

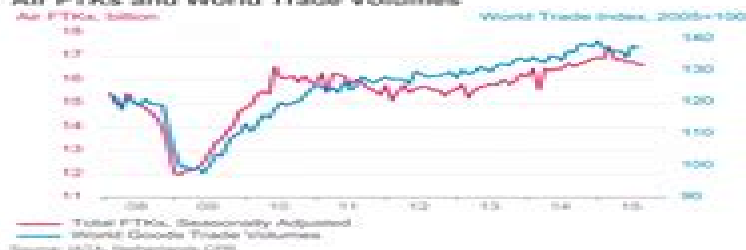
AIR FREIGHT MARKET ANALYSIS

AUGUST 2015

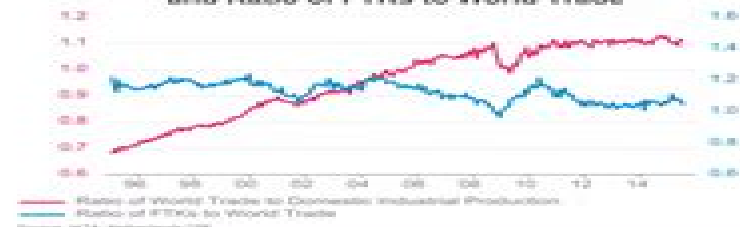
KEY POINTS

- ➔ Air freight volumes were broadly unchanged in August compared to a year ago, with freight tonne kilometers 0.2% higher. The August data shows a pause in earlier declines in air freight volumes, consistent with developments in world trade activity. That said, the trend in air freight volumes and world trade has been in decline for the best part of 2015.
- ➔ The first chart below shows the growth trend in air freight volumes and world trade. FTKs were broadly unchanged in August compared to July, but due to recent declines, the industry is still almost 2% smaller in August than it was at the end of 2014. The downward trend in world trade volumes appears to have paused, at least for the time being, and that has helped contain further weakness in air freight markets.
- ➔ Airlines in Asia Pacific continue to experience weakness, but declines in volumes have eased up a bit as trade to/from emerging Asia has stopped shrinking. A slight improvement for European carriers also helped contain further declines in the industry result, with airlines in that region seeing a small 0.7% rise on a year ago. Recent improvements in Eurozone manufacturing business activity could finally be starting to support air freight demand.
- ➔ Continued growth in air freight carried by Middle Eastern airlines (up 10.4% in August year-on-year), helped offset some of the decline that North American carriers are experiencing (down 3.3% in August year-on-year). Airlines in North America continue to see significant falls in FTK volumes since the boost from modal shift due to sea port congestion earlier in the year.
- ➔ Some of the conditions that led to the decline in world trade this year – a combination of weaker than expected global economic growth, particularly in emerging markets, as well as shifts toward the domestic market in China – are persisting. There are some tentative signs that things won't get worse – export orders have stabilized – but if the current trend were to continue, we would see negative year-on-year comparisons in the coming months.

Air FTKs and World Trade Volumes



Ratio of World Trade to Domestic Industrial Production and Ratio of FTKs to World Trade



Year on Year Comparison

Aug 2015 vs Aug 2014

YTD 2015 vs. YTD 2014

	FTK	AFTK	FLF	FTK	AFTK	FLF
International	0.5%	6.0%	43.9%	2.9%	6.3%	47.6%
Domestic	-1.3%	4.8%	28.4%	0.5%	2.9%	29.4%
Total Market	0.2%	5.8%	40.9%	2.6%	5.6%	43.6%

FTK: Freight Tonne-Kilometers; AFTK: Available Freight Tonne Kilometers; FLF: Freight Load Factor. All figures are expressed in % change Year on Year except FLF which are the load factors for the specific month.

Month on Month Comparison

Aug 2015 vs. Jul 2015

FTK	AFTK	FLF pt
0.0%	0.3%	-0.1%
0.4%	-0.2%	0.2%
0.1%	0.2%	0.0%

Data are seasonally adjusted. All figures are expressed in % change Month on Month except FLF which are the percentage point difference between load factors of two months.

