



Cluster for Logistics
Luxembourg
a.s.b.l.

ADDING VALUE IS THE KEY

Logistics Business forum 2012 > 1

Airfreight – Outlook and trends



Speaker:
Henrik Ambak,
Cargolux Airlines Intl. S.A.

Key messages

Period of strong volatility – “adapt or die”

- Outfall of “financial crisis” still lowering demand in Europe
- Change of international trading flows - Asia taking-off
- Capacity supply / demand growth short term out of sync
- Specialized cargo increasingly becoming the “menu of the day”

Luxembourg remaining a strong European gateway

- Central location with direct access to central high-way structure
- Uncongested runway and “all-in-one” cargo ramp and terminal

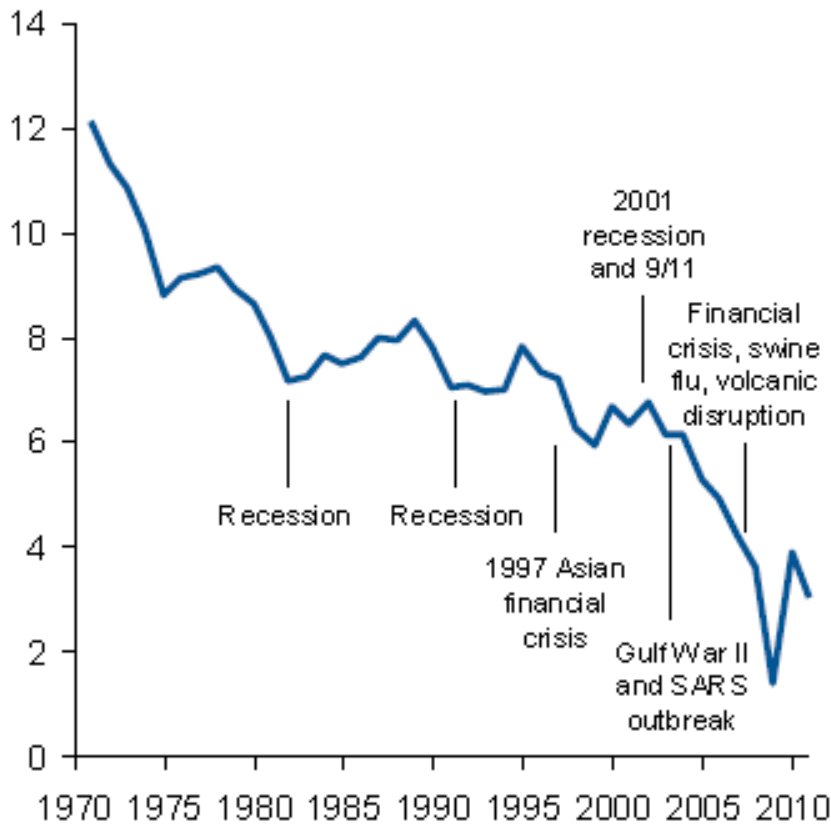
Cargolux – as ready as ever

- Introducing the latest in aircraft capacity and efficiency
- “Can do” - Committed to excellence and client service

Growth? – Yes but..

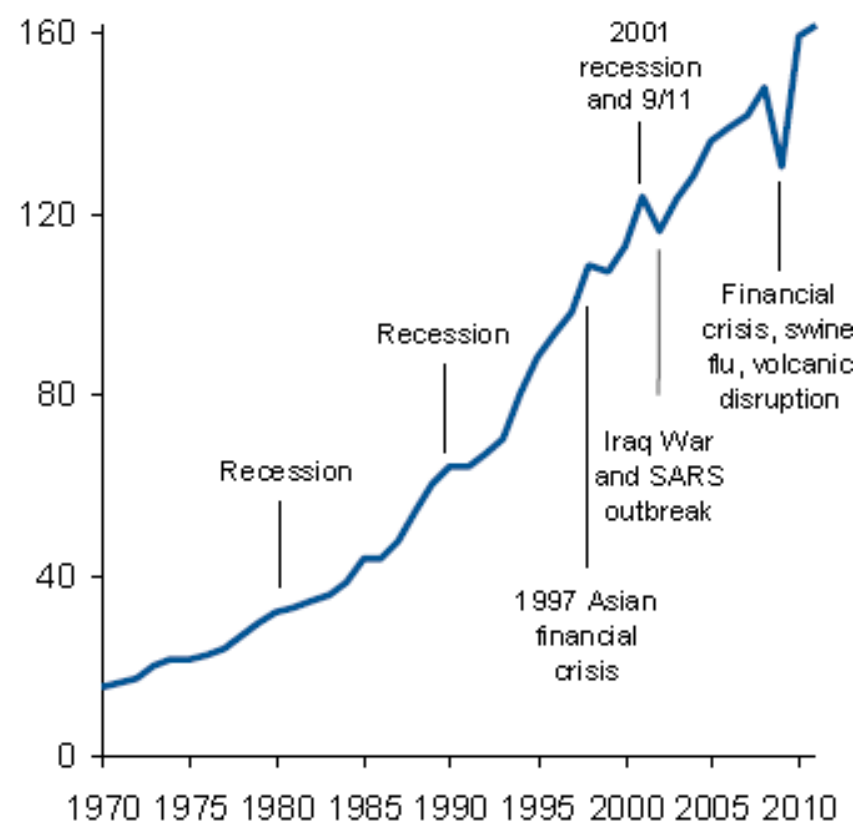
Air freight growth decelerating over time...

