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AWAT

Air Cargo Weekly Activities and Trends

Intermediaries EDIfly looks set to fly high

Carriers Southwest opens new Atlanta facility

Intermediaries DB Schenker expands its South-European freight hub at CDG

Infrastructure New record figures for Singapore Changi



Aircargo Weekly Activities & Trends

January 23, 2012

Freight volumes among Asian airlines vary greatly

Dear Reader,

News about soft freight volumes out of the Asia-Pacific has garnered headlines lately, but it appears that the phenomenon hasn't affected all carriers equally. Cathay Pacific Airways, for instance, saw cargo traffic decline rapidly throughout 2011 while Japan's All Nippon Airlines reported freight volumes on par with 2010 levels.

Despite the March earthquake and tsunami that ravaged Japan, cargo traffic for ANA remained steady throughout 2011. September was an especially strong month from a domestic standpoint, with the carrier posting 3.6 percent, year-over-year, growth. Domestic traffic in November waned slightly, however, falling 1.2 percent, year-over-year. Even so, ANA's international freight volumes remained high throughout the year. The carrier reported 12 percent, year-over-year, growth in April and an 8.7 percent, year-over-year, traffic surge in June. Volumes declined marginally in October and November, however, with ANA posting a 0.3 percent, year-over-year, loss in both months. (ANA's December traffic report hasn't been released yet.)

Cargo traffic for Cathay Pacific hasn't been as robust. In addition to contending with sluggish freight volumes in recent months, December proved to be especially challenging for Cathay and wholly owned subsidiary Dragonair. The airlines reported a combined, year-over-year, cargo drop of 11.9 percent and saw low factor fall 9.6 percent from December 2010. Compounding this loss was the fact that capacity rose by 3.9 percent in December, according to a press release. James Woodrow, Cathay Pacific's general manager of cargo sales and marketing, said these figures are even more disheartening considering the time of year.

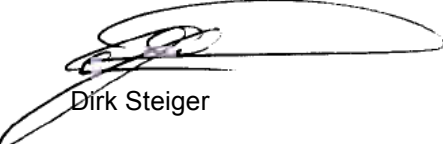
"The traditional year-end peak for our cargo business simply didn't happen and our December figures were a disappointing end to what was a challenging year overall," he said in a statement.

From a yearly perspective, cargo tonnage for Cathay Pacific fell 8.6 percent, year-over-year, on a capacity increase of 6.9 percent. Cargo and mail tonne kilometres flown also decreased in 2011, falling 5.2 percent from 2010 levels.

Woodrow isn't convinced that the situation in 2012 will be any different. "Demand out of our key markets in Hong Kong and Mainland China remain soft, and there is no sign of any upturn in prospect as we move into 2012," he stated. Still, all hope isn't lost, he said.

"On the positive side, we have been seeing good contributions from recently added destinations such as Chongqing, Chengdu and Zaragoza, and we will continue to seek out new business opportunities," Mr. Woodrow concluded in a statement.

Sincerely yours,



Dirk Steiger

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Note: Cover article taken from Air Cargo World, January 2012.

About AWAT:

The weekly aviainform AWAT Air cargo Weekly Activities and Trends newsletter is a summary of the most important developments in the airfreight industry. In order to find the really important and relevant information, we regularly review more than 90 different source media. After we faced the fact that the very same message appears multiple times, it is understood that the only purpose of many of these “free of charge” offered newsletter is to spread corporate press releases. In addition we would like to inspire our readers, in particular co-workers of airlines to also understand topics of the sea freight, since this has frequently effects on their own (airfreight) business. Finally we appreciate your input at anytime to make such news valuable to you. Write to us or call us. We'll listen.

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Carriers - Southwest Airlines opens 26,000-sq ft cargo facility at Atlanta airport

Dallas-based Southwest Airlines has built a 26,000-square foot freight handling facility at Hartsfield-Jackson Atlanta International Airport, which opens for business on February 12, reports Air Cargo World of Roswell, Georgia.

The launch of the facility coincides with Southwest's initiation of passenger service to Atlanta, a byproduct of the carrier's May 2011 acquisition of AirTran Airways.

