



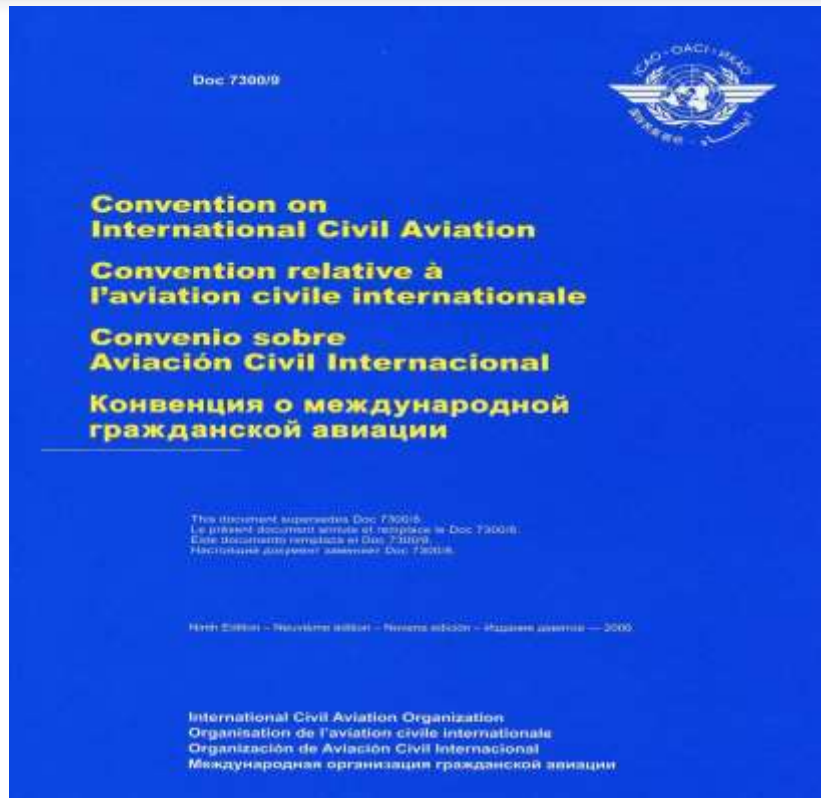
ICAO

UNITING AVIATION

# Développement du Fret Aérien en Afrique Air Cargo Development in Africa

Boubacar Djibo,  
Director Air Transport Bureau, ICAO  
DATB@icao.int

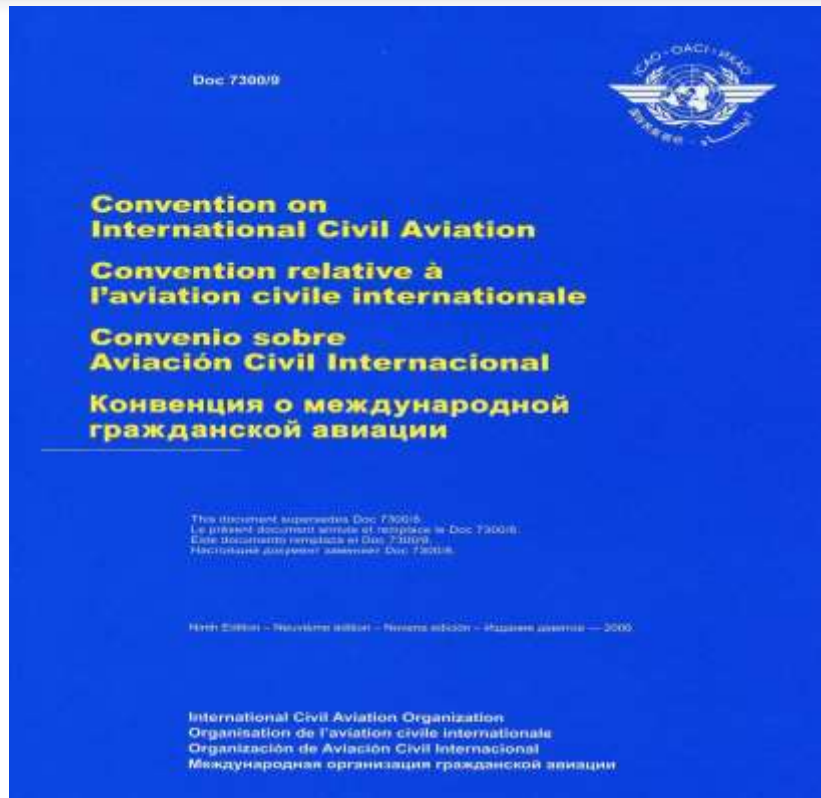
*ICAO Meeting on Air Cargo Development in Africa*  
Lomé, Togo, 5-7 August 2014



## CONVENTION DE CHICAGO

### Préambule

*EN CONSEQUENCE, les Gouvernements  
soussignés étant convenus de certains principes  
et arrangements, afin que l'aviation civile  
internationale puisse se développer d'une  
manière sûre et ordonnée et que les services  
internationaux de transport aérien puissent être  
établis sur la base de l'égalité des chances et  
exploités d'une manière saine et Économique,*



## CHICAGO CONVENTION

Preamble

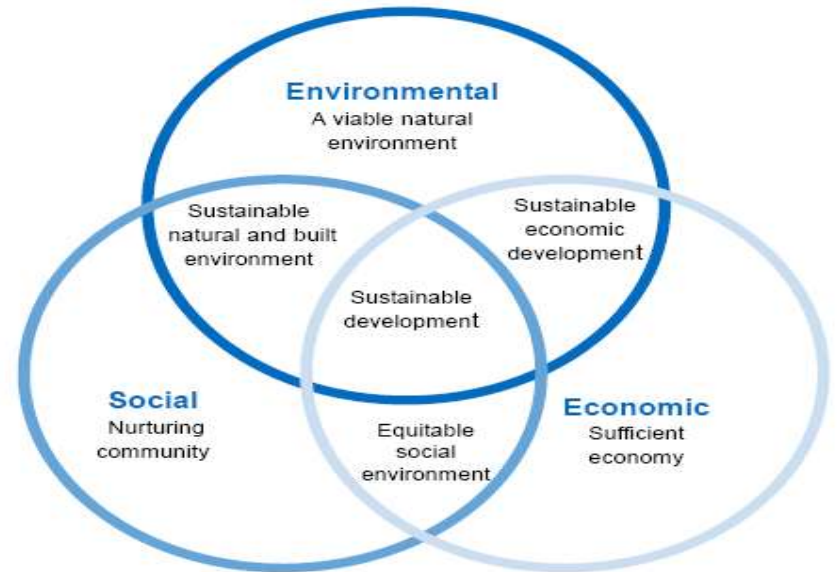
*THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically;*



# The three dimensions of sustainability

**United Nations:** "Sustainable development meets the needs of the present without compromising the ability of future generations to meet their own needs."

**Triple Bottom Line:** In business, one approach to sustainability is focusing on the impact of decisions on the environment and the community in addition to profit (traditional single bottom line). The diagram illustrates this idea.





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# **GLOBAL & AFRICAN PERSPECTIVE: AIR TRANSPORT**

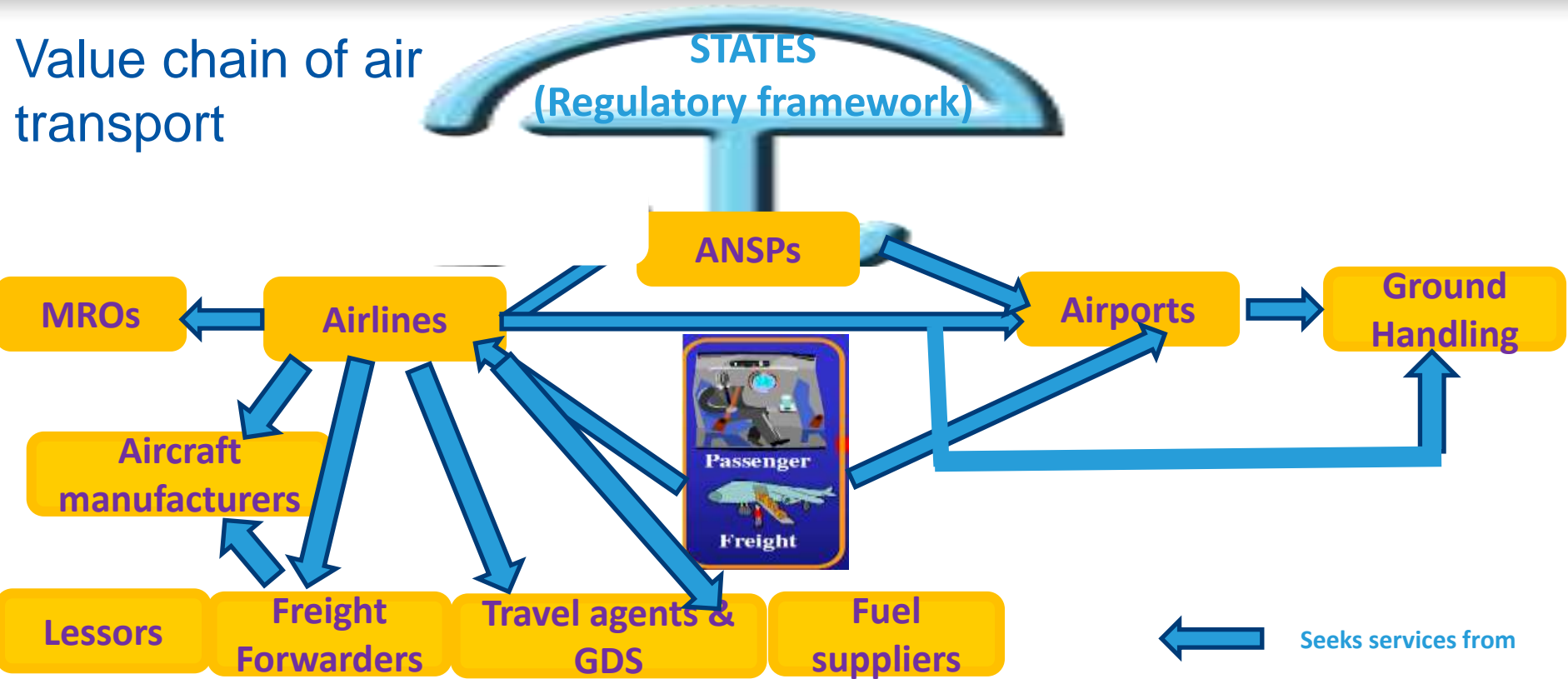


The air transport industry is not only

- a **vital engine** of global socio-economic growth
- but is also of vital importance as **a catalyst for economic development**,
  - creating direct and indirect employment,
  - supporting tourism and local businesses, and
  - stimulating foreign investment and international trade.



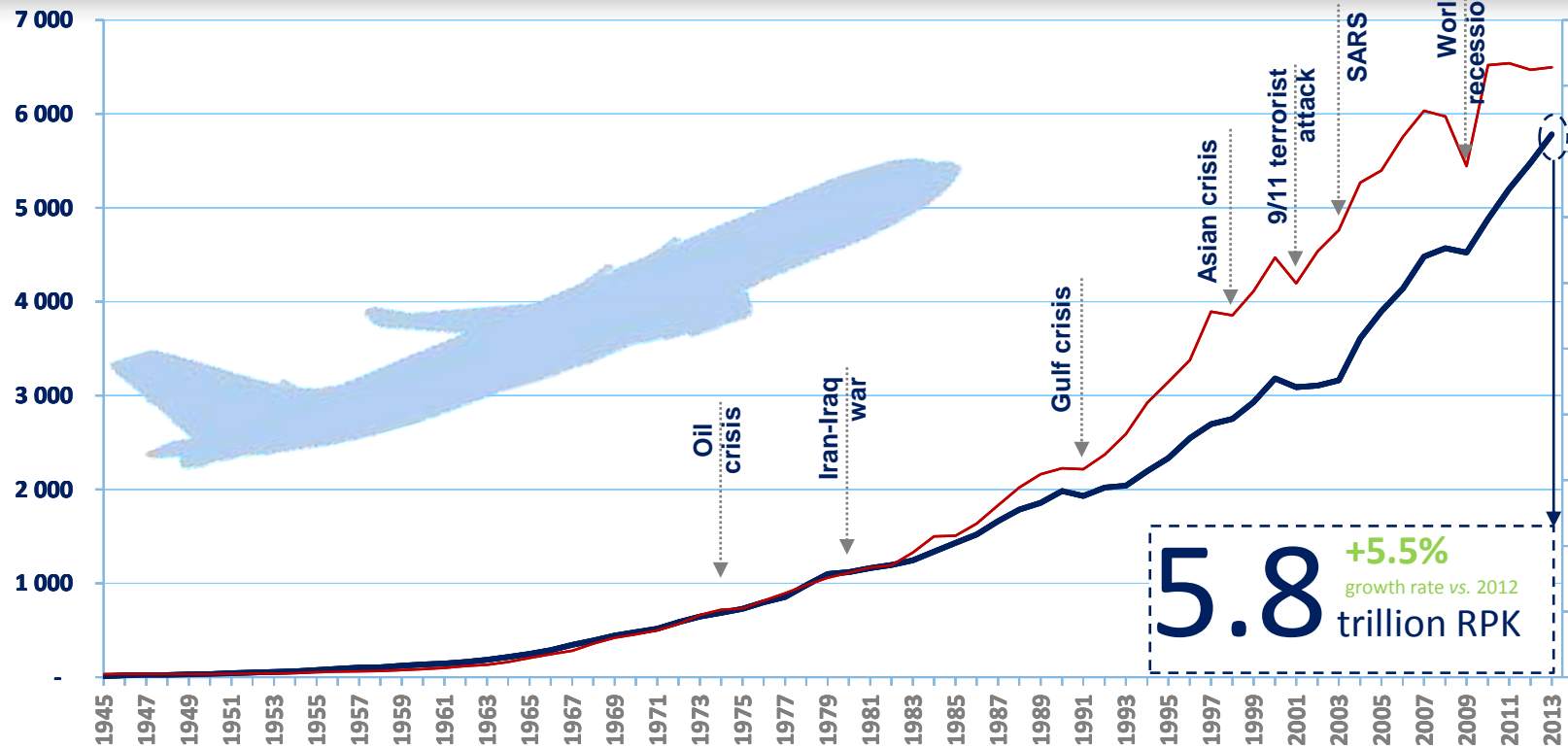
# Value chain of air transport





# Air Transport Development

Revenue Passenger-Kilometres  
(billion)



