

IATA WEBINAR

**Market outlook and
regulation changes
Special Cargo
transported by air**



Welcome

David Wall
Global Director, Cargo & Safety Solutions
IATA



3-Part Cargo Webinar Series

IATA WEBINAR

Market outlook and regulation changes
Cargo operations

5 October 2022, 14h00-15h00 CEST



COMPLETED

IATA WEBINAR

Market outlook and regulation changes
Special cargo transported by air

12 October 2022, 14h00-15h00 CEST



LIVE

IATA WEBINAR

Market outlook and regulation changes
Dangerous goods transported by air

19 October 2022, 14h00-15h00 CEST



19 October 2022
14h00-15h00 CEST

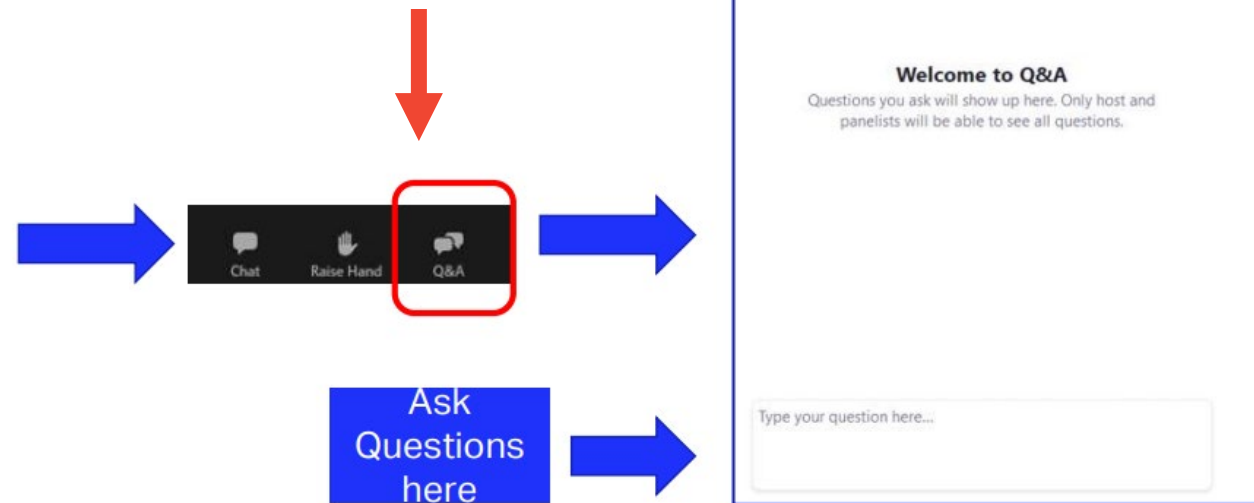


Webinar Housekeeping

This webinar **is being recorded** and it **will be shared with you**, along with this presentation.



Have a question? Access the **question tab at the bottom of your screen** and type in your question

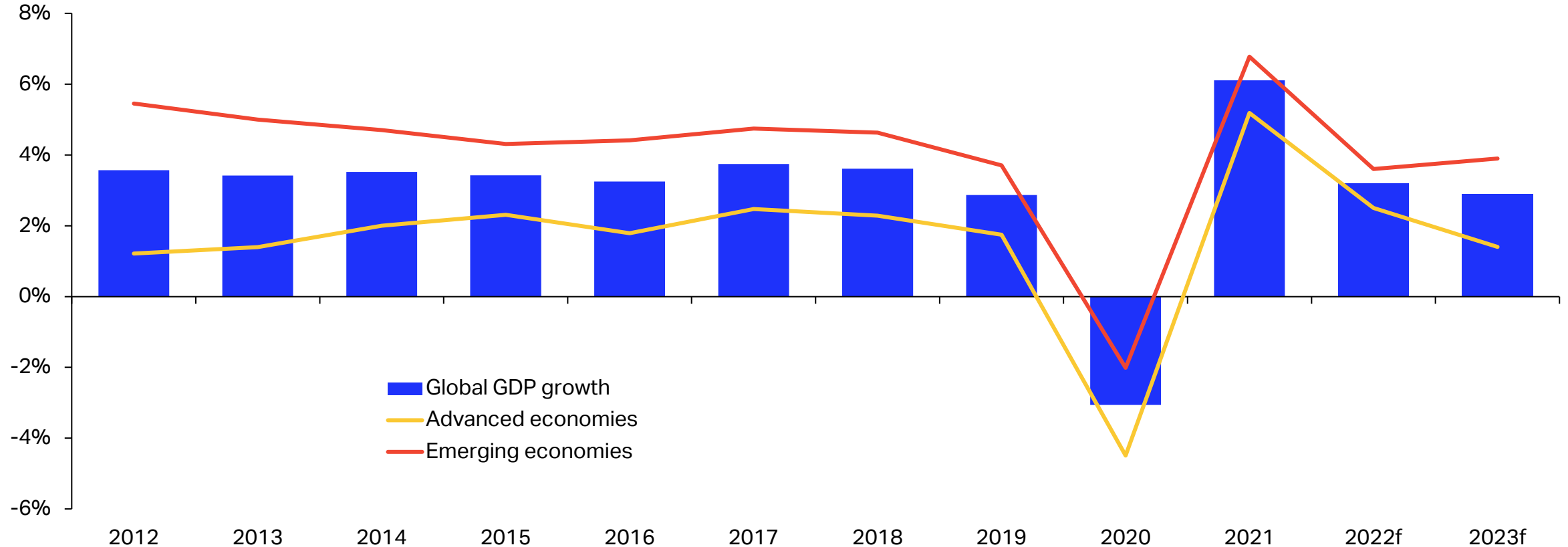


Agenda

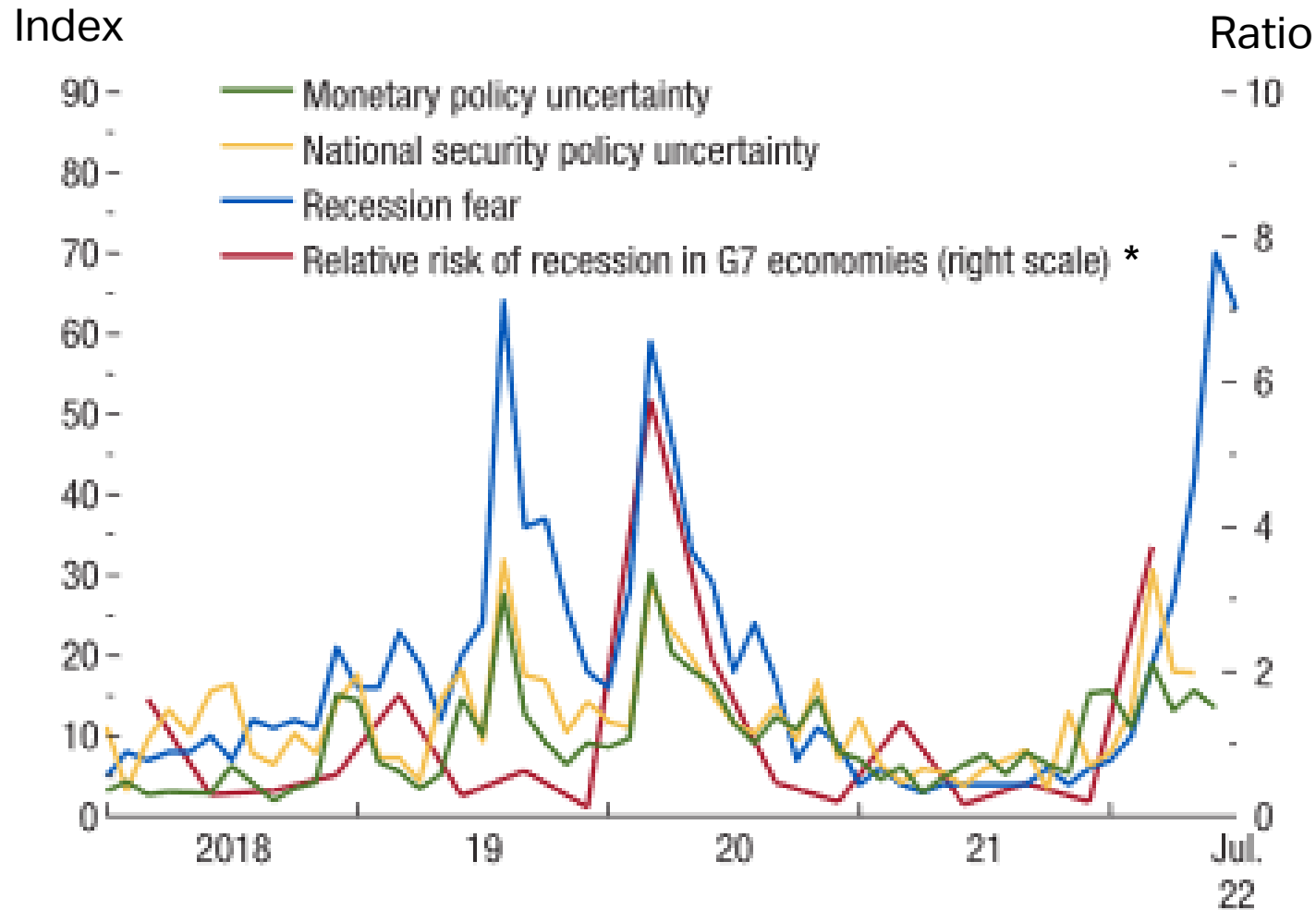
- **Economic Outlook**
 - Commodity Report
 - Industry Trends and Priorities
 - Focus on sustainability, technological improvements and industry collaboration
- **Standard Development**
 - Dedicated Board and Working Groups
 - IATA TCR, PCR, LAR Regulations and Guidelines
 - Compassionate Transportation Manual (CTM)
- **Compliance**
 - CEIV certification programs
 - Air Cargo Compliance Solution