Southwest sales chief Wally Devereaux told Air Cargo World that the carrier has high hopes for this facility, calling Atlanta a "critical city" for Southwest Airlines Cargo.

"We expect our Atlanta cargo operation to be one of the largest in the Southwest Airlines system," he said, expecting a "healthy mix" of commodities on flights unlike the carrier's that deals mostly in fresh flowers.

Southwest's freight operations will also be propelled by the acquisition of 737-800 series aircraft this year with the 737-800 providing more more capacity than the carrier's older 737s..

Source: Shipping Gazette, Jan 21, 2012

Intermediaries - Logwin flies in high pressure hoses to clean up flooded Thai schools

Logwin has been providing support for a fund-raising campaign in aid of flood victims in Thailand, after transporting 15 professional high-pressure cleaners without charge from Stuttgart to Bangkok.

The recipient was the Save the Children Fund.

The high-pressure cleaners will "enable school buildings in Thailand to be quickly freed up from the mud brought about by the devastating floods in autumn 2011. The aim is

to get the schools open and running again quickly so as to make it possible for the affected children to live a normal, everyday life," a statement said.

"It is nice to see that we can help people in need with what we do every day," said Logwin air and sea COO Helmut Kaspers.

The company transported the high-pressure cleaners by air from Stuttgart to its local office in Bangkok, which organised delivery of the equipment to Save the Children. The cleaning equipment is currently in use in schools in Bangkok and the north of Thailand.

Source: Shipping Gazette, Jan 21, 2012

Carriers - Jet Airways reports operating profit of Rs. 2,099 million for Q3FY12 - Rupee depreciation, high fuel costs impact Q3 results

India's Jet Group reported an operating profit of Rs. 2,566 million or US \$ 48.3 million for Q3 FY12. Q3 FY12

Total Revenue (combined) of Rs. 45,199 million or US \$ 851.1 million up by 13.1%, Q3 FY12 passenger growth of 13.4% versus same period last year; EBITDAR margin for Q3 FY12 of 5.7%

Highlights for quarter ended December 31, 2011 versus December 31, 2010 :

Operational

- System-wide ASKMs of 9,981 million, up 12.6%
- System-wide RPKMs of 7,764 million, up 10.4%
- System wide seat factor of 77.8% versus 79.3%
- 4.53 million revenue passengers carried, up 15.1%

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Financial

- Revenue of Rs. 39,869 million or US \$ 750.8 million up by 13.6%
- EBITDAR of Rs.2,099 million or US \$ 39.5 million in Q3 FY12
- EBITDAR Margin at 5.3% in Q3 FY12
- Loss before tax Rs. -1,012 million or US \$ -19.1 million
- Loss after tax Rs. -1,012 million or US \$ -19.1 million

Exchange rate used 1 US \$ = INR 53.105 for current quarter and 1 US \$ = INR 44.705 for previous year same quarter

Source: ATN, Jan 20, 2012

Intermediaries - Paris-Charles de Gaulle: DB Schenker expands its South-European freight hub at the airport

DB Schenker is ranked Number 2 in the global air freight market, and having doubled its presence at Paris-Charles de Gaulle at the beginning of 2010, is substantially expanding its operations for the long-term in Europe's leading air freight hub.

Adjacent to aprons and with direct access to runways and aircraft holds, DB Schenker is expanding its operations floor area by 50%. By 2022, the company will occupy 22,000 m² of 'border warehouses' incorporating 4,500 m² of office space in a latest-generation building designed to meet the highest operating standards.

This extension will mean that DB Schenker occupies the entire (GB2) freight terminal, allowing the company to optimise its operating processes.

François Cangardel, Real Estate Director at Aéroports de Paris: "We are absolutely delighted with this new agreement, which recognises the importance of Paris in the growth of air freight, and the value to forwarders of locating in the border warehouses of the Paris-Charles de Gaulle air freight zone."

Philippe de Crécy, Chairman of Schenker S.A.: "This new agreement allows DB Schenker to establish a high-quality, long-term resource in order to ensure the growth of its Southern European freight hub operations from Paris-Charles de Gaulle airport. This new extension will allow DB Schenker and ATH (Air Terminal Handling) to bring together all our import and export activities and invest in the safety and security measures required to achieve TAPA and ISO 14001 certification for the entire site.