FTK growth 10-year moving average (%)



... but it remains a growth industry

FTK (B)

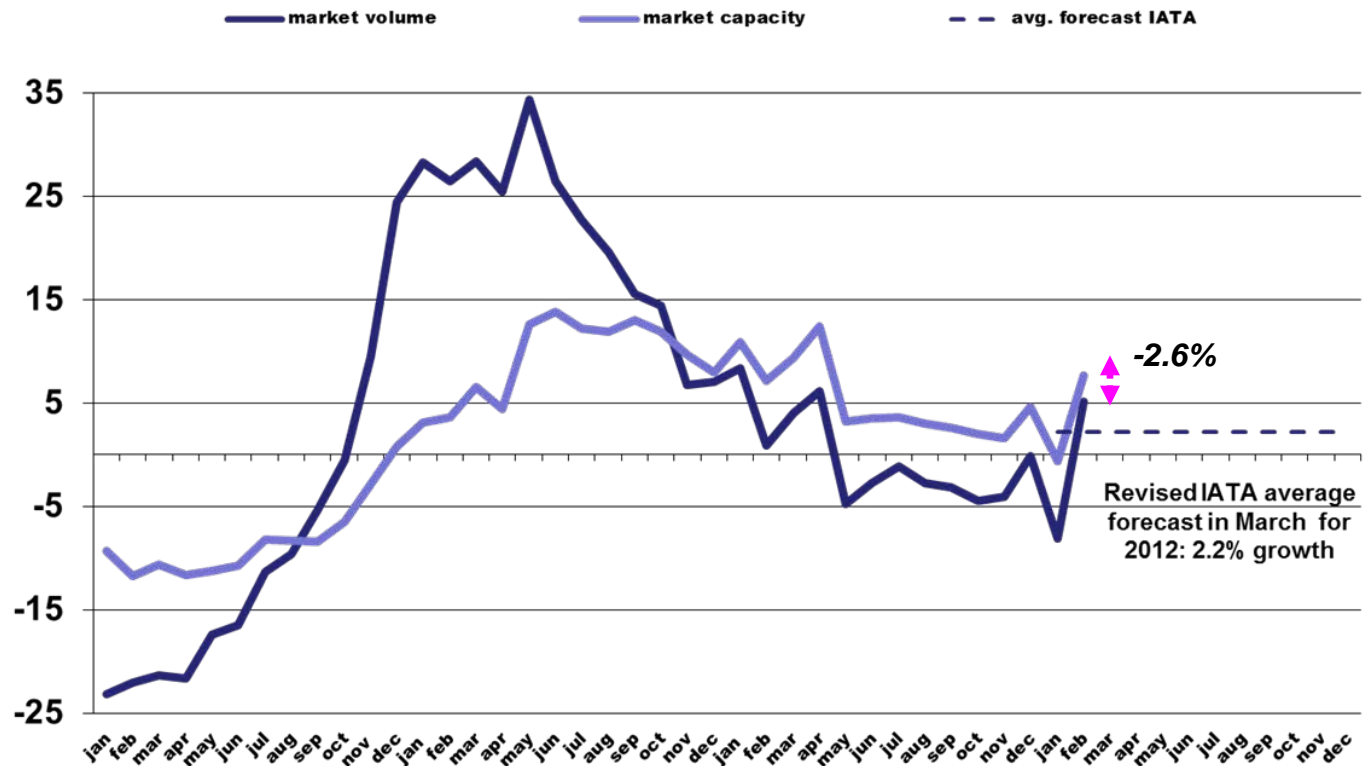


Courtesy of Seabury

Supply/demand nudging towards balance..

