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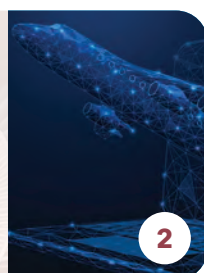
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Logistic operations in the Middle East are being driven by rising demand for rapid, time-sensitive logistics and the expansion of trade with the Global South. Companies are looking to utilise all aircraft and hubs to meet opportunity in the region, leveraging geographic advantage and operational agility.

"Currently, the regional air cargo and logistics market is growing at an annual rate of approximately 4.2 to 4.5 percent, depending on the source. This growth is expected to accelerate to between six and seven percent by 2026. Much of this expansion is concentrated in narrow-body aircraft operating within a six-hour radius—an area that remains relatively under-served," Hamdi Osman, Founder and CEO of SolitAir, explained.

The emphasis on rapid delivery has significant operational implications. Drawing on his 34 years with FedEx to outline SolitAir's approach to balancing speed with oversight, Osman outlined: "Custodial control matters the most. Safety and security come second, followed by pricing and information technology. Customers may not articulate this, but they demand visibility, reliability and accuracy in billing from day one.

"Velocity is becoming a necessity. Customers today ask, 'How fast?' before they ask, 'how much?' Speed and efficiency are driving loyalty, especially with the rise of e-commerce. A package delivered the same or next day leaves a lasting impression, while delays are remembered far longer than cost."

Emerging trade lanes

Prominent hubs like Dubai in the Middle East and Mumbai in South Asia are central to the growth of regional airfreight, playing a key role in linking production and consumption markets across the global south. "Approximately 70 to 80 percent of the world's population lives in the global south. These regions are producing, manufacturing and consuming goods—from agriculture to oil, gas, and precious metals. Connectivity via hubs is crucial for linking these supply chains efficiently," Osman stated.

This geographic situation, paired with market demand, has seen SolitAir look towards trade lanes that combine production and consumption within a six-hour flight time. Against an initial plan to serve 50 cities by 2027, the cargo airline has already covered over



35 routes in just one year of operation, highlighting its strong growth trajectory. "We are focusing on the CIS, Turkey, the Indian subcontinent and the Middle East. Each of these regions functions either as a producer, consumer, or both, making them strategic for narrow-body operations and fast delivery." Osman underscored.

Composition and preparedness

SolitAir's staffing strategy reflects a balance of experience and digital fluency. Combining seasoned industry veterans with younger, technologically adept personnel creates a resilient workforce. "Seventy percent of our employees are over 50, bringing wisdom and operational experience. The remaining 30 percent are under 32, providing insights into digital trends and AI-driven processes. This mix allows us to scale quickly and respond to market shifts

effectively," Osman said.

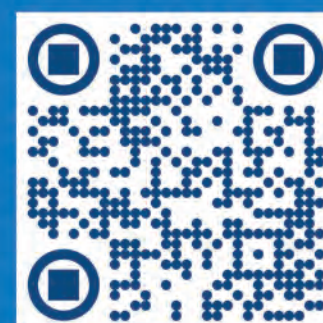
The integration of technology and market intelligence is also central to growth. "Every operation is preceded by a detailed market study and data analysis. We deploy a team of specialists to evaluate each airport and trade lane before we execute. Focus, analysis, development, and execution—that is our operational formula," he outlined.

Comparing SolitAir's first year to constructing the base of a skyscraper, Osman was clear how long-term strategic planning is central to development of operational foundations: "The foundation we built in year one is solid, allowing us to scale sustainably. We are now focused on expanding the footprint, increasing capacity and leveraging technology to enhance visibility, efficiency and customer satisfaction."



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THE CASE FOR THE TRACING, LOST AND FOUND PLATFORM



BY Michael SALES

THE rise in global airfreight volumes, combined with more interconnected networks, has exposed the limitations of traditional manual processes, highlighting how a modern Tracing, Lost and Found Platform is essential to address operational inefficiencies and enhance transparency across the supply chain.

Irregularities such as loss, damage, or delay remain common. However, it is the fragmented approach to managing these events that continues to disrupt operations. Manual workflows involving emails, spreadsheets, and phone calls slow resolution times, obscure accountability, and reduce service performance.

"Every irregularity triggers communication between airlines, ground handling agents, stations, and service partners. In many organisations, this still happens through emails, spreadsheets, and phone calls. That fragmented approach creates delays, confusion about ownership, and very limited visibility. By the time everyone aligns, valuable time is already lost. This directly affects service performance, operational costs, and customer satisfaction," Raoul Paul, founder of CargoHub Technology, said

Legacy workflows struggle with growing complexity

Airfreight networks have expanded significantly, increasing both operational complexity and customer expectations. Traditional tools for managing irregularities are often unable to keep pace, leaving stakeholders exposed to delays and inefficiencies.

"Air cargo networks have become far more interconnected and time critical. Yet the tools used to manage irregularities have hardly evolved. Manual updates, non-standard templates, and disconnected systems simply do not scale. As volumes increase and customer expectations rise, these legacy workflows can no longer meet operational or commercial requirements," Paul explained.

The persistence of irregularities highlights the need for systemic changes, while operational inefficiencies translate directly into financial consequences. "Unstructured communication based on email causes delays across time zones," he noted. "Manual case handling increases workload and leads to inconsistent data. There is limited transparency into case status and ownership, data is fragmented across systems, and there are hardly any analytics to prevent recurring lost or delayed shipments. Every delay or lost shipment carries administrative costs, potential compensation, and impacts customer trust. The cumulative effect is substantial across a large airline network."