DB Schenker will then be in a position to process its customers' shipments using state-of-the-art facilities allowing us to guarantee service quality excellence at Paris-Charles de Gaulle airport and to increase our share of the market."

Paris-Charles de Gaulle is Europe's Number 1 freight and mail handling airport. Aéroports de Paris now operates 194,000 m² of buildings dedicated to air freight services.

Source: ATN, Jan 19, 2012

Infrastructure - Another record breaking year for Changi Airport

Singapore Changi Airport registered a strong performance last month to achieve new records for passenger traffic and aircraft movements in 2011.

Celebrating its 30th anniversary in 2011, Changi Airport managed 46.5 million passenger movements and 302,000 aircraft movements during the year, an increase of 10.7% and 14.5% respectively.

Airfreight movements recovered to 2008 levels with 1.87 million tonnes of cargo handled, up 2.8% from 2010. December 2011 was Changi Airport's busiest month ever with 4.53 million passenger movements, 11.4% more than a year ago. Changi's daily record was also broken on 17 December 2011 with 165,000 passengers passing through during the 24 hours, surpassing the previous record of 148,000 passengers on 19 June 2011.

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There were 27,700 aircraft movements last month, an increase of 16.0% compared to December 2010. As at 1 January 2012, Changi Airport handles more than 6,300 scheduled flights each week, an increase of 16.7% from a year ago. More than 100 airlines now connect Singapore to 210 cities in 60 countries globally.

In terms of cargo movements, steady demand for airfreight enabled Changi Airport to close the year on a positive note. Some 167,000 tonnes of cargo were handled in December, an increase of 6.9% on-year, representing Changi's busiest month in three years. In 2011, Changi's cargo community welcomed the launch of freighter flights to Chengdu and Chongqing in China, and the introduction of all-freighter flights by Emirates and Lufthansa Cargo. At the same time, Cargolux and Cathay Pacific Cargo commenced operation of the new B747-8F aircraft to Singapore.

Strong travel demand in Asia-Pacific was a key growth driver for Changi Airport in 2011. Southeast Asia and Northeast Asia were the two best performing regions registering double-digit growth while traffic to and from South Asia and Southwest Pacific also enjoyed good growth.

Long-haul traffic between Singapore and Europe continued to increase as Changi Airport Group (CAG) worked with airlines to drive demand and enhance connectivity. Significant developments in 2011 include the commencement of Finnair's daily non-stop Helsinki-Singapore service and the introduction of Lufthansa's A380 service on the Frankfurt-Singapore route. Changi Airport is now the world's busiest multi-carrier¹ A380 hub.

There was little change to the rankings of Changi Airport's top 10 routes with Jakarta, Hong Kong, Kuala Lumpur, Bangkok and Manila occupying the top five positions. Despite a significant drop immediately after the March earthquake and tsunami, air travel to Japan recovered in the second half of the year and Tokyo has retained its position as one of Changi's busiest routes. For the year, passenger traffic between Singapore and Japan grew by 2%, buoyed by industry efforts to revive travel demand.

Among sectors with at least half a million passengers, Taipei, Manila, New Delhi, Melbourne and Hong Kong registered the strongest percentage growth, reflecting the addition of capacity as well as an increase in demand to and from these markets. In 2011, seven new carriers joined Changi's family of airlines. Changi Airport welcomed Air Macau and Hong Kong Airlines while Finnair became the latest European airline to launch passenger flights to Singapore. Taiwanese carrier TransAsia Airways, India's largest low-cost carrier (LCC) IndiGo and Lao Airlines also began operations to Singapore.

Changi Airport retained its position as one of the world's most connected air hubs with 11 new city links added in 2011. These included Changsha, Nanning, Ningbo and Zhengzhou, bringing Changi's connectivity to China to 25 cities and cementing Singapore's position as the most connected point to China from Southeast Asia. Other highlights include Changi's first connection to South America via Singapore Airlines' thrice-weekly service to Sao Paulo (via Barcelona) and Lao Airlines' services to Vientiane, completing Singapore's connectivity to all nine ASEAN neighbours.