Slowdown is expected to continue in 2023

Economic growth outlook, % year-on-year



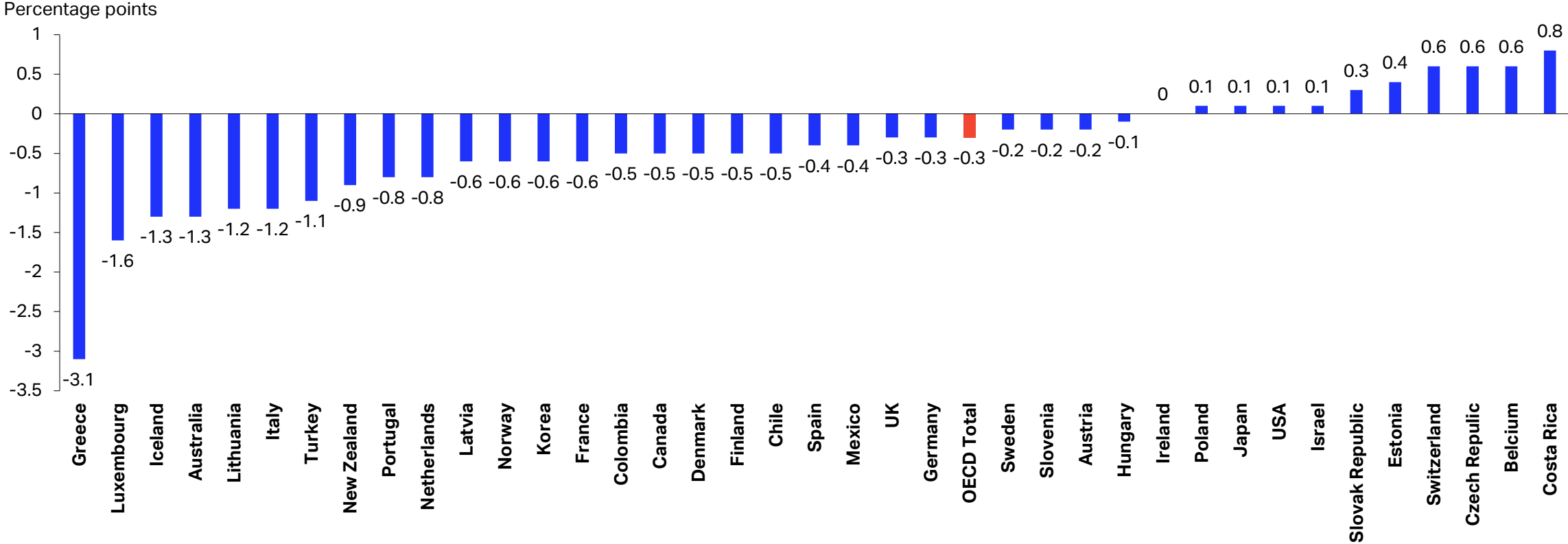
Recession fears and policy uncertainty



- Recession fears have set new highs.
- Policy uncertainty has risen but not to new highs.

Spectacular job growth should allay fears

Change in unemployment rate for selected OECD countries between February and April 2022

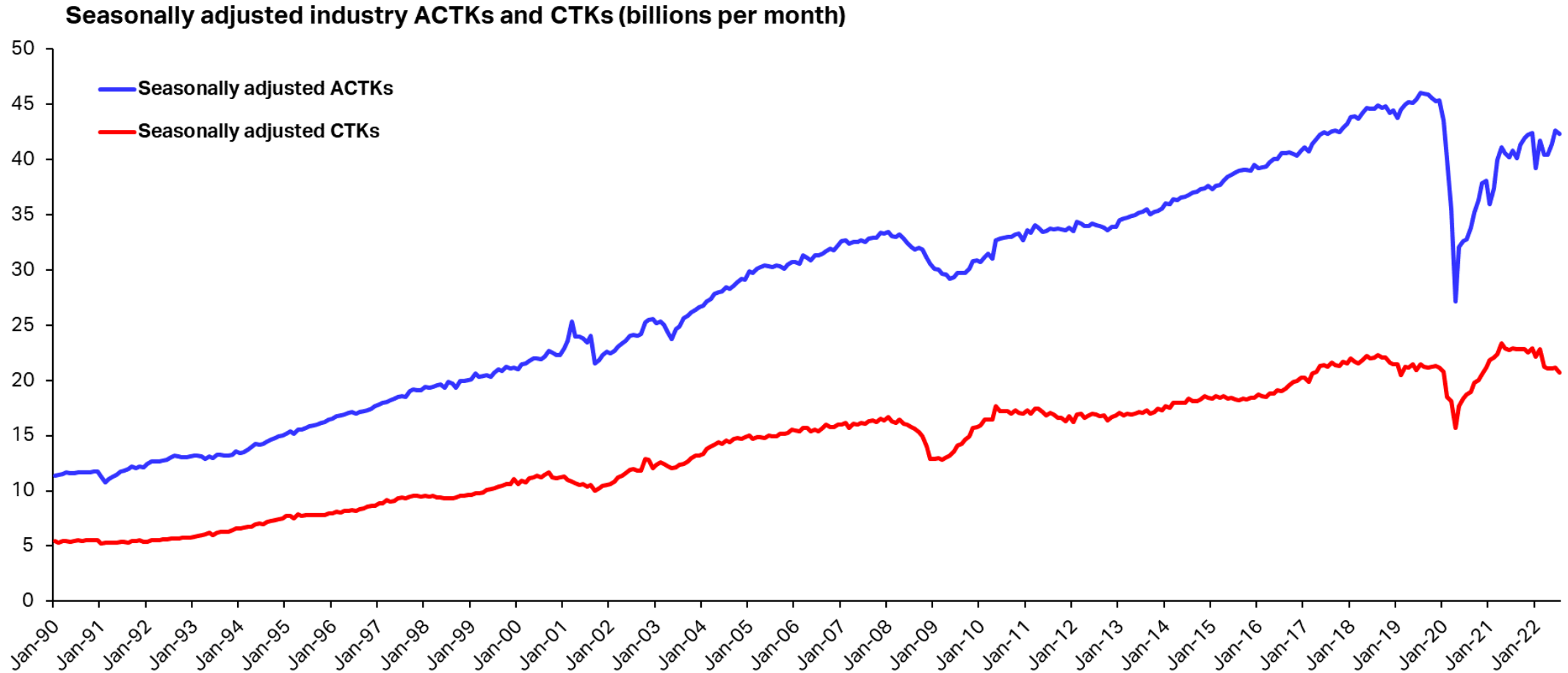


Air Cargo Industry



Cargo Industry Growth Historically

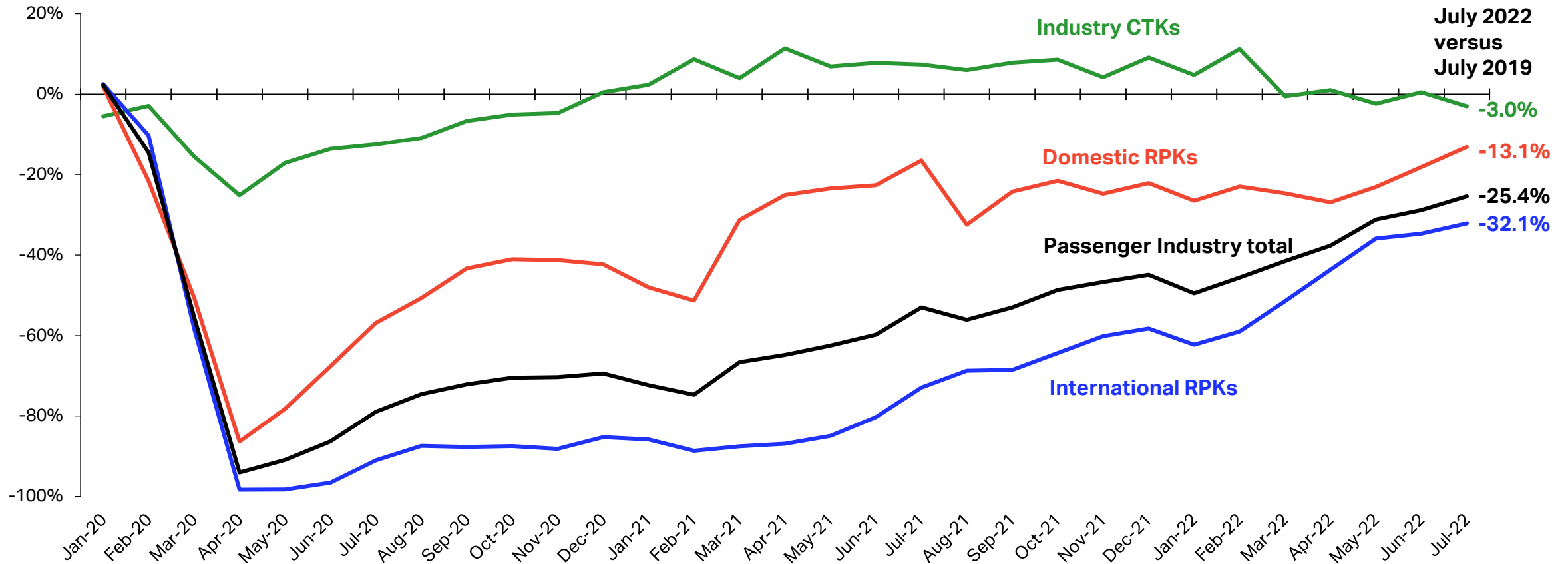
In July 2022, cargo supply remains an upward trend despite a slight decline in demand



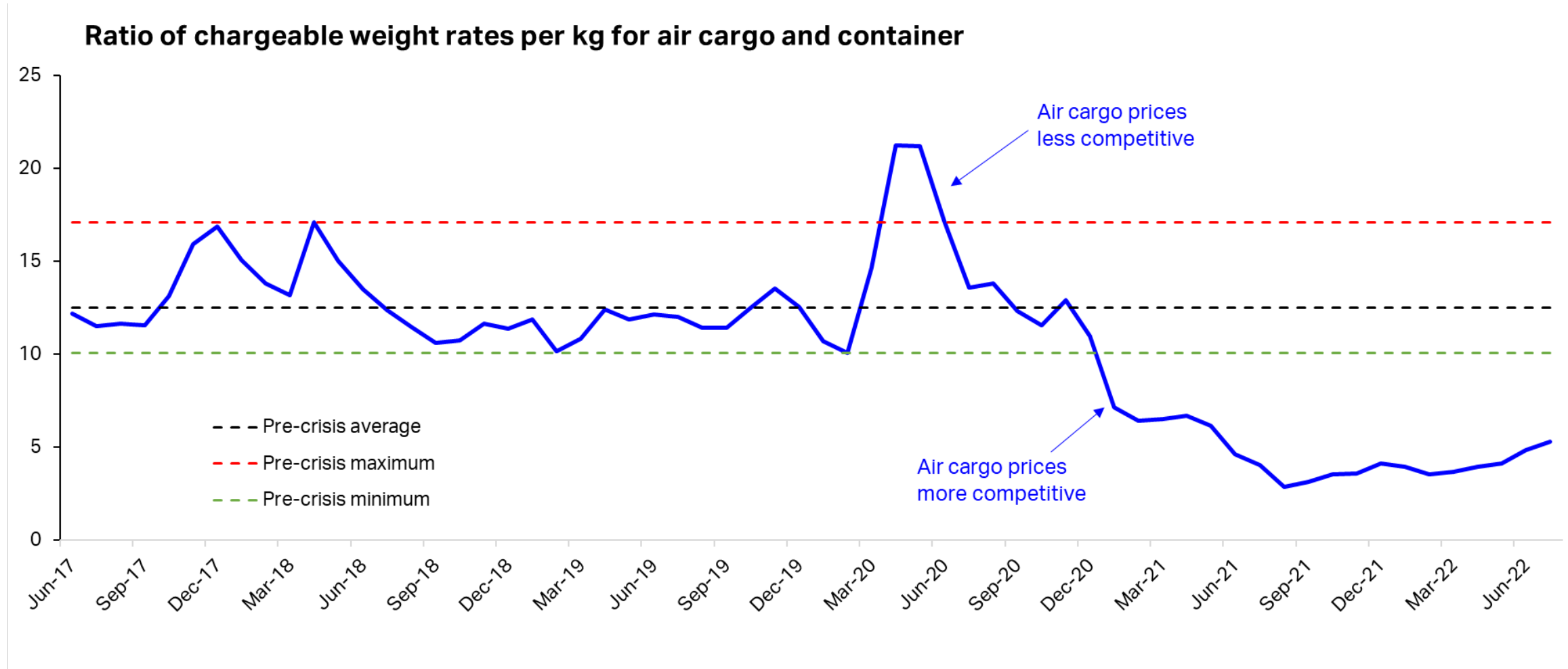
Resilient cargo as passenger-traffic recovery goes on