Digital platforms deliver visibility and collaboration

Centralised Tracing, Lost and Found Platforms consolidate irregularity management into a single digital environment, providing real-time collaboration and integration with existing airline and handler systems. "The platform introduces a centralised, digital, and collaborative environment for managing irregularity cases from first notification through closure. Instead of scattered emails and spreadsheets, every case is handled in one shared system," Paul said.

Integration is non-disruptive, using secure APIs and standardised protocols. "Secure APIs synchronise with cargo management and CRM systems in real time. Cargo IMP and IATA One Record ensure standardised data exchange. Single Sign-On aligns with existing authentication, and workflows are configurable to airline-specific procedures. The platform extends existing digital capability rather than replacing it," Paul explained. "By centralising and automating irregularity management, the platform delivers structured collaboration, full traceability, and end-to-end visibility. Digital case management, structured case-based communication, bi-directional system integration, performance analytics, and full audit trails become standard rather than exceptional," he added.

Operational and commercial benefits for handlers and airlines

Ground handlers benefit from clearer case ownership and reduced administrative burden. "For ground handling agents, the platform turns irregularity handling into a structured operational process. Handlers gain clear case ownership, standardised workflows across shifts and stations, and reduced administrative effort through automation. Coordination with airline cargo teams improves significantly as teams spend far less time on email coordination and far more time resolving cargo issues physically on the floor," Paul said.

Airlines gain network-wide visibility. "Airlines gain centralised control and network-wide visibility. They can see all tracing, lost, and found cases across stations and handling partners in real time. Faster resolution improves delivered-as-promised performance and customer communication," he noted. "The analytics provide insight into root causes, systemic issues, and handler performance. This reduces compensation payouts, improves accountability, and strengthens overall operational resilience. We typically see average case resolution times reduced from 72 to around 40 hours. SLA compliance increases from about 60 to 90 percent. Communication steps per case drop from more than 25 to roughly 10. Manual follow-ups are reduced from eight to two, and customer satisfaction improves from 70 to around 90 percent."

As air cargo networks grow more complex, stakeholders are recognising the limits of traditional manual approaches. Digital Tracing, Lost and Found Platforms offer a standardised, transparent, and integrated solution that improves operational efficiency, customer satisfaction, and compliance. Paul concludes: "By replacing fragmented communication with a unified digital environment, stakeholders achieve faster resolution, better visibility, and higher customer satisfaction. With secure API integration, Cargo IMP, and IATA One Record compliance, the platform delivers measurable operational and financial value. Reduced labour costs, fewer compensation payouts, and stronger customer relationships make digital Tracing, Lost and Found a core capability for the future of air cargo operations."

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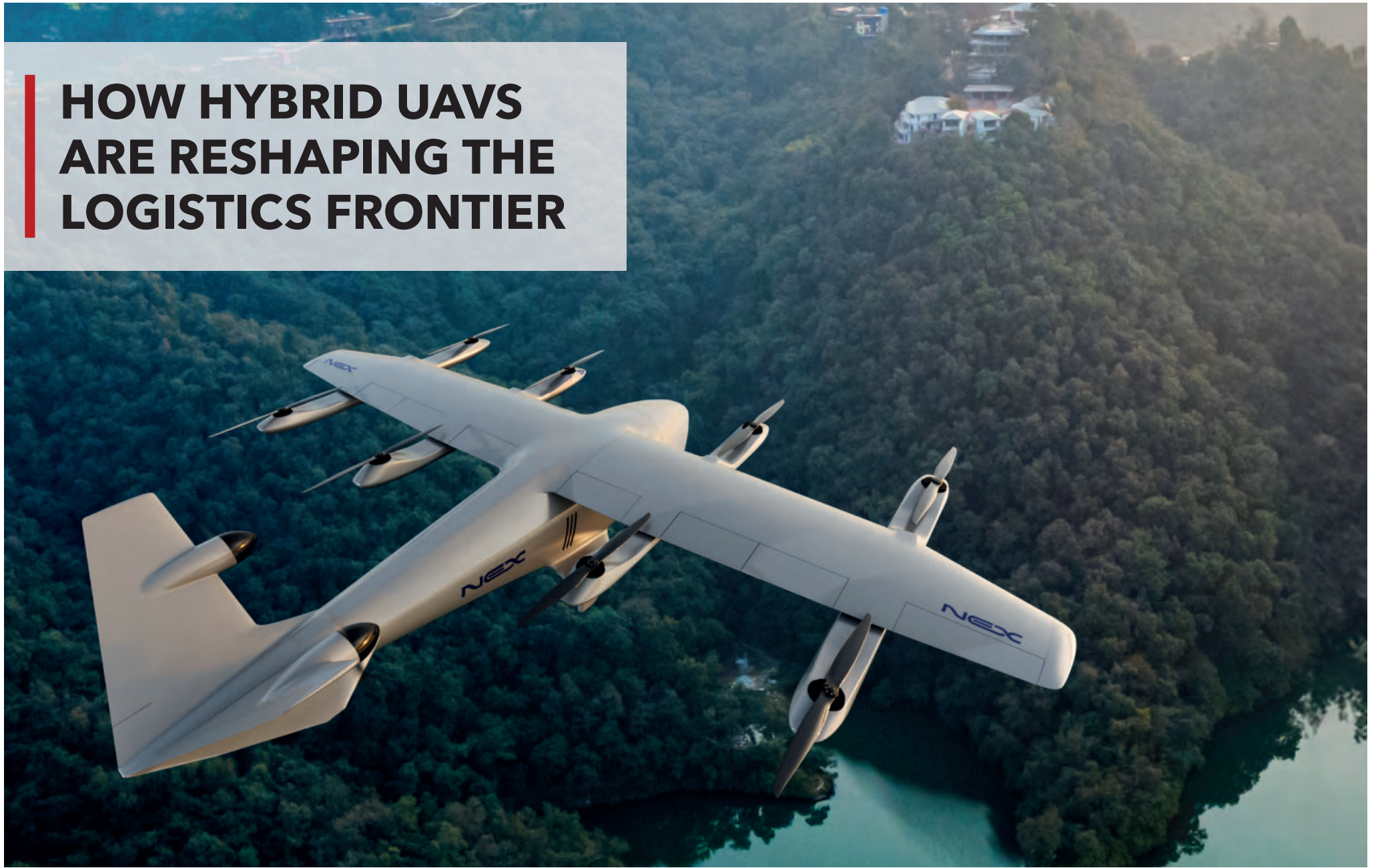
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MOVE BEYOND

