

# **IATA** CARGO WEBINARS

21 April 2021

Three-Part Webinar Series

**Webinar 3: Key learnings from the ongoing vaccine distribution effort and paving the way for the future**

**Welcome**

# Key learnings from the ongoing vaccine distribution effort and paving the way for the future

**Andrea Gruber**  
Head, Special Cargo  
IATA



# IATA CARGO WEBINARS



This session is conducted under the Competition Law Compliance



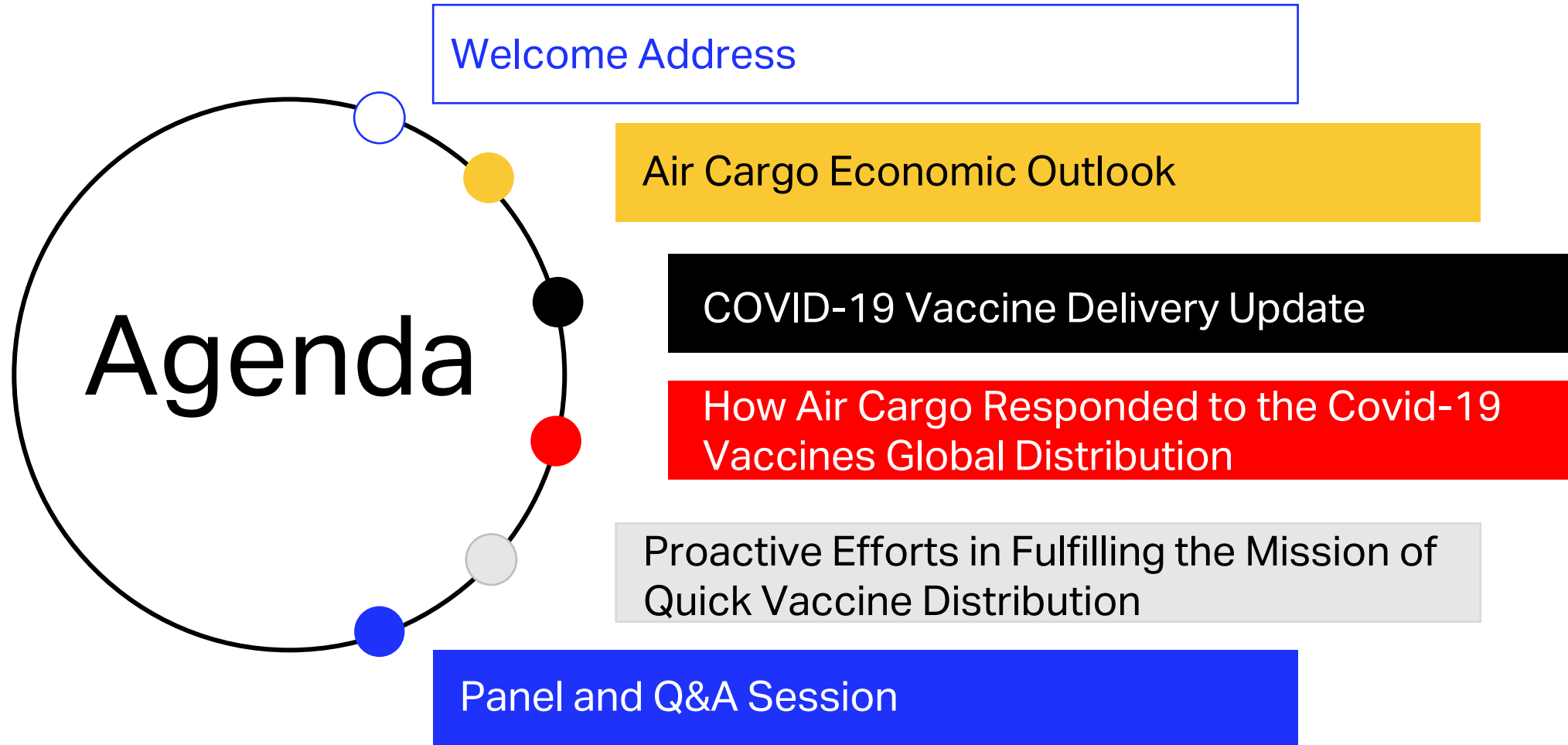
Microphones have been muted

Please submit your questions through the **Question box** and **send to Everyone**



The webinar is being recorded and will be made available afterwards, including the PPT slides.