Air Freight Market Analysis Iata

International Transport Forum



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The Airline Industry - A Comprehensive Overview John Frankie O'Connell, 2025-09-30 In recent years airlines have faced unprecedented financial and operational uncertainties not only in the wake of COVID 19 but across the industry Their responses provide valuable lessons for the future for airlines for related industries and for all sectors that find unexpected upheaval suddenly in their path As a truly global business the airline industry offers countless lessons in navigating uncertainty and the necessity of continual business transformation The Airline Industry A Comprehensive Overview Dynamic Trends and Transformations is an up to date state of the nation perspective on the airline industry Its dedicated and detailed focus on airlines makes the book an invaluable tool in deciphering how airlines have been run and managed to date and provides a roadmap for the future evolution of the industry The author has interviewed countless airline and related industry professionals in their respective fields of expertise which adds layers of real world insight to every chapter Written in a lively and accessible style that will appeal to readers whether they are in academia or the airline industry The Airline Industry A Comprehensive Overview Dynamic Trends and Transformations is essential reading for airline employees and undergraduate and postgraduate students and a vital point of reference for lecturers and researchers economists and business analysts looking for a thorough and commercial guide to the airline industry

Air Travel Industry Azizul Hassan, Nor Aida Abdul Rahman, Nurhayati Mohd Nur, 2023-06-23 As the air travel industry begins to emerge from the COVID 19 restrictions new research must be undertaken to survey the changing business landscape This book examines existing air travel literature illustrates the current theories in the field and suggests research methods for integrating them in fieldwork The book begins by surveying the landscape of air travel research and examining key theoretical frameworks such as grounded theory institutional theory prospect theory and the theory of planned behavior It then explores when qualitative and quantitative research methods are appropriate for use in air travel research and how they can be applied successfully Gathered contributors from Southeast Asia and the Middle East highlight some of the latest issues including the impacts of COVID 19 on airfreight airline catering and passenger perceptions of security and safety Future directions for research are also proposed This book will appeal to researchers and postgraduate students in the fields of air transport or aviation management tourism marketing and consumer behavior

The International Air Cargo Industry James Nolan, James Peoples, 2022-09-26 The International Air Cargo Industry A Modal Analysis provides an objective snapshot of this fascinating industry from the perspective of those who conduct academic research into its expansion and consolidation covering three broad economic areas costs demand and development

The Economic Effects of Air Transport Market Liberalisation Eyden Samunderu, 2024-09-19 This book rigorously examines the air transport market liberalisation process on the African continent and presents key highlights challenges and impediments to embracing an open skies market environment in Africa It focuses on the economic impact of air transport liberalisation policy constraints challenges of harmonisation and regional

economic integration and its impact on air transport development employing a quantitative assessment based on the Air Transport Liberalisation Index ALI to evaluate how an open skies policy would change the competitive dynamics of air transport in Africa Adopting a two tier gravity model the book explores how demand and route networks would be impacted by the deregulation of the air transport market The book also applies a historical perspective by evaluating the initial ratification of the Yamoussoukro Declaration 1999 which acted as a catalyst for Africa s 2063 regional agenda focused on establishing the Single African Air Transport Market SAATM The book also provides a comprehensive analysis of the African Continental Free Trade Area AfCFTA exploring its multifaceted impacts on Africa s single market from economic regulatory and sustainability perspectives This includes an introduction to the AfCFTA highlighting its inception as a major step towards continental economic integration aimed at enhancing intra African trade promoting sustainable development and fostering industrial diversification It then examines the capacity and competency building of African aviation personnel Training gaps and skills are extensively evaluated to ensure that the African region is prepared for the new competitive equilibrium post SAATM The book also raises critical questions regarding the status of the African air transport market Firstly with the introduction of an open skies policy in Africa will the national flag carriers be able to compete under the new market dynamics Will the SAATM become a game changer in paving the way for the privatisation of some of Africa s poor performing airlines Will the SAATM create a competitive market and a shift in airfares How will policymakers deal with the excessive aviation taxes fees and charges that make airfares in Africa the highest in the world What will the economic benefits be for signatory states that embrace the SAATM Will there be a significant growth trajectory in terms of air travel demand This book is intended for researchers studying air transport economics in developing markets graduate students with a primary focus on air transport development senior policymakers and professionals at governmental agencies and industry practitioners who want to expand their understanding of the dynamics shaping Africa s air transport landscape

