

World Aviation Conference 2026 – IATA Update

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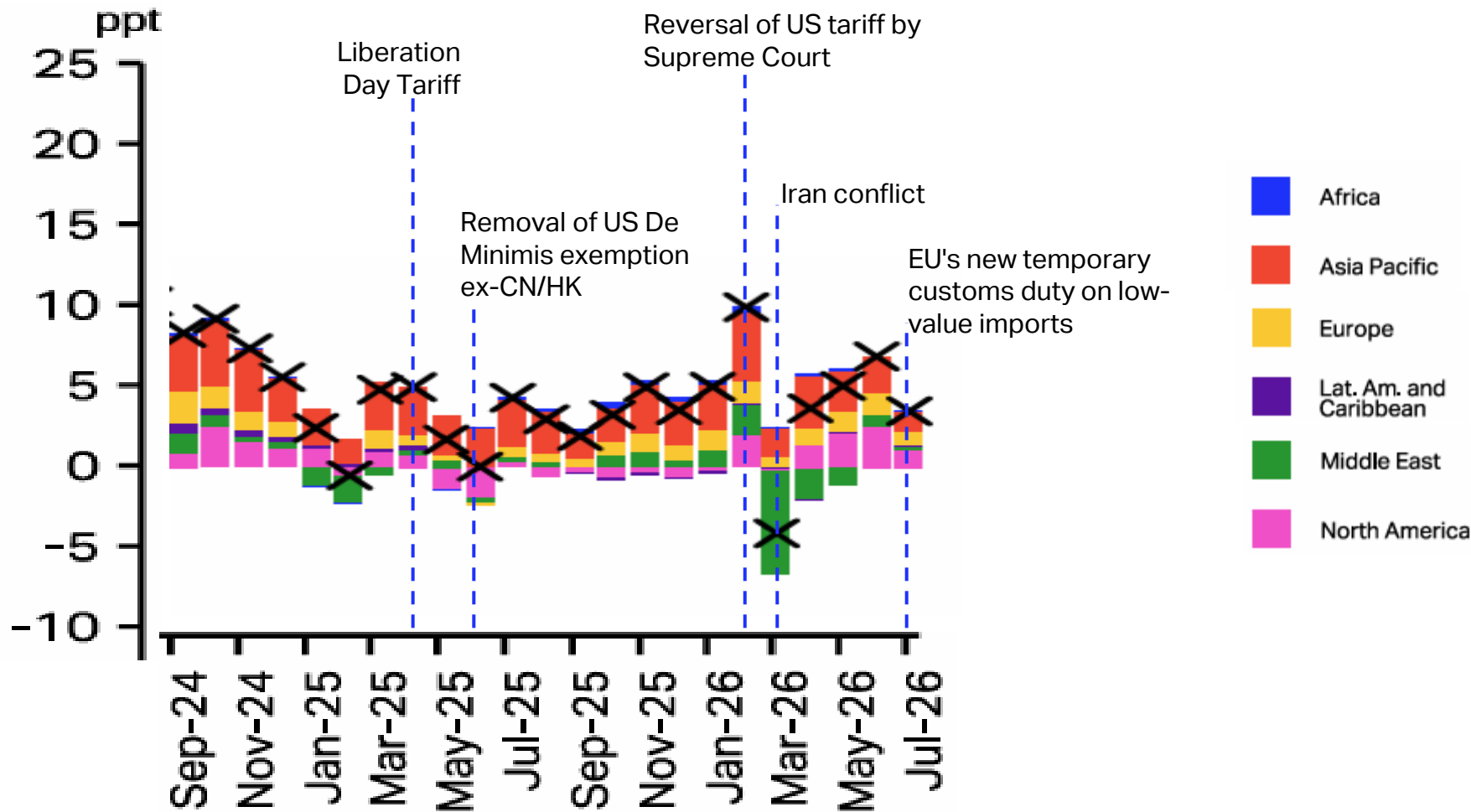


Global Air Cargo Trends and Capacity update

Global Air Cargo Demand Continues to Expand, Rising 4.6% YTD July

Asia Pacific, Europe, and North America carriers drive the majority of growth, supported by expanding East-West trade corridors. Middle East carriers have shifted back into expansion mode after adjusting to the impacts of the Iran conflict.

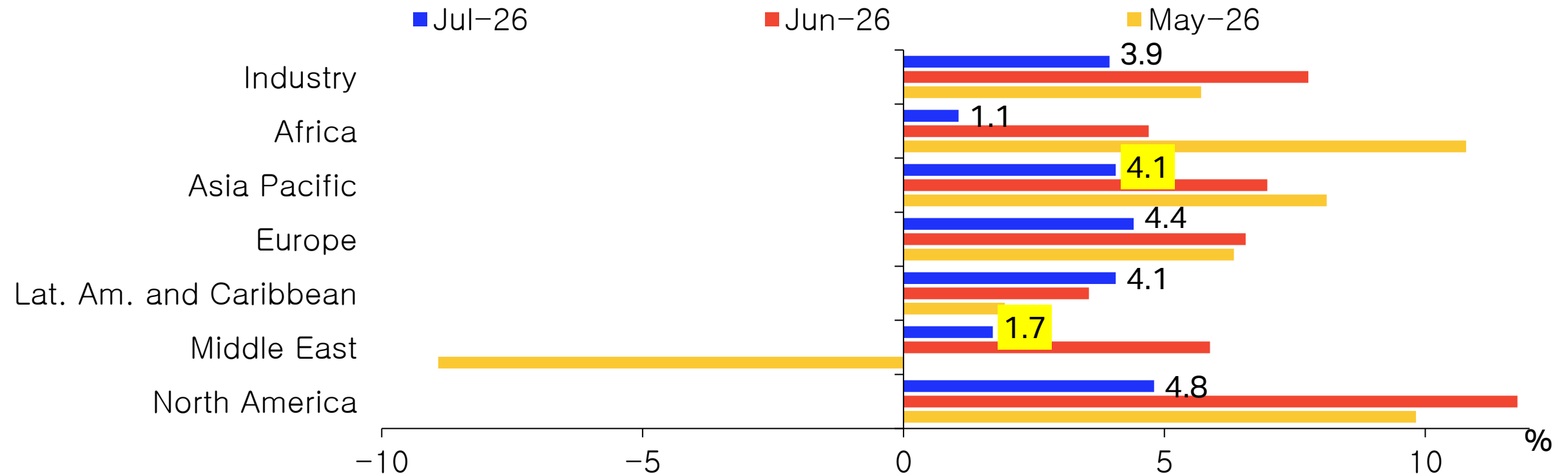
Regional contribution to industry-wide CTK growth, YoY%



