Air Cargo Distribution Current trends and prospects





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1. Introduction

Airlines transport over 62 million cargo tons of goods a year, representing more than 33% of global trade by value but less than 1% of world trade by volume. That is equivalent to \$8.3 trillion worth of goods annually, or \$22.7 billion worth of goods every day. Air cargo is crucial for serving markets that require speed and reliability for the transport of goods. Managing shipments in an accelerated and competent manner is essential for global economic development and aviation profitability. Air cargo distribution, the process of providing real-time pricing information, generating and managing quotes, and handling bookings, is an indispensable part of success.

Today, airlines have their own way to describe, present and propose their transportation products. This leads to inconsistencies of proposals through different channels and markets and does not allow for operational effectiveness in the quote and book process, especially from a customer point of view.

Therefore, the Subject Matter Experts of the relevant field identified a strong need to standardize the way airline products are described and presented, giving opportunities for freight forwarders and shippers to ease the comparison between different products in a consistent manner. The surge in air cargo demand has been primarily driven by robust cross-border e-commerce and, to a lesser extent, capacity limitations in ocean shipping.

Given these strong growth catalysts, along with a relatively positive macro-economic outlook, demand is expected to continue to rise significantly in 2025.

IATA Global Outlook for Air Transport



2. History and current reality of cargo distribution

The former way of cargo distribution, the point-to-point model was highly reliant on manual processes, such as phone and email, complemented by EDI messaging. This approach meant working only with static data including schedule sheets and rate sheets, lacking real time data sharing and hindering dynamic and flexible approaches.

Air cargo distribution has undergone significant changes over the years, driven by advancements in technology, changes in global trade patterns, and the evolution of the aviation industry.

In the early 2000's, stakeholders started to realize the evolving need for more modern ways of distribution. This is how platform connectivity started to emerge, creating a single-entry point for customers where multiple carriers are displayed, however occasionally still relying on static data, mail contact forms and EDI messaging. Platform connectivity is an important step towards modernizing cargo distribution. However, as of now, it mainly involves proprietary interfaces and individually connected platforms, which is not the desired long-term solution.

The most used static approach entails customers to make assumptions by examining schedule and rate sheets published by carriers, however oftentimes by the time of booking this information is outdated, rates may change, and capacity may become unavailable. Even if a booking is confirmed by a carrier, there remains uncertainty regarding the price and the availability until the goods are handed over. The channels used for distribution of cargo services varies significantly across different regions. In Europe, the distribution is primarily online, while the United States is gradually catching up. In Asia, certain airlines are making strides, but the market remains allotment-driven rather than spot-driven, unlike in the Europe and US.

Looking ahead the industry needs and is working on creating a standardized connectivity that relies on a common API used for distribution. This would aim to ensure that data is created and shared in a standardized way and tackle the existing challenges of cargo distribution.

Currently, around 2/3 of the available air cargo capacity is accessible online, the remaining 33% is to be digitalized.

It's important to note that the future of air cargo distribution will likely be shaped by a combination of technological advancements, regulatory changes, and shifts in global trade dynamics. The industry will need to adapt to meet the evolving demands for faster and more efficient cargo distribution solutions.



Figure 1: Air cargo capacity digitalization

3. Stakeholders feedback Air Cargo Distribution survey

IATA has launched a global survey on Air Cargo Distribution trends in 2023 to gather information and gain insights from airlines and freight forwarders about the practices and preferences in the cargo distribution process, focusing on the of use of channels for rate distribution and bookings. The survey has been answered by 24 companies, 29% airlines and 71% freight forwarders.

Here are the key trends in rate distribution and bookings from an airline's perspective.

Airline rate distribution

Majority of the airlines uses dynamic rate distribution (adjusting prices in real-time based on various factors such as demand, market conditions, competitor pricing, and booking patterns), while some of them are distributing static rates only once or twice per year. There is a wide range of channels used for distribution, including Mail/Fax, Email/Sales contact form, Phone, Website, Direct connectivity airline-forwarder with airline API, Distribution via 3rd party platform with airline API. The most preferred channels are website and email/ sales contact form, these are used for sharing all rates and commodity types, while the use of other channels is limited to some specific rates/commodities.