CTKs stable around 2019 levels, domestic RPKs now on an upward trend

CTKs and RPKs, % ch. vs. the same month in 2019



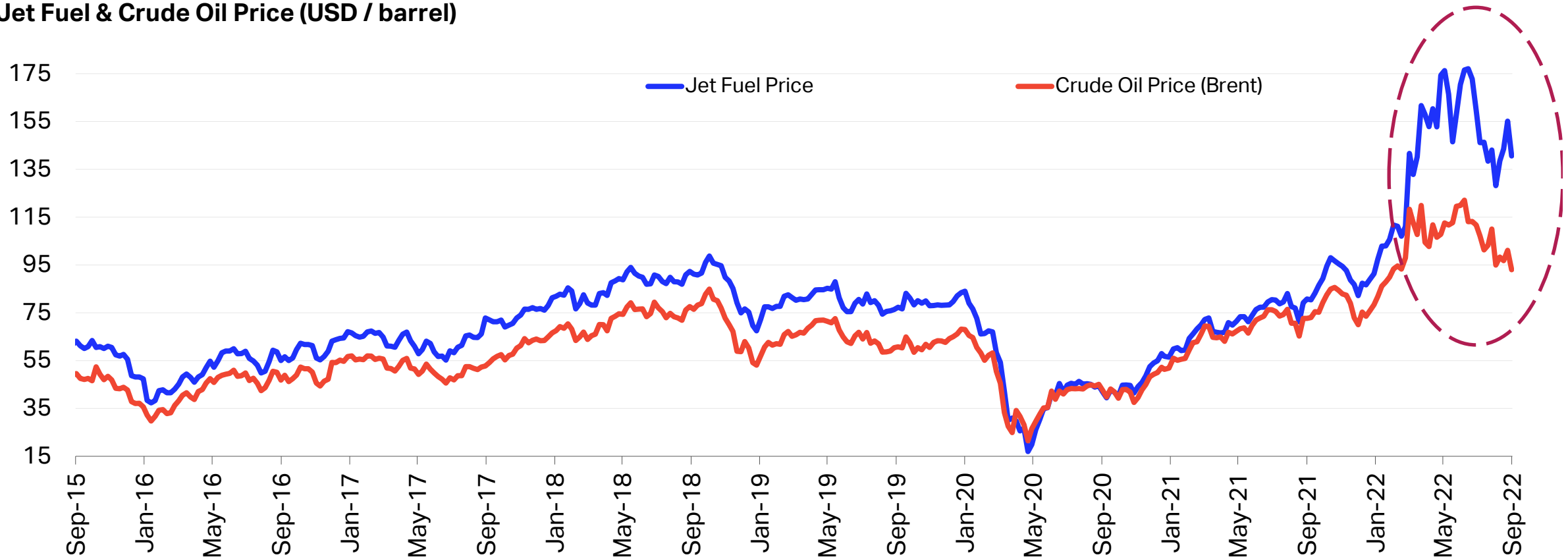
Cargo rates remain competitive to container



Pressures on operating costs remain

Brent averaged USD 100.4/bbl in August, crack spread still elevated

Jet Fuel & Crude Oil Price (USD / barrel)



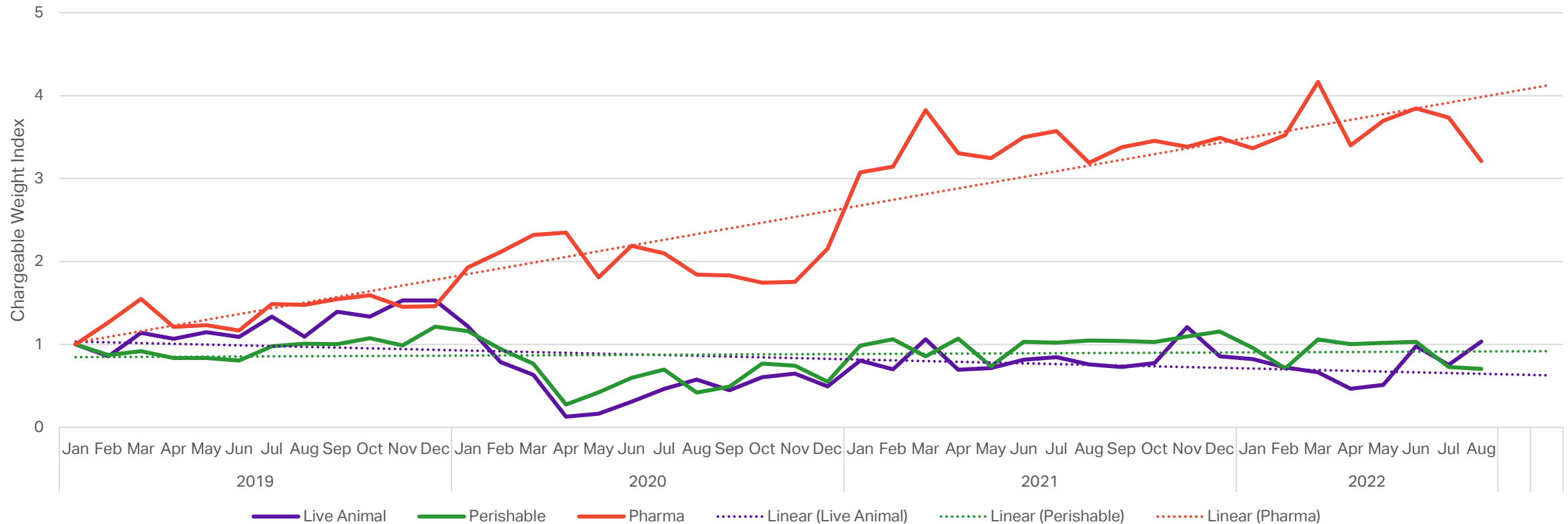
Special Cargo

Demand



Special Cargo Demand

Special Cargo Chargeable Weight Index from 2019 to 2022

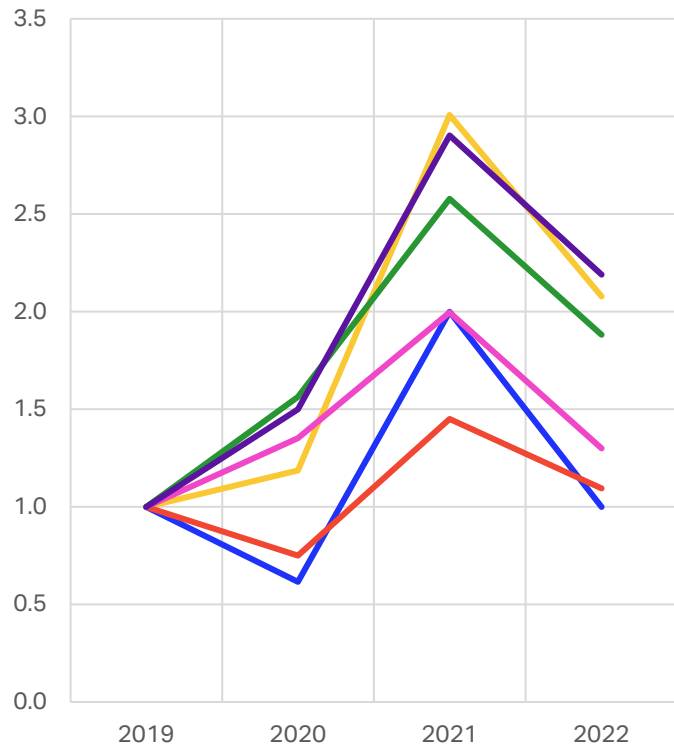


Based on [IATA CargoIS](#) (Intelligence Services)