HOW HYBRID UAVS ARE RESHAPING THE LOGISTICS FRONTIER



BY Ajinkya GURAV

WHETHER it's transporting life-saving medical supplies to a rural clinic, delivering spare parts to an offshore wind farm, or responding to disaster-struck zones where roads are impassable, traditional logistics methods—boats, trucks, and helicopters—are often too slow, too expensive, or simply unavailable.

Enter hybrid cargo drones: a new class of aircraft being engineered to operate in the most demanding environments, with the potential to offer vertical takeoff, extended range, and automated routing—without the need for runways, charging grids, or specialized ground staff. These drones are not just tech showcases; they're being designed for daily deployment in mission-critical logistics.

"Our aircraft sits in that middle space," explains Dr. Uwe Gross, CEO of NEX Aero GmbH, one of the companies at the forefront of this movement. "We design around deployment, not ideal conditions."

Real-world, not lab-bound

In many ways, the hybrid drone is becoming the missing link in modern logistics—a bridge between speed and sustainability, reach and reliability. While air cargo giants handle volume, and ground transport dominates cost efficiency, neither are well-suited for urgent, off-grid, or time-sensitive deliveries.

"Helicopters are fast but cost-prohibitive and crewed. Boats and trucks are cheaper but slow, infrastructure-dependent, and often delayed," explains Dr. Uwe Gross. "Our goal is to provide a practical option that can reduce delivery times, lower transport costs, and remain available even in difficult conditions."

The aircraft is being designed with real

constraints in mind: harsh climates, inconsistent communications, unpredictable weather, and minimal infrastructure. Vertical takeoff and landing (VTOL) capability would enable operation in locations without runways, while automated routing could support operations in areas where conditions change quickly and communications may be limited.

"The system we are developing is shaped by those environments," the CEO says. "Vertical lift removes the need for runways, hybrid power extends range, and routing is critical where predictability is low."

Perhaps most important is how seamlessly these drones fit into existing systems. Instead of asking organizations to build around new technology, the aircraft is built to plug into current logistics workflows.

"Our approach is to complement what already works," he explains. "In practice, that means direct delivery from a port hub to a wind turbine platform, or from a hospital to a regional lab, without new infrastructure or highly trained staff."

Efficiency, resilience and sustainability

Beyond logistics convenience, hybrid drones are also stepping into the growing demand for cleaner, more sustainable transport options. Replacing helicopters, small aircraft, or diesel-powered supply vehicles on short to medium routes, these drones have the potential to offer significantly lower emissions per delivery.

"The concept we are developing reduces emissions by replacing fossil fuel-heavy transport on short and mid-range logistics routes," says Dr.

Uwe Gross. "Our initial system is designed for early deployment using a hybrid-electric architecture, while hydrogen propulsion remains a longer-term objective to further reduce emissions."

Developing this kind of hybrid system comes with its own challenges. "Hybrid systems are complex because they must balance range, weight, and reliability," he explains. "From day one, we have taken a system-level approach—looking across power management, thermal behavior, and mechanical integration to ensure the solution is not only functional but will ultimately be certifiable."

NEX Aero's engineering process is guided by regulatory alignment and operational safety. Their goal is not only to get the aircraft flying, but to ensure it meets the certification standards for controlled airspace—a critical milestone for any commercial drone operation.

"The challenge is not just building something that flies," he adds. "It's building something that can fly reliably, be maintained efficiently, and meet safety standards."

And the applications are already stacking up. The aircraft is being designed to support heavier payloads than current solutions in the market, handling consolidated shipments such as full-sized medical kits, cold chain containers, and critical equipment—all in a single, fast, and automated flight.

Infrastructure for the unreachable

In regions where traditional infrastructure is weak or nonexistent—think island chains, mountain villages, post-disaster zones, ships at anchorages or offshore vessels—these drones could prove

particularly valuable.

"We are designing the system specifically for environments where roads are unreliable, helicopters are too expensive, and urgency cannot be compromised," he explains. "That includes conflict zones, natural disaster response, and medical supply into areas with no infrastructure."

To that end, NEX Aero is exploring features like automated hover-drops, compact modular cargo systems, and cold chain support—all built around the operational realities of aid agencies and emergency responders.

As part of its roadmap, the company is preparing for pilot missions across offshore logistics, humanitarian aid, and critical medical delivery—anywhere, essentially, that access is difficult and time is short.

Looking forward, their focus is clear: certification, real-world testing, and gradual commercial rollout.

"Our next milestones focus on validation and certification," Dr. Uwe Gross shares. "In parallel, we are advancing our work with regulators. The long-term goal is to enable regional logistics that are faster, cleaner, and more resilient."

And as regulations mature and public infrastructure catches up, these hybrid drones are poised to become a core component of the logistics landscape—not just for emergencies, but for routine operations where speed, flexibility, and automation matter most.