Airline channels for booking and adjusting existing bookings

When it comes to bookings, the following channels are listed: Email/Sales contact form, Phone, Website, Direct connectivity airline-forwarder with airline API, Distribution via 3rd party platform. Out of these, 4 channels are used with higher frequency, Email/Sales contact form, Phone, Website and Distribution via 3rd party platform. As for adjusting existing bookings, the same channels are preferred.

Airline API used for distribution

Several airlines have already implemented a proprietary API solution and use it for distribution with multiple customers. Airlines recognize that they shall make some improvements to proprietary API, such as including more rate and commodity types and reduce time to connectivity. Besides proprietary API, airlines also work with 3rd party platforms. Connecting to such platforms is considered relatively easy, however similar improvements shall be implemented as for airline proprietary APIs.

Regarding the business opportunities driven by proprietary or $3^{\rm rd}$ party API, respondents highlighted:

- Extended scope of sales.
- Increased visibility.
- Closer cooperation with core customers.
- Potential to increase bookings by 5-10%.

Figure 2: Breakdown of distribution channels used



Figure 3: Breakdown of channels used for booking



After reviewing the status of rate distribution and bookings from the airline's perspective, preferences and insights from the receiver end, the freight forwarders, should also be analyzed.

Information on rates

As previously described, the 2 main channels used to receive information on rates is email/sales contact form and website. This approach makes rate comparison difficult, based on freight forwarder feedback 3.94 on a scale 1-10.



Quote and booking lead times

On average, lead time to receive a response to a quote request or a booking request is within 6 hours, which in some cases can grow to up to 24 hours. The level of satisfaction with this lead time is 6.76 out of 10, indicating that freight forwarders would require faster response time.

Limitations in distribution when using digital channels

Whether talking about airline proprietary API's or 3rd party platform, freight forwarders experience similar limitations with these channels:

- Technical difficulties
- Limited rate types available
- Limited commodity types available
- Related costs (valid for 3rd party platform)

Respondents have confirmed that they see benefits in airlines and forwarders using a standardized booking process and an industry wide standard data model for cargo distribution.

4. Challenges in air cargo distribution

Air cargo sales face several challenges that can impact the efficiency and effectiveness of the sales process. These difficulties arise from various factors, including industry dynamics, regulatory requirements, and technological advancements. Lacking a standardized way of connectivity, stakeholders experience several pain points as part of the air cargo distribution process, included but not limited to the below.

Challenge	Description	Affected stakeholders*	
Draduat diatribution	Differen	t product characteristics and presentation by airlines	
inconsistencies	Inconsis practice	stencies of offers/proposals through different channels, markets, s, tools, etc.	FF
	Lack of using dif	real-time data leading to unnecessary back and forth; sometimes fferent channels for the same booking	
Data quality and real-time availability issues	Inability custome	to manage real-time change in booking/status and inform the ers in timely manner	FF
	Inconsis	stencies of data throughout channels	
Missed opportunity to	Inability	to get a complete view of the customer behavior and profile	ΔΙ
customer journey	Inability	to follow up proactively on marketing lead and offers	AL
Price Volatility	External operatin competi	factors, such as fluctuations in fuel prices can significantly impact ng costs for airlines, leading to challenges in setting and maintaining itive pricing for air cargo services	AL
	Rapid ch conditio	nanges in market demand, seasonality, geopolitical and economic ns can make it challenging to predict and adjust pricing accordingly	FF
Capacity Constraints	Air cargo to difficu and pote	o capacity constraints, especially during peak seasons, can lead ulties in meeting customer demand. This can result in higher prices ential delays especially with last minute changes	FF
To the stars labor and inc	Integrati modern interope	ion with outdated or legacy systems can hinder the adoption of digital technologies. Transitioning to digital platforms and ensuring grability with existing systems can be a significant challenge	AL
rechnology integration	The mix complex solution	of modern and outdated technology in the industry makes it (for one stakeholder to properly structure its IT infrastructure and s	FF
Customer Expectations	Custom the lack process	ers demand simplicity and speed in the distribution process, of cohesion between all channels is a major obstacle in today's es	AL
	Meeting service	customer expectations is critical. Failing to provide high-quality can lead to customer dissatisfaction and loss of business	
Competition	The air of and logic pressure	cargo industry is highly competitive, with numerous carriers stics providers vying for market share. Competition can lead to e on pricing and the need for differentiation in service offerings	AL

*AL: airline, FF: freight forwarder

Addressing these challenges in air cargo sales requires a combination of strategic planning, technological investments, and a customer-centric approach. Companies that can confront these obstacles effectively are better positioned to succeed in the dynamic and competitive air cargo industry.