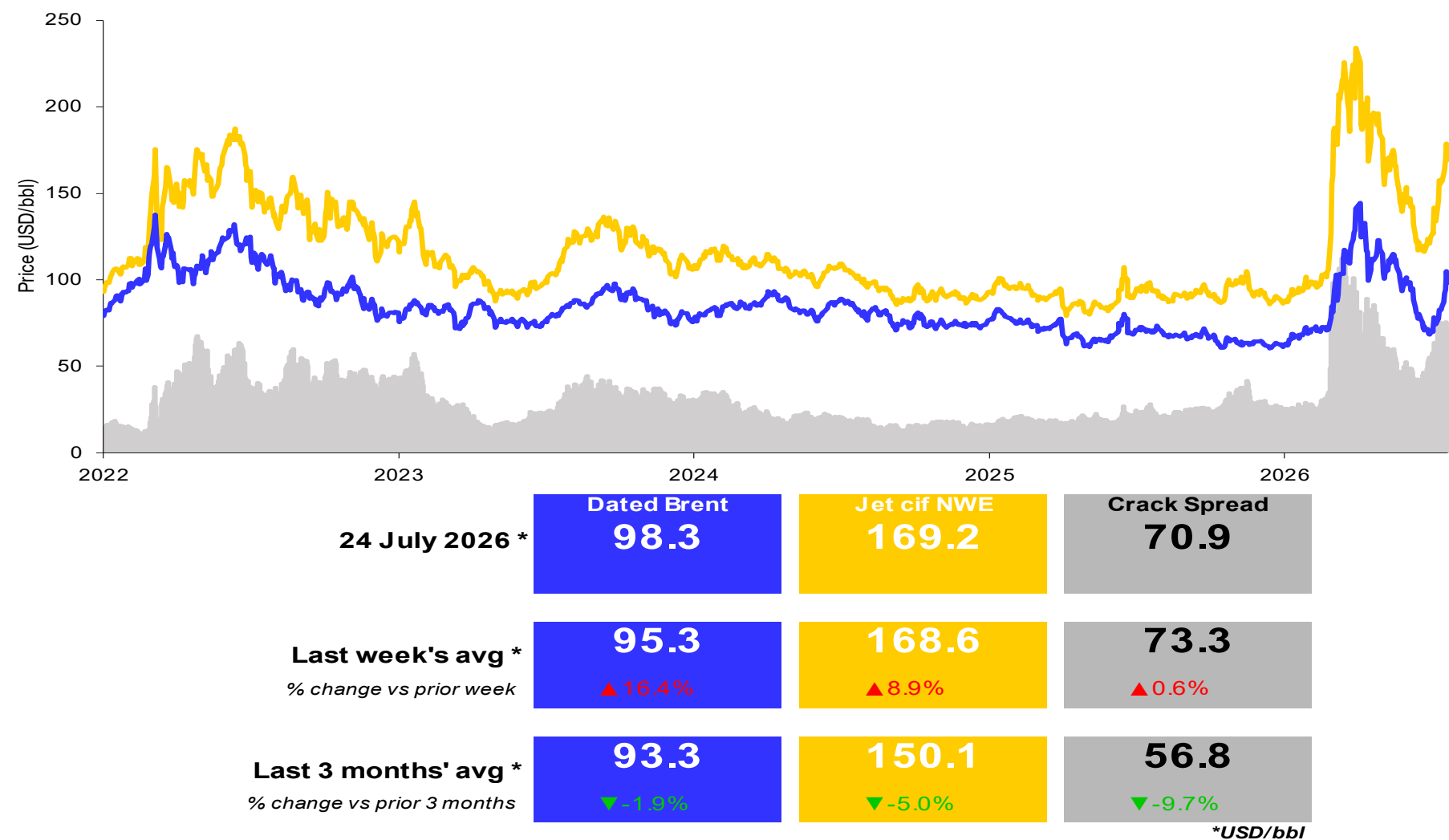
3.9% YoY expansion in total global CTK for July

Asia Pacific carriers' traffic grew 4.1% YoY, while Middle East carriers continued their recovery-driven growth momentum.

Total CTK by airline region of registration. YoY. %



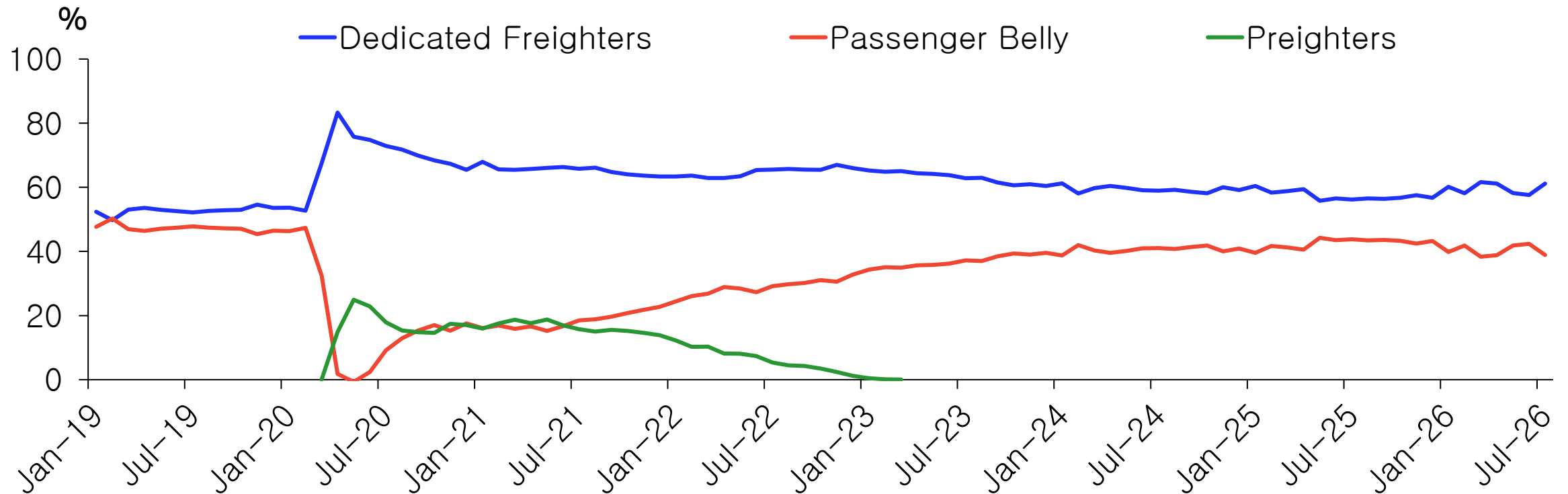
Fuel prices rebounded as the war placed renewed upward pressure on energy markets



Source: IATA Sustainability and Economics, S&P Global Energy Platts."

Dedicated freighters continue to carry most international CTK after covid

Share of international CTK by cargo type, %



Source: IATA Sustainability and Economics using data from IATA Information and Data - Monthly Statistics