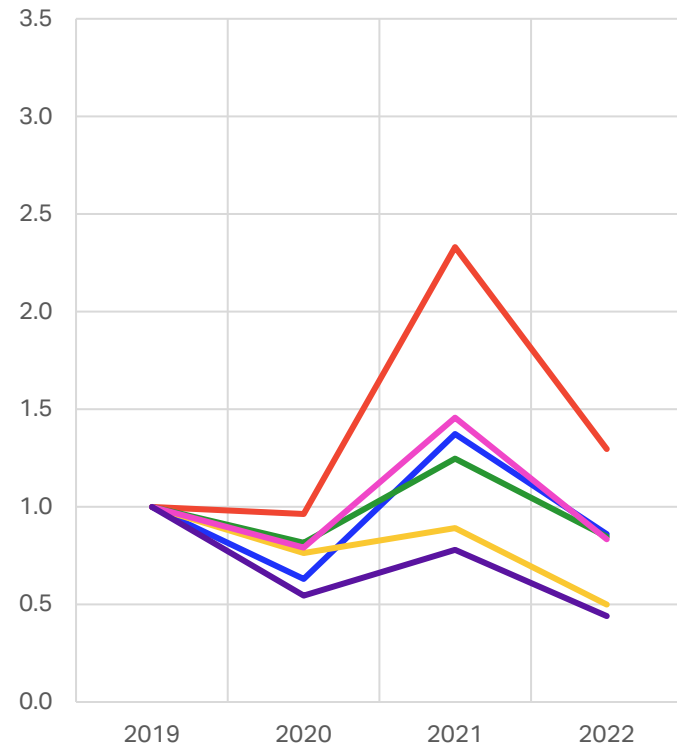


Special cargo demand by origin region

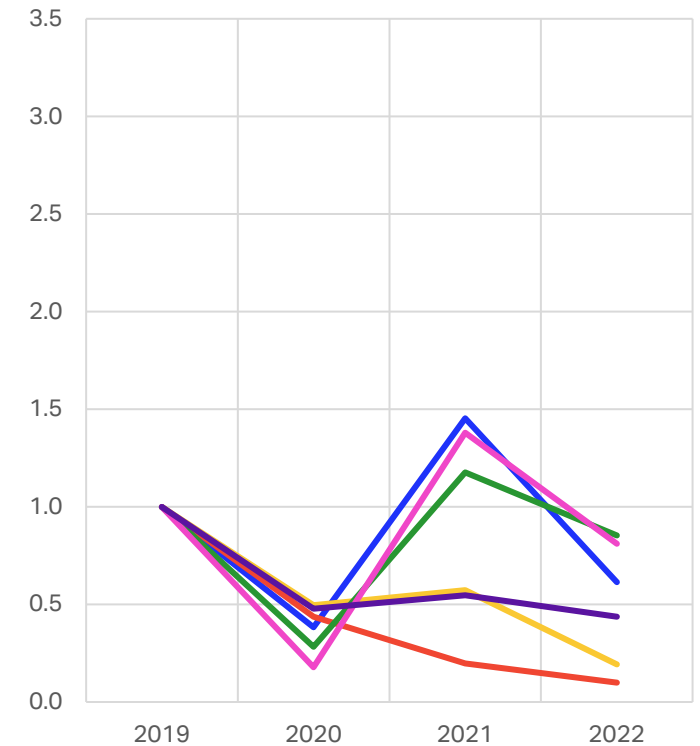
Pharma chargeable weight index - Index 2019



Perishables chargeable weight index - Index 2019



Live Animals chargeable weight index - Index 2019



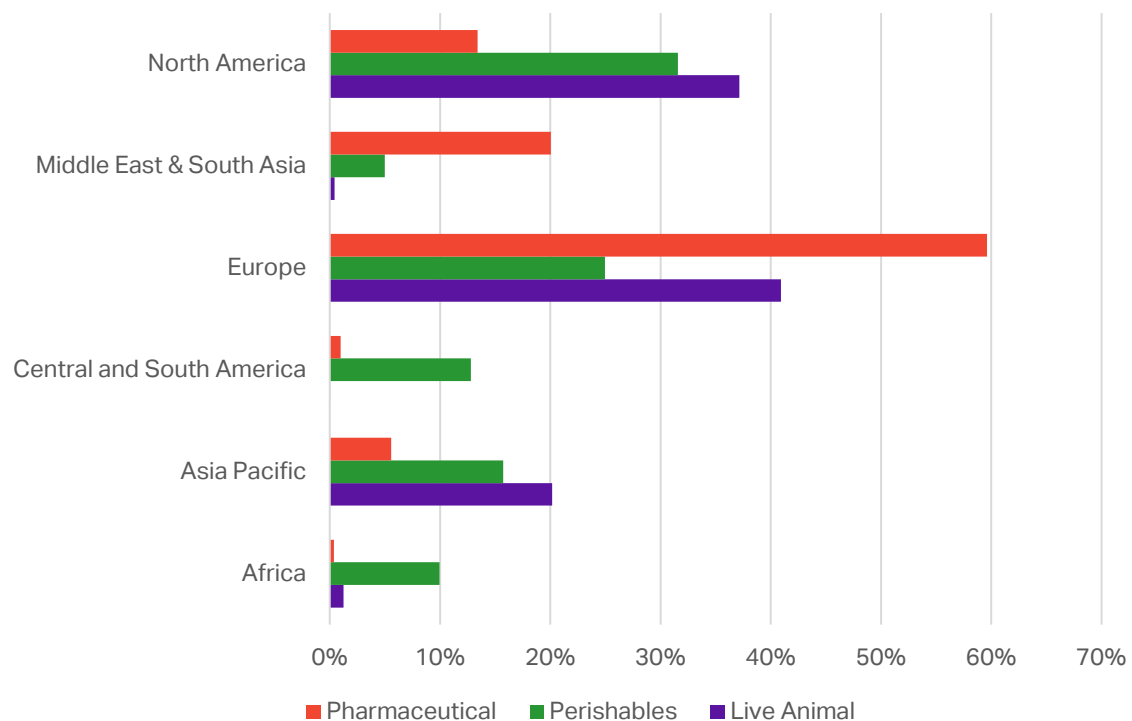
— Africa — Asia Pacific — Central and South America — Europe — Middle East & South Asia — North America

Based on [IATA CargoS](#) (Intelligence Services)

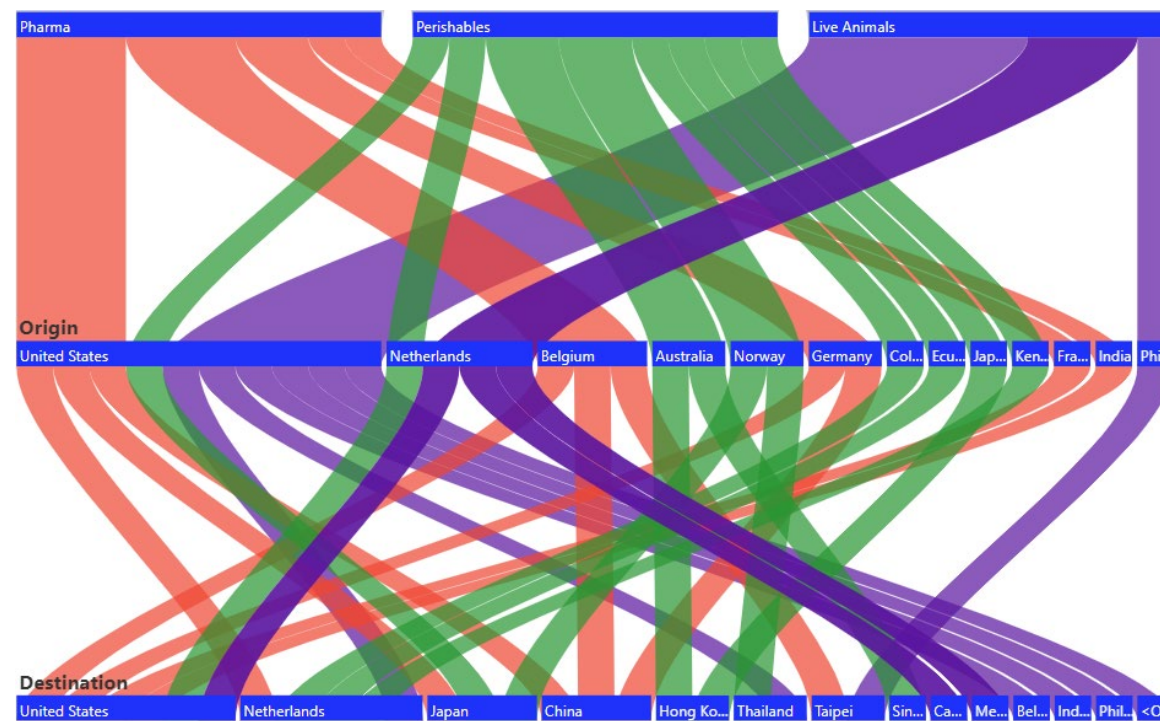


Flows of special cargo in Jan-Aug 2022

Distribution of flows by region



Top country-to-country flow



Based on [IATA CargoIS](#) (Intelligence Services)



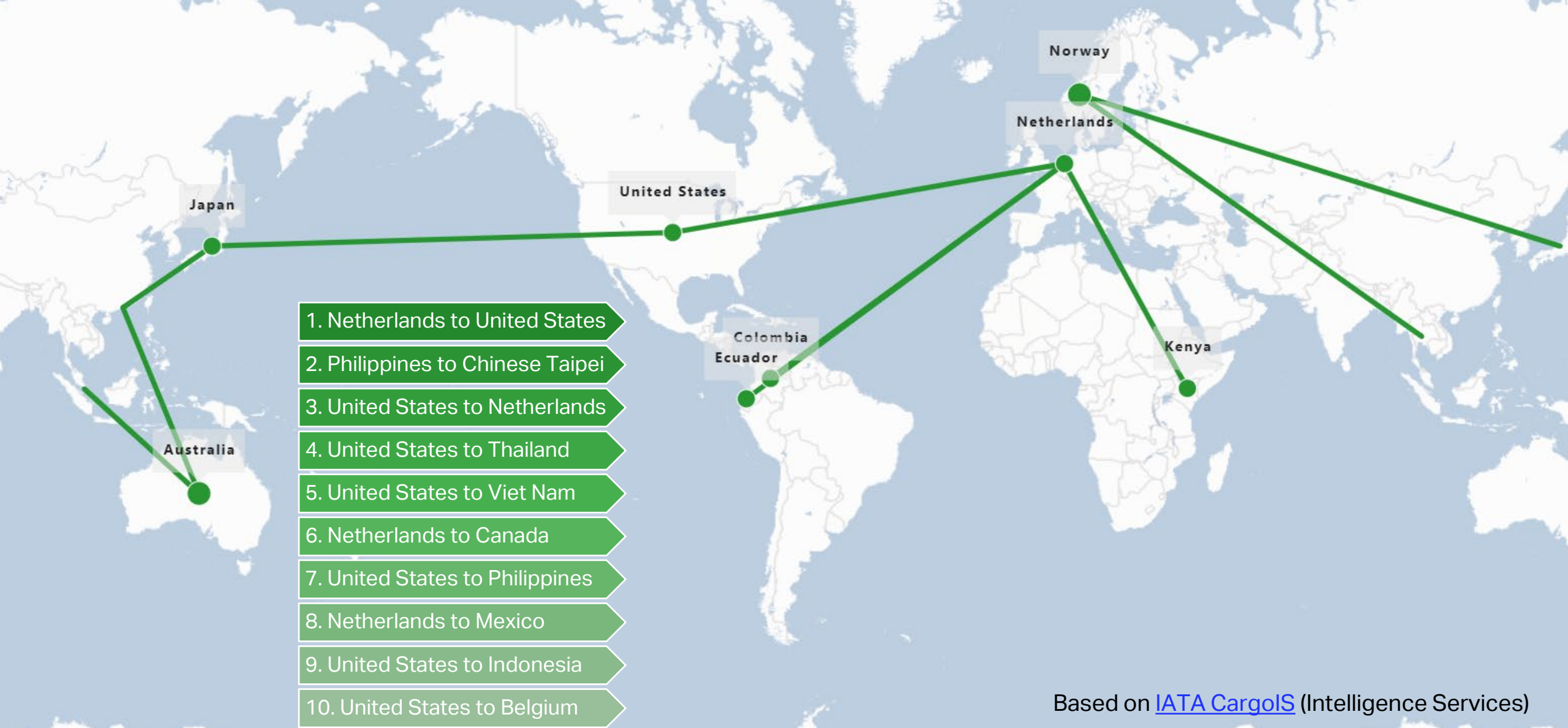
Top country-to-country pharma flows in Jan-Aug 2022