Freight Tonne-Kilometres  
(billion)

**5.8** trillion RPK  
+5.5% growth rate vs. 2012

Scheduled commercial traffic

Total (international and domestic) services

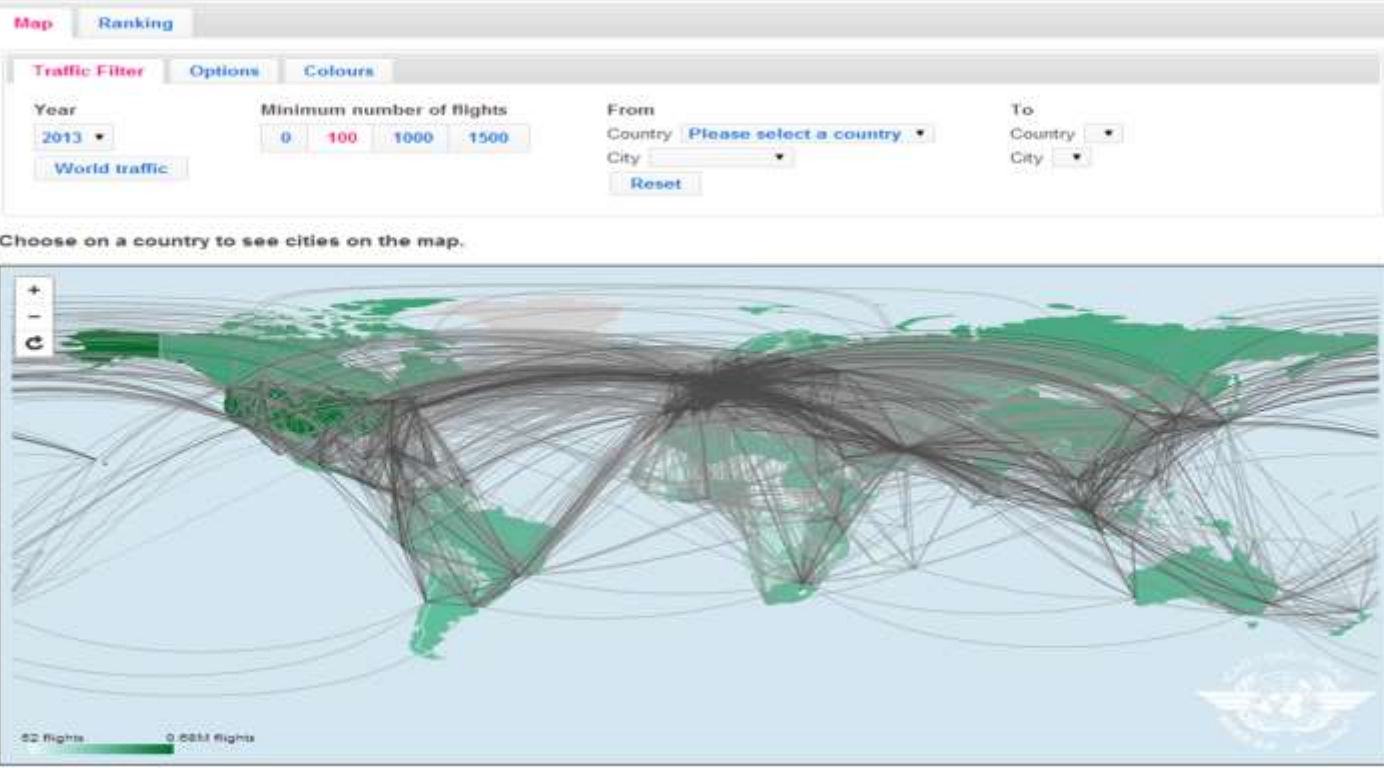
Source: ICAO Annual Reports of the Council (preliminary figures)





# Traffic Networks Development

2003 vs 2013



**Number of routes increased by 30% in the last decade showing the dramatic growth of new regional hubs**

(International scheduled departures. Source: ISDB Form C, RCA, OAG)



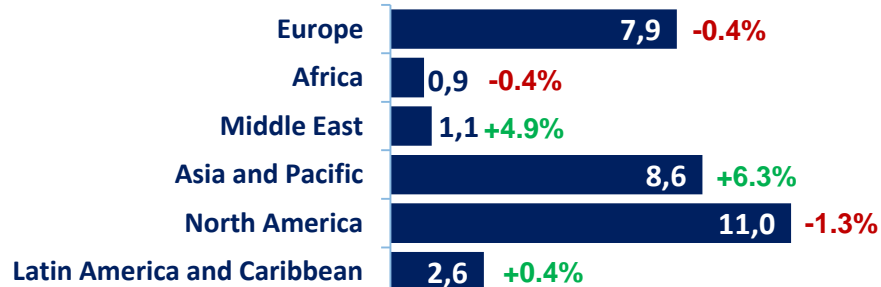
- 3.1 billion passengers
- 49 million tonnes of freight
- 1 000 scheduled airlines
- 26 000 aircraft in service
- More than 4 000 airports
- 170 air navigation centres



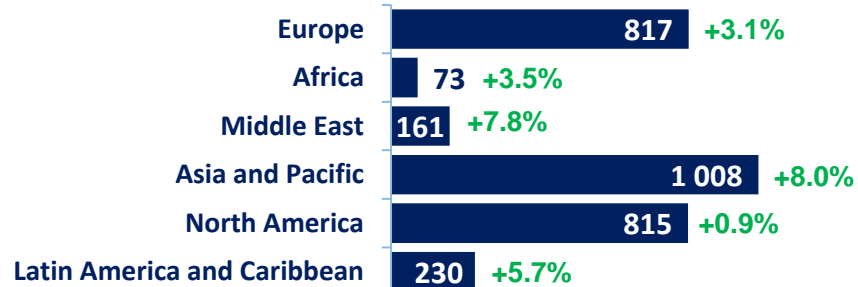


## 2013

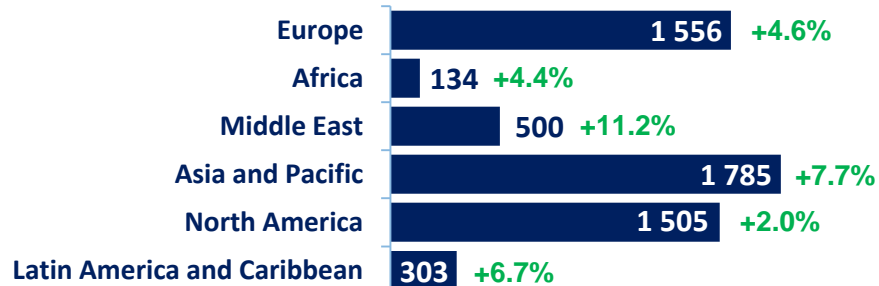
### Aircraft departures (million)



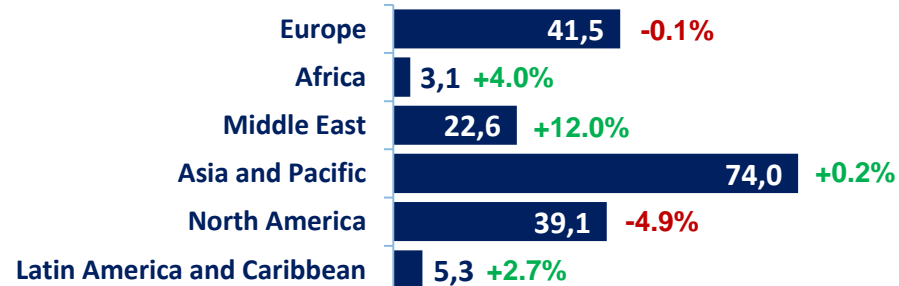
### Passengers carried (million)



### Revenue Passenger-Kilometres (billion)



### Freight Tonne-Kilometres (billion)



Source: ICAO Annual Report of the Council 2013 (preliminary figures)

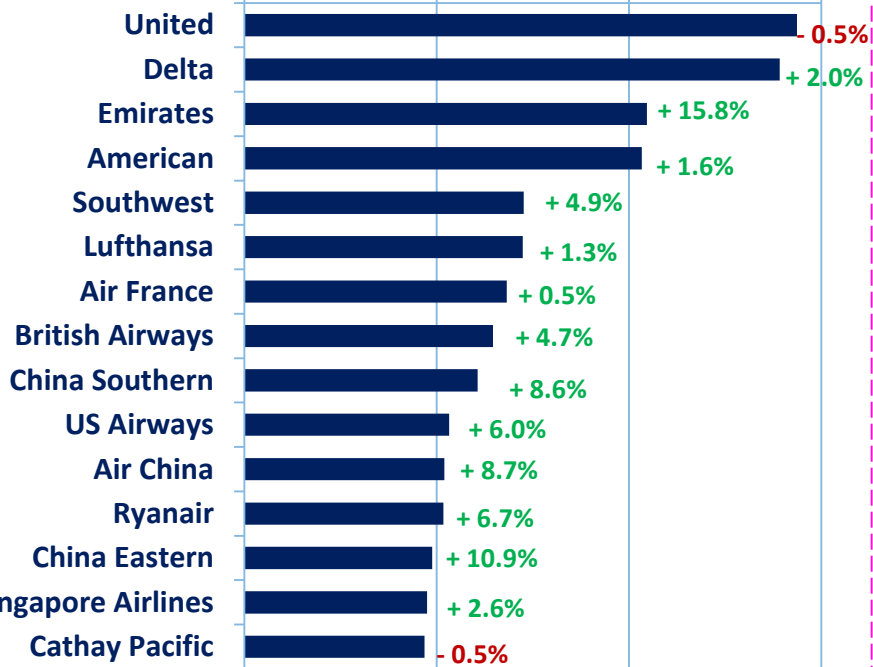
Total (international and domestic) services Scheduled commercial traffic



# World Top 15 Airlines in 2013

RPK (billion)

100 200 300



- 5 carriers from **North America**
  - 5 carriers from **Asia/Pacific**
  - 4 carriers from **Europe**
  - 1 carrier from **Middle East**
  - 2 **low-cost carriers**: Southwest and Ryanair
  - **Highest growth** → Emirates with **+15.8 %**
- RPK growth in 2013 vs 2012

Note: scheduled services

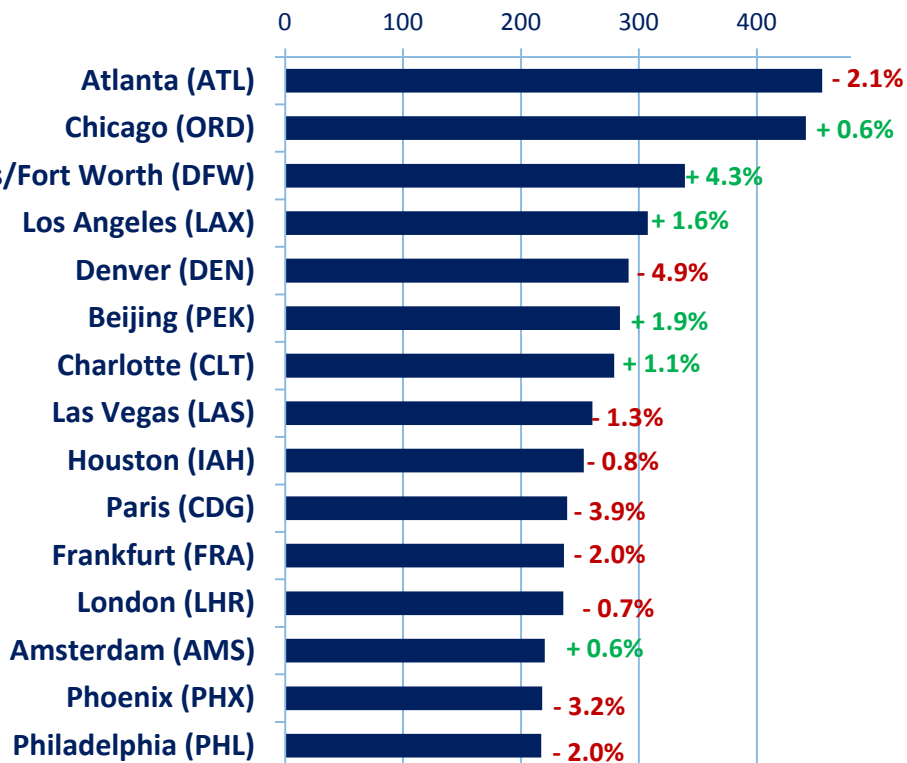
Source: ICAO Form A and ICAO estimates

Total (international and domestic) services



# World Top 15 Airports in 2013

## Departures (thousand)



- 10 airports in North America
- 4 airports in Europe
- 1 airport in Asia/Pacific