The Routledge Companion to Air Transport Management Nigel Halpern, Anne Graham, 2018-01-31 The Routledge Companion to Air Transport Management provides a comprehensive up to date review of air transport management research and literature This exciting new handbook provides a unique repository of current knowledge and critical debate with an international focus considering both developed and emerging markets and covering key sectors of the air transport industry The companion consists of 25 chapters that are written by 39 leading researchers scholars and industry experts based at universities research institutes and air transport companies and organisations in 12 different countries in Africa Asia Pacific Europe and North America to provide a definitive trustworthy resource The international team of contributors have proven experience of research and publication in their specialist areas and contribute to this companion by drawing upon research published mainly in academic industry and government sources This seminal companion is a vital resource for researchers scholars and students of air transport management It is organised into three parts current state of the air transport sectors

Part I application of management disciplines to airlines and airports Part II and key selected themes Part III **ITF**

Transport Outlook 2019 International Transport Forum,2019-05-22 The ITF Transport Outlook provides an overview of recent trends and near term prospects for the transport sector at a global level as well as long term prospects for transport demand to 2050 The analysis covers freight maritime air surface and passenger transport car rail air as well *Handbook of*

Research on Artificial Intelligence Applications in the Aviation and Aerospace Industries Shmelova, Tetiana,Sikirda, Yuliya,Sterenharz, Arnold,2019-10-11 With the emergence of smart technology and automated systems in today s world artificial intelligence AI is being incorporated into an array of professions The aviation and aerospace industry specifically is a field that has seen the successful implementation of early stages of automation in daily flight operations through flight management systems and autopilot However the effectiveness of aviation systems and the provision of flight safety still depend primarily upon the reliability of aviation specialists and human decision making The Handbook of Research on Artificial Intelligence Applications in the Aviation and Aerospace Industries is a pivotal reference source that explores best practices for AI implementation in aviation to enhance security and the ability to learn improve and predict While highlighting topics such as computer aided design automated systems and human factors this publication explores the enhancement of global aviation security as well as the methods of modern information systems in the aeronautics industry This book is ideally designed for pilots scientists engineers aviation operators air crash investigators teachers academicians researchers and students seeking current research on the application of AI in the field of aviation **Air Transportation**

Professionals Tracy Brown Hamilton,2022-09-15 Welcome to the air transportation field If you are interested in a career in air transportation you ve come to the right book What exactly do these people do on the job every day What kind of skills and educational background do you need to succeed in this field How much can you expect to make and what are the pros and cons of these various professions Is this the right career path for you How do you avoid burnout and deal with stress This book can help you answer these questions and more Air Transportation Professionals A Practical Career Guide which includes interviews with professionals in this field which has proven to be a stable lucrative and growing profession Pilot co pilotAir Traffic ControllerAircraft and Avionics MechanicAirport ManagerTransportation Security ScreenerAirfield Operations SpecialistAeronautical EngineerFlight Attendant **Airport Marketing** Nigel Halpern,Anne

Graham,2021-11-04 This accessible up to date comprehensive and in depth textbook introduces students and practitioners to the principles and practice of airport marketing as well as the major changes and future marketing challenges facing the airport sector It applies principles of marketing within the airport industry and examines airport marketing and its environment how to define and measure the market for airport services airport strategic marketing planning and individual elements of the airport marketing mix product price distribution and promotion The book integrates key elements of marketing theory with airport marketing in practice Each chapter contains extensive industry examples for different types of

airports from around the world to build on the theoretical base of the subject and show real life applications This new second edition has been updated to include New and expanded content on branding and the passenger experience marketing partnerships engagement marketing and customer relationship management Three brand new chapters on digital marketing marketing for a more sustainable future and crisis communications and marketing in light of the Covid 19 pandemic New global case studies and examples throughout This comprehensive textbook written by two airport marketing experts will be essential reading for air transport students and future managers