In 2011, LCCs carried 26.3% more passengers while passenger movements on full service airlines grew 6.2%, albeit from a larger base. In terms of flight movements, LCCs accounted for 28.6% (2010: 26.3%) of all flights at Changi. One in four passengers passing through Changi currently travels on an LCC, compared to around one in five in 2010.

Note: Lufthansa, Qantas and Singapore Airlines operate more than 200 weekly A380 flights at Changi.

Source: Changi Airport, Jan 20, 2012

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Infrastructure - Munich Airport: Bavaria's air transportation hub closes in on the 40 million mark

Approximately 38 million passengers – a gain of more than 3 million over the previous year – used Bavaria's international aviation hub in 2011.

With this 9 percent increase in passenger traffic, Munich was Germany's fastest-growing airport last year. Since it opened in 1992, the airport's annual passenger numbers have more than tripled.

Munich Airport also achieved a substantial increase in total take-offs and landings. The number of aircraft movements rose by 20,000, or 5 percent, to 410,000, and was thus only 5 percent short of the record results of 2007 and 2008.

"Without the steadily worsening bottlenecks in our runway system, we would have achieved even stronger gains," explained Dr Michael Kerkloh, the president and CEO of Munich Airport. Kerkloh added, "During the peak periods we have no more available slots for take-offs and landings, so that many connections requested by airlines cannot be implemented."

Demand for transportation services in the cargo sector at Munich Airport also showed a strong increase yet again in 2011. The total freight turnover of 286,000 tons represents a new record. Combined with airmail, the volume of flown airfreight topped 300,000 tons for the first time ever. This was a 6 percent gain over the 2010 figure.

The airlines operating in Munich responded to the surge in demand for passenger and freight services by increasing their service frequencies and – when their fleet mix allowed it – using larger aircraft.

The market put the substantial rise in the number of available seats to good use. As a result, the average load factor of the aircraft matched the record level of 74 percent set in the previous year despite the higher supply.

The European traffic segment at Munich Airport showed particularly strong gains: The wide range of European destinations offered

from Munich attracted 22.2 million passengers, or 11 percent more than in 2010.

The 5.7 million passengers flying on intercontinental routes represented a nearly 7 percent jump over the previous year's total. Traffic on flights within Germany, at approximately 10 million passengers, was up by nearly 5 percent.

"Now the priority is to take decisive action to ensure that Munich Airport's success story will continue," said Michael Kerkloh. "With the new satellite terminal and the planned third runway, we are laying the groundwork for our airport to handle the projected future traffic growth. This is essential for Munich Airport's ability to continue meeting the rising mobility requirements of the population and ideally performing its important role as an engine for economic growth and employment."

Source: Munich Airport, Jan 18, 2012

Infrastructure - More Than 56 Million Passengers at Frankfurt Airport in 2011

Frankfurt Airport (FRA) concluded the year 2011 with record traffic figures again. For the first time, FRA served more than four million passengers during a December month. A total of 4.35 million passengers in December 2011 represented an increase of 12.2 percent year-on-year.

New December records were also registered for aircraft movements and maximum takeoff weights (MTOWs). Aircraft movements at FRA climbed by 12.3 percent to 38,326 takeoffs and landings in December 2011, while MTOWs increased by 5.6 percent to 2.29 million metric tons.

FRA's airfreight volume reached 167,970 metric tons, down 6.5 percent compared to December 2010. Taking into account the statistical effect of the adverse winter weather in December 2010, the bottom line is that passenger traffic still grew by about five percent in December 2011.

Frankfurt Airport's historical passenger records were all broken during the summer of

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2011. With 56.44 million passengers for the full year 2011, FRA achieved a 6.5 percent gain compared to 2010. Thus, this confirms the prognosis from Fraport executive board chairman Dr. Stefan Schulte at beginning of last year: an increase ranging between four and seven percent, a conservative estimate.

"The inauguration of Frankfurt's new runway had a very positive effect on traffic development and showed how important this capacity investment is for the positive further development of this economic hub," said Schulte commenting on the latest traffic results.

In FRA's other traffic categories, aircraft movements for 2011 grew by 4.9 percent to 487,162 takeoffs and landings, and MTOWs jumped by 4.6 percent to 29.25 million metric tons in 2011.