Note: scheduled and non-scheduled services

Source: ACI

Total (international and domestic) services

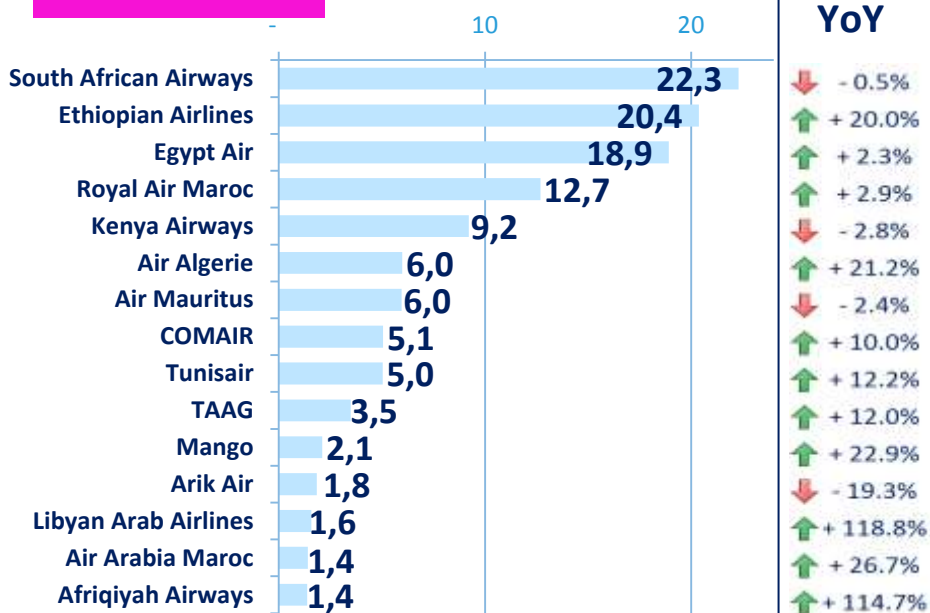


## Africa

## Top 15 Airlines - Top 15 Airports

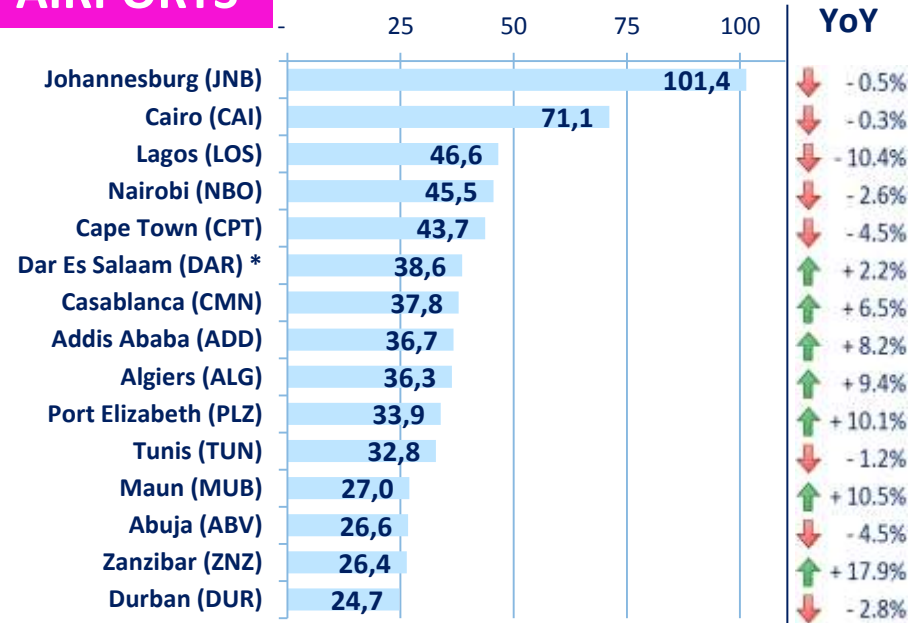
## AIRLINES

RPK (billion)



## AIRPORTS

Departures (thousand)



1<sup>st</sup> airline and 1<sup>st</sup> airport are **South African**

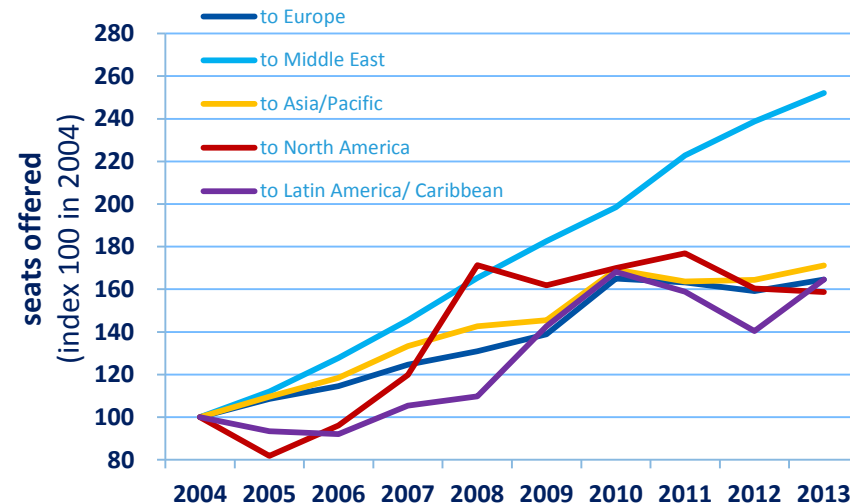
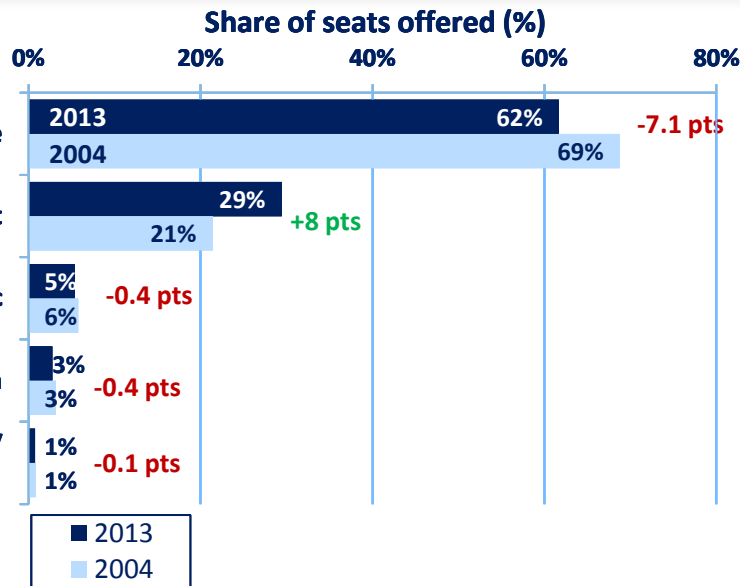
**Ethiopian Airlines: +20%** RPK growth → **2<sup>nd</sup> largest** airline in 2013

Each airport of the **Top 5** recorded a decrease in 2013

**Africa: +4.4%** RPK growth in 2013



# Inter-Region Capacity Offered from Africa to the World



## FROM AFRICA:

- **1<sup>st</sup> destination** : to Europe (-7.1 pts) → more than 60% of seats offered
- **Fastest growth** destination during 2004-2013: to Middle East → 29% share in seats in 2013 (+8 pts)
- Distribution of seats offered among regions is very **unbalanced**



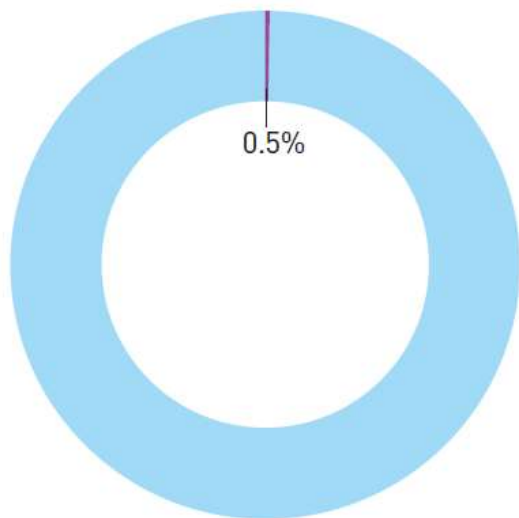
# **GLOBAL & AFRICAN PERSPECTIVE: AIR CARGO**





Volume of world international cargo shipment

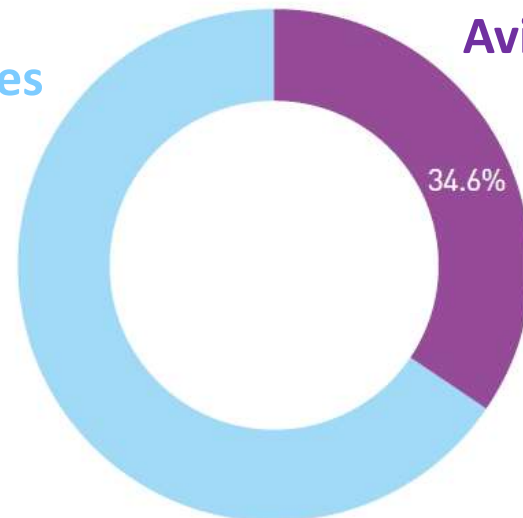
**Aviation**



Value of world international cargo shipment

**Aviation**

Other Transport modes

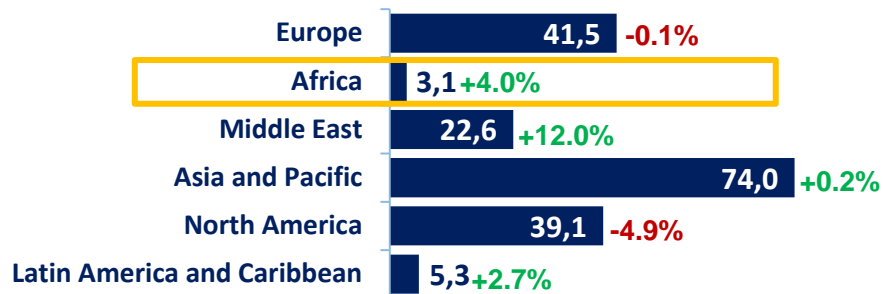


Source: Air Transport Action Group (ATAG), 2014 for 2012 data



# World Air Cargo in 2013

## Freight Tonne-Kilometres (billion)



186 <sup>+0.4%</sup>  
vs. 2012  
billion

**Freight Tonne-Kilometres**

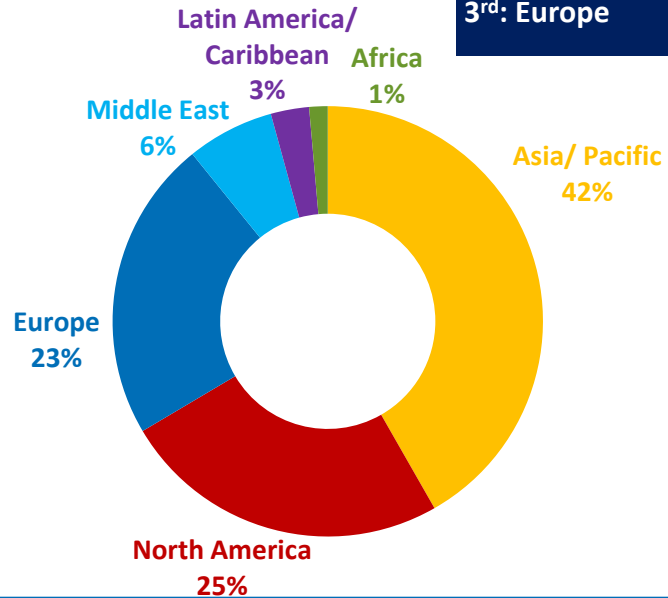


# Freight Traffic: Worldwide Distribution

## Distribution in Freight Tonne-Kilometers

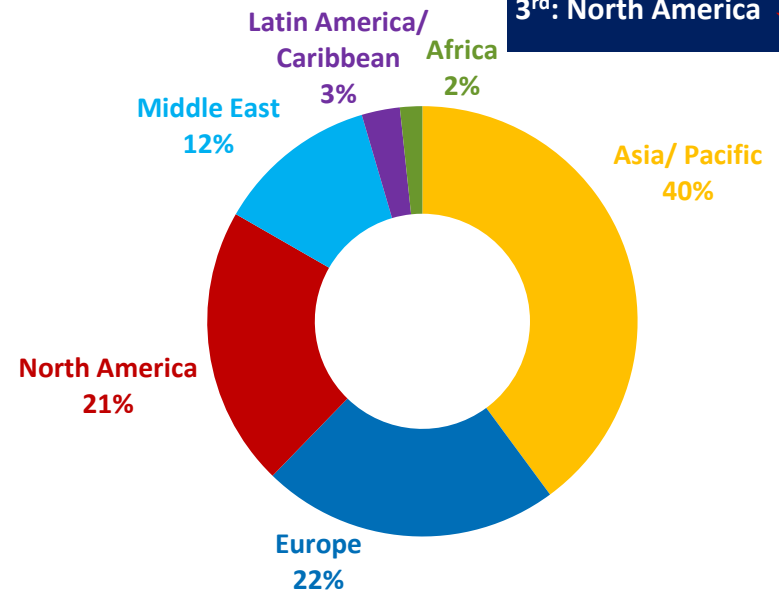
2007

1<sup>st</sup>: Asia/Pacific  
2<sup>nd</sup>: North America  
3<sup>rd</sup>: Europe