ITF Transport Outlook 2021 International Transport Forum, 2021-05-17 The ITF Transport Outlook 2021 provides scenarios for the development of transport demand up to 2050 This edition includes a special focus on the impacts of the Covid 19 pandemic on transport systems and models potential long term changes with challenges and opportunities for decarbonisation

Air Transportation Industry Edward Majewski, Konrad Stasiczak, Sonia Huderek-Glapska, Łukasz Olipra, Wojciech Augustyniak, 2024-10-16 Air Transportation Industry considers the influence of political legal economic social and technological factors on the developments in the industry It provides a brief historical background of the air transport industry the determinants of the changes in the airline business and adaptation processes that resulted in the evolution of business models and structural changes in the industry Utilizing a unique database containing the characteristics of more than 16 000 air carriers worldwide the book discusses key findings related to changes in the transport capacity of airlines operating at different points in time including the length of the lifecycle and reasons for termination of activity types and geographical scope of operations It also explores the impacts of global and regional scale legal regulations The book will interest air transportation and airport operations researchers It can also serve as a reference for management and operations transportation students in logistics air transportation and economics courses

The Economics of International Airline Transport James Peoples, 2014-07-09 The Economics of International Airline Transport provides a complete analysis of the economics of international air transportation by presenting research on the costs borne by air transportation companies due to pollution regulation in Europe Australia and New Zealand

Harmonising Regulatory and Antitrust Regimes for International Air Transport Jan Walulik, 2018-12-07 Harmonising Regulatory and Antitrust Regimes for International Air Transport addresses the timely and problematic issue of lack of uniformity in legal standards for international civil aviation The book focuses on discrepancies within the regulatory and antitrust framework comprehensively reveals the major legal limitations and conflicts and presents possible solutions thereto It discusses possible strategies for multilateralisation and defragmentation of air law and for international harmonisation of airline economic regulation with fair competition standards This discussion extends to competition between air transport law and other legal regimes as well as to specific regulatory problems related to air transport The unique feature of the book is that it reconciles distinct perspectives on these issues presented by renowned aviation and aerospace experts who represent the world's key air transport markets and air law academic centres By

providing unbiased solutions that could serve as a base for future international arrangements this book will be invaluable for aviation professionals as well as students and scholars with an interest in air law economic regulation antitrust studies international relations transportation policy and airline management

The Air Transportation Industry Rosario Macario, Eddy Van de Voorde, 2021-11-16 The aviation sector consists of various actors such as airlines ground handling companies and others all with conflicting priorities In order to understand how these actors position themselves in an increasingly competitive market The Air Transportation Industry Economic Conflict and Competition analyzes all the market segments in detail examining such issues as which industrial economic structure drives decisions the main economic problems the consequences for negotiations between different actors impacts on the global aviation market and much more This book covers the entire aviation sector including strategies regulation resilience privatization airport slot management and more It examines how economic and strategic struggles underlie the current market structure both for aviation as a whole and for the constituent actors as carriers authorities and handlers It examines the ways market and nonmarket approaches impact the competitiveness of the air transport industry offering a complete mapping of the economic actions between actors of the air transport industry This volume will help readers gain insight into the possible strategic choices and the mutual competitive strength within the future aviation market Contains contributions from well known aviation scholars Includes numerous cases studies throughout that explore a wide range of topics Focuses on applied knowledge with clearly structured chapters examining topics from a global perspective Addresses the ongoing consequences of COVID 19 on the air transportation industry examining potential strategic responses in the event of subsequent pandemics

ITF Transport Outlook 2015 International Transport Forum, 2015-01-27 The ITF Transport Outlook examines the development of global transport volumes and related CO2 emissions and health impacts through to 2050

A Strategic Analysis of Chinese Airline Industry under Online Environment Hang Liu, 2018-03-29 The boom of internet is causing another industrial revolution It is necessary for Chinese airlines to develop E business in order to keep their competitive advantages China Southern Airlines is the first Chinese airlines to enter E business sector and is fairly successful in Chinese civil aviation market However comparing with British Airways current E business strategy in this company quite falls behind After a strategic analysis it is clearly that E business is a profitable strategy for China Southern Airlines and should be applied further It is quite urgent for China Southern Airlines to enlarge and improve its E business strategies so that it can consolidate its leading position in this market segment Therefore some reasonable future strategic choices are put forward and a recommendation is given On the other hand the explosion of Chinese economy provides a rapid growth of air traffic world widely British Airways and other foreign airlines would increase their profits significantly from Chinese air market