1. India to United States
2. United States to Netherlands
3. Belgium to United States
4. United States to Japan
5. Germany to China
6. Germany to United States
7. France to United States
8. Belgium to Chinese Taipei
9. Belgium to China
10. United States to China

Based on [IATA CargoIS](#) (Intelligence Services)

Top country-to-country perishables flows in Jan-Aug 2022

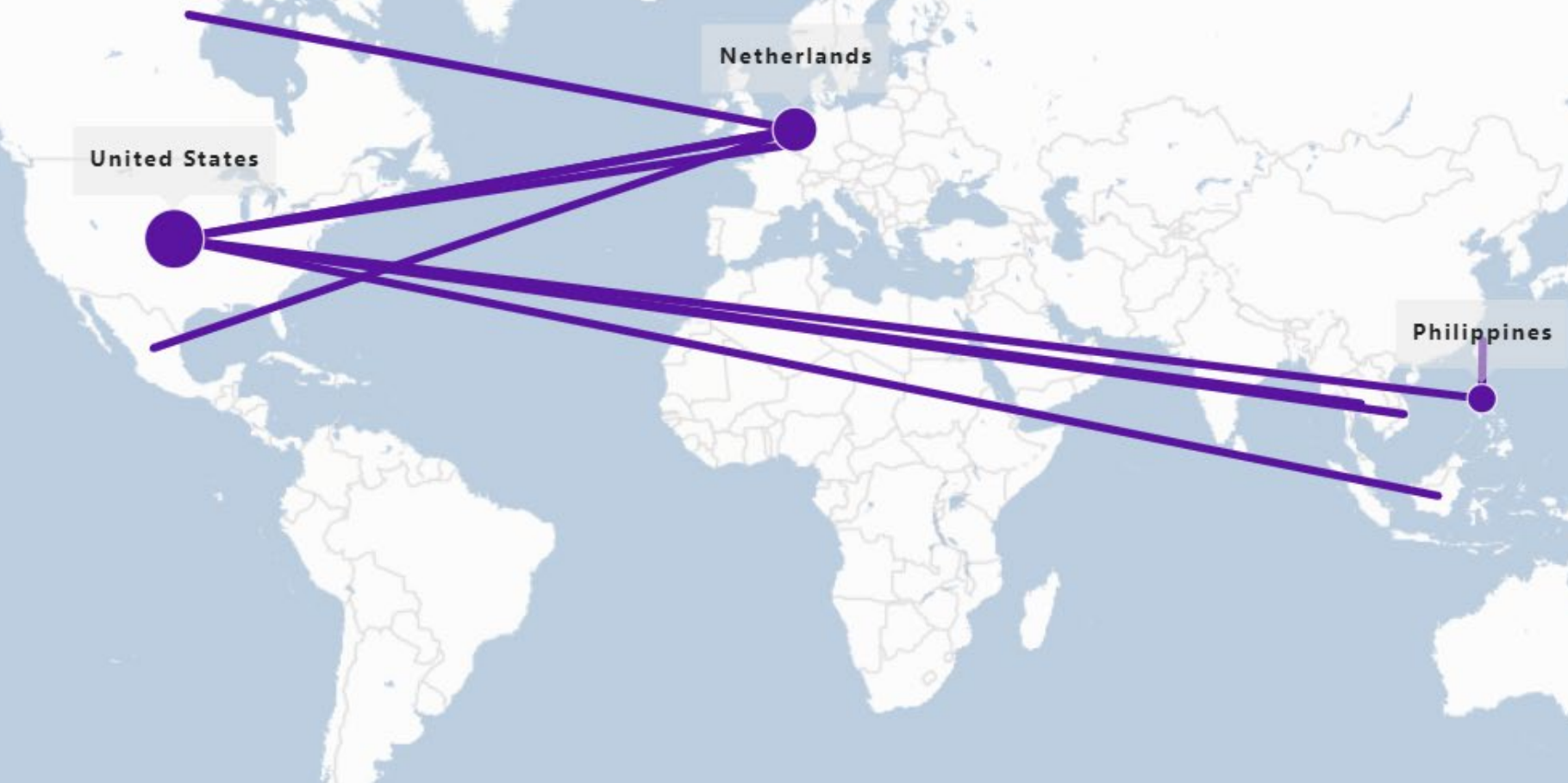


1. Netherlands to United States
2. Philippines to Chinese Taipei
3. United States to Netherlands
4. United States to Thailand
5. United States to Viet Nam
6. Netherlands to Canada
7. United States to Philippines
8. Netherlands to Mexico
9. United States to Indonesia
10. United States to Belgium

Based on [IATA CargoIS](#) (Intelligence Services)

Top country-to-country live animal flows in Jan-Aug 2022

1. Netherlands to United States
2. Philippines to Chinese Taipei
3. United States to Netherlands
4. United States to Thailand
5. United States to Viet Nam
6. Netherlands to Canada
7. United States to Philippines
8. Netherlands to Mexico
9. United States to Indonesia
10. United States to Belgium



Special Cargo

Industry trends





Sustainable operations

Net-zero carbon emissions by 2050

- Sustainable aviation fuels, new aircraft technology, more efficient operations and infrastructure, and zero-emissions energy sources.
- Recommended Practice RP1678 on CO2 Emissions Measurement Methodology to calculate emissions.
- Global standard to measure air cargo carbon footprint at the shipment level.
- Ongoing update of RP1678 to adapt to the reality of the industry

Reducing perishables waste

- Growing consumer demand for healthy products all year round.
- UN Sustainable Development Goals (UN SDGs) to "ensure sustainable consumption and production patterns".
- Temperature excursion more frequent in transit.
- Real-time data to prevent wastes.
- Increased use of specialized storage rooms to guarantee freshness.





Digital transformation

Data quality and control

- Full control of data quality. Data stays at the source and owners grant access

Visibility and transparency

- Cover end-to-end transportation chain, from shippers to consignees. Share data with relevant parties

Plug & Play connectivity

- Facilitates direct connectivity between all stakeholders with web API. New cooperative IT solutions and innovation

Growing demand for healthcare

- World's population grows, becomes wealthier and ages. Demand for treatment of chronic diseases is rising, increase in healthcare products transports.
- Deliver quickly and safely with no incident that would affect efficacy.
- Digitalization and cybersecurity drive end-to-end visibility and security of the healthcare supply chain. Temperature monitoring with real-time tracking devices for better visibility of shipments and intervention in case of deviations.
- Industry-recognized certification programs are becoming more common place for better compliance with regulations.





Reduce illegal trade in wildlife

- Illegal wildlife trade worth between \$7 and \$23 billion a year. 4th largest illegal global trade.
- The trafficking of wildlife by-passes health checks at borders and presents a threat of disease transmission to both animals and humans.
- IATA signed a Memorandum of Understanding with the World Association of Zoos and Aquariums (WAZA) to enhance standards of transportation for live animals and benefit the conservation of species of wild fauna.

Standard Development

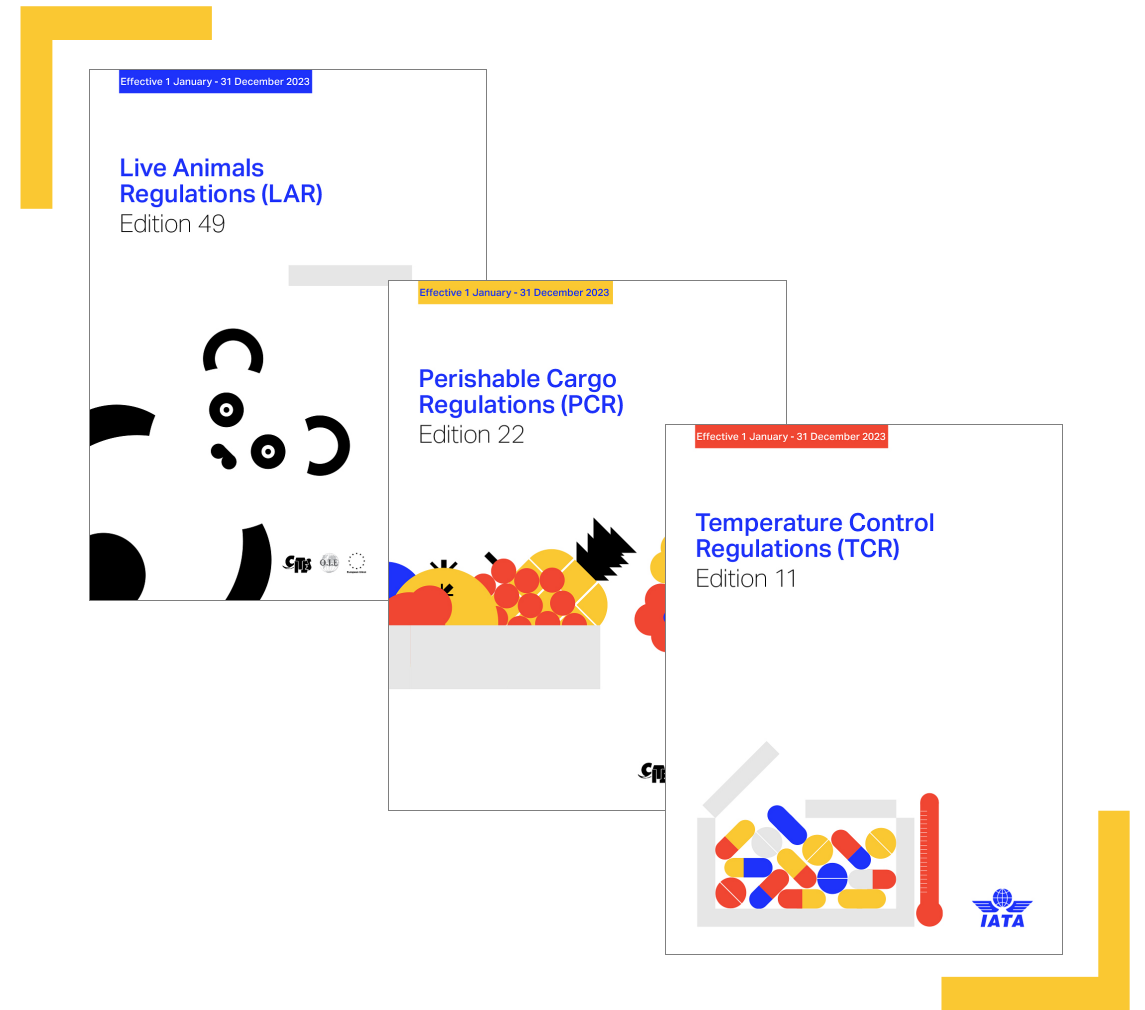
Sonia Ben Hamida, Head Special Cargo
Maria Jitomirski, Manager Special Cargo
Lucy Exell, Manager Cargo Industry Programs



Standard-Setting Organization

IATA supports aviation with global standards for airline safety, security, efficiency and sustainability.