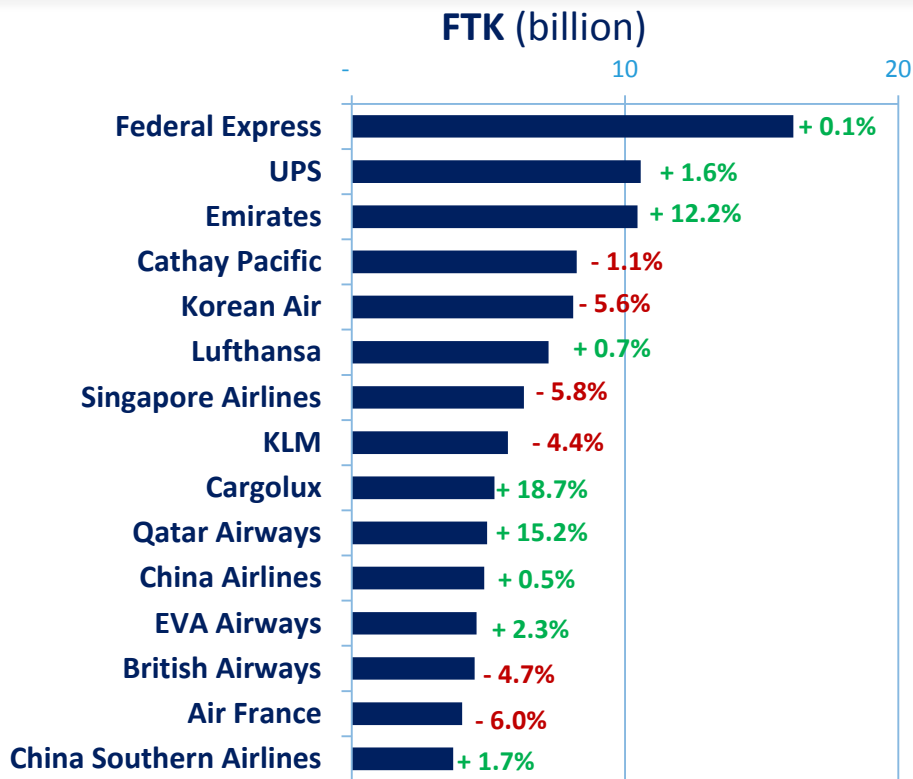
2013

1<sup>st</sup>: Asia/Pacific →  
2<sup>nd</sup>: Europe ↑  
3<sup>rd</sup>: North America ↓





# Top 15 airlines for carried freight



- 6 carriers from **Asia/Pacific**
- 5 carriers from **Europe**
- 2 carriers from **North America**
- 2 carrier from **Middle East**
  
- 2 all freight carriers: Federal Express and UPS
- Highest growth → Cargolux with +18.7 % FTK growth

Total (international and domestic) services

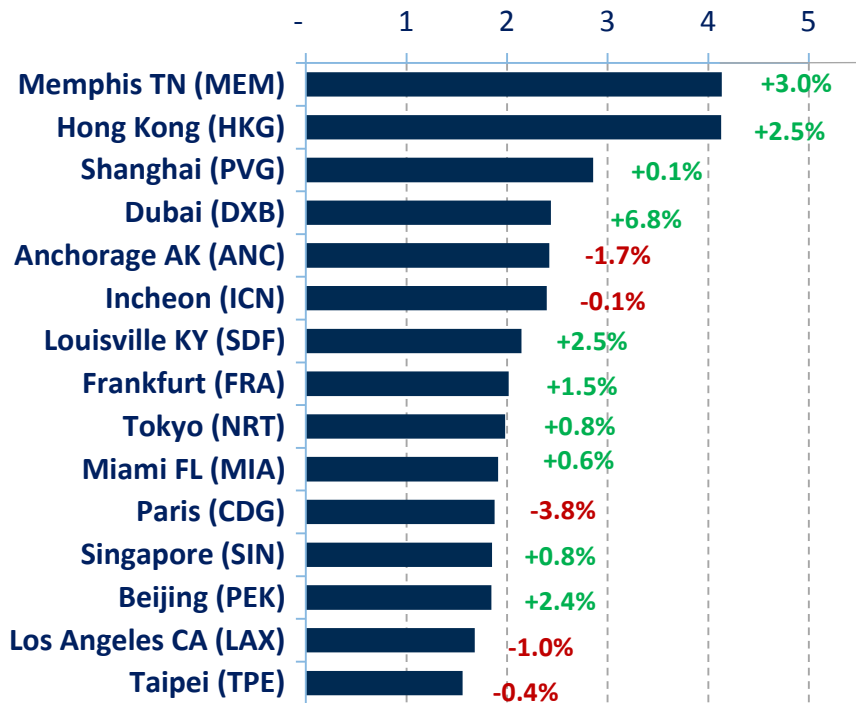
Note: scheduled services

Source: ICAO Form A and ICAO estimates



# Top 15 airports by freight tonnes handled

## Freight tonnes handled (million)



- 7 airports from **Asia/Pacific**
- 5 airports from **North America**
- 2 airports from **Europe**
- 1 airports from **Middle East**
- **10 out of the Top 15 airports** recorded an annual growth
- **Highest growth** → **Dubai Airport** with **+6.8 %** tonnes handled growth

Note: scheduled services

Source: ACI



# Air Transport and Economic Impact in Africa

## 428,000 direct jobs created by air transport in Africa (2012)

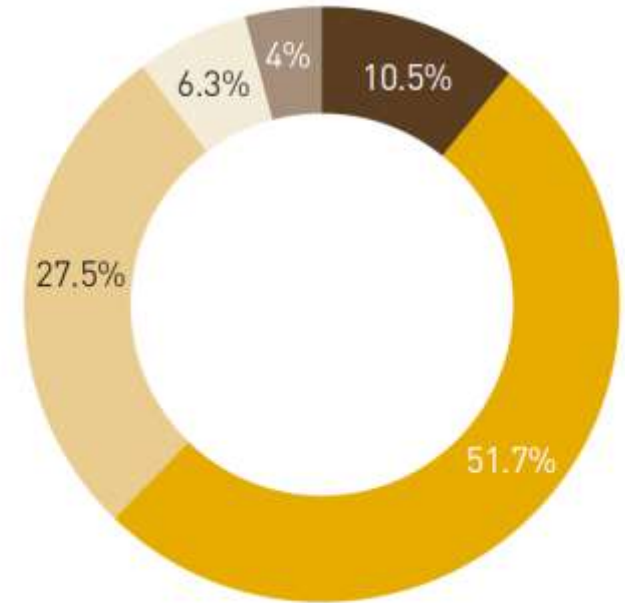
**118,000 (27%):** airlines, handling agents (flight crews, maintenance, reservations)

**222,000 (52%):** governments agencies (customs, security) or services (restaurants, hotels) on airports

**45,000 (11%):** airports (management, maintenance, etc...)

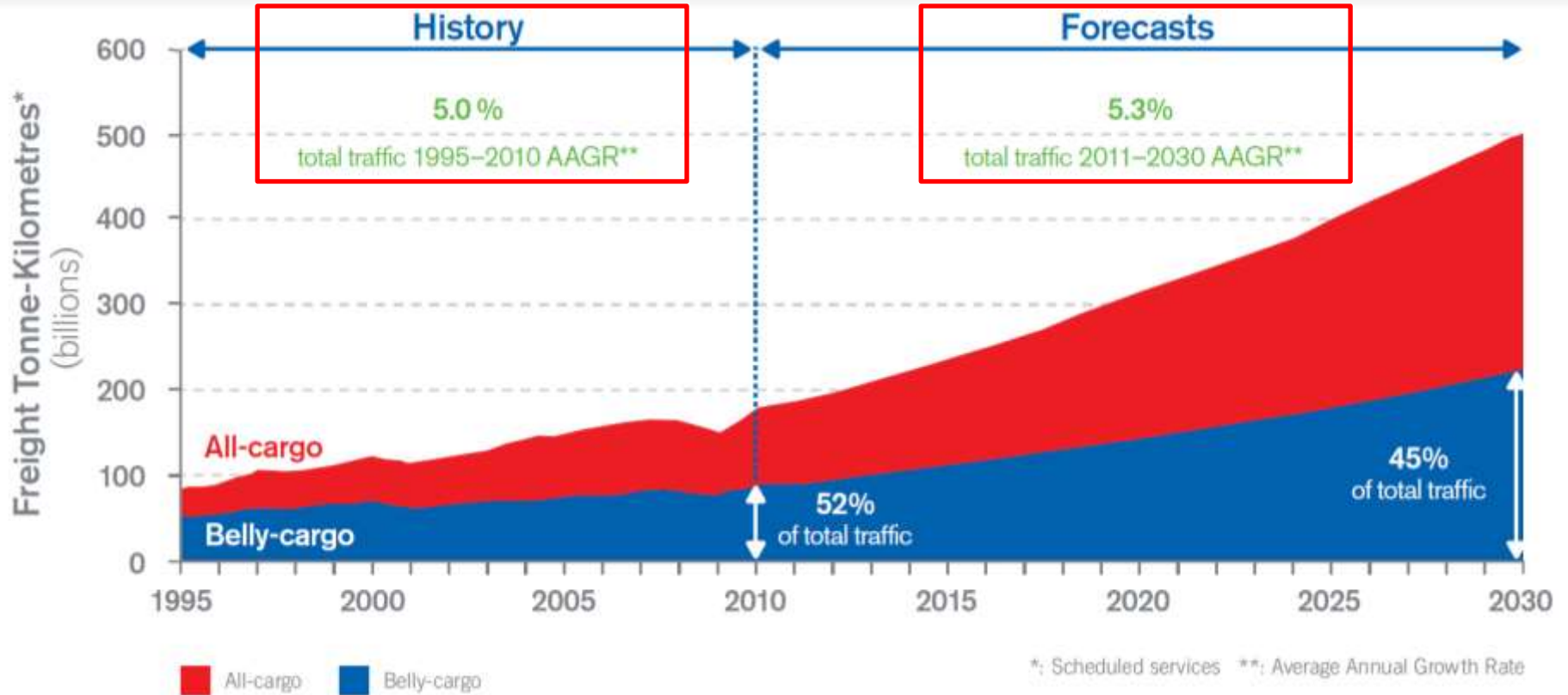
**27,000 (6%):** civil aerospace sector (manufacture of aircraft systems, components, airframes and engines)

**17,000 (4%):** Air Navigation Service providers





# Long-term Air Traffic Forecasts: "GATO" Scheduled Freight Traffic





# Long-Term Air Traffic Forecasts: "GATO" Africa - Scheduled Freight Traffic

## Freight traffic (FTK) to/from and within Africa



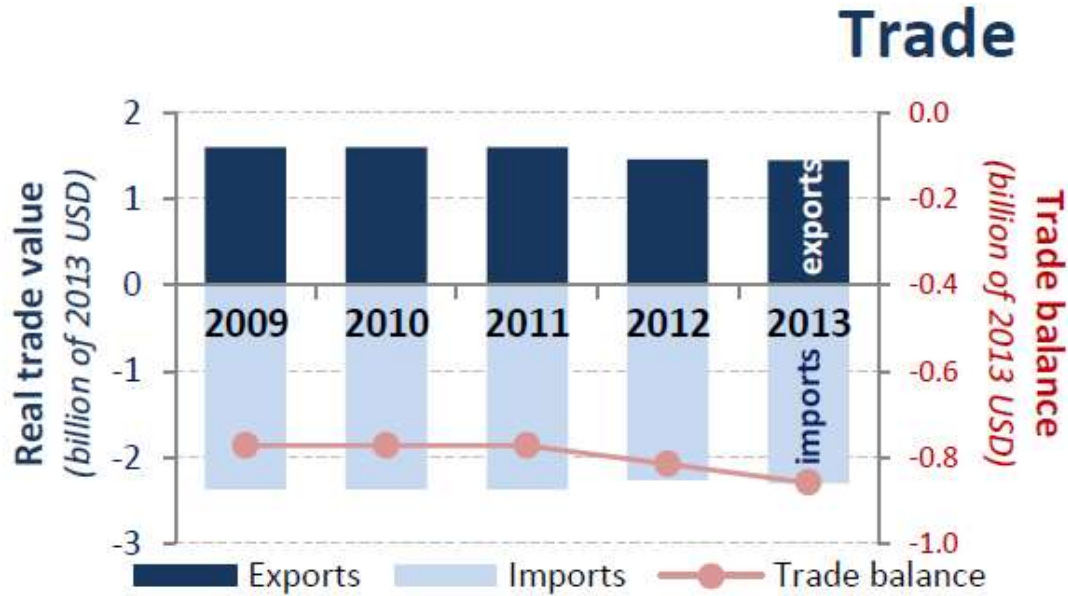
\*AAGR: Average Annual Growth Rate



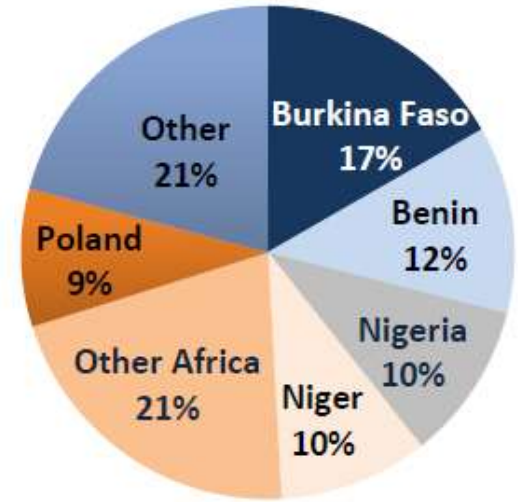


# SPOTLIGHT:

# TOGO



Source: IHS Global Insight



**Exports by value (2012)**

Source: United Nations Statistics Division



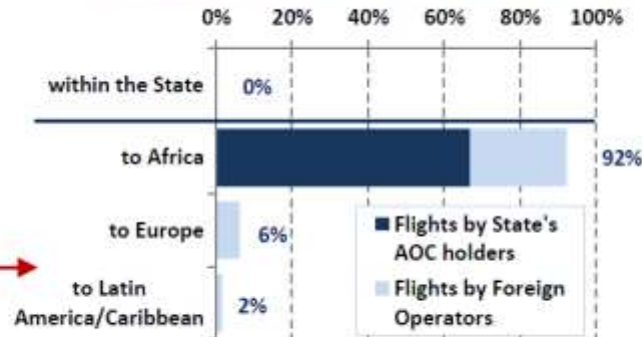
# Aviation Indicators: Togo



Main airport (100% of departures in 2013):  
Lomé-Tokoin Airport

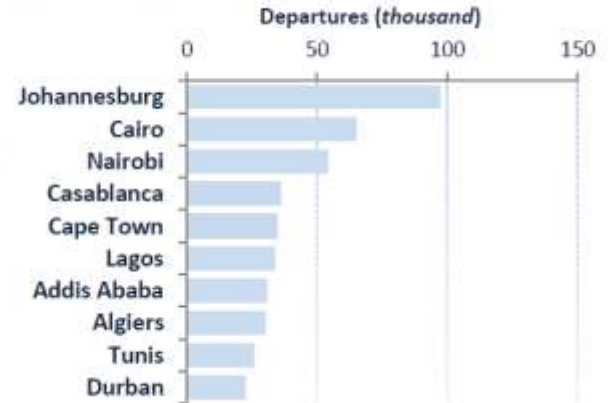
Note: scheduled services.  
--- Average annual growth