"What we are building is not a replacement for existing modes," he concludes. "It is a new tool that expands what is possible—bringing predictability, automation, and flexibility into regional supply chains that have always needed more options."

THE MOVE TOWARDS MULTIMODAL LOGISTICS



BY Edward HARDY

FACED with increasingly complex global supply chains and shifting customer expectations, traditional road feeder firms are expanding into air and sea freight—transforming from regional hauliers into full-scale logistics integrators.

Discordia, one of Europe's largest road transport companies, is among those to make that leap. The Bulgarian-based operator, with a fleet of 1,500 trucks, has built a reputation for reliability and reach across the continent. But as markets evolve, so too has its ambition.

"It was our air and sea group director's decision to expand into air and sea freight in Romania, as the Bulgarian market was already covered," says Anda Urzica, Branch Director Bucharest at Discordia Romania Bucharest. "It's a natural evolution of Discordia's commitment to providing complete, end-to-end logistics solutions."

For a company long rooted in overland transport, the step into international forwarding marks a notable shift. "As global trade became more interconnected, our clients increasingly sought a single partner capable of managing their entire supply chain," Urzica explains. By adding air and sea freight to its portfolio, she says, Discordia aims to "connect every mode of transport under one roof, ensuring efficiency, visibility, and reliability from origin to destination."

From trucking to global forwarding

For many road operators, diversification comes with an identity challenge: how to retain credibility in their core business while breaking into global logistics. Discordia argues that its trucking background gives it a competitive edge.

"Our heritage in trucking is an advantage, not a limitation," Urzica says. "It gives us deep expertise in the most complex part of logistics—the first and last mile." That capability, she adds, underpins the company's air and sea operations, which are built on "the same precision, speed, and service quality" road customers already expect.

Discordia has invested in experienced forwarding teams, global carrier partnerships, and "custom-made digital systems" linking its overland network with air and sea operations. "The result is credibility built on both legacy and innovation—a combination that sets us apart in the marketplace," Urzica says.

Its ownership of one of Europe's largest truck fleets, she adds, remains the company's biggest differentiator. "That gives us direct control over capacity, timing, and service quality—something few forwarders can claim."

Digital integration and the push for sustainability

Discordia's diversification mirrors a broader transformation across the forwarding sector, where digitalisation and sustainability are no longer optional. Visibility—long a weak point for many multimodal providers—has become central to customer expectations.

"Visibility is at the core of our multimodal strategy," Urzica says. "We're implementing unified digital systems that connect all modes of transport into a single platform, giving customers real-time updates from pick-up to final delivery." She adds that the system consolidates data from trucks, carriers, and partners worldwide, offering "one source of truth for shipment status, documentation, and performance."

Sustainability is also shaping decision-making. "By combining modes intelligently, we can significantly reduce total emissions," Urzica says.

Integrators in motion

Discordia's ambitions over the next few years focus on scale and integration. "We're expanding our presence in key trade gateways and enhancing our strategic partnerships with leading airlines and shipping lines," Urzica says. The company is also developing integrated service centres linking road, air, and sea under one roof to streamline coordination.

While Discordia's story is one of corporate transformation, it also signals a broader industry pattern. Traditional road feeder operators—once confined to regional haulage—are becoming multimodal logistics providers, leveraging their control of ground capacity to move upstream in the supply chain.

For Urzica, the strategy is clear: "Discordia offers something unique—true control and connectivity across every mode of transport."



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WHO WILL WIN CANADA'S COLD-CHAIN RACE?



BY Anastasiya SIMSEK

AS 2026 begins, Canada's two largest cargo gateways are locked in a quiet but significant competition. Toronto Pearson and Montréal-Trudeau are both expanding cold-chain infrastructure, both courting pharmaceutical shippers, and both positioning themselves as indispensable nodes in North American life-sciences logistics. Yet their strategies, and their bets on what the next wave of demand looks like, are notably different.

With biologics, vaccines and temperature-sensitive therapeutics moving in higher volumes and tighter time windows, the question for shippers and forwarders is no longer whether Canada will play a larger role, but which gateway will define it.

A surge shaped by biologics, not just volume

The growth story behind Canada's cold-chain push is less about sheer tonnage and more about complexity. Advanced biologics, cell and gene therapies, and specialised injectables are increasing the value, and fragility, of shipments moving through North American air networks.

As US capacity tightens periodically and regulatory scrutiny intensifies, Canadian gateways are investing in infrastructure and certifications that support temperature-sensitive cargo. Toronto has expanded its cold-chain handling footprint at Pearson with an enlarged, CEIV-qualified pharma facility, while Montreal benefits from CEIV-certified cargo handlers, such as Swissport at Montréal-Trudeau, that underpin reliable, temperature-controlled handling for pharmaceutical shipments.

Toronto: Scale, automation and network

Toronto enters 2026 leaning into its natural advantage: scale. Toronto Pearson remains Canada's largest air-cargo gateway, handling over

45 percent of the country's air cargo activity and serving more international destinations than any other Canadian airport, according to the airport's cargo services overview. Toronto Pearson

Toronto's cargo ecosystem also supports temperature-sensitive freight through specialist airline and ground-handling offerings. Air Canada Cargo, which operates at Pearson, promotes its full-service temperature-sensitive and pharmaceutical shipping solutions, reflecting growing capability at the gateway to handle complex logistics flows. Pharmaceutical Technology

For large pharmaceutical manufacturers and global forwarders, that reliability, even at the cost of marginal speed, remains compelling.

Canada as a re-export corridor

What ties both strategies together is Canada's growing role as a secondary gateway for US-bound pharma. Early 2026 routing patterns suggest forwarders are increasingly directing sensitive shipments through Canadian airports to mitigate congestion risk, diversify entry points and maintain compliance continuity.