After the extraordinary gains of 2010, the airfreight sector has increasingly felt the impact of the slowdown in the global economy during the course of last year. Airfreight throughput in 2011 slipped by 2.8 percent to 2.17 million metric tons. Nevertheless, this clearly exceeded the pre-crisis level of 2007.

Fraport's majority-owned foreign airports continued to contribute to the airport company's success. Combined, the Group's five majority-owned airports welcomed at total of 96.63 million passengers in 2011, a 9.1 percent gain year-on-year. Aircraft movements for the Group soared by 7.1 percent to 816,330 takeoffs and landings. Antalya Airport (AYT) on the Turkish Riviera was the overall leader with 24.96 million passengers (up 12.7 percent). Peru's Lima Airport (LIM) served 11.8 million passengers (up 14.7 percent), followed by the Bulgaria Black Sea gateways of Burgas Airport (BOJ) with 2.25 million passengers (up 19.0 percent) and Varna Airport (VAR) with 1.18 million passengers, which declined by 3.7 percent mainly because of the closure of the airport this winter for renovations.

December 2011 passenger figures for the foreign majority-owned airports are as follows: AYT with 562,509 (up 12.9 percent), LIM with 988,711 (up 8.1 percent), BOJ with 23,762 (up 270.2 percent due to the renovation work at Varna), and VAR registered no traffic because of its closure.

The Fraport Group's majority-owned airports registered a total of 5.82 million passengers in December 2011, a double-digit rise of 11.3 percent compared to the previous year.

Source: Fraport, Jan 18, 2012

Intermediaries - ACG opts for TRAXON EDI

The German all-cargo carrier ACG Air Cargo Germany, founded in 2008, relies on paperless communication with customers and service providers.

The airline is using TRAXON EDI services for messaging, including the electronic exchange of FWB (Master Air Waybill), FHL (House Air Waybill), and FSU (proactive status information) messages worldwide. ACG focuses on airfreight transportation between Europe and South Korea, Hong Kong, P.R. China, the UAE, Kazakhstan, India, South Africa and South America.

TRAXON EDI provides the all-cargo carrier with opportunities to increase efficiency and customer satisfaction. In addition, it enables the cargo carrier to meet the requirements of the EU Import Control System (ICS) as well as to participate in the IATA e-freight and Cargo 2000 initiatives.

"The paperless message exchange via TRAXON EDI offers our customers clear advantages. This was a key factor for our decision in favor of the TRAXON solution", says Holger Ufer, Director Ground Operations at ACG. "We are still a very young company. But with TRAXON Europe we have 20 years of experience in global airfreight communication on our side. And we profit from their competence and innovative strength. With TRAXON EDI we meet the demands of our partners along the airfreight supply chain more cost efficiently and faster. In this highly competitive environment we must be better than or at least as good as the competition."

TRAXON EDI is a byword for first class connectivity, tailor-made consulting services and seamless data transmission. The

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integrated host-to-host solution supports numerous transmission protocols and is compatible with all common message formats. The contract with TRAXON Europe provides ACG with access to the global TRAXON network. It enables the German all-cargo carrier to do business with all logistics services providers and partners in the air cargo industry on a single, uniform platform using stable host-to-host (EDI) messaging services. In addition, ACG has the option to use several other TRAXON products via TRAXON EDI.

“The co-operation with TRAXON helps ACG to further standardize their processes, simplify business procedures and achieve a higher efficiency at lower costs. The EDI-message exchange is an important pre-requisite to drive further paperless freight handling. The airline quickly realized these advantages. And we were very impressed how fast Air Cargo Germany was connected to the TRAXON network“, says Beverly Seebach, Area Manager Sales (Germany, Switzerland, Austria) at TRAXON Europe.

Source: Traxon, Jan 20, 2012

Intermediaries – EDIfly looks set to fly high

This week’s edition concludes with a reprint of an interesting article that recently appeared in Payload Asia about EDIfly, a new way for low costs industry communication.

Source: Payload Asia, Vol1, Jan 2012

FOCUS ||

EDIfly looks set to fly high

A new IT tool is making waves among carriers and ground handlers for its simplicity and ability to not only save money, but provide access to more information. By Heiner Siegmund.