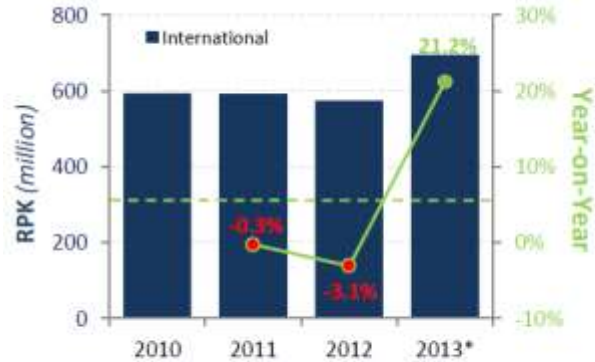
## State's Airport Departures



Source: ICAO Form I, OAG, EAP estimates

## TOP 10 cities in the region in terms of departures in 2013





**Main operator (100% RPK share in 2013):**  
ASKY Airlines

*Note: scheduled services*  
--- Average annual growth

Source: ICAO Form A, OAG, EAP estimates

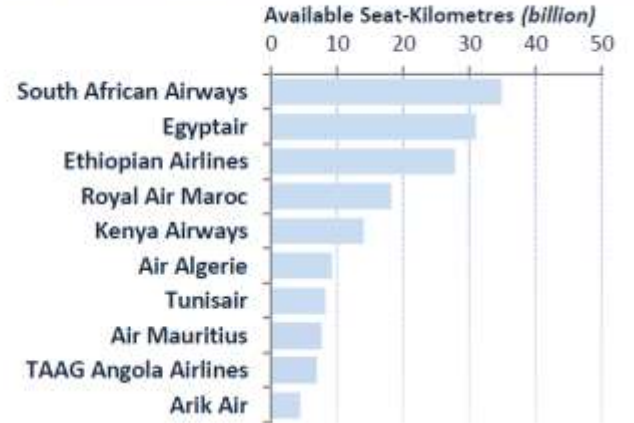
## State's Operator Traffic

**ASKY Airlines Key Figures**

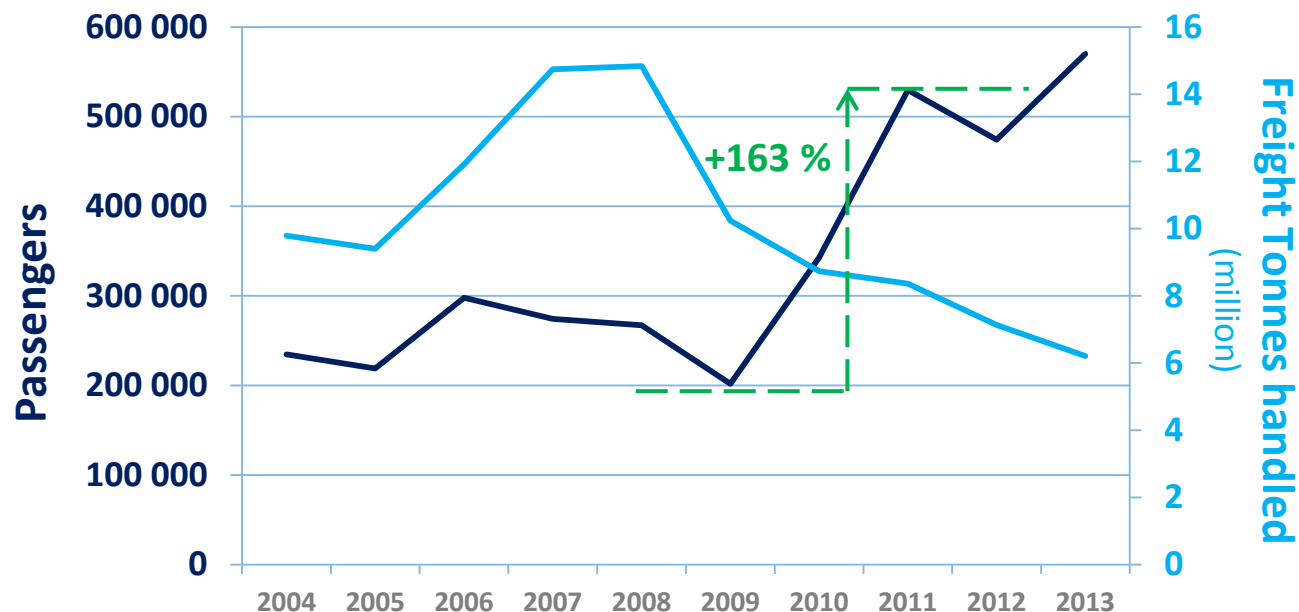
- 6 aircraft** (3 Boeing 737-700, 3 Dash8 Q400)
- 840 000 passengers\***
- 75% passenger Load Factor\***

*\*2013 preliminary data*

## TOP 10 carriers in the region in terms of capacity in 2013



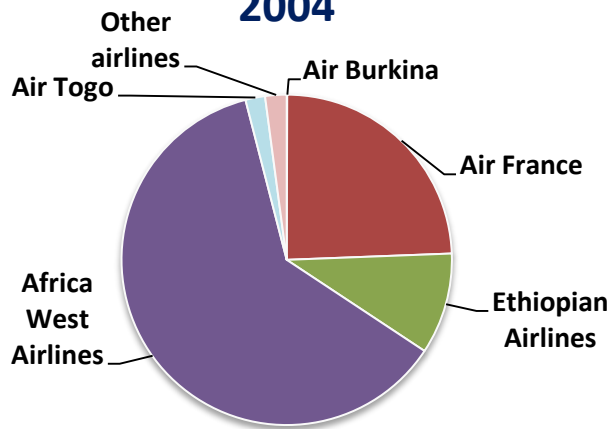
## Evolution of passenger and freight traffic at Lomé-Tokoin airport from 2004 to 2013



- Passenger traffic increased from 2004 to 2013
- Passenger traffic grew in 2009-2011 period due to the starting of operations of ASKY (+163%)
- Cargo traffic increased in 2004-2008 and decreased in 2008-2013

## Freight handled at Lomé-Tokoin airport in 2004 and 2013 – breakdown by airline

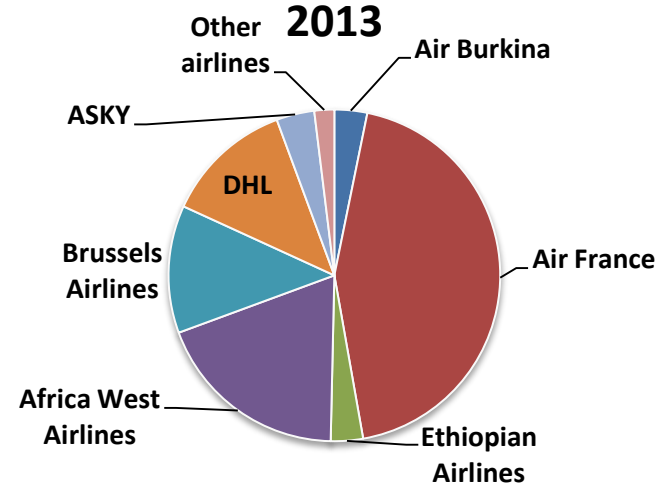
**2004**



**9.8 kilo-tonnes of Freight handled at Lomé airport**

- In 2013, Air France is the largest cargo operator (market share of 24% in 2004 and 44% in 2013)
- Africa West Airlines' market share decreased from 62% to 19%
- Total cargo handled declined by 37% from 2004 to 2013

**2013**



**6.2 kilo-tonnes of Freight handled at Lomé airport**



# **CONNECTIVITY: AN IMPORTANT VALUE CHAIN TO STIMULATE AIR TRANSPORT DEVELOPMENT**



# Definition of Connectivity in Air Transport

Movement of passengers, mail and cargo involving the **minimum of transit points**

- which makes trip as **short** as possible
- with **optimal** user satisfaction
- at the **minimum** price possible

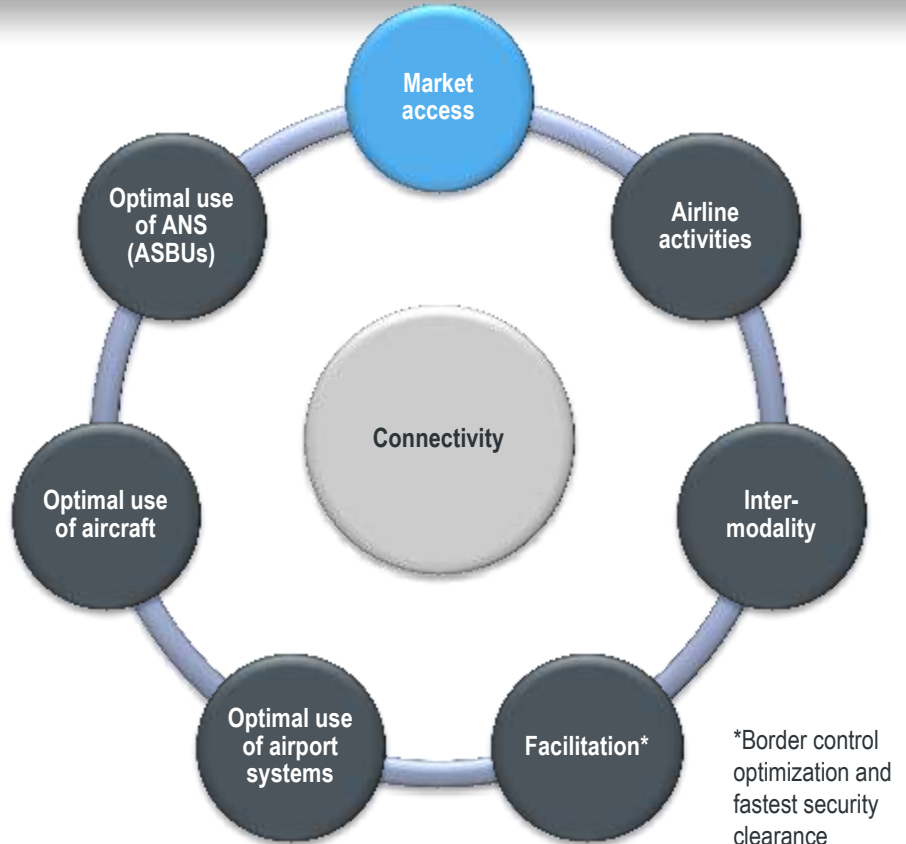


# Connectivity Components

In order to optimize connectivity a strong supporting framework is needed

## This includes:

- market access (e.g. liberalization)
- optimal use of:
  - air navigations services (incl. ASBUs)
  - Aircraft
  - airport systems
  - facilitation and security
- intermodality
- airline activities