IATA sets standards for the airline industry's business processes and operations.



Setting standards for industry by industry

IATA Airlines

Live Animals & Perishables Board (LAPB)
12 members

Industry Experts

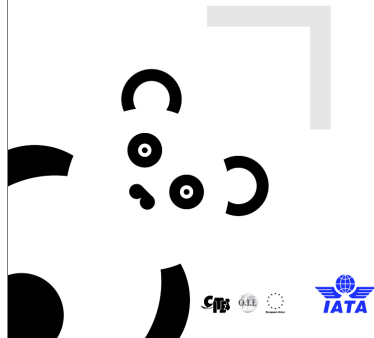
LAPB Advisory Group
6 members

Perishable Cargo Working Group
20 members

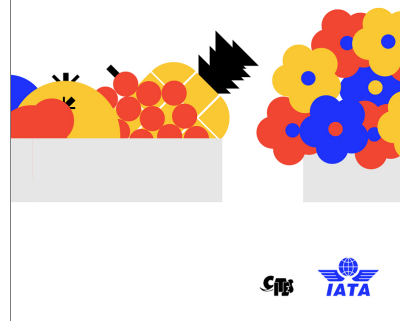
Healthcare Cargo Working Group
20 members

Join us to take part in standard setting activities.

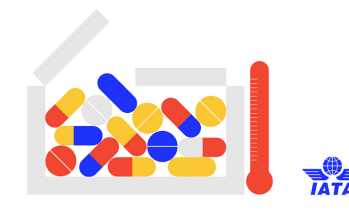
Live Animals Regulations (LAR)
Edition 49



Perishable Cargo Regulations (PCR)
Edition 22



Temperature Control Regulations (TCR)
Edition 11



Temperature Control Regulations (TCR)

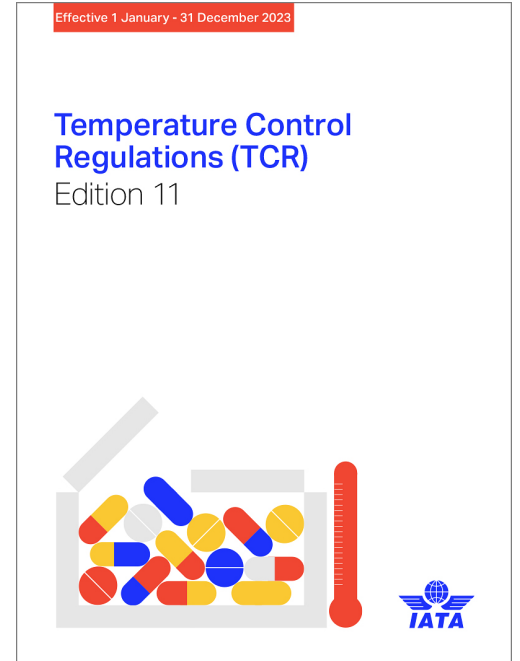
Contains information to ship compliant temperature-sensitive products: from packaging to documentation and labelling.

2023 Significant Changes

- Added and aligned definitions with Dangerous Goods Regulations
 - overpack, package, packaging
- Added definitions from the IATA ULD Regulations
 - Active Temperature Controlled Container; Aircraft Container; Aircraft ULD; Non-Aircraft Container; ULD, etc.
- State & Operator variations

New IATA Healthcare Cargo Working Group

- Develop standards & guidelines to ensure the quality and integrity of healthcare cargo and the promotion of sustainable practices



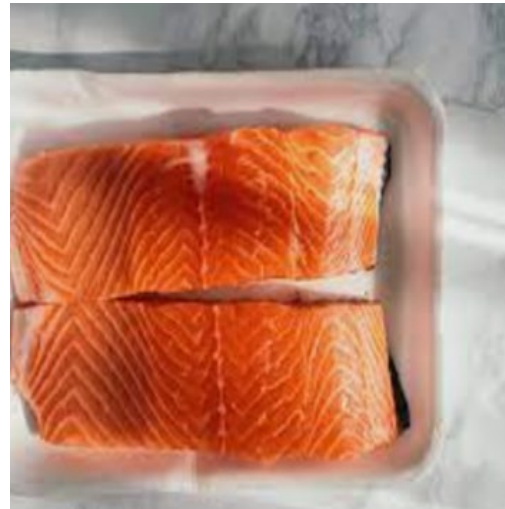
Time is of the essence with perishables



Delaying
premature
product
deterioration



Time and
temperature
sensitive
goods



Prevent
damage,
spoilage

Strength of the Uninterrupted Cold Chain



**Speed
Operations
Logistics**



**Packaging
Documentation
Labeling
Storage Facilities**



Industry Collaborative Efforts



Perishable Cargo Regulations (PCR)

Has all the up-to-date, best-practice and guidance information you need to develop loss-minimizing perishable shipping processes.

2023 Significant Changes

- Perishable Facts & Types
- Addition and alignment of glossary terms
- State & Operator variations

New IATA Perishable Cargo Working Group

- Industry effort to enhance the IATA PCR with standards and regulations and address sustainability requirements, such as reduction of single-use plastics and product loss.



Live Animal Transport by Air

Animal safety & welfare considerations



Compliance
(containers, equipment, facilities, etc.)

Training, communication and information sharing



Live Animal Transport by Air

What are Shipper Responsibilities?

Route and special care required prior to acceptance	Documents and information for Shipper's Certificate	Compliance with national, carrier and IATA regulations
Container with marking & labelling	Bedding and food	Name and quantity of animal
Wild caught or captive bred?	Feeding and watering instructions	Date and time that food and water was last given
Any medication given	Veterinary health certificate , CITES export permit , etc.	24-hour emergency number

What are Operator Responsibilities?

7.6.2 In-Cabin Live Animal Acceptance Checklist (Cabin/Excess Baggage)

An example of the Live Animal Acceptance Checklist for animals travelling in cabin is shown hereafter. For all requirements related to the Checklist see section 10.1 of these Regulations.

	YES	NO*	N/A
1. Information on the flight:			
Flight details:.....	<input type="checkbox"/>	<input type="checkbox"/>	
Ticket number/PNR:	<input type="checkbox"/>	<input type="checkbox"/>	
Date:	<input type="checkbox"/>	<input type="checkbox"/>	
Flight Origin:	<input type="checkbox"/>	<input type="checkbox"/>	
Destination:	<input type="checkbox"/>	<input type="checkbox"/>	
If the shipment is part of an interline agreement has the passenger/shipper confirmed that all arrangements are in place for the interline sector?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Information on the owner:			
Name:	<input type="checkbox"/>	<input type="checkbox"/>	
24-hour contact number:	<input type="checkbox"/>	<input type="checkbox"/>	
3. Questions to consider:			
Is species of animal provided?	<input type="checkbox"/>	<input type="checkbox"/>	
Is all necessary documentation provided (e.g. health certificate)?	<input type="checkbox"/>	<input type="checkbox"/>	
Is the animal clean and does it appear to be fit to travel?	<input type="checkbox"/>	<input type="checkbox"/>	
Has the owner confirmed the animal is not sedated?	<input type="checkbox"/>	<input type="checkbox"/>	
Is documentation available proving that the animal is at least 8 weeks old?	<input type="checkbox"/>	<input type="checkbox"/>	
4. Questions on the container to consider:			
Is the size of the container suitable for the animal?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the consignment weight/size comply with the operator's policy?	<input type="checkbox"/>	<input type="checkbox"/>	
For cats and dogs:			
• Can the animal sit, stand, turn around and lie down in a natural position?	<input type="checkbox"/>	<input type="checkbox"/>	
• Does the container have at least 16% ventilation of the 4 sides?	<input type="checkbox"/>	<input type="checkbox"/>	
• Does the container have ventilation on all 4 sides?	<input type="checkbox"/>	<input type="checkbox"/>	
Is the container leak and escape proof?	<input type="checkbox"/>	<input type="checkbox"/>	
Is the container clearly labelled with a live animal label?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the container fully comply with IATA LAR standards?	<input type="checkbox"/>	<input type="checkbox"/>	
Date:			
Submitted by (passenger/shipper):			
Print name _____ Signature _____			
Received by (acceptance agent):			
Print name _____ Signature _____			

* IF ANY QUESTION IS ANSWERED WITH "NO", DO NOT ACCEPT THE SHIPMENT

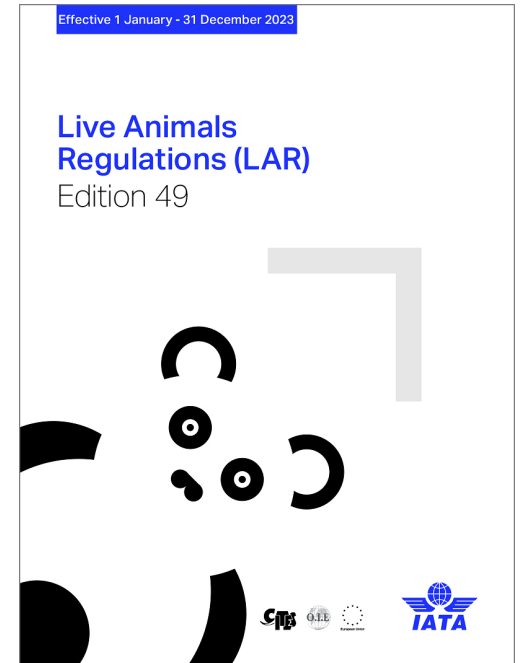


Live Animals Regulations (LAR)

Covers animal transport of all kinds and contains comprehensive information about the requirements for protected and endangered species as lab animals, livestock and domestic animals.