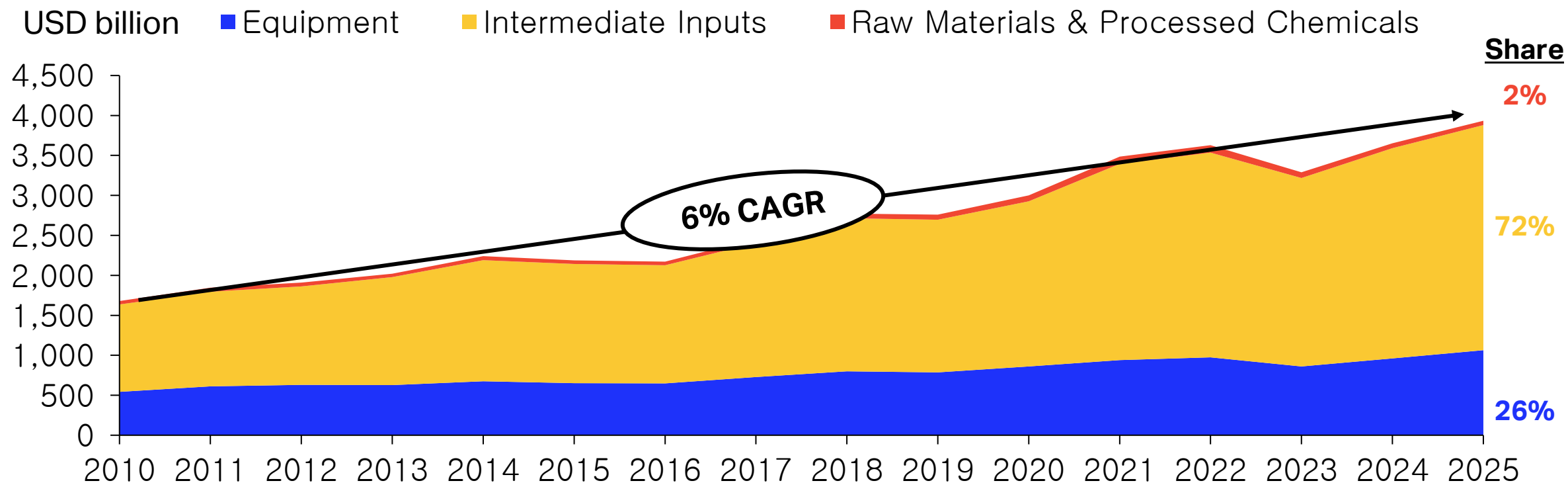




Major Air Cargo growth drivers

Strong growth in trade in AI-related goods

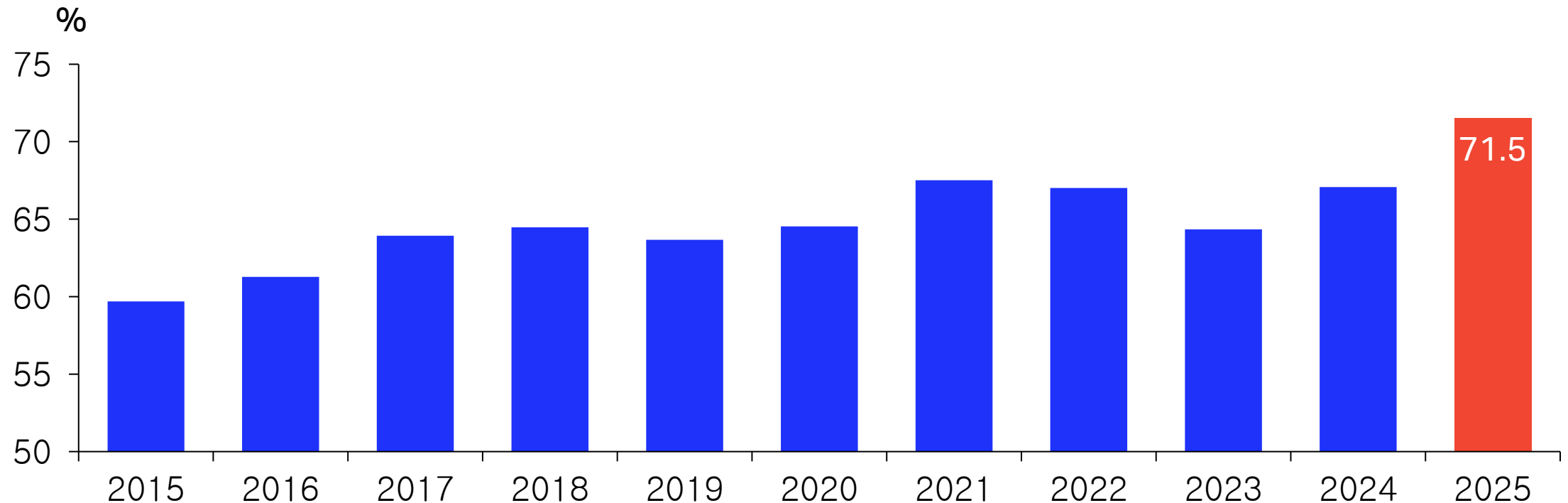
Trade in AI-related goods, USD billion, 2010-2025



Source: IATA Sustainability and Economics, Global Trade Tracker.

Air cargo increasingly important for AI

Share of AI-related trade value by air, % of total sample, 2015-2025



Source: IATA Sustainability and Economics, Global Trade Tracker.

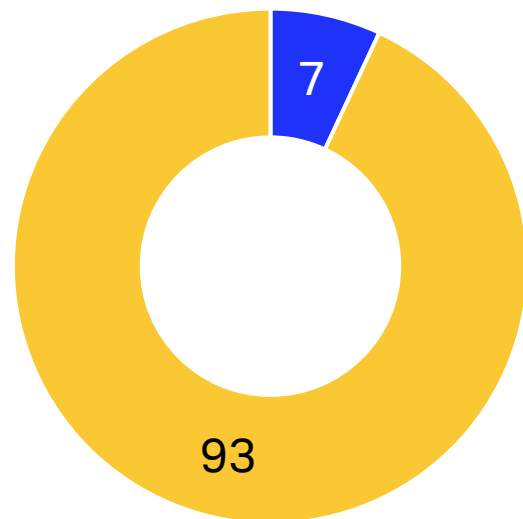
Note: Sample of 42 countries that consistently reported trade by air since 2015, together representing 37% of 2025 global trade.

AI goods accounted for 53.5% of the value of air transported trade, while representing only 7% of its volume in 2025

Share of AI-related goods in trade by air, 2025

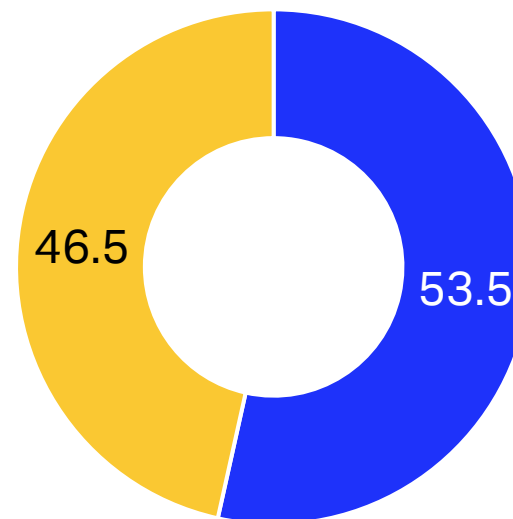
Panel A: Share of weight in kg, % of total sample

■ AI-related goods ■ Others



Panel B: Share of value in USD, % of total sample

■ AI-related goods ■ Others

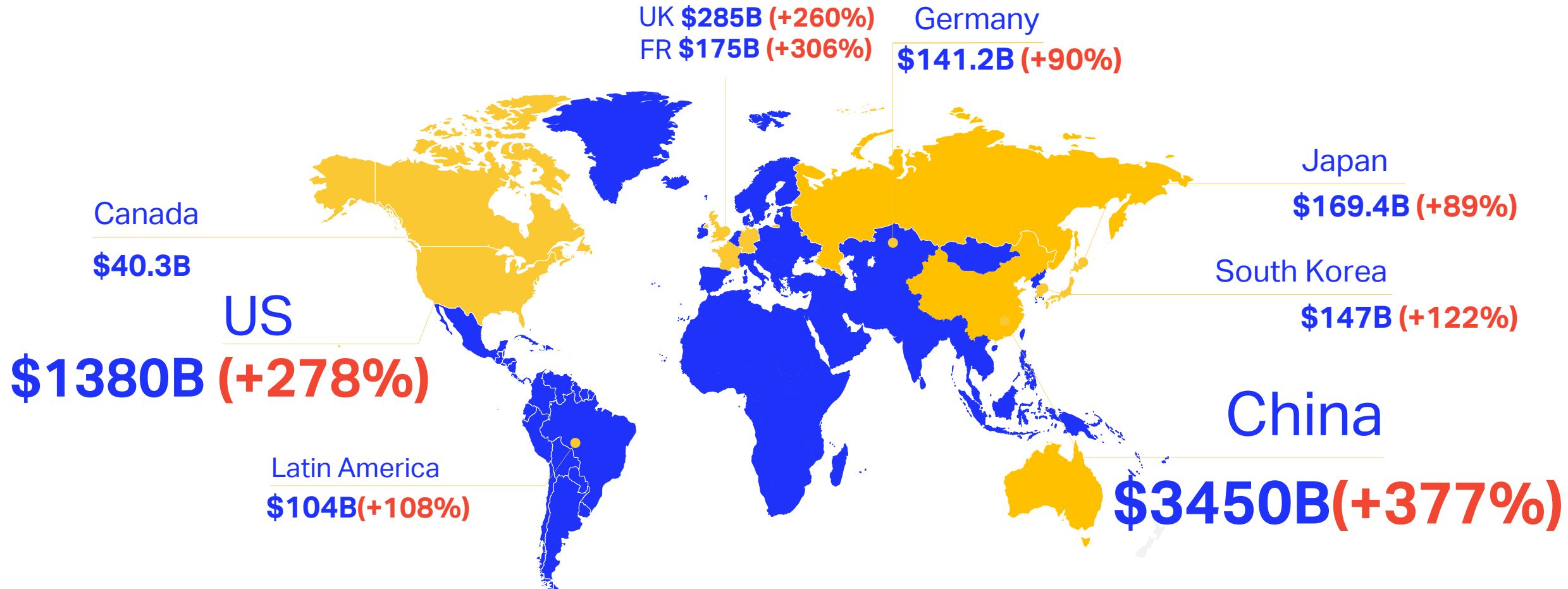


Source: IATA Sustainability and Economics, Global Trade Tracker.