This trend benefits both Toronto and Montreal, but in different ways. Toronto captures flows that require scale, network optionality and flexible rerouting. Montreal attracts shipments where speed and handling precision outweigh network breadth.

The competition, then, isn't strictly zero-sum. Yet as investment accelerates, each airport is implicitly betting on which definition of "cold-chain excellence" will dominate.

Montreal: Speed, proximity and adjacency

Montreal's approach is more surgical. Rather than competing head-on with Toronto's volume, the city is doubling down on proximity to pharmaceutical manufacturing and time-critical handling.

Montréal-Trudeau handled around 150,000 tonnes of air cargo

in the early-2020s, significantly less than Toronto Pearson, according to Canadian government transport data.

This difference in scale, however, does not determine cold-chain competitiveness on its own. For high-value biologics, cell and gene therapies and other temperature-sensitive products, proximity to manufacturing, handling precision and elapsed time often matter more than raw throughput.

Quebec's life-sciences ecosystem gives Montreal a structural advantage in this context. The province represents one of Canada's most concentrated pharmaceutical and biotechnology clusters, supported by manufacturing, research and export-oriented infrastructure, according to Invest Québec's life-sciences industry overview.

Logistics managers describe Montreal's advantage as less about throughput and more about elapsed minutes. Faster handoffs, shorter truck legs and closer integration with regional pharma producers form the backbone of the gateway's 2026 cold-chain strategy.

Which gateway wins in 2026?

The answer depends on who's asking. For global pharma manufacturers with diversified portfolios and high-volume distribution needs, Toronto's scale remains difficult to match. For innovators shipping smaller batches of ultra-sensitive biologics, Montreal's proximity and speed are increasingly attractive.

What's clear is that Canada is moving decisively into the cold-chain spotlight. As 2026 commences, Toronto and Montreal aren't just competing with each other, they're collectively reshaping how pharma cargo moves across North America.

For shippers and forwarders, the smartest strategy may be recognising that in this race, the real advantage lies in having both options on the agenda.



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FROM EMISSIONS TO E-COMMERCE

BY Anastasiya SIMSEK



08



“The key will be balancing this demand against rising regulatory and sustainability costs.”

The European air cargo market posted a resilient 4.3 percent year-on-year demand increase by October 2025, but that headline masks a deeper reconfiguration. The defining trend was the redirection of trade flows, with the Europe-Asia corridor becoming the world's strongest major lane, surging 11.7 percent in October.

This spike was driven largely by “a pivot from Chinese e-commerce giants towards European consumers and the need to adapt supply chains amid global trade policy shifts.” In contrast, intra-European cargo volumes dipped slightly, underscoring the uneven distribution of growth across the continent.

Automation moves forward

On the operational side, Europe saw a mixed picture. While digitalisation continued to advance — including systems like Germany's mandatory “Secure Release Order” for port containers - complexity increased elsewhere. “Operational procedures saw both simplification and complexity,” says Alexey Zotov, Managing Director of Air Cargo Green Capabilities S.a.r.l., part of ACN Group.

The regulatory horizon is adding new costs and risk. The EU Deforestation Regulation (EUDR), taking effect in January 2026, will require “extensive due diligence documentation for key commodities, risking customs holds for non-compliance.” Meanwhile, the EU Emissions Trading System (ETS) continues its phase-out of free allowances, directly impacting airline margins.

“The key will be balancing this demand against rising regulatory and sustainability costs,” Zotov notes, pointing to growing pressure on operators to absorb or offset compliance-related burdens.

Growth goes global

Globally, 2025 defied gloomy expectations with projected three to four percent growth in air cargo demand. Africa led regional performance with 16.6 percent growth in October, while Asia-Pacific recorded 8.3 percent, buoyed by “high-value tech and AI-related shipments.”

North America was the weak link. US policy changes - including “high tariffs and the removal of the de minimis exemption for low-value packages” - contributed to a six-month contraction on the crucial Asia-North America corridor. This pushed carriers to shift capacity and supply chains to more stable regions.

“Freighters were reallocated, and production moved to Southeast Asia and India,” explains Zotov. As a result, “lanes like Middle East-Asia and Within Asia saw near double-digit growth as supply chains adapted.”

But volatility brought complications. Spot rates globally were down six percent year-on-year in early December, but “specific lanes like China-U.S. saw

rates spike to their highest annual level.” In response, shippers grew cautious. “This uncertainty made shippers wary, leading to a preference for shorter, 6-month contracts over long-term commitments to maintain flexibility.”

“Freighter utilisation remained high, particularly for perishables... and on growing corridors like Africa-Asia.” However, dedicated freighter availability saw “sharp double-digit declines” from mid-year — a shift partially absorbed by returning passenger bellyhold capacity, particularly on transatlantic routes.

This mismatch caused rate pressure in some regions. Despite growing demand, the influx of bellyhold capacity generally kept global spot rates under downward pressure. But as the peak season arrived, “space on key lanes like Asia-Europe and Asia-US tightened, driving rates up by mid-to-high single digits.”

AI and automation shift from nice-to-have to must-have

Infrastructure strain also persisted - congestion at major hubs and weather events (like Super Typhoon Ragasa) continued to challenge reliable transit times. Against this backdrop, digital tools moved from convenience to necessity. AI-powered platforms for booking, document automation (like data extraction from bills of lading), and real-time visibility became operational necessities, moving from ‘nice-to-have’ to core infrastructure for agile decision-making.

“From 2026, EU airlines will have to account for 100 percent of their emissions under the ETS, increasing costs and incentivising investment in Sustainable Aviation Fuel (SAF) and fuel-efficient aircraft.” As Zotov puts it: “Environmental costs will become a permanent part of freight pricing.”