2023 Significant Changes:

- Amendments to Shipper's Responsibilities on sedation
- 8.1.4.1 Sedation, Tranquilization and use of Psychoactive Drugs
- Container Requirements
- 10.1 Best practice for operators
- 10.3.1/10.4.1 Handling Requirements
- State & Operator variations



Compassionate Transportation Manual (CTM)

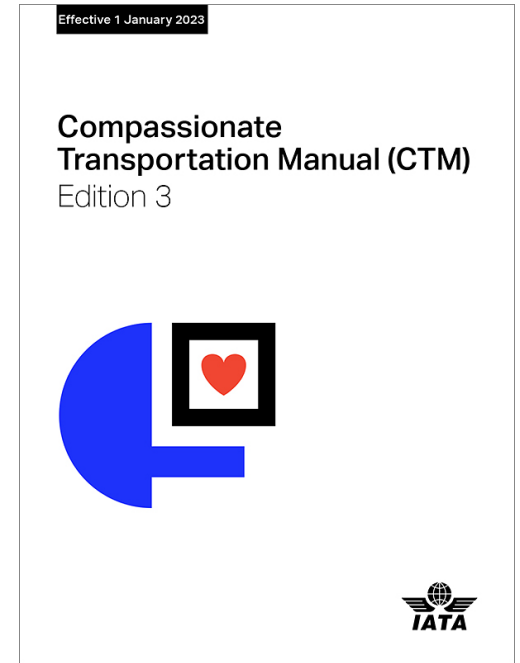
Contains the guidance needed for funeral operators, airlines and freight forwarders on how to prepare, ship and handle this special cargo.

What's inside the manual

- State & Operator information
- Requirements on documentation, packing, handling, marking and labeling
- CTM checklist
- Sustainable and Environmentally friendly options

Contributors

IATA Member Airlines - Funeral Home Associations - Manufacturers and Distributors



Excellence beyond Compliance

David Wall
Global Director, Cargo & Safety Solutions
IATA



1) Information Access. ONE Source – transparency and visibility



New Certifications

What is ONE Source?

Validation Programs

JOIN | LOGIN

Find validated aviation capability and infrastructure information

Search by location ▼ Type Location 🔍

Search Wizard | Advanced Search | Airline | Airport Operator | Cargo Handling Facility | Freight Forwarder | Ramp Handler | See all

New Certifications

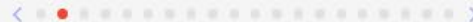


CEVA Logistics - PVG

Shanghai

CEIV Lithium Batteries

Go To Station Profile



What is ONE Source?

IATA ONE Source is the industry platform for validated aviation capability and infrastructure information. Find the right business partner for your needs, from specific infrastructure requirements such as temperature-controlled rooms to IATA certifications



Free of charge

Registering your station in One Source is free of charge!



Reliable

Only place to find up to date information about IATA validations, company equipment and infrastructure.



Global reach

Publish your station information on a global, industry recognized platform.



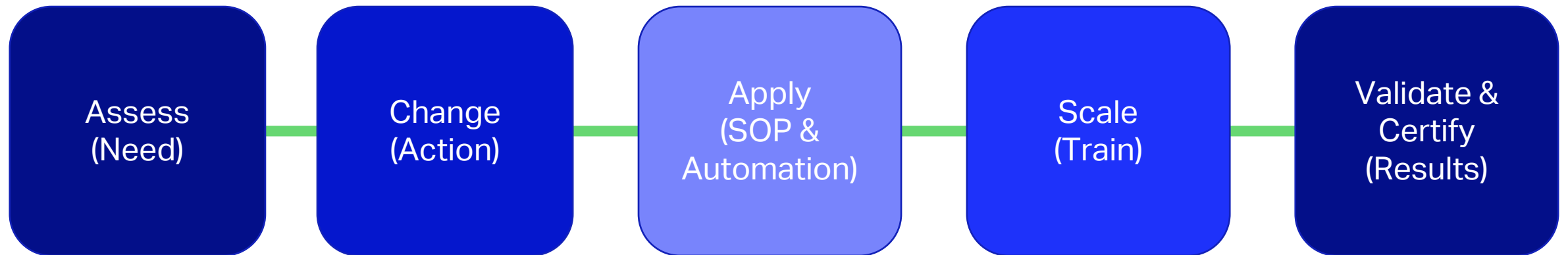
At your fingertips

Find the right business partners right where you need them.

<https://onesource.iata.org/>

2) Identifying Operational change:

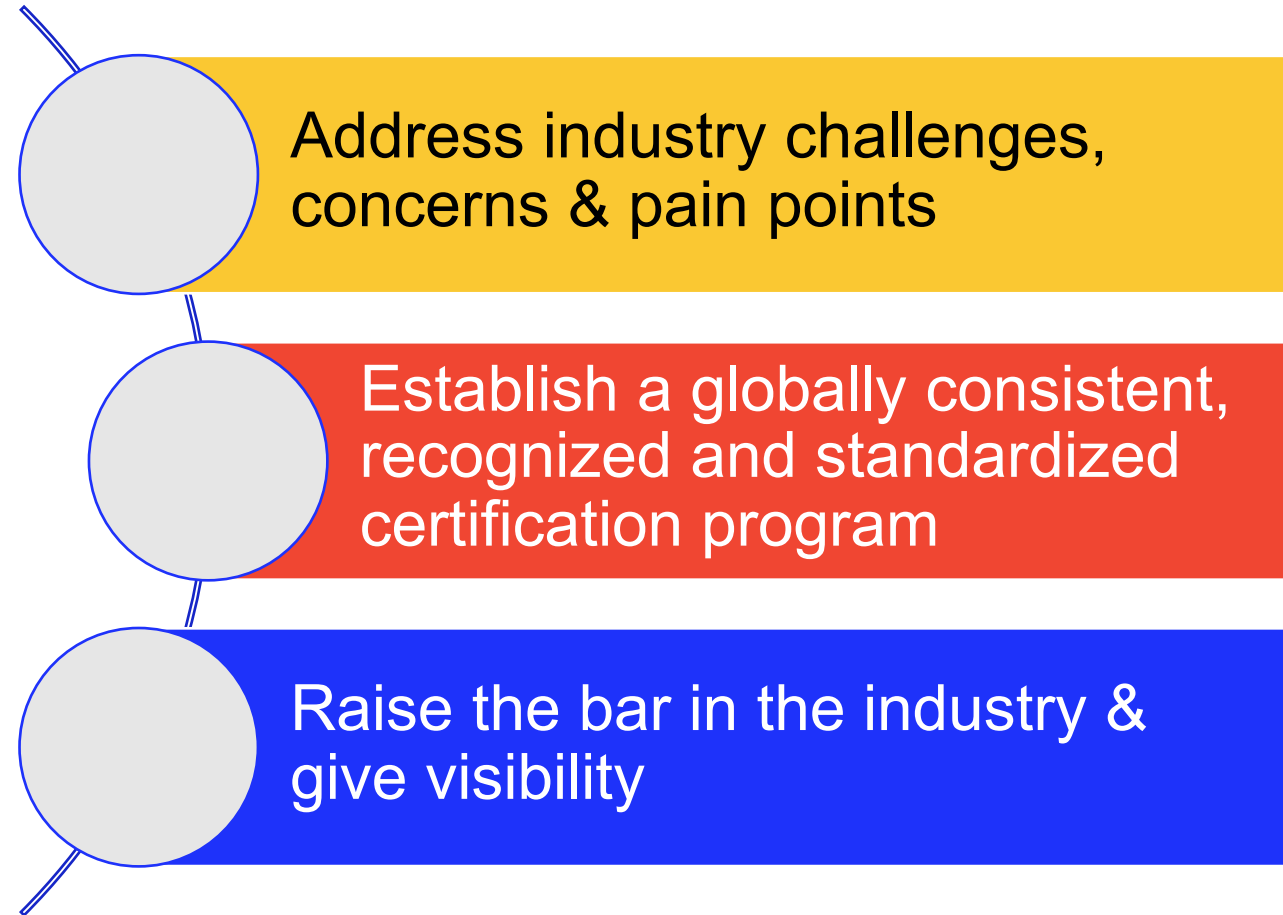
Embedding Safety & Compliance first





Certification

Established following a call-to-action to standardize process, improve operation and enhance training in relation to transport and handling of air freight shipments



Excellence beyond compliance

**BECOME
RECOGNIZED
FOR THE SAFE,
COMPLIANT
AND EFFICIENT
TRANSPORT OF
SPECIAL CARGO
COMMODITIES**

Standards & Regulations

- Comprehensive information about the requirements for handling and transporting live animals
- Compliance with national and international guidelines and regulations

Quality Program

- Harmonization of standards
- Applicability of regulations
- Benchmark the quality and standard of your organization



3) Tools to assist Operational Excellence

IATA TACT: moving a Shipment from VIE to LON?

Origin	Destination	Airline	From Date	To Date
<input type="text" value="VIE Vienna, Austria, AT [City]"/>	<input type="text" value="LON London, United Kingdom, GB [City]"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[RATES](#) | [RULES](#) | [SCHEDULES](#) | [DENIED PARTIES-SANCTIONS](#) | **TRADE FACILITATION**

HS Code (6-digit)

080810 - Apples, pears and quinces, fresh : Apples

[Disclaimer](#) [Reset](#) [Search](#)

080810

Apples, pears and quinces, fresh : Apples

[New Partnership: Global Trade Information Helpdesk](#)

- Do you know what are the temporary trade measures?
- Do you know what are the documentary requirements & trade info. to export avocados from Mexico to Spain?
- [The Global Trade Helpdesk \(GTH\)](#) is a multi-agency initiative jointly led by ITC, UNCTAD, and the WTO that aims to simplify market research for companies, and especially Micro, Small and Medium Enterprises (MSMEs), by integrating trade and business information into a single online portal.
- IATA is working with [ITC](#) to refine integration requirements of the Global Trade Helpdesk into TACT Online



Moving a Shipment from VIE to LON?

Origin	Destination	Airline	From Date	To Date
<input type="text" value="VIE Vienna, Austria, AT [City]"/>	<input type="text" value="LON London, United Kingdom, GB [City]"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[RATES](#) | [RULES](#) | [SCHEDULES](#) | **DENIED PARTIES-SANCTIONS** | [TRADE FACILITATION](#)

Please click [here](#) for a non-exhaustive list of the current source material for this module search functionality.