Note: Sample of 42 countries that consistently reported trade by air since 2015, together representing 37% of 2025 global trade.

E-Commerce snapshot in 2025

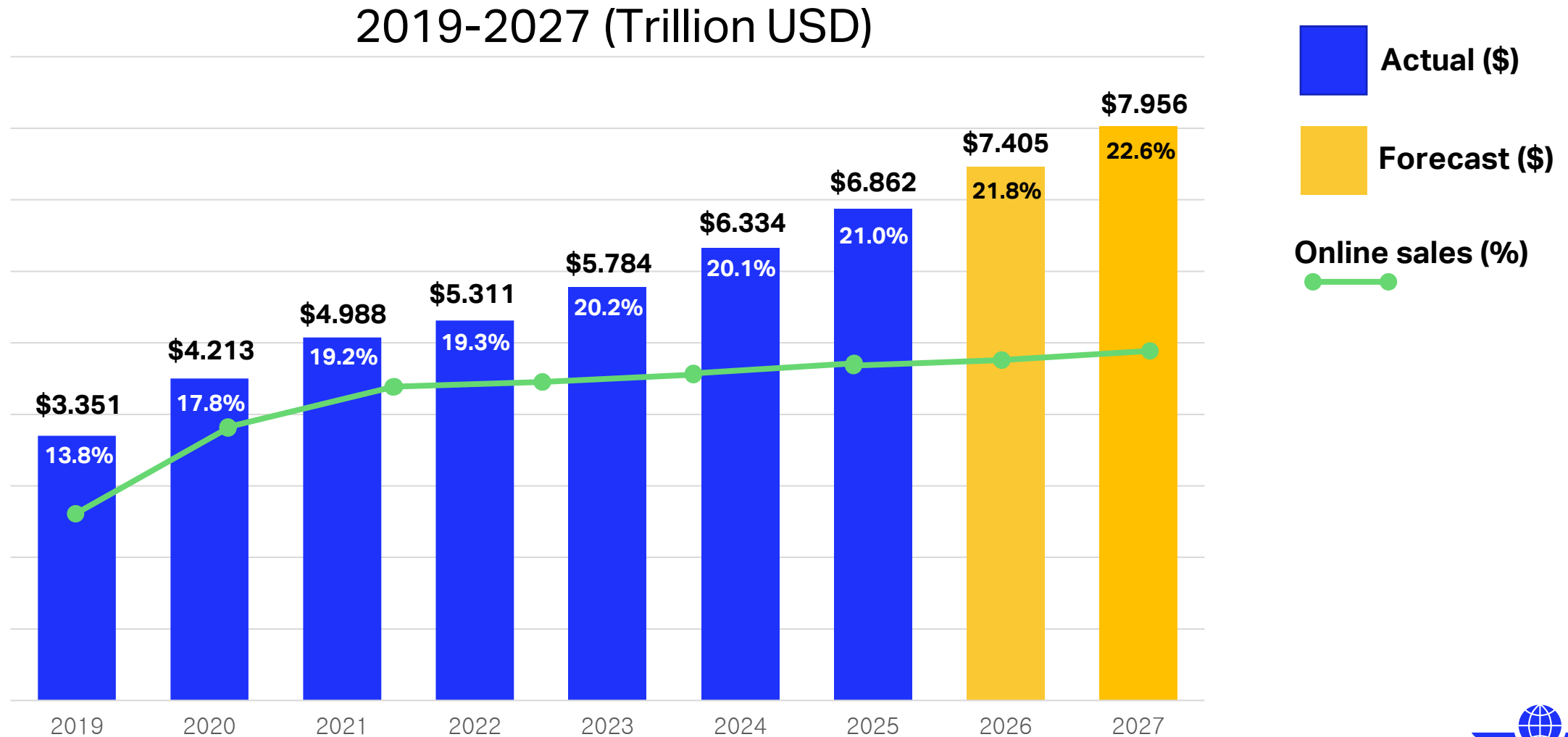
6.8 Trillion USD (+105% against 2019)



Note: The growth in percentage are all against 2019 figures

Source: Sellers Commerce

Worldwide E-Commerce Retail Sales – Still Growing





**217
billion**
Parcels
shipped 2025

5,900
Parcels per
second

**256
billion**
Parcels
projected to
be sent 2027

Tsunami of Parcels

More people have access to internet, more online stores = more e-commerce

Volumes of parcels shipped:

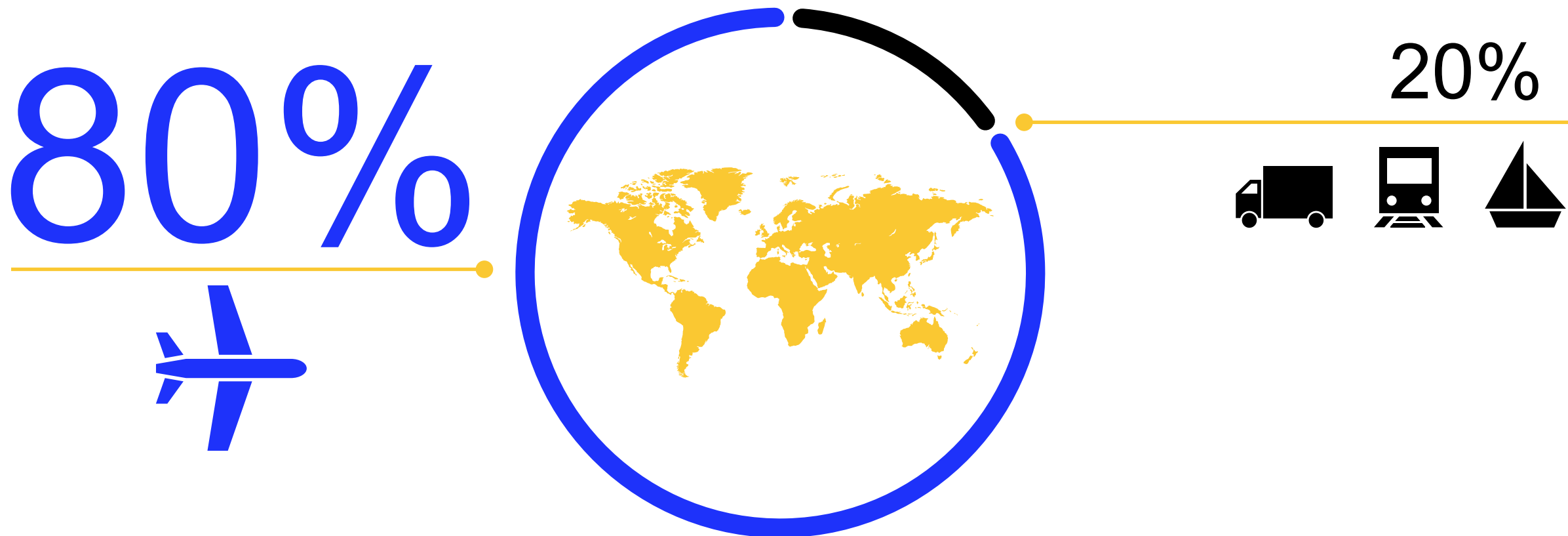
- 2022 - 170 billion parcels
- 2023 – 189 billion parcels

