs are enhancing standards and trust across the supply chain. Diversity and people-centered leadership were at the core of the "Women in Air Cargo" panel, which explored how inclusive cultures foster growth and resilience.

On the Innovation Stage, sessions focused on digital tools and data-driven decision-making. IATA's CargoS platform demonstrated how trade lane intelligence can shape strategy, while FIATA spotlighted digitalization and cybersecurity as essential pillars of a future-ready cargo industry. Additional presentations highlighted enhanced billing systems like Global CASSLink and its new solution, FlexPay; the CO₂ Connect platform for transparent emissions reporting; and collaborative training programs with institutions like Western Michigan University to help prepare the next generation of logistics professionals.

The **2025 CNS Partnership Conference** was a standout event that brought the global air cargo community together, marked by strong participation, meaningful engagement, and forward-looking collaboration. The conference concluded with a lively evening celebration themed 'Havana Chic,' blending music, color, and Caribbean flair to cap off an inspiring and collaborative week.

In the words of Andres Bianchi, LATAM Cargo CEO: **"CNS provides great opportunities for networking at a time in which discussing and engaging is extremely relevant. The best way to arrive at better solutions is to talk about them and find win-win opportunities among all the players in the industry. That's why we like attending CNS, and we believe the conference continues to be a great place to do so."** ►►►

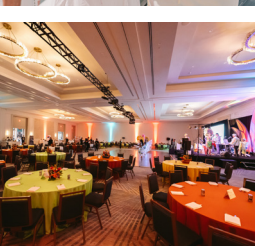
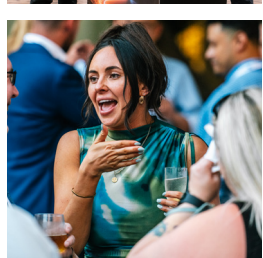
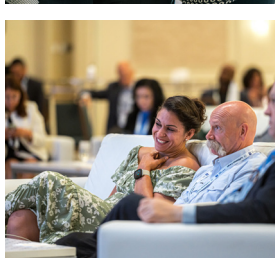
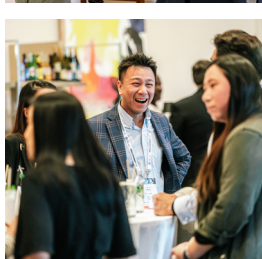
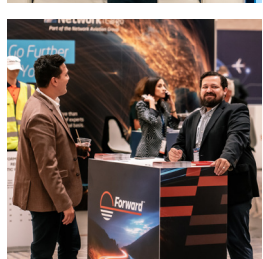
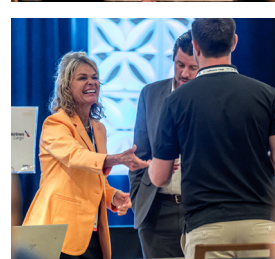
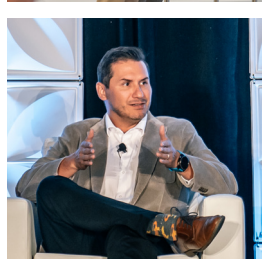
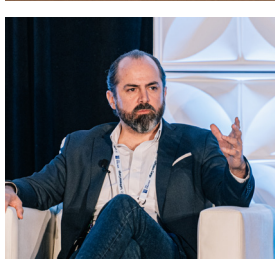
CNS

PARTNERSHIP
CONFERENCE

2025 Conference Photo Recap

Step into the vibrant atmosphere of the 2025 CNS Partnership Conference, held under the sunny skies of Miami, where industry leaders, innovators, and collaborators came together to drive forward-thinking solutions and build lasting partnerships. Our extensive photo gallery captures the energy, inspiration, and camaraderie that defined this milestone event. Explore all the photos from the event on IATA's Flickr.com account.