5. Digitalization as the solution

Digitalization plays a key role in transforming and improving various aspects of air cargo sales. The integration of digital technologies and data-driven solutions enhances efficiency, customer experience, and overall performance in the air cargo sales process.

Online booking via digital platforms	 Air cargo companies leverage online platforms to facilitate easy and convenient booking of cargo space. Shippers and freight forwarders can make reservations, check availability, and manage bookings through web portals or dedicated applications.
Dynamic pricing	 Digital tools enable dynamic pricing based on various factors such as demand, product type and dimensions, capacity, and seasonal fluctuations. Automated quoting tools provide instant and accurate pricing information to customers, improving transparency.
Tailored service to customers	 CRM systems allow air cargo companies to manage customer interactions, track communication history, and analyze customer preferences. This data can be used to personalize services, offer targeted promotions, and enhance customer satisfaction.
E-commerce Integration	 Integration with e-commerce platforms allows seamless handling of online orders. Air cargo companies can collaborate with e-commerce businesses to streamline the transportation of goods purchased online, supporting the growing e-commerce industry.
Data Analytics for Sales Insights	• Digitalization enables the collection and analysis of sales data. Air cargo companies use analytics tools to gain insights into customer behavior, market trends, and sales performance. This data-driven approach helps in making informed decisions and optimizing sales strategies.
Electronic Contracts and Agreements	• The use of digital contracts and agreements simplifies the documentation process. This includes the creation, distribution, and signing of contracts electronically, reducing paperwork and speeding up the sales cycle.
Automated Order Processing	 Automation in order processing reduces manual efforts and minimizes errors. Order management systems help in efficiently handling and processing customer requests, from order placement to shipment confirmation.
Integration with Logistics Systems	 Digital systems seamlessly integrate with logistics and transportation management systems. This integration ensures smooth coordination between sales and operations, optimizing the movement of cargo from booking to delivery
Customer Self-Service Portals	 Allow shippers and freight forwarders to independently manage bookings, track shipments, and access relevant information. This enhances customer satisfaction by providing real-time visibility and control.
Compliance and Regulatory Management	• Digitalization aids in ensuring compliance with regulations and industry standards. Air cargo sales systems can incorporate features that help users adhere to legal requirements, reducing the risk of regulatory issues.

The overall impact of digitalization in air cargo sales is a more streamlined, proactive, responsive, and customer-centric process. By leveraging digital technologies, air cargo stakeholders can enhance their competitive edge and adapt to the evolving demands of the industry and customers.

6. Vision moving forward

The new way of cargo distribution encourages to turn the current practice of static approach around. Instead of forwarders looking at rate and schedule information to create assumption for shipments, they would provide all relevant product information to the carriers or distribution platforms and carriers can present available options based on the characteristic and requirements of the shipment. Forwarders are then able to decide and select the most suitable offering and proceed with their booking.

Interconnectivity between stakeholders can be drastically improved when all are using the same standardized technologies and processes. The industry should aim for a Plug & Play connectivity through APIs.

- From a customer perspective the shipment's characteristics and transportation requirements can easily be shared to various stakeholders using the same data structure and technologies.
- From a carrier perspective, interconnectivity with various customers is simplified and much more quote requests can be received and assessed at the same time.
- 3rd party platforms can play a leading role by connecting stakeholders of different sizes between each other.

Figure 4: xxx









Airlines



Distribution platforms (including marketplaces)

Multiple answers from Airlines, all with the same data structure

A **single** quote request by the forwarder

Forwarder

Digitalization gives access to real-time data and faster response time, facilitating the Sales & Booking process on both ends. Customers can be more accurate with their demands and easily update the requirements while carriers have a much better visibility on their bookings and can inform ground handlers quickly.