4x more than 2014

- 2025 – 217 billion parcels
- 2027 – 256 billion parcels

Cross-border B2C - 2023

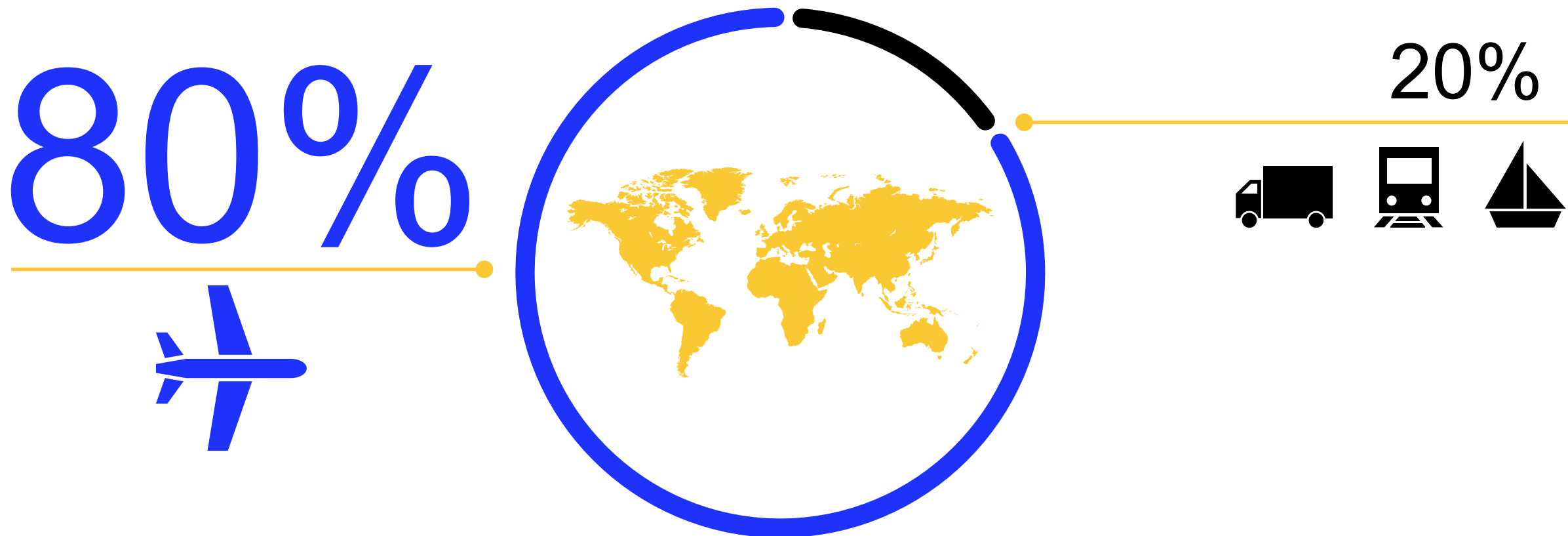
Air cargo is built for eCommerce



In 2023, 1 package out of 5 is bought online (20%)

Cross-border B2C – 2027

Air cargo is built for eCommerce



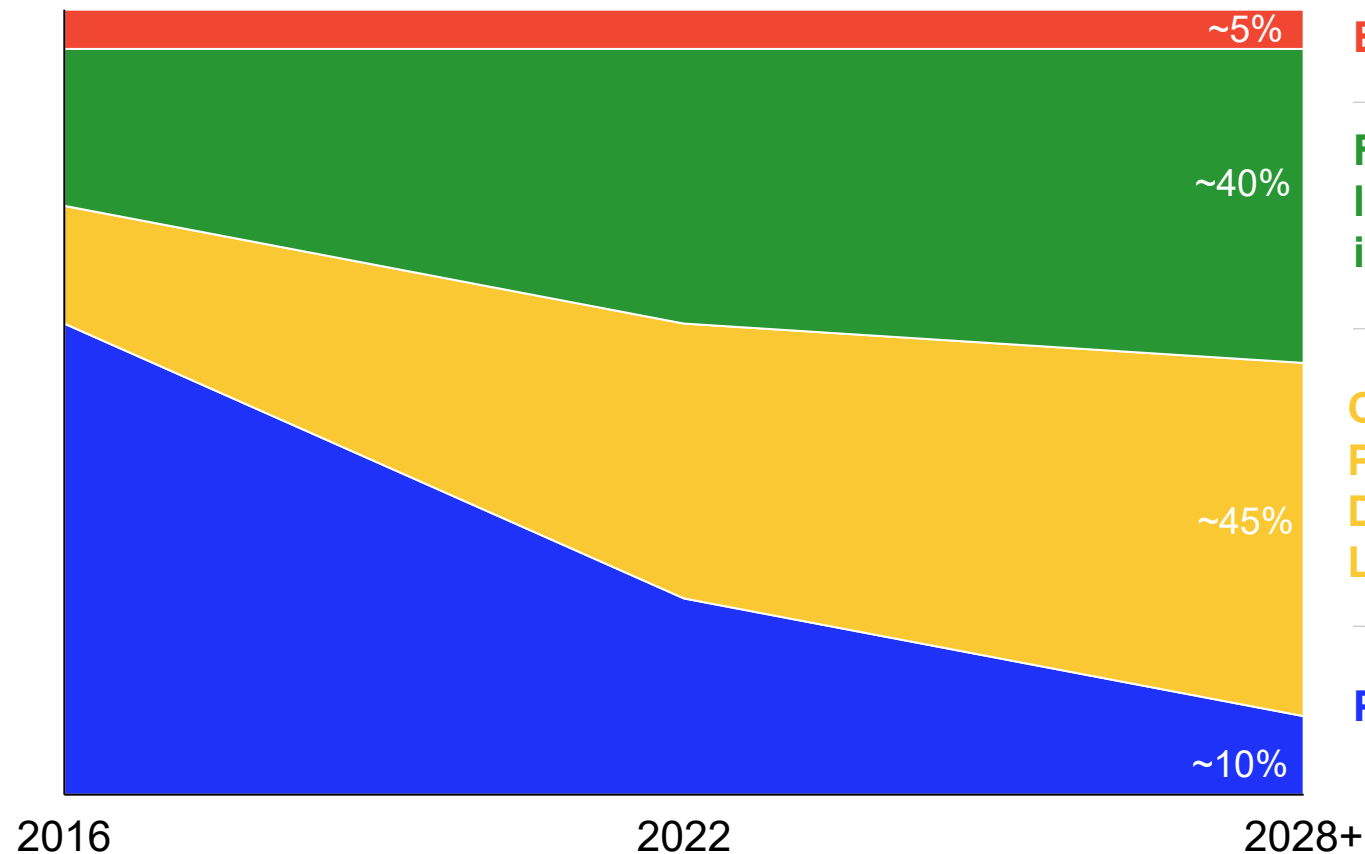
In 2027, 1 package out of 3 is forecasted to be bought online (30%)

XB e-commerce parcels use 4 main channels

(with growing trend towards commercial parcels and forward inventory)