Addis Ababa Airport zwischen Globalisierung und Fragmentierung Felix Guntermann, 2019-04-25 Der Flughafen von thiopiens Kapitale Addis Abeba steht als Beispiel f r aufstrebende Gro flugh fen an der Schwelle zu global wirksamen Drehkreuzen Er verk rpert verbindende und

beschleunigende Kräfte damit verbunden sind jedoch auch begrenzende und verlangsamende Effekte die an die Wirkungsweise eines solchen Umschlagplatzes gekoppelt sind Eine Reihe von Faktoren auf unterschiedlichen raum zeitlichen Ebenen machen in ihrer Summe die Bedeutung dieses Flughafens aus In seiner geographischen Lage positioniert er sich global als Vermittler asiatisch afrikanischer Bewegungsströme und wird zum Einfallstor zum afrikanischen Kontinent In Afrika Addis ist eine kontinentale Drehscheibe die mit Hilfe ihres Home Carriers Ethiopian Airlines über neue Airline Beteiligungen und regionale Zubringer panafrikanische Konnektivität schafft Eine starke nationale Führung verknüpft den vom Staat kontrollierten Luftfahrtsektor mit einer Entwicklungsstrategie die vorrangig auf den Energie und Transportbereich setzt Die prosperierende Metropole Addis Abeba manifestiert ihren Aufschwung mit lokalen Bau und Verkehrsprojekten die weit über den Flughafen hinausreichen Basierend auf Ethiopiens langer Luftfahrttradition wird die Investition in eigene Ausbildungskapazitäten zu einem kontinuierlichen Antrieb für den identitätsstiftenden Aviation Sektor Der reale Flugbetrieb schafft ein sich wiederholendes Muster von Umsteigewellen und Aktivitätsrastern deren Wachstumssequenzen sich berlagern Das Tempo nimmt weiterhin zu sowohl bei der Umsetzung der Ausbauvorhaben am Bole Airport als auch bei der Geschwindigkeit der dort angestoßenen Prozesse Hochfliegende Visionen der Airline und Pläne für einen neuen Flughafen treiben den augenblicklichen Wachstumskurs weiter voran Intensität und Erfolg all dieser Prozesse bringen auch Schattenseiten mit sich Dazu gehören etwa neue Abhängigkeiten von chinesischen Investitionen wachsende Vorbehalte und sich verhärtende Fronten im idealerweise geeinten kontinentalen Luftraum eine einseitige nationale Wachstumsagenda mit autoritären Zügen und lokale Unstimmigkeiten angesichts zunehmend ausgeschlossener Akteursgruppen Auch birgt die Intensität der Beschleunigung mit der die Luftfahrtexpansion in Addis Abeba einhergeht die Gefahr einer Berforderung von Infrastruktur Personal und Umgebung Der Standort stellt ein aufschlussreiches Beispiel dar für aktuelle Neuorientierung innerhalb der globalen Luftfahrtlandschaft

Global Governance of Civil Aviation Safety Nilgun Ozgur, 2022-09-30 This book indicates the shortcomings of the current international legal system and customary international norms that govern international aviation law to comply with contemporary air transport market realities As the air transport market develops globally the safety regime of civil aviation should also be governed and applied globally In this book the author departs from current international legal norms to examine the emerging legal field of global administrative law Through that lens the possibility of reconstructing the set of legal mechanisms that govern domestic and international administrative interaction in the global field of aviation safety is explored This book demonstrates that a legal system is never complete but always develops in tandem with changing needs i.e. the participation of the affected parties Exploring the principles of GAL theory contributes to addressing the contemporary legal issues relating to state compliance with international aviation safety standards that would otherwise not be covered by customary international law In particular the principles of GAL theory regarding global governance and the public character of global regulations the role of individuals and states in global

governance and state sovereignty are considered valuable contributions to contemporary global aviation safety issues in practice It is asserted in this book that proper checks and balances in global aviation safety can be improved by making these accessible to individuals by way of national courts Finally establishing public awareness of global aviation safety standards will eventually create greater pressure on states to implement and enforce them This book is in an area increasing academic and research interest of practitioners of public international aviation law global administrative law global governance and global aviation safety global air transport market regulations