7. Work done by IATA and MCD group

Since 2020, the Modernizing Cargo Distribution (MCD) working group, in collaboration with the ONE Record initiative, has brought together over 30 different stakeholders including airlines, freight forwarders, and solution providers, all working towards a unified goal. The primary objective of this collaboration is to establish a common and standardized approach to cargo distribution within the industry. By leveraging the ONE Record standard as its foundation, the MCD working group aims to simplify interactions among stakeholders.

The key deliverables of this initiative include the development of a standardized sales and booking process based on the ONE Record standard. Additionally, the group is focused on defining specific objects and data elements within the ONE Record Data Model. Another significant deliverable is the creation of a standardized API flow to support the entire process. These efforts are designed to streamline operations and enhance efficiency across the cargo distribution industry. 85% of the survey respondents – both airlines and freight forwarders – confirmed that they see benefits in using an industry wide standard data model for cargo distribution.

8. ONE Record for cargo distribution

ONE Record is an industry-led initiative that aims to modernize and standardize the way air cargo information is handled and shared across the aviation supply chain. The goal is to establish a single, standardized data sharing model for the air cargo industry, enhancing efficiency, transparency, and collaboration among stakeholders.

Requirements

The Modernizing Cargo Distribution working group (MCD) has defined the standardized Sales & Booking process to highlight the business and data requirements of Distribution. The current Sales & Booking process is the following:



In addition, a specific Cancellation process has been defined:





In this process, the quote request should contain a minimum set of information:



The second step, airline presenting booking options, needs to ensure that the following data are included:

матсн	Exact matchAlternative optionsNo match with a reason
ALWAYS PROVIDED	 Quote reference (call back link) Type of quote (e.g. allotment, block space, free sale, contract spot) Routing Shipment & Operational details Handling information Airline Product Rate (including all charges/surcharges applicable) Special conditions (including validity of the offer)

The booking confirmation step ends the Quote & Book process, it should ensure that some data are validated and agreed between the two parties. The data are:

•	Booking	status
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- Booking reference
- Type of booking (e.g. allotment, block space, free sale, contract, spot)
- Quote reference
- Booking details, including:
- BOOKING INFORMATION – Routing

+

- Shipment and Operational details
- Handling information
- Airline Product
- Rates (including all charges/surcharges applicable)
- Special conditions

Further discussions with MCD working group members allowed to identify the need to properly track the shipment status and data throughout the shipment lifecycle. Essential shipment data such as Weight can evolve as the Quote & Book process moves forward, the data model and ONE Record specifications need to ensure that this is possible. The group came up with a proposal for a standard shipment lifecycle as depicted below:



This is an example of a typical shipment lifecycle that should help standardize some of the events and milestones that are required on the business side of the Quote & Book process.

Chosen approach in the data model

The chosen approach is on multiple levels to make sure that all requirements are met.

Definition of appropriate objects to reflect Distribution

Four main objects have been defined to represent the Distribution:

- Booking Shipment: In the context of Distribution, and only distribution, the **BookingShipment** is a simplified mix between Piece and Shipment to meet a quote request minimal requirement.
- Booking Option Request: It refers to the quote request.
- Booking Option: A Booking Option is an offer made by a carrier that is supposed to be bookable.
- Booking Request: It refers to the booking confirmation request, equivalent to (X)FFR message.
- Booking: Used for confirmed bookings, it contains all information that have been agreed between customer and carrier.

Figure 7: xxx



Along those two main objects, a few simpler objects are added to ensure that all information are available for the Sales & Booking process. It includes **Routing**, **ScheduledLegs**, **BookingTimes**, **BookingSegment**, **CarrierProduct**, **Price**, **Ratings and Ranges**.

Ranges are included to address challenges where cargo tendered to Airline has variance versus the booking option request dimension and/or weight.

As the Sales & Booking process may occur before actual operations, we have chosen to allow for some data property at **BookingOptionRequest** level that are to be used for the sole purpose of the quote request. Thus the expected Commodity and requested Handling data properties are used at an early stage to indicate what the forwarder intends to ship. The **BookingShipment** object, which is still being finalized, is also used for that purpose, with more detailed information on intended shipment.