Cross-border by speed / delivery provider¹

% of volumes, estimates



Express



FedEx



Forward-located inventory



Commercial Parcel / Direct Lane

pitney bowes



CAI NIAO

SEVEN SENDERS

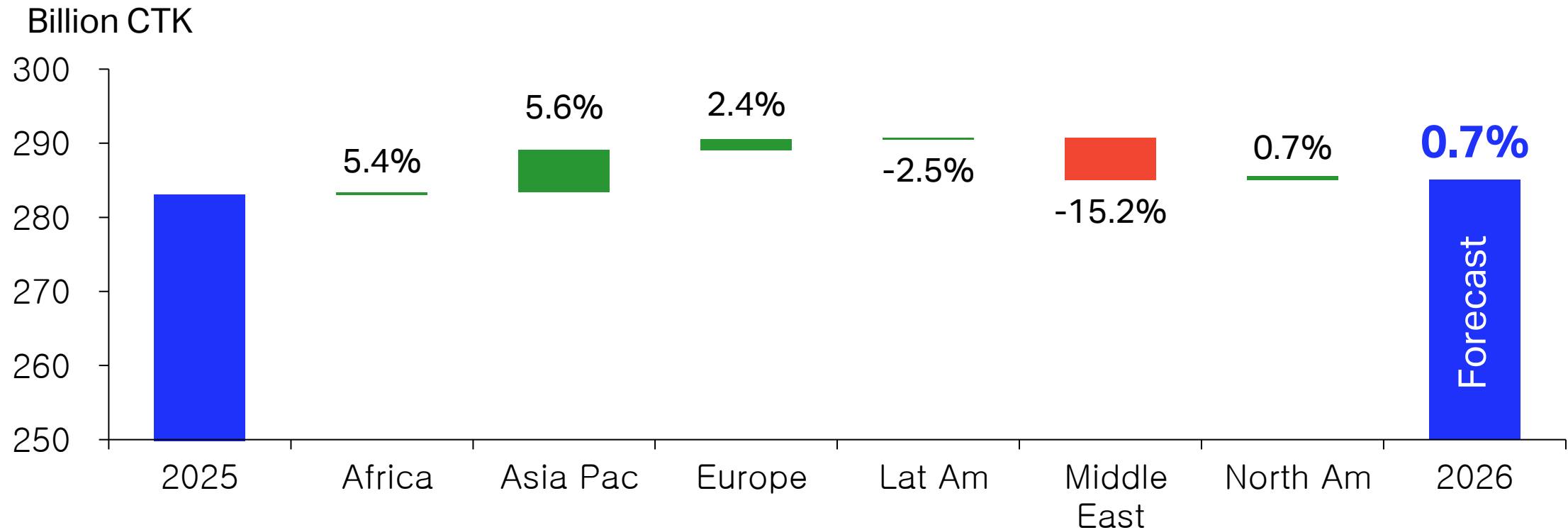


Postal



The Asia Pacific region is projected to account for the largest share of global air cargo growth in 2026.

Contribution to cargo traffic growth by region, billion CTK, and annual growth, % YoY



Source: IATA Sustainability and Economics, IATA Information and Data – Monthly Statistics.

Shaping the Future of Air Cargo Through Automation and Digitalization



Air Cargo Technology = Excellence



Why Digitalization Matters for Air Cargo

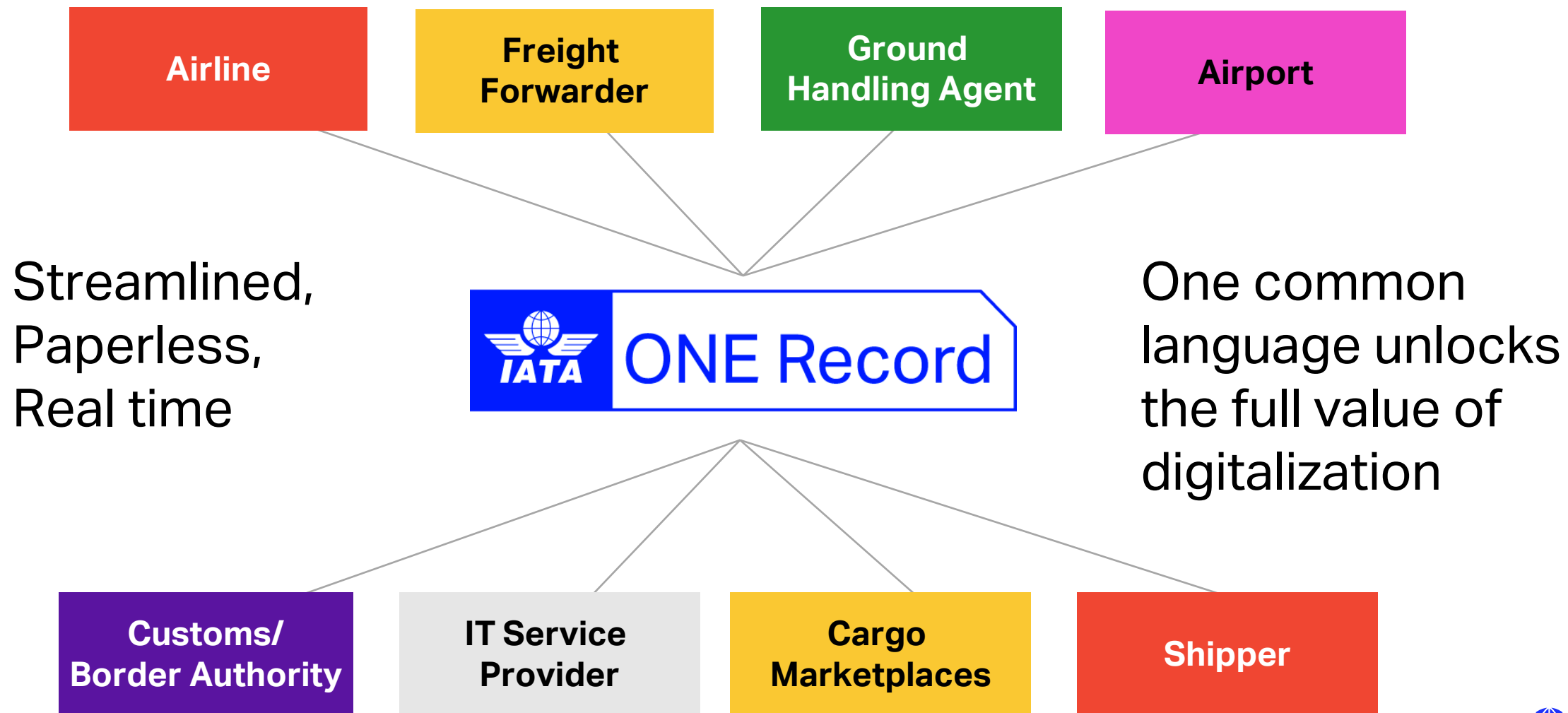


- **Visibility:** Customers expect real-time visibility and predictability
- **Efficiency:** Efficiency depends on accurate, shared data
- **Security:** and compliance require trusted, traceable information
- **Automation:** and AI require digital, structured data