The Denied Parties & Sanctions search engine allows you to identify individuals or entities for which national government agencies apply restriction on certain exports, re-exports or transfer or items. For each result, you can follow the link to the relevant Sanction list official text of reference.

Please enter the name of the person / entity you are looking for, as well as the country.

Name	Address	City
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Disclaimer](#) [Reset](#) [Search](#)

Last refreshed 23 Sep 2022 1453hrs GMT

86 FR 36496

NAME:

MATCHED ADDRESSES:

3rd Floor, 9 St.
London
GB

Coverage limited to:

- US Sanctions Lists
- UN Sanction List
- EU Sanction List
- UK Sanctions List
- Coming up: CAN, AUS, PL



Moving a Shipment from VIE to LON?

Origin	Destination	Airline	From Date	To Date
<input type="text" value="VIE Vienna, Austria, AT [City]"/>	<input type="text" value="LON London, United Kingdom, GB [City]"/>	<input type="text" value="Finnair Oyj (AY-105, FIN)"/>	<input type="text"/>	<input type="text"/>

[RATES](#) **[RULES](#)** [SCHEDULES](#) | [DENIED PARTIES-SANCTIONS](#) | [TRADE FACILITATION](#)

[Reset](#) [Search](#)

Information by Country

[Austria \(AT\)](#)

[United Kingdom \(GB\)](#)

Information by Carrier

[Finnair Cargo \(AY/105\)](#)

Cargo Border Management Bulletins

[#101 Upcoming new EU PLACI requirements and expected impact for the air cargo supply chain](#)

[#100 New indicative list of critical COVID-19 vaccine inputs](#)

Austria (AT)

Amounts shown are expressed in Euro (EUR)

0. General Information

1. Airport Information

2. Import

3. Transshipment/Transit

4. Export

State and Operator Variations:

- Country of Export
- Country of Import
- Airline
- Cargo Border Management Bulletins applicable to the geographic scope selected

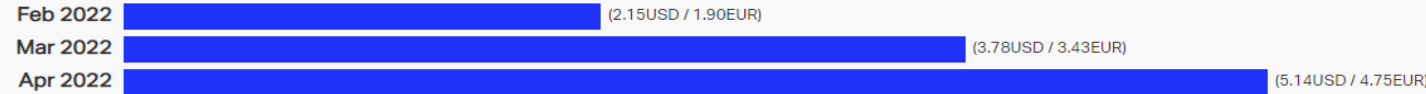


Moving a Shipment from VIE to LON?

From	Arrival	Est. Drop Off	Latest Arrival	Commodity	Load Type	Total Pieces	Total Gross Weight	Total Volume
LHR	HEL	2022 Sep 24 00:00	2022 Sep 29 00:00	CONSOL	Bulk	1	50 kg	0.12 m3

All-in rate per kg over the last three months for London - Helsinki

Powered by 











This chart displays city-city aggregated and anonymized average rates per kilo, and is based on historic IATA CargoS data over the last three months. For more information about this data, please visit [IATA CargoS](#).

Showing 20 offers

Last updated 2022 Sep 23 16:23:03 [More Details](#) [Duplicate](#) [Refresh](#)

Carrier Product [Filter](#)

Quote Id	Carrier	Routing	Departure	Arrival	Product	All-In Total	Est. CO ₂ Emission (Beta)
1115		LHR - HEL	2022 Sep 24 07:30	2022 Sep 24 12:20	General Cargo	GBP	70.73
1116		LHR - HEL	2022 Sep 24 16:10	2022 Sep 24 21:00	General Cargo	GBP	70.73
1117		LHR - HEL	2022 Sep 24 18:10	2022 Sep 24 23:00	General Cargo	GBP	70.73
1105		LHR - MAD - ARN - HEL	2022 Sep 24 17:10	2022 Sep 28 12:00	General Cargo	GBP	Not currently available
1106		LHR - MAD - ARN - HEL	2022 Sep 24 10:50	2022 Sep 28 12:00	General Cargo	GBP	Not currently available
1107		LHR - MAD - ARN - HEL	2022 Sep 24 16:45	2022 Sep 28 12:00	General Cargo	GBP	Not currently available
1108		LHR - MAD - ARN - HEL	2022 Sep 24 17:10	2022 Sep 28 12:00	General Cargo	GBP	Not currently available
1109		LHR - MAD - ARN - HEL	2022 Sep 24 18:45	2022 Sep 28 12:00	General Cargo	GBP	Not currently available

Quote & Book:

- Real-time pricing and booking for spot requests
- Filters to view specific results
- Co2 Emissions (Beta)



As an industry, we still work with siloed content



Air Cargo Compliance Solution

Brings together:

**Standards,
Regulations & Best
Practice.**

Reference. Active &
Dynamic

Information.

Dynamic. Real Time.
Relevant.

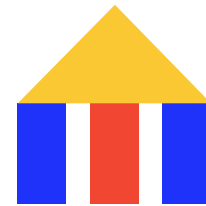
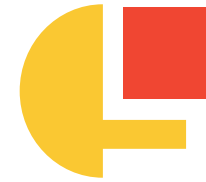
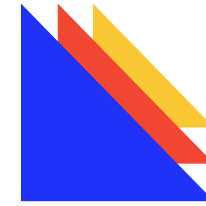
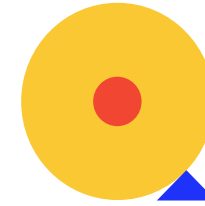
Data.

Actionable.
Transactional. Business
Intelligence

...to provide access to real time, live, integrated and up to date standards, information & data to help facilitate compliance, automate procedures, inform decisions...

To deliver this:

- A new solution, web-based, aligned with industry standards
- Supporting the air cargo shipment lifecycle
- Delivering value to the end user
- Automating Compliance Checks at every step

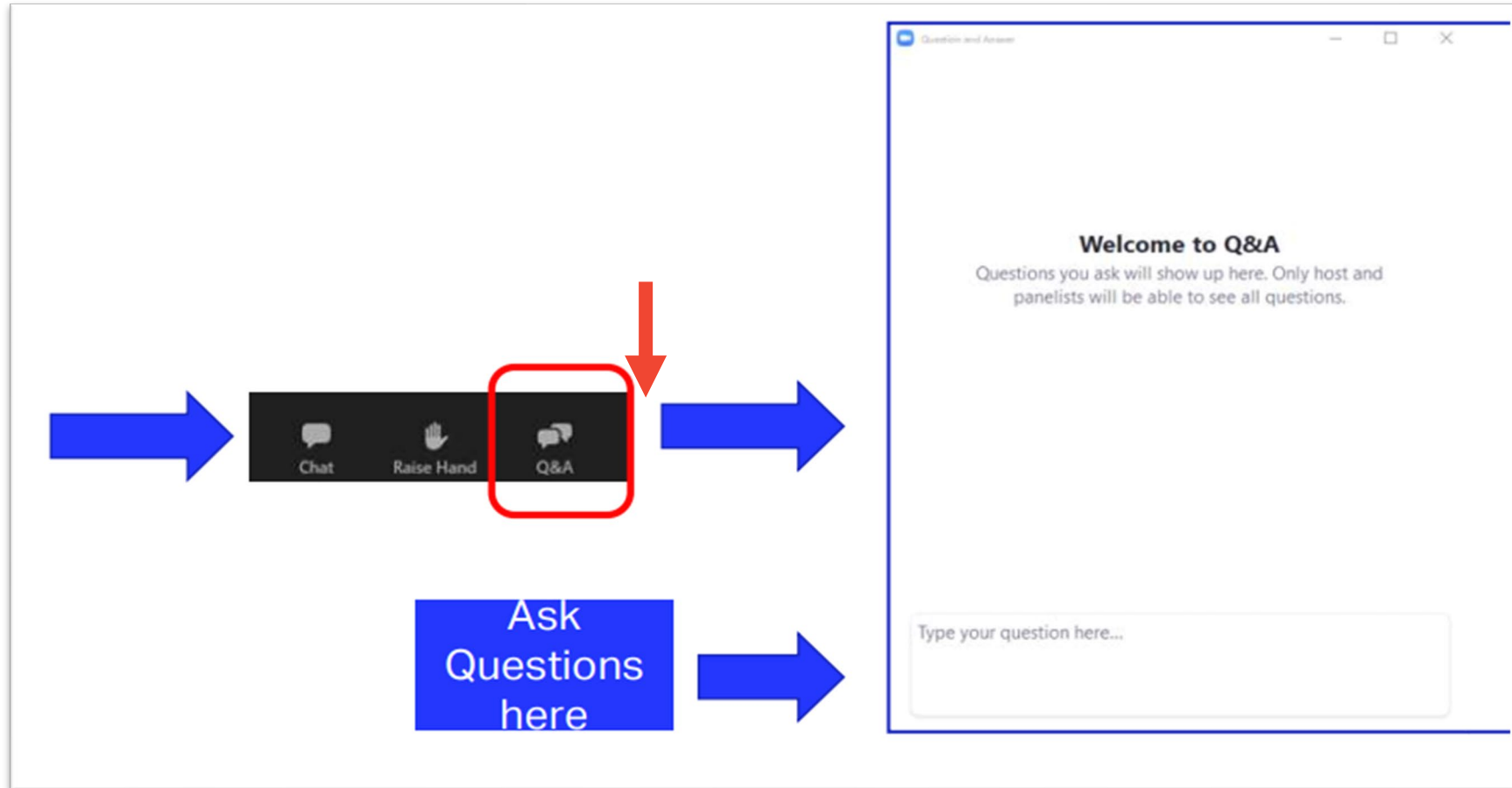


Cargo Compliance Automated

meuniera@iata.org : Please contact Arnaud Meunier for more info



Q&A



IATA MANUALS

The #1 source for the regulations, standards and best practices

FIND YOUR MANUAL
[iata.org/manuals](https://www.iata.org/manuals)



IATA TRAININGS

The #1 place developing professionals for tomorrow's air transport industry

FIND YOUR TRAINING
[iata.org/training](https://www.iata.org/training)



Today's webinar



Today's recording and presentation will be shared with you via email.



Thank you

Sonia Ben Hamida

Head, Special Cargo

Operations, Safety and Security (OSS)

benhamidas@iata.org | www.iata.org

Maria Jitomirski

Manager, Special Cargo

Operations, Safety and Security (OSS)

jitomirskm@iata.org | www.iata.org

Lucy Exell

Manager, Cargo Industry Programs

Operations, Safety and Security (OSS)

exell@iata.org | www.iata.org