The expectedCommodity values are to be discussed and decided by the MCD working group, the requestedHandling values shall refer to special handling codes.

ONE Record mechanisms to ensure keeping track of data throughout the lifecycle

Like all Logistic Objects, **BookingShipments** can have **Events**. An **Event** can record the state of a shipment (e.g. "Quote Requested, Booking requested, etc.) and reflect the lifecycle.

The Audit Trail specified in ONE Record API can be used to recover older versions of the objects based on, for instance, a specific date and time.

Data model

Details of the objects and their data properties can be found in the Ontology or in the Visualizer.

The impacts on the conceptual data model and the way these objects are supposed to interact with each other are quite straightforward and explained in the figure above.

API mechanism

Based on the Data Model, a standard API workflow has been designed. The use case shows an interaction between a Customer (Freight Forwarder) and a Carrier where both stakeholders have their own ONE Record servers. Using a 3rd party service provider would be the same workflow.

9. What does digitalization hold for the future of air cargo distribution?

Elimination of manual work

The industry shall aim to eliminate manual bookings and human involvement in information extraction by relying on AI agents.

Competitiveness and innovation

Despite challenges, such as high costs and limited competition among core system providers, the industry is urged to
embrace AI swiftly to increase its competitive edge.

Standardization

The adoption of ONE Record for Air Cargo Distribution is encouraged to further digitize distribution and leverage AI benefits.

API focus

 The air cargo procurement space will see a significant increase in API-driven capabilities, leading to improved agility and competitiveness.

Holistic digital connectivity

Over the next decade, end-to-end visibility will become standard, with real-time tracking benefits.

Digitalization

 Digital booking is expected to surpass offline bookings in market share, driven by emerging technologies that enhance industry agility, collaboration, and data sharing.

Customer centricity

 The airlines that embrace digitalization achieve better customer experience. Sales and customer experience roles will become more specialized, with AI handling routine interactions.

Customer centricity

Dynamic pricing will fully infiltrate the industry, yet the players will need to look out for the added complexity it may bring.

Booking window

 Forwarders will have very limited time to create bookings to avoid price changes, therefore it is crucial to have automated solutions that can react instantly to quotes.

IATA is committed to enhancing the efficiency and excellence of the entire supply chain by implementing innovative digital standards and best practices.

By focusing on digital transformation, IATA ensures that all aspects of the supply chain are optimized for efficiency and excellence.

Please also refer to IATA's recently published white papers on "Cargo Operations: Efficiency and Excellence" and "2025 Vision for the Future of Air Cargo Facilities".

10. Existing platforms, their contribution to modernizing distribution, and their future vision

Numerous digital solutions are available in the market that support the industry and advance the path towards full digitalization of distribution. The platforms listed below represent just a fraction of the diverse solutions available and are companies that have actively contributed to IATA's efforts in this area.

🔄 CargoAi

CargoAi is a technology company transforming air cargo with Al-driven solutions. One of their solutions is a digital platform that optimizes air cargo quoting and booking for freight forwarders and airlines, supporting both marketplace distribution and direct integrations. With 20,000 forwarders actively using the platform to check rates and book shipments, their technology enables instant spot requests across multiple airlines, receiving responses either manually or through automation for maximum efficiency.

Al is at the core of their innovation—automating repetitive tasks such as extracting shipment details from emails and PDFs, processing up to 500 queries daily for the marketplace product or directly connected to Airlines, GSSAS or freight forwarders. By leveraging Al and data analytics, CargoAi free up time for strategic decision-making, enhance dynamic pricing, and optimize market insights on rates, quality, and CO2 emissions. Al is not just about efficiency; it's about empowering the industry to move faster and attracting the next generation of talent. "A lot of progress has been made in digitalizing distribution over the past few years. Let's not wait 20 years to embrace the next revolution—Al."