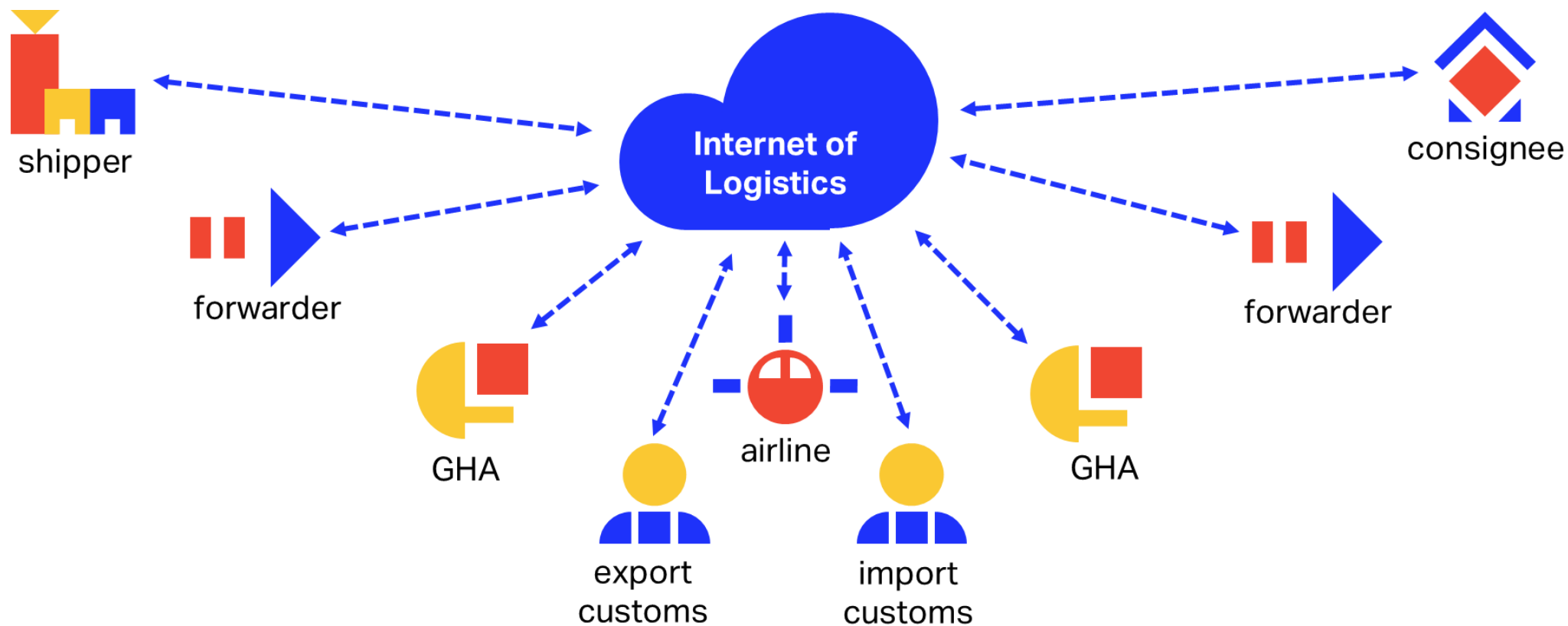
ONE Record

The Concept

ONE Record is central to that digitalization



ONE Record: Internet of Logistics



Internet of Logistics – exchange logistics data over the internet, using ONE Record protocols

All data sits in a single record

- Milestone events
- Freight information
- Data properties: geolocation, temperature, CO2 emissions, humidity etc
- Shipper requirement for special cargo: Active/Passive packaging or Product temperature range etc)



ONE Record provides a common real-time data-sharing framework across transport and regulatory documents

Document-Centric transactions

- | | |
|--------------------------------|------------------------------|
| 1. Invoice | 12. Flight Manifest |
| 2. Packing List | 13. Transfer Manifest |
| 3. Certificate of Origin | 14. Export Cargo Declaration |
| 4. Letter of Instruction | 15. Import Cargo Declaration |
| 5. Dangerous Goods Declaration | 16. Transit Declaration |
| 6. CITES Certificate | 17. Security Declaration |
| 7. Master Air Waybill | 18. Freight Book List |
| 8. House Waybill | 19. Import Goods Declaration |
| 9. House Manifest | 20. Customs Release Import |
| 10. Export Goods Declaration | |
| 11. Customs Release Export | |

Data-centric transactions



Where is the industry today?

ONE Record as the preferred data sharing standard for all air cargo stakeholders as of **1 Jan 2026**

- A mature, fit for purpose and open standard, freely accessible, published on GitHub
- 200+ on going pilot projects covering use cases across operations, commercial and billing





ONE Record Participation in Asia Pacific



ONE Record

Production and Pilot cases



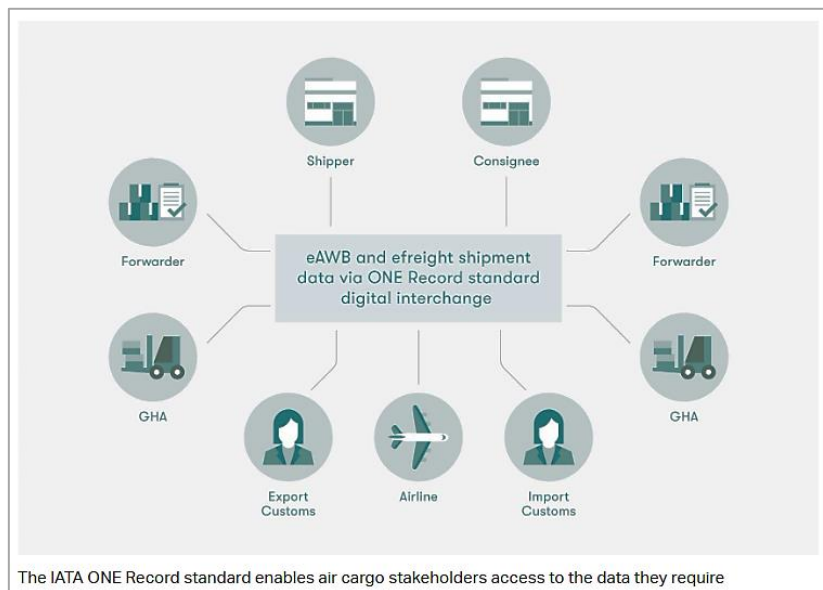
ONE Record in Production – Hong Kong



- Cathay Cargo introduces IATA ONE Record data exchange in day-to-day usage (24 Feb 2025)

"In December 2024, three freight forwarders on the Chinese Mainland – Sinotrans Air Freight, WECAN International Freight Forwarding International Logistics and ALL-LINK Logistics – started exchanging **electronic air waybill (eAWB)** and **shipment status information** with Cathay Cargo using an API designed to ONE Record data standards"

<https://www.cathaycargo.com/en-us/stories/our-business/iata-one-record-data-exchange.html>



The IATA ONE Record standard enables air cargo stakeholders access to the data they require

- Cathay Cargo becomes the first airline to offer real-time customs clearance status via IATA ONE Record (17 October 2025)

"The current scope of the new initiative will give users **clearance status from customs authorities** including Europe (ICS2 Import Control System), the United States, Canada and United Arab Emirates. The statuses will be treated as ONE Record "Logistic Events" so that customers know if their shipment is still pending, being assessed, is permitted to load or not, and at the destination if a shipment is being held for inspection or has been released for collection."