Another cost headwind looms in e-commerce. New EU customs fees on low-value packages from 2026 may dampen volumes, putting pressure on a sector that has propped up air cargo demand since the pandemic.

Geopolitical shifts are also quietly changing modal dynamics. “A gradual return of ocean shipping to the Suez Canal may recapture some cargo that shifted to air due to longer sea transits.”

“The volatility of recent years has proven that flexibility is paramount. Success will depend on leveraging AI for forecasting, maintaining diversified sourcing and routing strategies, and using data-driven platforms for end-to-end visibility and agile mode switching.”

From 2026, EU carriers will face full ETS exposure, with no free emissions allowances - a structural cost that reshapes margins, not just for airlines but across the chain. For carriers, that means accelerating investment in SAF and fuel efficiency. Forwarders will need to re-price services more dynamically and help shippers navigate compliance complexity. And for shippers: environmental costs are no longer an externality - they're baked into the freight bill.

FRANKFURT-HAHN BETS ON E-COMMERCE AND 24/7 OPS TO ATTRACT AIR CARGO

BY Anastasiya SIMSEK

09

Frankfurt-Hahn Airport recorded steady cargo growth in 2025, driven by its round-the-clock operations, streamlined processes, and growing role in e-commerce logistics. While broader market conditions across Europe remained unpredictable, Hahn focused on speed, coordination, and flexibility.

Frankfurt-Hahn Airport managed to grow cargo throughput in 2025, defying market headwinds and Europe's shifting freight dynamics. In the first six months, the airport processed over 50,000 tonnes—a rise of approximately two and a half percent compared to 2024. November delivered an even sharper boost, with volumes up approximately 33 per cent year-over-year.

"While the overall balance for 2025 will depend on December and the holiday season," said CEO and Managing Director Rüdiger Franke, "we anticipate a slight overall increase in cargo volumes for the year of approximately six percent."

Freight flows shift beyond Germany

Freighter traffic is being reshaped by global instability and changing logistics demands, Franke noted. "The market is highly dynamic—one might say that what applies today can be completely different tomorrow."

e-commerce, however, continues to climb. But the gains are not equally spread. "From a German perspective, it is evident that airports in other European countries are achieving significantly higher growth rates. Germany is falling behind due to less favourable regulatory conditions," he said.

Rather than expanding physical capacity, Frankfurt-Hahn has prioritised speed and coordination in response to the e-commerce boom. "We are now in a position to state that Hahn Airport, together with its local partners, is capable of processing e-commerce shipments quickly and reliably," Franke said. That came after intensive planning with customs, ground handlers, and the airport's own teams.

Hahn's clearest advantage lies in what it doesn't restrict. "Our greatest advantage remains our 24-hour operating permit. This authorisation is by no means a given in Europe and makes Frankfurt-Hahn Airport highly attractive for customers," said Franke. "Furthermore, we have no slot

restrictions... we can offer our customers maximum flexibility in planning their flight movements."

With on-site authorities and a compact layout, the airport can also offer short distances and fast handling—a contrast to larger, congested hubs.

Despite these strengths, Hahn faces growing competition from regional airports across Europe that are expanding cargo facilities and forming cross-border alliances to attract freight flows. These include efforts by airports in Belgium and the Netherlands to tap into the same e-commerce and express segments.

International partnerships are also part of the long-term plan. A new cooperation with Greenville-Spartanburg Airport in the US is aimed at sharing best practices in areas such as security, customer service, sustainability, and operations. "Through this and other partnerships, we focus on an intensive exchange," said Franke.

Although Frankfurt-Hahn has the capacity to handle up to 450,000 tonnes annually, regulatory barriers continue to weigh down the German airfreight sector. "Germany is characterised by an extensive array of regulations, taxes, and fees," Franke said. "We would welcome a more level playing field within the EU." Heading into 2026, Hahn's strategy remains focused on capturing high-growth segments rather than chasing scale alone. "Given the continuous global surge in e-commerce—set to represent a third of all air cargo soon—this segment is a key opportunity for us," Franke said.

With forwarders increasingly looking for direct links into Germany, bypassing slower routing through other countries, Hahn is positioning itself as a more agile alternative.

"As mentioned, we have established the ideal environment for e-commerce here. Parallel to this, we remain committed to our core strategy, consisting of three parts: strengthening the cargo business, expanding passenger services, and driving sustainable real estate development at the airport."

Looking ahead, the airport's growth strategy centres on three pillars: expanding its cargo business, developing passenger services, and building sustainable real estate on site.



"We would welcome a more level playing field within the EU."



PREDICTIVE TRACKING AND SUSTAINABILITY METRICS



BY Edward HARDY

BLUEBOX Systems is positioning predictive and sustainability-focused tracking as a central tool for airfreight operators and shippers seeking to optimise efficiency and reduce carbon footprints. The company's new Trade Lane Intelligence platform builds on real-time shipment visibility, extending capabilities to predictive ETAs, carbon benchmarking, and operational reliability analysis.

The new system combines historical shipment data, live transport updates, and external factors to provide proactive guidance for supply chain decisions. "From the pure fact, where is my cargo, we have moved on to the more proactive parts of supporting the customer," Martin Schulze, CEO of BlueBox Systems, said.

The tool allows companies to evaluate transit options not just by transit time but by reliability and emissions, enabling informed route and carrier selection. "It's a different thing if, say, an airline has three days usually in transit, and it really has three days, sometimes it's four, or if you have an airline that can range from two to eight days," Schulze added.

Airfreight decision-making is increasingly informed by both operational and environmental factors. The platform's carbon module extends beyond retrospective reporting to include predictive assessment for future shipments. "The main option is, which airline do I pick and which routing do I pick?" Schulze noted, emphasising the importance of forward-looking carbon management.