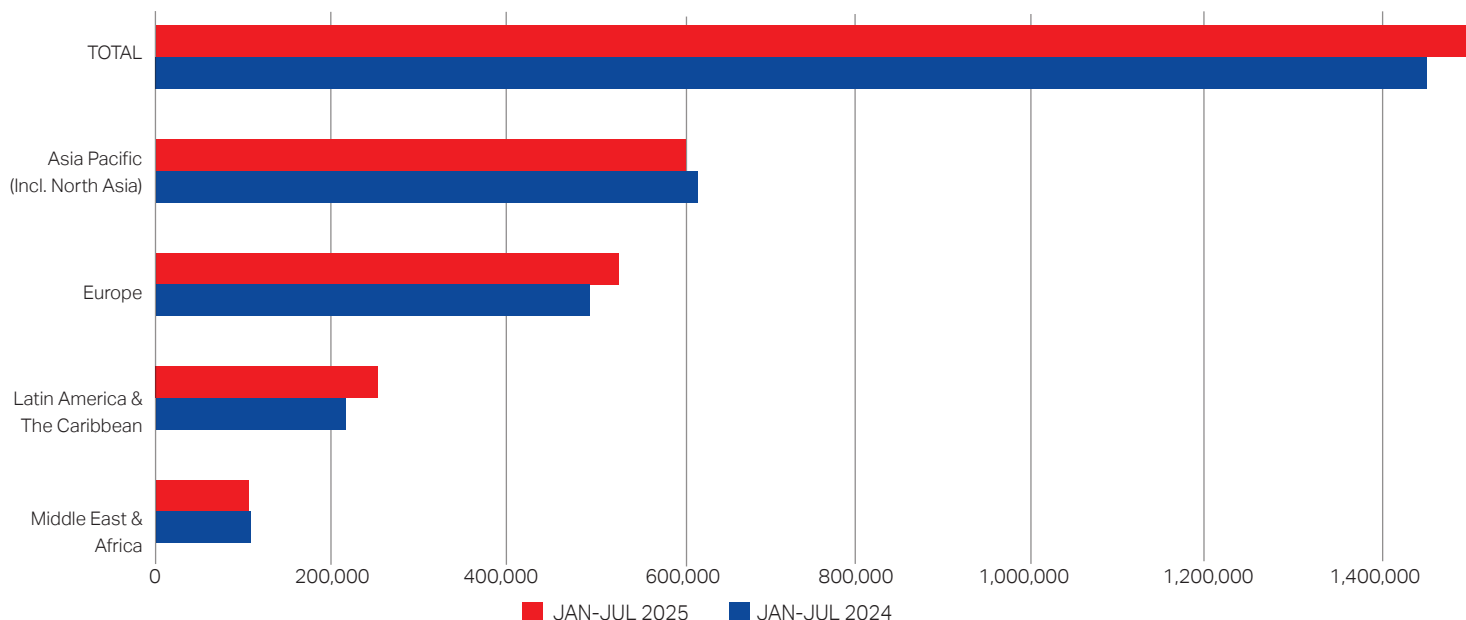




CASS-USA Market Monitor

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-Jul 2025 Weight in Tons		Jan-Jul 2024 Weight in Tons		Jan-Jul 2025/Jan-Jul 2024	
Region	Jan-Jul 2025	Region	Jan-Jul 2024	Region	% Change
Asia Pacific (incl. N. Asia)	608,474	Asia Pacific (incl. N. Asia)	621,108	Asia Pacific (incl. N. Asia)	-2.0%
Europe	531,074	Europe	497,120	Europe	6.8%
LatAm & The Caribbean	255,738	LatAm & The Caribbean	225,427	LatAm & The Caribbean	13.4%
Middle East & Africa	109,935	Middle East & Africa	111,080	Middle East & Africa	-1.0%
Total	1,505,221	Total	1,454,736	Total	3.5%

Jan-Jul 2025 Shipment Count		Jan-Jul 2024 Shipment Count		Jan-Jul 2025/Jan-Jul 2024	
Region	Jan-Jul 2025	Region	Jan-Jul 2024	Region	% Change
Asia Pacific (incl. N. Asia)	598,396	Asia Pacific (incl. N. Asia)	605,799	Asia Pacific (incl. N. Asia)	-1.2%
Europe	482,957	Europe	483,188	Europe	0.0%
LatAm & The Caribbean	232,117	LatAm & The Caribbean	218,995	LatAm & The Caribbean	6.0%
Middle East & Africa	135,017	Middle East & Africa	135,921	Middle East & Africa	-0.7%
Total	1,448,487	Total	1,443,903	Total	0.3%

JULY 2025

In June and July, U.S. export revenue remained stable y/y. Yields were reported to decrease by 6% y/y in July and 4% y/y in June. U.S. tonnage to Asia Pacific and North Asia increased by 4% y/y in July and remained stable y/y in June. Export tonnage to Europe increased by 12% y/y in July, compared to 9% y/y in June. Overall y/y results for Jan-Jul

2025 statistics reflected an increase in revenue of 1% y/y and a decrease in yield of 2%.