2008-2010: The big crisis “swings”

2011-2012: The slow movement towards normal balance



Source of data: IATA

Ever more specialized cargo..

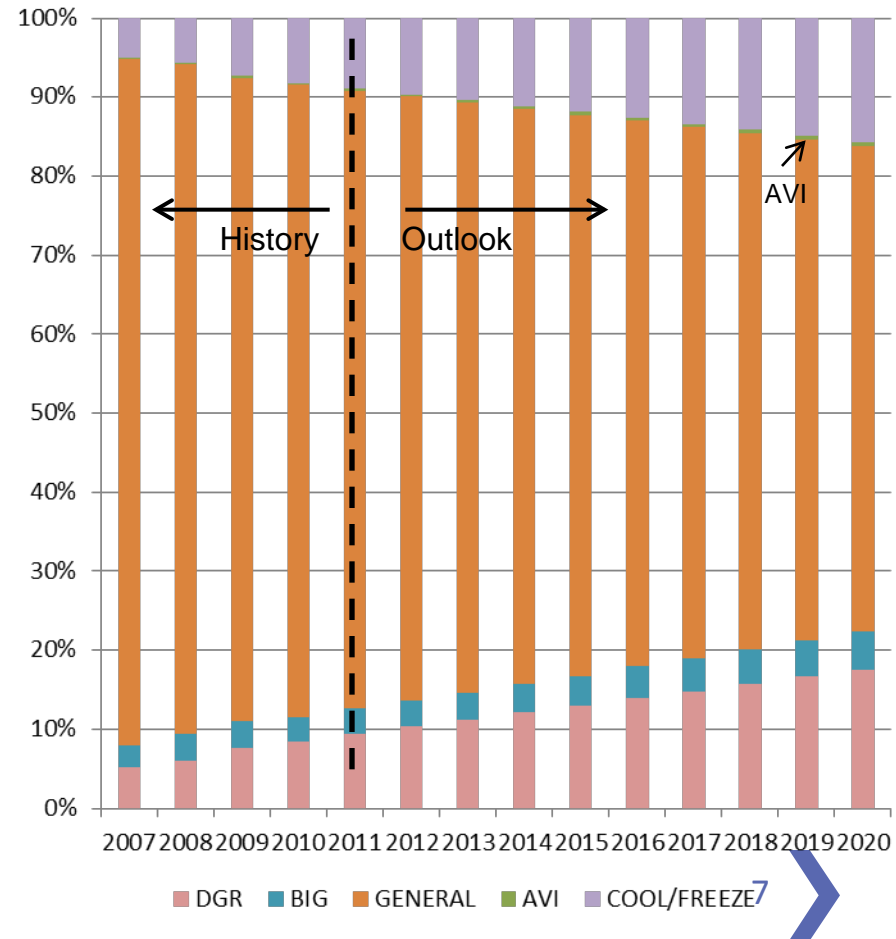
Special commodities to become “menu of the day”

Key messages:

- DGR^(*) + TEM to grow by 100%
(*) this before considering that lithium batteries will become fully regulated by January 2013
- AVI can grow by up to 100%
But still a small business in absolute volumes
- BIG to grow by around 50%

Special commodities drives

- Infrastructure / facilities
- Training / qualification of people



Cargolux estimation for own planning

Luxembourg

– a first class central European hub

- **Cargo area placed next to the east/west high-way**
- **Uncongested runway**
- **Cargo aircraft parked at cargo terminal**
 - Fast through-put
 - Limited weather exposure to cargo
- **Airline handling and forwarder handling integrated**
- **On-site customs 24x7**



Cargolux? – as ready as ever..

- **+40 years of know-how in scheduled and charter services**
- **Serving 68 stations on 5 continents with regular service**
- **First 3 new B747-8F in operation**
 - Less fuel burn / Less noise
 - Moving more cargo
- **Cargo2000 “Platinum” rank**
 - Only 7 out of +80 members achieved this for 2012
 - CV, CX, KL, LH, LX, Schenker + Kuehne & Nagel
 - Commitment to customer service and contribution to industry development