Digitalisation as a driver of agility under uncertainty

Airfreight operations are experiencing a new normal of persistent uncertainty, with geopolitical events, regulatory shifts, and trade disruptions requiring swift adaptation. Digital tools are proving central to providing visibility and supporting decision-making in this volatile environment. "The ultimate target is, of course, that digitalisation will enable the changes and adjustments itself," Schulze said, noting the gap between real-time information and automated operational adjustments. While fully autonomous supply chain responses remain aspirational, digitalisation is enabling faster reactions and better risk assessment. "Swift, ad hoc changes still require a lot of human interactions... we're definitely not there yet," he added.

The integration of digital tools is also shaping cost and operational efficiency. Traditional cost considerations are being complemented by metrics for reliability and sustainability, which can be quantified in monetary terms. "Reliability and CO2... are nothing else but cost as well," Schulze said. By providing data on emissions and operational variability, digital platforms allow companies to evaluate trade-offs between speed, cost, and environmental impact. This holistic approach is informing routing decisions, carrier selection, and supply chain redesigns, particularly where high-value or time-sensitive shipments are concerned. "What does that enable me for the future? What swift changes can I do with less, or maybe even without human interactions?" he added, framing digitalisation as a strategic enabler rather than a simple reporting tool.

Adoption is not without cultural and organisational challenges. Logistics providers are experienced in operational flexibility but may resist altering internal processes or business models. "The biggest enemy for digitalisation and modernisation is... the impetus to traditional ways and relying on the processes you are used to," Schulze said.

Sustainability and operational benchmarkingThe combination of predictive transit analytics and carbon benchmarking is changing how shippers evaluate airfreight options. Operational reliability and environmental performance are increasingly treated as cost factors in decision-making, with implications for carriers and airports. Trade Lane Intelligence provides visibility not only on airlines but also on airport performance along specific routes. "You can benchmark the different choices in transportation... to get a better understanding of not only what will be my transit time, but also what is the reliability of that service," Schulze explained.

Regulatory pressure, particularly in Europe, is heightening demand for accurate carbon reporting, but the industry is also exploring proactive emission reduction strategies. "The conversation... is currently just in the beginning, to see, okay, yes, we need to do airfreight, but is there anything we can do to (delete still) lower our emission footprint further?" Schulze said.

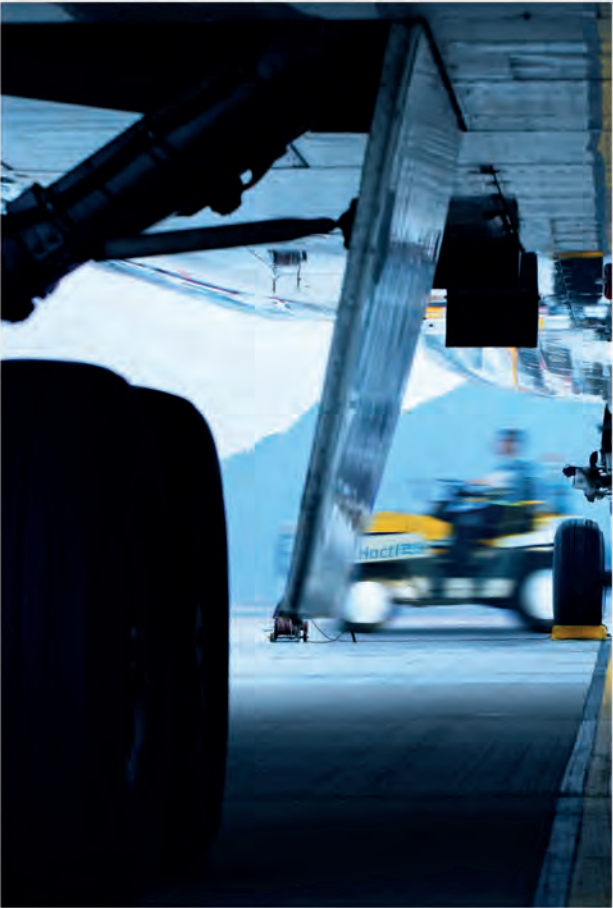
Companies can reduce emissions by up to 30 percent through routing and carrier choices, a competitive factor for operators with modern fleets or direct services. "The carrier themselves will also try to market that aspect more... with a more modern fleet and maybe more direct flights," he noted.

Looking ahead, the integration of predictive, digital, and environmental metrics is likely to accelerate the professionalisation of airfreight decision-making. Shippers and forwarders that fail to adopt these tools may encounter increased risk and inefficiency. "If you're not embracing this kind of tidal change... it's too late," Schulze warned.



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60 Seconds With ...



NATALIE COMÉN

Partner & Conference Director, Euroavia International

BY Edward HARDY

Natalie Comén is co-owner and Partner at Euroavia International, an event agency dedicated to the air cargo industry. A natural in sales from the age of 13, she brings energy, imagination and a deep belief in creating value to every event she helps lead.

What's your most memorable moment in the air cargo industry?

Each conference marks a milestone. Last year, we celebrated our 50th conference.

What was your dream job as a child?

I knew from the age of 13 that I wanted to be in sales. I've

always loved the energy of building connections and creating value — and I've never regretted that passion.

What's the biggest change you've seen in the industry?

Technology has changed almost everything — from visibility to efficiency — but what really stands out is how collaboration and trust have become just as important as systems and speed.

What's one buzzword you secretly dislike?

«Think outside the box». I think we've overused the box — maybe it's time we just built a better one.

Window or aisle seat?

Definitely window.