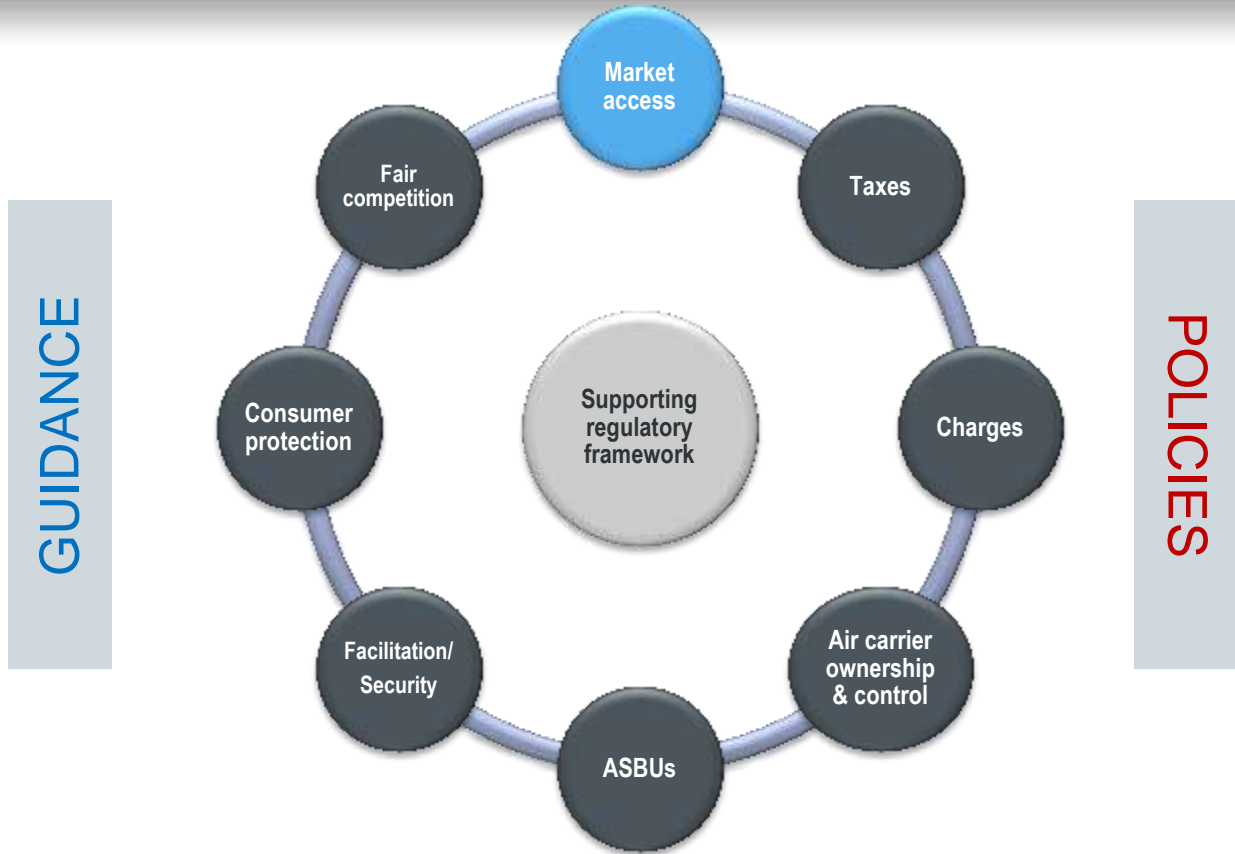




# The Supporting Regulatory Framework: ICAO's Contribution to Connectivity

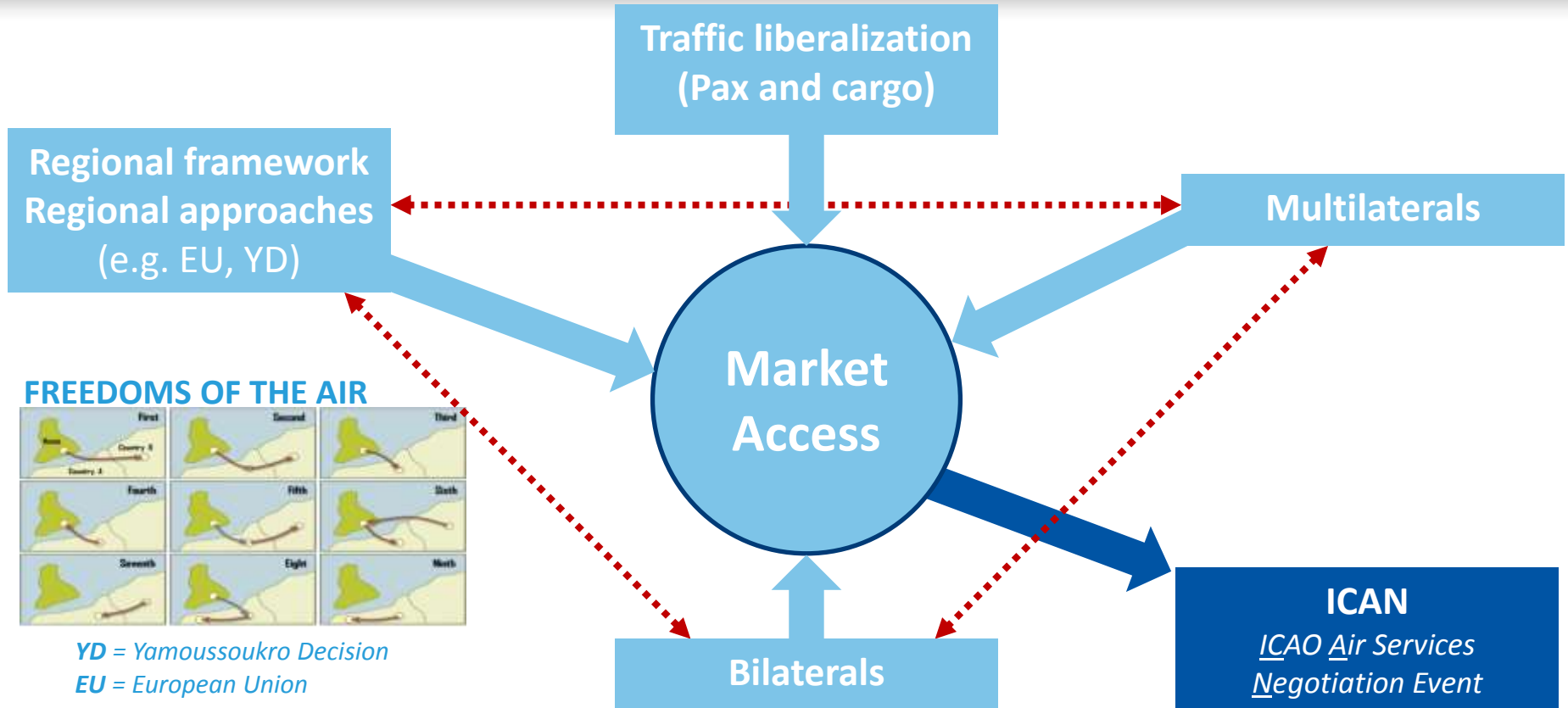
The supporting  
regulatory  
framework:

ICAO's  
contribution to  
connectivity





# Market Access – Supporting Framework



## FREEDOMS OF THE AIR



*YD = Yamoussoukro Decision*  
*EU = European Union*



Venue Year	2008 Dubai, UAE	2009 Istanbul, Turkey	2010 Kingston, Jamaica	2011 Mumbai, India	2012 Jeddah, Saudi Arabia	2013 Durban, South Africa
Number of participating States	27	52	38	64	62	73
Number of bilateral meetings held	100	200	200	370	350	486
Number of agreements signed	20	60	60	120	130	458

## ➤ Improve efficiency of negotiations

- A place to meet for multiple ASA talks
- A forum to get info, discuss issues
- A platform for bilateral, multilateral talks

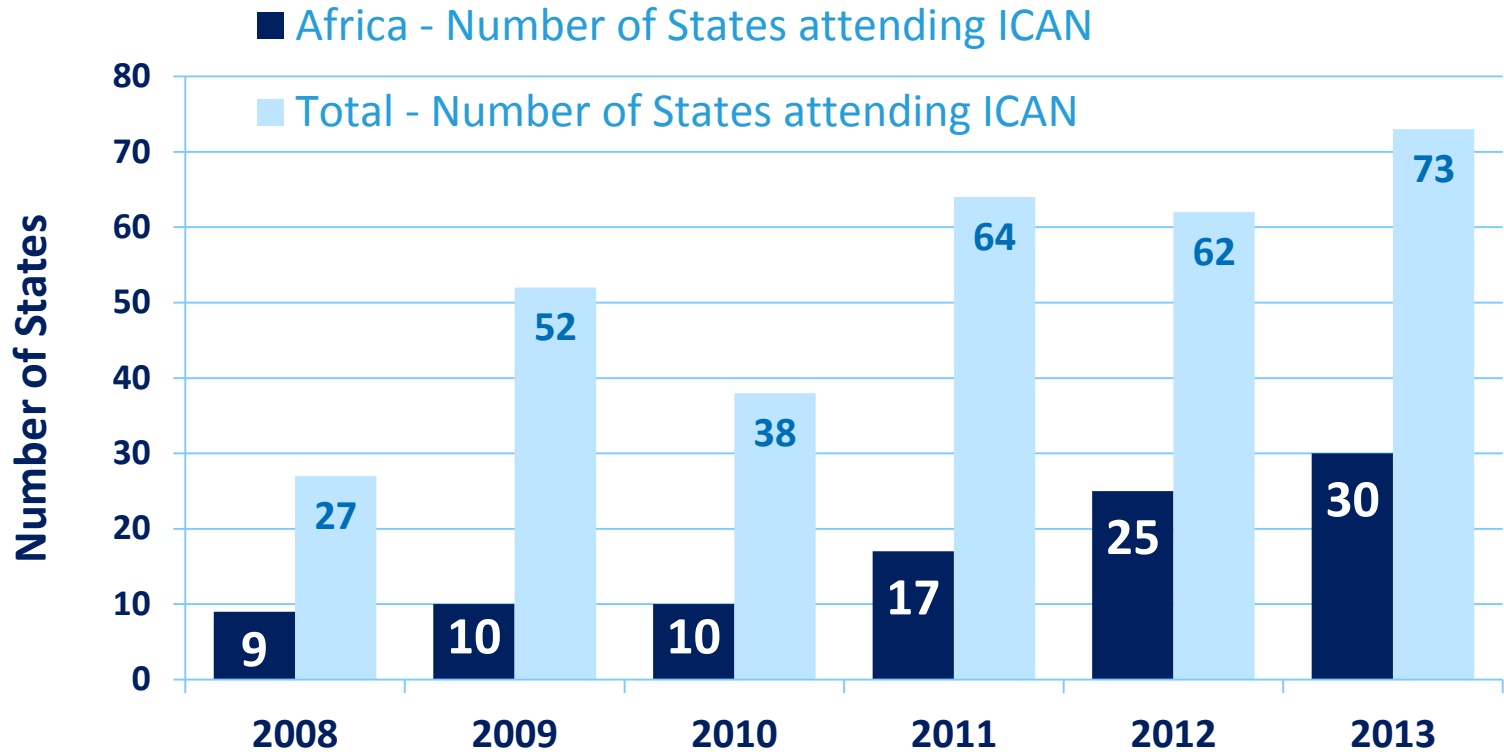
## ➤ Save time and money for States

**ICAN 2015: Turkey**

**ICAN 2016: Latin America**



# ICAN – African States





# ICAN 2014 Bali, Indonesia (17-21 Nov 2014)



**INTERNATIONAL CIVIL AVIATION ORGANIZATION**

*A United Nations Specialized Agency*

Français 中文 |



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## 2014 ICAO Air Services Negotiation Event

ICAN 2014 will take place 17-21 November 2014 in Bali, Indonesia, and includes an Air Transport Symposium on current trends and developments - read more...

[Air Cargo Africa Event](#)

[Air Cargo China Event](#)

[Aviation Security Innovation](#)

[ICAO Green Tech Seminar](#)

[Business Class 2014 Symposium](#)

[ICAN 2014](#)

### Latest News

[Ukraine Requests ICAO Assistance in MH17 Accident Investigation](#) | 18/7/2014

[ICAO Meteorological Meeting Delivers Important Recommendations Supporting Future 'SWIM' Environment](#) | 18/7/2014

[See more ...](#)

### Upcoming Meetings & Events

[New Technologies Working Group \(NTWG\), Request for Information from Vendors](#) | Montréal, Canada | 21/7/14 - 25/7/14

ICAO website





- For the development of civil aviation, African States should give priority to tackling obstacles such as:
  - **the slow pace of implementation of the Yamoussoukro Decision (YD),**
    - Article 3: Octroi de droits de trafic // 3.1 Les États parties s'octroient mutuellement le libre exercice des droits de trafic de première, deuxième, troisième, quatrième et cinquième libertés pour l'exploitation, par une compagnie éligible, de vols réguliers et non réguliers de transport de passagers, de fret et de courrier,.....
    - Article 3 : Granting of Rights // 3.1 State Parties grant to each other the free exercise of the rights of the first, second, third, fourth and fifth freedoms of the air on scheduled and non-scheduled passenger, cargo and/or mail flights performed by an Eligible Airline.....
  - **inadequate airport and air navigation infrastructure, and**
  - **unjustified charges and taxes.**



## Outlook on new ICAN features (in progress)

- B2B – Meetings with the Industry
  - For the first time this year in Bali
- Possible future “ICAN Cargo” perspective:
  - Component during future ICAN events to specifically address air cargo issues; or
  - specific “ICAN Cargo” event in cooperation with TIACA
- Promoting negotiations between States, International Organizations and the Cargo Industry





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# ICAO Air Cargo Development

**SAVE THE DATE !** **Air Cargo Development Forum**  
Lomé, Togo | 5 – 7 August 2014  
[www.icao.int/Meetings/AirCargoDevelopmentForum-Togo/](http://www.icao.int/Meetings/AirCargoDevelopmentForum-Togo/)

- Present recent trends in the delivery of air cargo services and the regulatory framework to be implemented for the sustainable development of air cargo in Africa.
- Provide a synopsis of the challenges preventing the air cargo industry from reaching its potential on the Continent.
- Adopt a Declaration on the Development of Air Cargo in Africa.



## ICAO Meeting on Air Cargo Development in Africa Lomé, Togo

5 – 7 August 2014



ICAO

In partnership with the  
National Civil Aviation Administration  
of Togo



**NOTEZ LA DATE !** **Forum sur le développement du fret aérien**  
Lomé (Togo) | 5 – 7 août 2014  
[www.icao.int/Meetings/AirCargoDevelopmentForum-Togo/](http://www.icao.int/Meetings/AirCargoDevelopmentForum-Togo/)

- Présenter les tendances actuelles de la prestation des services de fret aérien et le cadre réglementaire à mettre en œuvre pour assurer le développement durable du fret aérien en Afrique.
- Préparer un bilan des difficultés qui empêchent l'accès à du fret aérien de qualité aux aéroports sur le continent.
- Adopter une déclaration sur le développement du fret aérien en Afrique.