Handbook of Research on the Impacts and Implications of COVID-19 on the Tourism Industry Demir, Mahmut,Dalgıç, Ali,Ergen, Fatma Doğanay,2021-06-25 The tourism sector has been deeply affected particularly in economic terms by the COVID 19 pandemic This crisis has led to new practices and radical changes Scientists emphasize that mankind will face pandemics more frequently in the forthcoming years Thus it is important to understand the negative impacts the COVID 19 pandemic had on the tourism sector as well as the measures that were and are being put in place to protect the industry during future outbreaks The Handbook of Research on the Impacts and Implications of COVID 19 on the Tourism Industry is a comprehensive reference source that reflects upon the evaluations of the experienced and ongoing pandemic crisis in the context of the tourism sector The positive and negative effects experienced by tourism employees and tourists are examined and post pandemic processes and business practices are evaluated Covering topics including consumer rights in tourism dynamic changes in the tourism industry and employment in tourism this book is suitable for travel agencies restaurateurs hotel managers brand managers marketers advertisers managers executives hospitality personnel policymakers government officials tourism practitioners students academicians and researchers seeking the latest sustainable policies and practices that are being utilized to increase the productivity of the tourism sector and will allow it to thrive in the years to come

Access to NCD medicines: emergent issues during the COVID-19 pandemic and key structural factors World Health Organization,2023-03-22 The coronavirus disease COVID 19 pandemic exacerbated pre existing inequalities in the treatment and care of non communicable diseases NCD The report examines the effect of the COVID 19 pandemic on access to NCD medicines and the policies and strategies implemented by countries and health systems to anticipate and mitigate stresses across NCD medicine supply chains The full range of upstream and downstream impacts are investigated including manufacturing procurement importation and last mile delivery patient level effects through affordability and availability and the effects on NCD medicine availability by category of disease The report culminates in recommended actions and interventions for key stakeholders in the NCD pharmaceutical supply chain including governments regulatory authorities manufacturers and the private sector as well as directions for future research for improving access and supply chain access resilience

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Table of Contents Air Freight Market Analysis Iata

1. Understanding the eBook Air Freight Market Analysis Iata
 - The Rise of Digital Reading Air Freight Market Analysis Iata
 - Advantages of eBooks Over Traditional Books
2. Identifying Air Freight Market Analysis Iata
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Air Freight Market Analysis Iata
 - User-Friendly Interface
4. Exploring eBook Recommendations from Air Freight Market Analysis Iata
 - Personalized Recommendations
 - Air Freight Market Analysis Iata User Reviews and Ratings
 - Air Freight Market Analysis Iata and Bestseller Lists
5. Accessing Air Freight Market Analysis Iata Free and Paid eBooks
 - Air Freight Market Analysis Iata Public Domain eBooks

- Air Freight Market Analysis Iata eBook Subscription Services
- Air Freight Market Analysis Iata Budget-Friendly Options
- 6. Navigating Air Freight Market Analysis Iata eBook Formats
 - ePub, PDF, MOBI, and More
 - Air Freight Market Analysis Iata Compatibility with Devices
 - Air Freight Market Analysis Iata Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Air Freight Market Analysis Iata
 - Highlighting and Note-Taking Air Freight Market Analysis Iata
 - Interactive Elements Air Freight Market Analysis Iata
- 8. Staying Engaged with Air Freight Market Analysis Iata
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Air Freight Market Analysis Iata
- 9. Balancing eBooks and Physical Books Air Freight Market Analysis Iata
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Air Freight Market Analysis Iata
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Air Freight Market Analysis Iata
 - Setting Reading Goals Air Freight Market Analysis Iata
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Air Freight Market Analysis Iata
 - Fact-Checking eBook Content of Air Freight Market Analysis Iata
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks

14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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