What's the best business lesson you've learned the hard way?

You don't grow by getting it right — you grow by learning from what went wrong.

If you could swap jobs with anyone for a day, who would it be?

King of Sweden - Carl XVI Gustaf.

Which three items would you bring to a desert island?

A knife, a water purifier, and a satellite phone — survival first, connection second.

Tea or coffee?

Coffee.

What's your guilty pleasure TV show or movie?

The Bridge. (Bron in Swedish)

What's the most exciting place you've visited for work?

Baku, Azerbaijan.

If you could introduce one new regulation in air cargo, what would it be?

Simpler digital processes and clearer documentation — because when rules are easy, the whole industry works better.

What's your go-to karaoke song?

I don't go to karaoke.

Describe your job in three words.

Planning, collaborating, celebrating.

What's your hidden talent?

I can organise almost anything perfectly... and then forget where I put my keys!

If you could instantly master one skill, what would it be?

Playing piano.

What's something on your bucket list?

Machu Pichu, Galápagos, Antarctica.

What's the best airport in the world, and why?

Singapore Changi — I like it for its efficiency, comfort, and overall passenger experience.

If air cargo had a mascot, what would it be?

I think it would be a cheetah — fast, agile, and always on the move, just like air cargo.

How did you get into airfreight/logistics?

I married the guy involved in air cargo.

What quote has most resonated with you?

Be kind, for everyone you meet is fighting a hard battle.

What's the best piece of advice you've ever received?

Take risks, but be prepared.

What is the most adventurous thing you have ever done?

The most adventurous thing I've ever done was visiting the Mursi people in southern Ethiopia, in the Omo Valley.

View From The Maindeck

BEYOND GROUND HANDLING

BY **Anastasiya SIMSEK**

GROUND handling has become a game of fine margins and tighter choices. For operators, the question is no longer how to grow fast, but where it still makes sense to invest time, people and capital.

For HAE Group, the answer has been to step away from scale-for-scale's-sake and move further into the operational chain. As capacity patterns continue to shift and customer expectations harden around speed, reliability and accountability, the company is concentrating on niche activity where it can exert control, integrate services and remain commercially relevant to long-term partners.

"Competition is fierce at the moment," said Richard Thackeray, COO of HAE Group. "Which is why when it comes to handling we tend to focus on niches where we know we can add value, gain a return for ourselves and maintain long standing relationships."

Old playbooks don't work anymore

To meet rising customer expectations around speed and responsiveness, the company has been investing steadily in infrastructure and training. "We have invested in new handling equipment, management infrastructure and training to be competitive and responsive to customers changing needs," he said. "We also offer a number of additional services to help customers."

This includes a growing focus on airport-to-airport (A-A) movements, which are gaining popularity as a faster alternative to traditional multi-modal transport. HAE's model differs from traditional GSAs by embedding itself deeper into its clients' operations. "HAE's GSA+ mentality and approach means that we can service a range of clients that traditional service providers cannot," Thackeray noted. "Our approach is to be as 'sticky' as possible offering A-A truck brokerage, handling, back office, sales, and admin and finance."

Wholesale access for SMEs

The group also provides wholesale services to SMEs, giving smaller forwarders access to capacity and back-end functions they might otherwise struggle to secure.

While point-to-point remains dominant in many lanes, HAE sees a continuing role for air-to-air transshipment—particularly in response to changing capacity flows. "Key hubs in our opinion will always complement point to point services as demand is commodity, transit time, capacity and price driven," Thackeray said.

He pointed to recent shifts in Asia-Pacific flows as a case in point. "It's fascinating to see how carriers ship supply, for example, away from AP-US to AP-EU and to AP-LATAM, but capacity imbalances then become a challenge for GSA to help the carrier with its economics," he explained. "E-commerce demands have also had an impact moving away from hub and spoke to generate their own supply and demand, where their sales increase."

The evolving interplay between freighters and passenger bellyhold also adds complexity. "The use of freighters feeding wide-body passenger services, for example, through the Middle East, shows there is more science than ever in the supply chain."

Compliance, complexity and digital advantage

Beyond physical movement, Thackeray sees growing pressure in the compliance space, particularly around customs and classification accuracy. "Our compliance partners' APIs are market-leading and cover everything from denied parties screening to accurate commodity descriptions," he said.

Yet there's still friction caused by inconsistent standards and fragmented data. "It is also vital that all parties in the supply

chain are aware of their obligations, as there seems to be a lot of manual data cleaning and passing of the responsibility to parties further down the chain," he said.

Digitalisation, in his view, is the only way forward. "It's critical, no other way of putting it," Thackeray stressed. "Harmonising the data and common use of the same information will enable compliance and add speed to clunky processes."

To support this, HAE offers API connectivity and customs broker services in several key markets. "We can offer compliance services and API connectivity for forwarders, airlines, customs brokers and handlers with state-of-the-art systems that can assist in the correct classification of HS Codes, descriptions and even landed costs in many markets."

While many handlers are focused purely on-airport, HAE is extending its footprint further into the first and last mile. "In handling we offer beyond the airport to and from door, airport to airport trucking and flight supervision and planning," Thackeray said. "The addition of these services acts as an enabler for our customers to enter new markets, particularly in Europe."

This strategy also supports the group's commercial positioning as post-Covid-19 overcapacity lingers. "Our focus is to grow our activity even in a market where often there is overcapacity," he said. "It's not about gaining overall market share, for us it's about growing the activity and being competitive for our airline partners and our forwarding customers."

In a market still shaped by overcapacity and shifting demand, HAE isn't trying to be everywhere—it's focused on being essential. By extending beyond the airport and building smarter, more connected services, it's helping customers stay agile where it counts.