Henrik Ambak of Cargolux describes EDIfly as "Google for cargo airlines and handling agents." Others like Ingo Roessler, the former VP of Royal Jordanian Airlines Cargo and now chief commercial officer of EDIfly, speaks of the Electronic Data Interchange as a sort of Skype. Not without reason since EDIfly, as the system is branded, transmits aviation process data for cargo and passenger via the worldwide web. Basically every company that is connected to the Internet can use this new tool developed last year by Danish entrepreneur Anders Jensen and in production since July 2011.

First Cargolux applied the system, reporting substantial cost advantages affected by EDIfly compared to the traditional SITA system utilised by most airlines and handlers. Meanwhile, EDIfly is installed at a growing number of players in the air freight arena like Hong Kong's HACTL, Shenzhen's ICCS and Frankfurt-based handling agent LUG.

"Hactl is undergoing testing with EDIfly with a target go live date in 1H 2012," said Tan Chee Hong, executive director, Hactl. "We always work hard to accommodate the special requirements of our customer airlines, and are very pleased we have been able to facilitate Cargolux's wish to implement EDIfly as its messaging provider."

Furthermore, the Arab Air Carrier's Association (AACO), comprising Qatar Airways, Saudi Arabian Airlines, Oman Air decided on testing the system since this October.

Now, UK-based Hermes Logistics Technologies (HLT) Ltd, market leader in delivering IT solutions for airlines, ground handlers, and airports also decided to start cooperating with EDIfly, *Payload Asia* was informed. "It allows our customers an innovative solution for Type B messaging, commonly referred to as SITA messages," said HLT in a statement.

"Handlers can now provide a new service to their airline clients offering a safe and secure transmission of these messages using the public Internet – fully encrypted and digitally signed." Their announcement further reads:



Kai Yu

"Subscribers to EDIfly can achieve significant savings as the EDIfly solution is offered as an annual flat fee irrespective of the data volumes transmitted."

Commenting on his company's experience with EDIfly, Wolfgang Korte, managing director of LUG said: "By exchanging messages via EDIfly we can help the airlines achieve significant savings, while assuring the highest level of security, reliability and redundancy. Moreover, there was no training required for our staff outside the IT team, which made the set up a breeze."

Not only handling agents and airlines benefit from this innovative approach but also forwarding agents. Riege Software International, a leading service provider of electronic tools for the cargo industry uses EDIfly for a simplified transmission of data between forwarders and airlines.

"EDIfly enables us to manage interchange of all shipment related messages for our logistics' clients with airlines and handlers connected to this innovative service; allowing us to remove cumbersome management of direct connections," said managing director and owner Johannes Riege. "Applying the innovative tool enables us to offer our clients an enhanced product and the electronic integration of a variety of services."

Meanwhile technical expert Henrik Ambak, VP Commercial IT at Cargolux estimates that EDIfly will save his airline a six-digit euro amount annually,

depending on the number of ground handlers and forwarders linked to the system.

ICCS goes EDIfly

We spoke to Kai Yu, senior IT manager of ground handler International Cargo Centre Shenzhen (ICCS) about the new electronic data manager.

PLA: How long have you been utilising EDIfly?

Yu: I got the first information about EDIfly on 9 June and shortly after we received the test version. Eight days after we started setting up the EDIserver and commenced testing message transmission between ICCS and Jade Cargo. This was done successfully.

PLA: Why did you decide on this information manager?

Yu: In one aspect it is unlike other software which requires a lot of work regarding the interfacing. With debugging during the implementation phase, it is a transparent layer between our applications and the SITA gateway. Another reason is the cost side. It will mainly reduce the messaging cost for our airline customers. The third thought is that it can be a backup line in addition to the SITAtex for us. In addition we can use 'double signature' to bypass our SITA cost to the airline we serve. If an increasing number of ground handling agents link their network it will also result in a reduction of our costs on telex transmission.

PLA: Did you implement EDIfly to replace another system or do you use it complementary?

Yu: No, we use it additionally. I believe this is a good feature of their software; I use it on top of SITAtex. It can be an enhancement or supplement of our messaging transmission services. So far we run the trial version so I could not test the full functionality yet. Nevertheless, our main requirements can be fulfilled very well and compared to SITAtex, we can retrieve more information. ✦