Matt Petot CEO, CargoAi



🔁 cargo.one

cargo.one offers a full suite of solutions including rate procurement and management, quotation, customer interaction, booking, and tracking. cargo.one pro allows agents to compare, book, and track shipments with live and static rates from 200+ airlines, while cargo.one for enterprise provides extensive API suites for real-time market content. Some of the world's largest forwarders power their booking operations tools using its 60+ direct airline connections. Its 'live estimates' provide real-time insights into market buy rates fuelled by market intelligence, merging rate sheets with the live spot market, and enabling better quoting and buying decisions. cargo.one's 'Agent Rates' enables digital agent-toagent collaboration, allowing export agents to list rates on a Storefront and secure live agent bookings globally, backed by non-payment protection.

cargo.one's AI Assistant uses AI and machine learning to enhance productivity by automating and streamlining workflows. It converts customer emails into quotes in seconds, reducing manual data entry and improving accuracy. cargo.one also uses AI for dynamic rate management and is developing future solutions for demand prediction and pricing advice. These innovations aim to provide personalized offerings and optimize operations, ultimately driving more value for customers. "Freight forwarders compete in a fast-moving market, and cargo. one gives them an immediate edge with digital solutions that drive real ROI. For example, our AI Assistant transforms email inquiries into structured data instantly enabling faster responses, more competitive quotes, and increased win rates. By cutting complexity and streamlining workflows, we help forwarders secure better deals today while staying ahead of the demands of tomorrow."

Simson Demmer VP Partnerships, cargo.one

"Digitalization will lead the way and change management process will be next level, and booking cargo shall be as easy as booking a ride." Digitalization will lead the way and change management process will be next level, and booking cargo shall be as easy as booking a ride." $AW \equiv RY$

Cargobooking is a digital solution for GSAs and airlines, offering a whitelabel solution that looks like the user's own booking engine. Besides, Awery also offers a marketplace for quotes and bookings. Self-Service Booking allows customers to book services immediately without assistance. While Spot Requests enables customer to send a spot request to the airline if not satisfied with the available price. These features aim to streamline the booking process and enhance efficiency for both customers and airlines.

Awery solutions use AI to automate tasks, such as copying text details into specific fields resulting in time saving. Cargobooking integrates with Outlook to process emails – including attachments and screenshots - and provide offers. This allows customers to book immediately or send a spot request to the airline if the available price is unsatisfactory. On the other end, this solution allows airline sales personnel to upsell based on available capacity. Looking forward, AI will continue to play a more prominent role in predictive analysis, dynamic pricing and proper tracing of shipments, allowing alerts for rerouting and delays especially in case of interlining.

Vitaly Smilianets CEO, Awery

III FREIGHTOS

Freightos' WebCargo booking platform has seen significant growth since the first airline connected in 2018. By 2020, it started gaining volume with multiple airlines, and by 2024, the platform surpassed one million bookings. The platform now includes over 70 airlines and around 4,000 freight forwarders. Freightos handles airline API integrations, allowing users to select shipment types, itineraries, and dates, and then send requests to multiple airlines. Rates are displayed, with some airlines offering dynamic rates and others fixed. Most commodity types are available, depending on the airline. Bookings can be edited online, and both manual and automatic AWB number entries are supported, along with booking and shipment tracking. This combines well with more traditional freight rate management solutions for end-to-end pricing and booking.

Moving forward, AI can significantly enhance pricing efficiency for airlines by optimizing dynamic prices, thus capturing more revenue and volume. For freight forwarders, AI can help optimize markups. Airlines receive extensive data, including the Freightos Air Index (FAX), which shows worldwide average prices at the lane level. Additionally, AI tools like CompassAI can generate various air cargo reports based on region or lane, providing further insights to the end users.

"Digital is really happening, after many years of promises."

Zvi Schreiber CEO, Freightos



Arnaud Meunier Product Manager, TACT Air Cargo Solutions



The market is progressively moving away from tariffs, though airlines still publish them as a stable distribution method, typically twice a year or quarterly. This also varies greatly per region, and tariffs also play an important role in AWB Processing productivity.

IATA is now merging IATA Net Rates' key features into TACT online, therefore providing a one-of-a-kind solution, for over 135 airlines enables rates distribution, as well as bookings between airlines and freight forwarders. Freight Forwarders can access air cargo rates, including contract rates, through a secured solution.

To further connect the dots, TACT Online will further integrate with CO2 Connect for emissions data and CASS for smoother financial reconciliation. All is being explored for future data transformation and platform enhancements.



Do you have a digital solution to support air cargo distribution and are interested in contributing to our efforts? Please contact us and share your achievements.



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