OACI

En partenariat avec  
l'Administration nationale de l'aviation civile  
du Togo





### For sustainable development of air cargo

The International Civil Aviation Organization (ICAO), in partnership with the Civil Aviation Administration of China (CAAC) and the People's Government of the Henan Province, will convene an air cargo development forum at the Zhengzhou International Convention and Exhibition Centre, Zhengzhou, China, from 2 to 5 September 2014. The event will be jointly hosted by the International Cooperation and Service Centre, CAAC and the People's Government of Zhengzhou.

The Forum will present recent trends in the delivery of air cargo services and the regulatory framework to be implemented for the sustainable development of air cargo. An outlook of the challenges preventing the air cargo industry from reaching its potential will be provided in relation to specific areas, such as: liberalization of air cargo services, development of an air cargo security system, enhancement of air cargo facilities, and the air cargo hub and its value chain.



To take advantage of this invaluable learning and networking event, please visit ICAO Meetings and Events website at: [www.icao.int/meetings](http://www.icao.int/meetings). Promo Code: ACC\_828

## Air Cargo Development Forum Zhengzhou , China

### 2 – 5 September 2014

ICAO | One-To-One Meeting Service

Attend the Air Cargo Development Forum in Zhengzhou. Meet with high-level Chinese government officials and others!

ICAO has initiated an exclusive meeting service alongside its conferences and symposia.

**Who Should Use This Service**

Invited primarily for aviation business organizations interested in meeting government officials from ICAO Member States and / or industry stakeholders.

**Industry and States**

Representatives from ICAO Member States can also use this service to arrange a meeting with aviation industry organisations and / or businesses.

Reserve a private meeting facility to present business proposals, negotiate agreements or showcase a new product.

Member States, international organisations and industry stakeholders participating at ICAO conferences or symposia are offered the opportunity to request and schedule private bilateral meetings at the conference venue with other interested participants. The meetings will be arranged in a private setup at a dedicated time with optional additional services.

Expression of Interest

Request Meetings

Meeting Schedule

Meeting Coordination

One-To-One Meeting

For more information or to express your interest in the One-to-One Service please visit:

[www.icao.int/one2oneACC](http://www.icao.int/one2oneACC)



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# Air Transport and Tourism Partnering for Economic Development



## Aviation & Tourism



### Hand in Hand for Sustainability

Air transport and tourism contribute to global economic prosperity. In 2012, more than one billion domestic, onward international tourists, more than half by air. The vast number of international tourists, which includes both leisure and tourist travellers, is expected to reach 1.8 billion by 2020. This will further increase the demand for air transport services with overall annual passenger departures forecast to grow from today's 58 million to 82 million in 2020.

The symbiotic relationship between aviation and tourism is reflected at the global level in the regular meetings of the International Civil Aviation Organization (ICAO) and the World Tourism Organization (UNWTO). While ICAO sets standards and policies for aviation safety, security, efficiency, environmental protection and the economic development of air transport, UNWTO promotes tourism as a driver of economic growth and

sustainable development, offering leadership and support to the sector in advancing knowledge and best practice worldwide.

Recognizing ICAO and UNWTO have provided to strengthen their collaborative efforts towards building a more sustainable future out of the three pillars of the United Nations definition of sustainability – social, environmental and economic – and its pillars of transport and tourism as strategically interrelated sectors that benefit the global society they both serve.

To that end, the two Organizations – hereinafter referred to as "we" – affirm their common understanding and shared vision through the following Joint Statement on Aviation and Tourism, solemnly signed on the occasion of the official opening of the ICAO 40th Worldwide Air Transport Conference, held under the theme of "Sustainability for Transport".

#### A solid track record

ICAO and UNWTO are designated joint governmental bodies responsible for aviation and tourism respectively. As sister agencies within the United Nations system, we together contribute to securing the social, economic and environmental pillars of sustainability.

In 1985, we entered into a Working Arrangement for consulting each other on questions of common concern, as well as ensure optimum coordination of activities and avoid duplication of efforts.

In 2011, we signed a Memorandum of Understanding to strengthen collaboration in several areas of strategic importance to air transport and tourism:

- Security and facilitation for travellers;
- Promotion of eco-tourism in aviation infrastructure and policy;
- Crisis management;
- Health issues, including those pertaining to the spread of communicable diseases through travel;
- Sustainable development, including environmental protection, mitigation of, and adaptation to, climate change;
- Liberalization of international air transport;
- Economic studies on aviation and tourism, and their impact on development.

#### A firm intention

Looking ahead, we intend to further explore the benefits of aviation and tourism through:

- Maximizing synergies between air transport and tourism, while being fully cognizant of common values and interests;
- Cooperating for the modernization of the air transport regulatory framework;
- Enhancing air transport connectivity further through cooperation:
  - Regarding civil and other level document formalities and recovery, including the simplification of visa processing and the development of multi-State regional standard e-visas;
  - On the improvement of air passenger flow management at airports;
  - On the implementation of the Essential Services and Business Development Theme (ESBD) strategy;
- Collaborating in the emergence of quality certification schemes for the provision of passenger, business and other services providers, within the regulatory framework and the framework of existing or future international bilateral or multilateral agreements;
- Continuing to find solutions to common issues of common concern from aviation and tourism;
- Taking joint initiatives in the particular respect of an air transport for tourism development in long-haul destinations and landlocked or island countries;
- Studying the impact of taxes, charges and other economic, social and health, and their implications on growth and jobs.

Working together on common issues will more effectively position aviation and tourism as leaders in the pursuit of sustainable development.

Signed in Montreal on 18 March 2013.

ICAO

Mr. Tomijima, Secretary General

UNWTO

Mr. Talek Rizki, Secretary General



## Tourism and Air Transport

Air transport and tourism are major contributors to global economic prosperity

The symbiotic relationship between aviation and tourism is reflected at the global level by the cooperation of ICAO and UNWTO – partnering for economic development.

UNWTO

ICAO | ICAO | UNITING AVIATION

**UNWTO/ICAO  
Ministerial Conference**  
Tourism and Air Transport in Africa  
14-15 October 2014, Victoria, Mahé, Seychelles

**SAVE THE DATE!**  
Victoria, Seychelles  
(14-15 October 2014)



## ICAO and TIACA Declaration of Intent

Strengthen cooperation and on technical matters (April 2013)

Closer work in the field of

- air cargo and mail security and facilitation;
- Accelerating the evolution from paper-based to electronic processes;
- environmental stewardship;
- the liberalization of market access; for air cargo services; and
- air cargo safety

### NEWS RELEASE

Please find here a news release issued today by TIACA

Media contact: Jamie Roche, JRPR  
Date: April 18th 2013  
T: +44 (0) 1344 631880/1/3  
E: jamie@jamiyrochepr.co.uk



## ICAO AND TIACA TO STRENGTHEN COOPERATION

**Dallas/Fort Worth (18 April 2013):** The International Civil Aviation Organization (ICAO) and The International Air Cargo Association (TIACA) signed a Declaration of Intent today to strengthen co-operation on technical matters.

The declaration was officially signed in Dallas at TIACA's 2013 Executive Summit by the Association's Chairman, Michael Steen, and by ICAO's Secretary General, Raymond Benjamin.

Under the terms of the new agreement, ICAO and TIACA will work more closely on air cargo and mail security and facilitation, accelerating the evolution from paper-based to electronic processes, environmental stewardship, the liberalization of market access for air cargo services, and air cargo safety.



Michael Steen said: "This is another highly significant breakthrough in the new era of collaboration between our industry and leading regulatory bodies. ICAO is taking a lead in critical areas of aviation, such as security and the environment, and the Secretary General and his team have made a clear point of meeting with us, listening to our views and participating in our events to learn more about the requirements and concerns of the air cargo industry. ICAO clearly sees air cargo as the vital industry that it is and we welcome the opportunity to help this important global standards setter realize its objectives, based on a stronger understanding of the views of our sector."



On behalf of ICAO, Raymond Benjamin, added: "ICAO has been grateful for the input and advice received by TIACA as we have begun to develop closer ties with the air cargo sector. With this agreement now supporting our future cooperation across a wide range of shared priorities, ICAO will be focusing its near-term efforts on evolving our regulatory frameworks with States and industry stakeholders, including TIACA, toward the greater liberalization of air cargo services."

ICAO and TIACA have agreed to 'consult, confer and cooperate on a continuous basis, over an above attendance at formal meetings. They will keep each other informed of project activities and programs of work in the areas identified in the Declaration of Intent.

TIACA, which is already on the list of international organizations that may be invited to attend suitable ICAO meetings, has agreed to disseminate information on relevant ICAO standards and recommended practices, policies and technical guidance materials, and to promote implementation by its members.

Each of the parties will also invite the other to be represented by observers at global and regional conferences or meetings relating to the areas of cooperation.

This new commitment by ICAO and TIACA follows a joint communiqué for 'Enhanced Cooperation in the Field of Air Cargo Transportation' last October, which was issued at TIACA's 26th International Air Cargo Forum & Exposition in Atlanta, Georgia.



-end-



## ICAO and WCO Memorandum of Understanding

Joint Forces to Strengthen Air  
Cargo Security (June 2011)

Increased cooperation to protect  
air cargo from acts of terrorism or  
other criminal activity and for  
speeding up the movement of  
goods by air worldwide

Foundation for future Joint  
Communiqués and Publications.



| ICAO



WORLD CUSTOMS ORGANIZATION  
ORGANISATION MONDIALE DES DOUANES



## Moving Air Cargo Globally

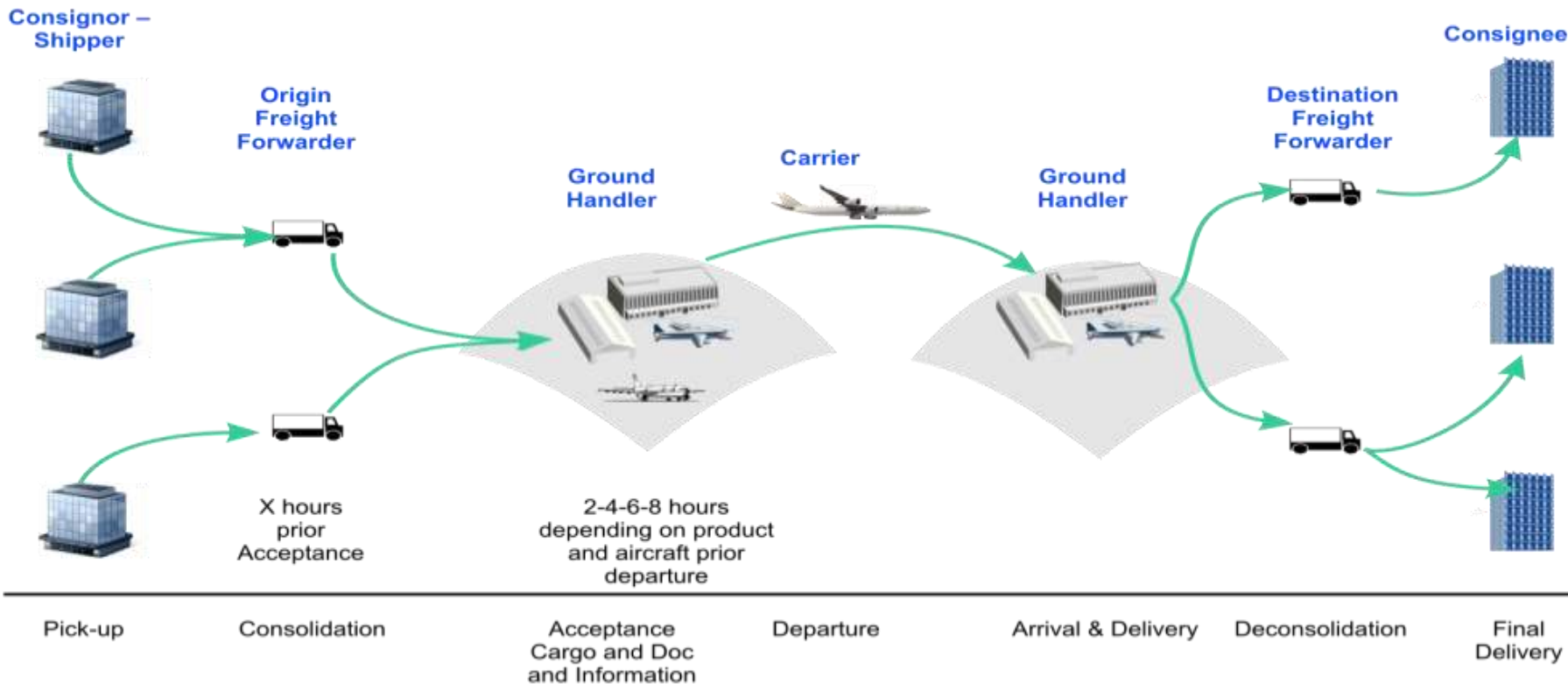
ICAO-WCO Joint publication on Air cargo Security and Facilitation