<https://www.cathaycargo.com/en-us/news/20251017-01.html>



HKIA Cargo Data Platform

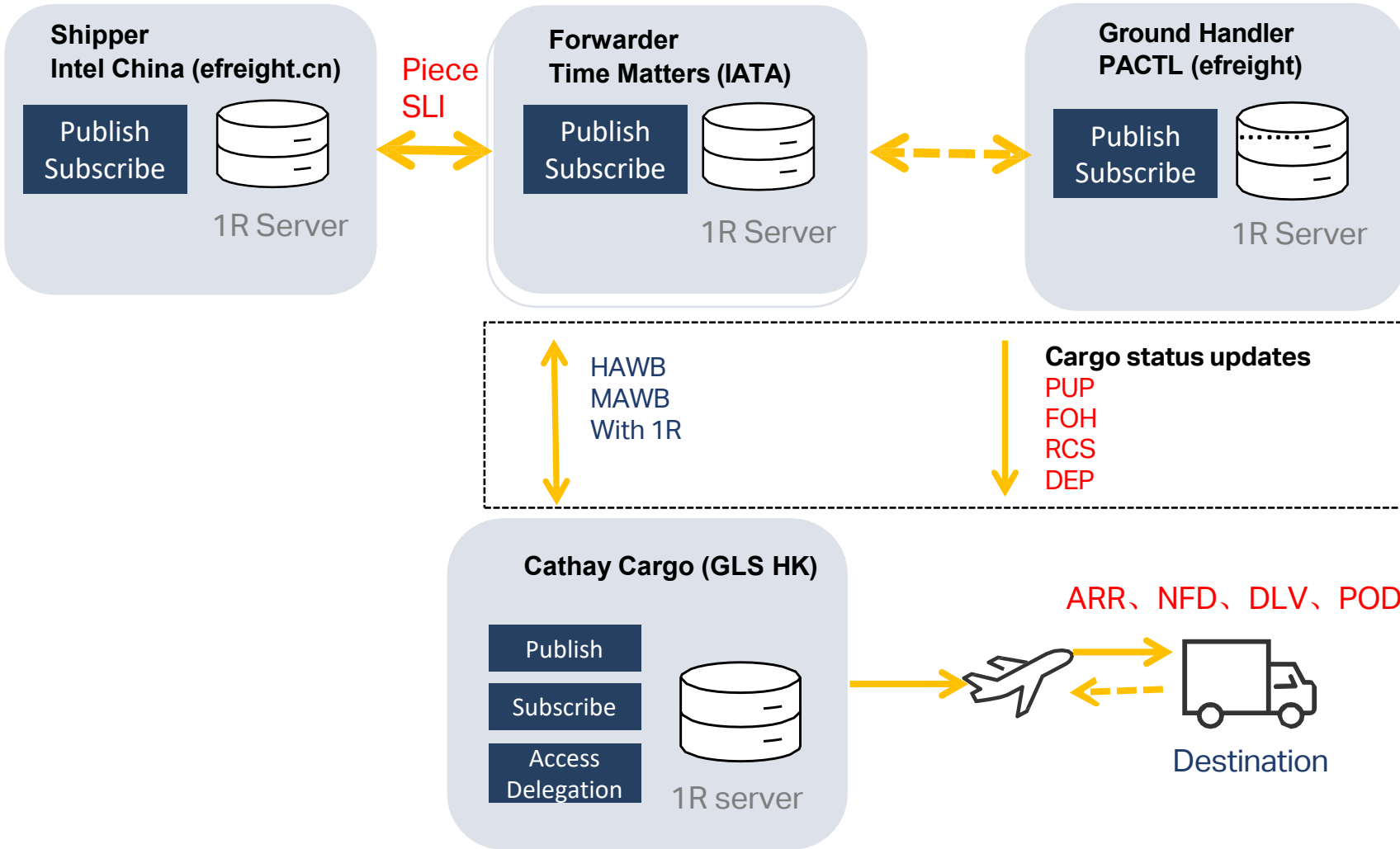
- Community-based digital platform connecting freight forwarders, truckers, airlines, and regulators designed to improve operational efficiency and end-to-end shipment visibility across Hong Kong's air cargo supply chain
- Powered by IATA ONE Record data protocol enabling a single source of truth and end-to-end shipment transparency
- Real-time milestone tracking allowing shipment progress to be logged and shared across stakeholders from shipper to consignee



PLACI ONE Record Pilot

- Transport Canada is conducting pilot project on PLACI submission using ONE Record standard

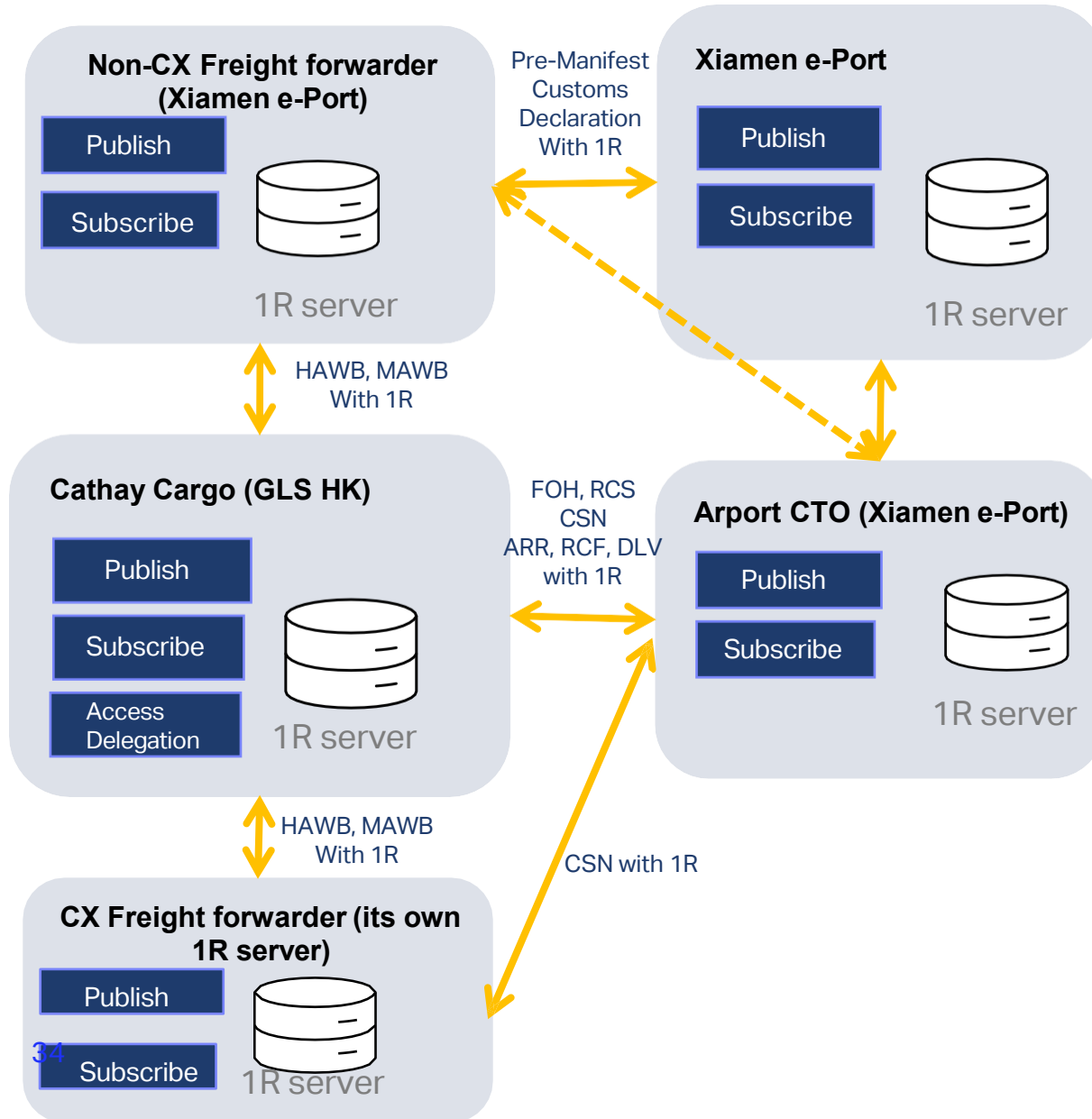
Shanghai Airport - Pieces Level Tracking



- ✓ Enable point-to-point data exchange among participating parties
- ✓ Complete data model mapping for cargo items, shipping instructions, HAWB and MAWB
- ✓ Enable the integration of data sharing and change request processes
- ✓ Enable access authorization control for embedded logistics objects

Trade Facilitation Platform

Pre-arrival Manifest Declaration ONE Record pilot



 中国(厦门)国际贸易单一窗口
China (XiaMen) International Trade Single Window

 元翔货站
AIRPORT CARGO TERMINAL
翔业集团成员企业

 CATHAY CARGO
國泰貨運

 IATA

 GLS 传讯

- ✓ Pre-arrival manifest declaration data exchange
- ✓ Master air waybill and house air waybill sharing
- ✓ Cargo milestone update
- ✓ Customs Status Notification (CSN) used for customs release information

 IATA

SEA-AIR ONE Record pilot

Hong Kong - Greater Bay Area(GBA) Pilot

“Cathay Cargo accepts shipment in the Greater Bay Area using IATA ONE Record protocols prior to journey by sea and unloading for export from Hong Kong International Airport”

Pilot Description

- To create awareness and help the GBA air cargo community to get ready for IATA One Record.
- The pilot includes exchange of shipment status including security status for a multi-models shipment. The cargo is accepted in GBA (Dongguan), shipped to HK Airport via vessel and then export in flight.
- This project is jointly owned by HKIA, CX and GLSHK.

Pilot Participants



Pilot Project Tag Line

**“Seamless Cargo Connectivity for GBA-Hong Kong:
Sea-to-Air shipment data sharing through ONE Record”**



Thank you.