Available for download in six languages

- Arabic
- Chinese
- English
- French
- Russian
- Spanish

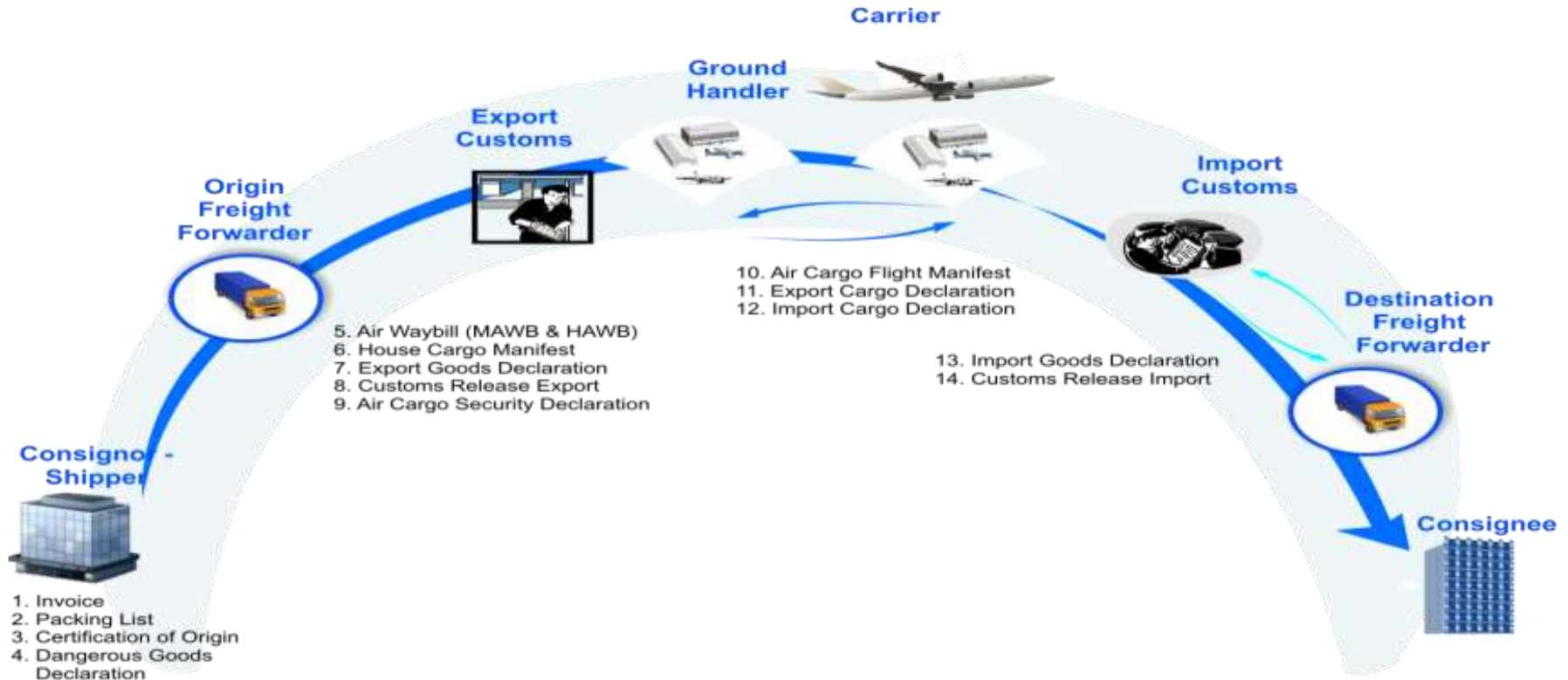
<http://www.icao.int/Security/aircargo/Pages/Air-Cargo-and-Mail-Security-and-Facilitation.aspx>

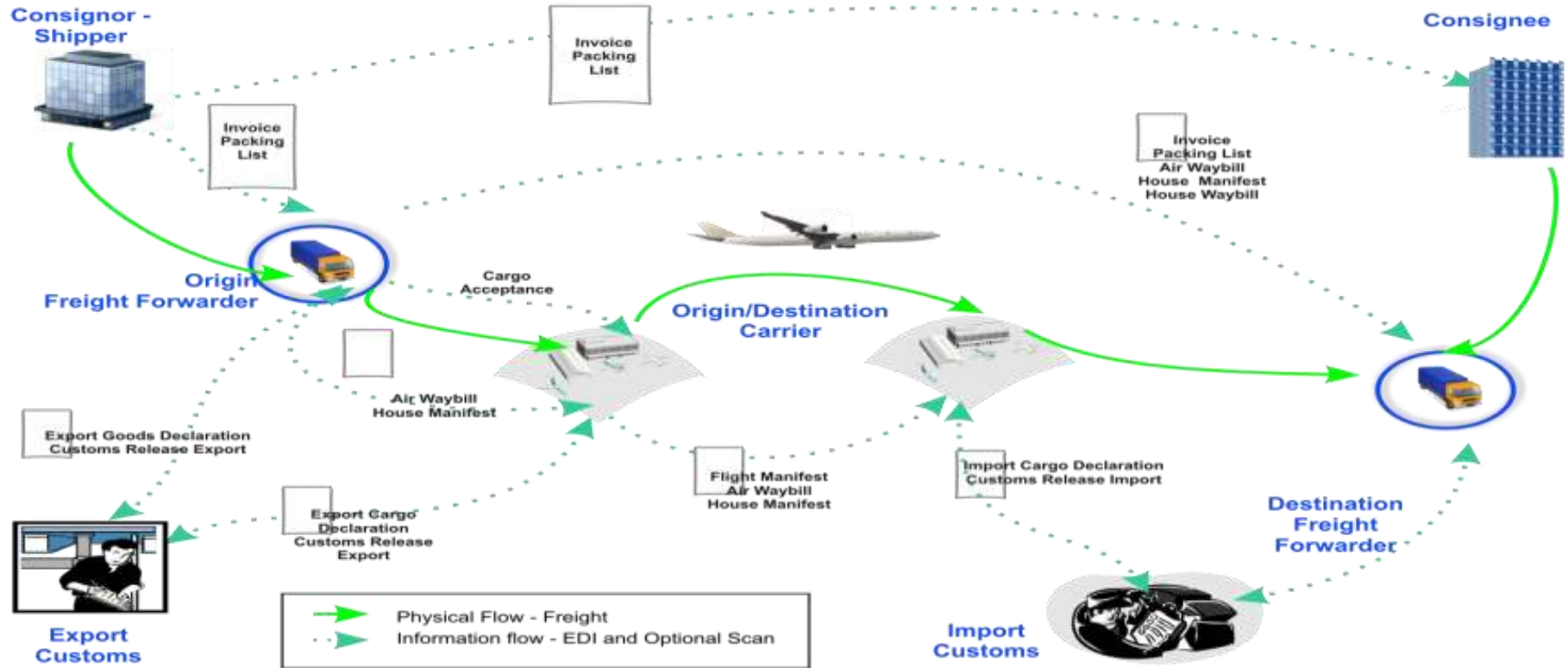






# Air Cargo Supply Chain and Associated Documents







## ICAO, WCO and TIACA

### Solidify Cooperation on Air Cargo Supply Chain Objectives





- **Ethiopian Airlines** and the Agence Française de Développement (AFD) signed a loan agreement of 50 million euros on 20 June 2014 at the ET HQ. The agreement is aimed at financing the construction of the new state-of-the-art cargo terminal. “Infrastructure development is one of the four pillars of our fast, profitable and sustainable growth strategic roadmap, Vision 2025. This loan from AFD will enable us to build our new cargo terminal, which when completed will have 1.2 million tons annual capacity, making it one of the largest in the world. The new cargo terminal is part of our Ethiopian Cargo Vision 2025, which aims first and foremost **to support our country’s fast growing export of perishables such as flowers, fruits, vegetables and meat.** As part of our Ethiopian Cargo Vision 2025, we plan to operate 18 dedicated freighters serving 37 international cargo destinations by 2025 and carry 820,000 tons of cargo (200,000 today).



- The African continent is a key market for **Kenya Airways Cargo** and remains an area of huge trading potential. With its continually growing network and fleet expansion, KQ Cargo is set to offer enhanced levels of connectivity, flexibility and reliability to its cargo customers across Africa.
- La compagnie peut en outre s'appuyer sur le **fret aérien de fleurs et de légumes**, qui représente déjà **plus de 10 % de son chiffre d'affaires**,
- **Star Alliance Cargo**: Le CEO de Lufthansa Cargo envisage pour **2014** de créer une alliance de compagnies aériennes cargo sur le modèle de Star Alliance, dans le secteur passager, « Nous voulons travailler avec des partenaires qui nous offriraient un accès à de nouveaux marchés et davantage de liaisons », a-t-il déclaré. Une telle alliance impliquerait notamment une mise en commun des capacités et des standards de qualité. Lufthansa Cargo pourrait ainsi étendre son réseau et mieux remplir ses appareils.



## New Developments

- **Etihad Cargo** has started freighter flights between Abu Dhabi and Hanoi, and will operate 2X-weekly using an Airbus A330-200F, Etihad Cargo expects the new service to carry raw materials, consumer goods and perishables, with electronics and textiles destined for the Gulf region, Europe and **Africa** on the return flight.
- The **PAL-Etihad** agreement also includes cargo, as well as connecting into **Africa**, Australia, the Middle East and Southeast Asia, with both airlines concentrating on high-value cargo, such as pharmaceuticals.
- **Etihad Cargo**, has launched a new weekly A330-200 freighter service between Abu Dhabi and **Entebbe** Uganda, and also to **Dar es Salaam**, Tanzania. Etihad Cargo expects the direct service to carry large quantities of electronics and textiles, with primarily perishable goods destined for the Gulf region and Europe loaded for the return flight. Payload on the freighter is around 64 tonnes.





- **Corsair fait mieux que prévu dans le fret en 2013**, Elle continue de faire du fret une de ses priorités avec un objectif de 15% de CA d'ici deux à trois ans. L'ouverture d'un poste vétérinaire à Orly le week-end devrait être un des vecteurs lui permettant de réaliser ses ambitions. Alors qu'elle avait anticipé de transporter entre 13 500 et 14 000 tonnes de fret pour son exercice clos au 30 septembre 2013, la compagnie Corsair a fait mieux que prévu. Elle en a, en effet, acheminé 14 600 tonnes dont environ un quart sur **Dakar et Abidjan**, ses deux nouveaux relais de croissance en Afrique Occidentale. Surtout, cette nouvelle hausse des tonnages lui a permis d'atteindre l'objectif des 10% de chiffre d'affaires générés par l'activité cargo. « **Au-delà du tourisme**, notre ambition est de contribuer activement au développement de l'économie sénégalaise, notamment **grâce au secteur du fret aérien** au départ et à destination du Sénégal. Grâce à l'initiative de Corsair, l'ouverture des services vétérinaires le samedi est une avancée significative pour les producteurs de produits halieutiques sénégalais et permet ainsi à Corsair de mieux répondre aux attentes de ses clients fret ».



- **Autonomous freight drones: A revolution in Air Cargo?**
- several unmanned aerial vehicles (UAV's) were deployed in the Dominican Republic. The UAV's, electrically powered quad-rotors capable of carrying two kilogrammes up to 20 kilometres, were deployed by Matternet. The company claims the drones will form a small network between medical clinics on the island, delivering medicines and other high value, time sensitive goods. Similar trials have been conducted in various locations worldwide.
- Amazon also made headlines in December last year when they demonstrated their testing of Prime Air, an automated drone delivery service. The idea is that inner city deliveries could be made autonomously, in a very short time frame.





# Future of Air Cargo ???????



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شكرا, Shukran

Xie Xie, 谢谢

Thank You

Merci

Spasiba, Спасибо

Gracias

**We look forward to seeing you in 2 years, for the next ICAO Meeting on Air Cargo Development in Africa.**

**Venue to be confirmed.**



# Questions? Comments?

**[DATB@icao.int](mailto:DATB@icao.int)**



# ICAO Meeting on Air Cargo Development in Africa – Website



Réunion de l'OACI sur le développement du fret aérien en Afrique

Date : 5 au 7 août 2014

Emplacement : Togo

[www.icao.int/Meetings/AirCargoDevelopmentForum-Togo](http://www.icao.int/Meetings/AirCargoDevelopmentForum-Togo)



## Reference Documents

*International*

Arabic Chinese

English French

Russian

Spanish

**ICAO**

- Convention on International Civil Aviation (Doc 7300)
- Convention for the Unification of Certain Rules for International Carriage by Air of 28 May 1999 (Doc 9740)
- Working Papers for the Sixth Air Transport Conference (ATConf/6) (Notably WP/14, 34, 36 et 96)
- 38th session of the ICAO Assembly (A38 website) Working Papers of the Economic Commission (EC) (Notably WP/56)
- Assembly Resolutions in Force: A38-14 : Consolidated statement of continuing ICAO policies in the air transport field



## Reference Documents *International*

### WCO

- SAFE Framework of Standards to secure and facilitate global trade, June 2012
- Compendium of Authorized Economic Operator Programmes 2014
- WCO Compendium, Volume 1 How to Build a Single Window Environment: The Executive Guide
- WCO Compendium, Volume 2 How to Build a Single Window Environment: The Professional Practice Guide
- Recommendation of the Customs Co-operation Council on the Dematerialization of Supporting Documents, June 2012
- WCO-UPU Postal Customs Guide, June 2014
- Guidelines for the Immediate Release of Consignments by Customs



- **ICAO/WCO: Moving Air Cargo Globally** (All ICAO Languages)
- **Joint Communiqué on Enhancing Air Cargo Security and Facilitation – Collaborative Solutions to Future Challenges**  
Manama, Bahrain 17 April 2014 (All ICAO Languages)
- **Joint Communiqué on Enhancing Air Cargo Security and Facilitation – Synergy through Cooperation**  
Singapore, 6 July 2012 (All ICAO Languages)
- **ICAO/TIACA Agreement** April 2013: both organizations to work more closely on air cargo safety and security matters, supporting future cooperation across a wide range of shared priorities, including greater liberalization of air cargo services. (En Fr)

### Reference Documents

*International*  
**ICAO/WCO**  
**ICAO/TIACA**



## Reference Documents

### *Regional*

- Yamoussoukro Decision, 1999  
available in English and French