# Transport of Vaccines and Life Science Products by Air



Speaker [biographies](#) are available on the IATA website



# Recent Economic Developments in the Air Cargo Market and the Vaccine Roll-Out

**Brian Pearce**  
Chief Economist  
IATA



# COVID-19

## Outlook for air cargo

Brian Pearce

Chief Economist

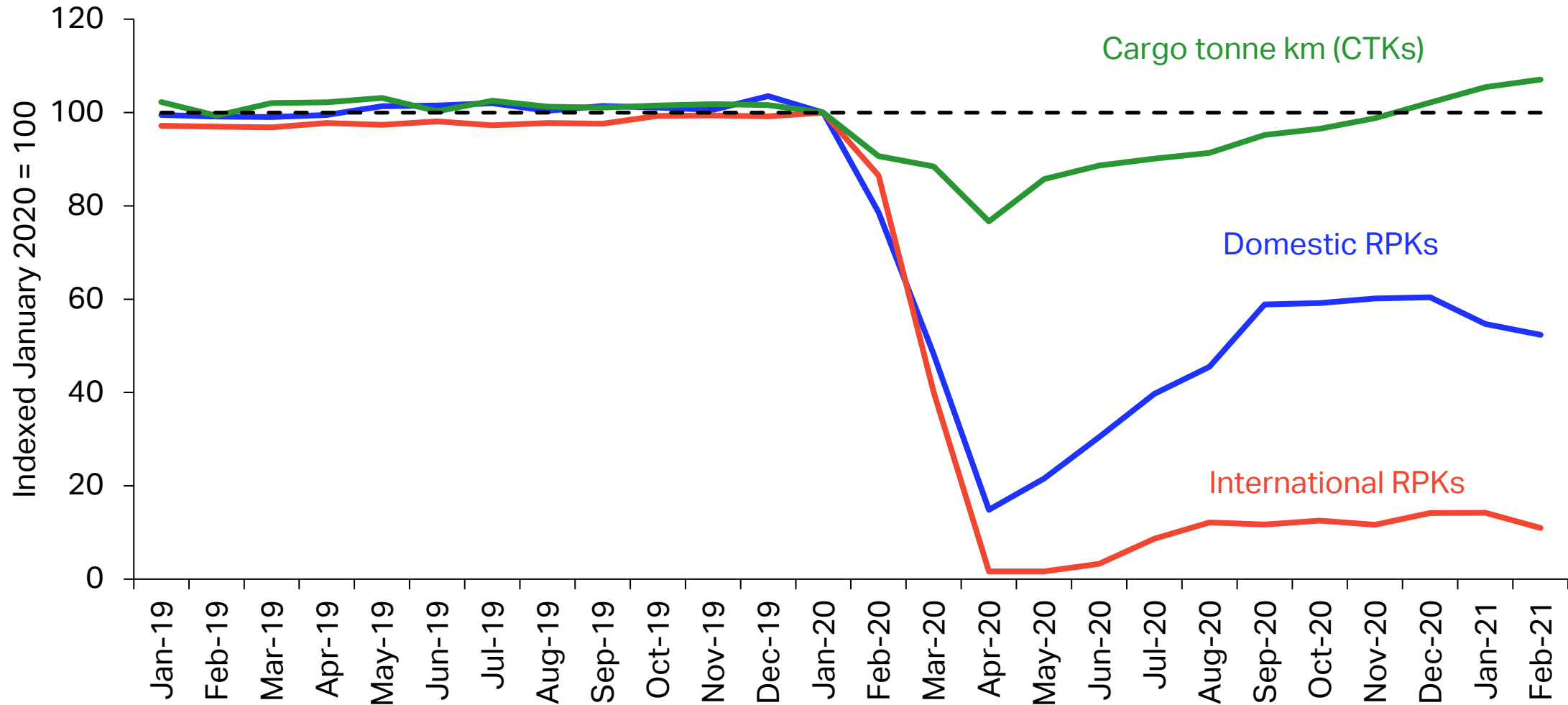
19<sup>th</sup> April 2021



# Air cargo volumes back to pre-crisis levels, unlike pax

Global RPKs fell to -75% vs Feb 2019, but cargo tonne km 9% higher

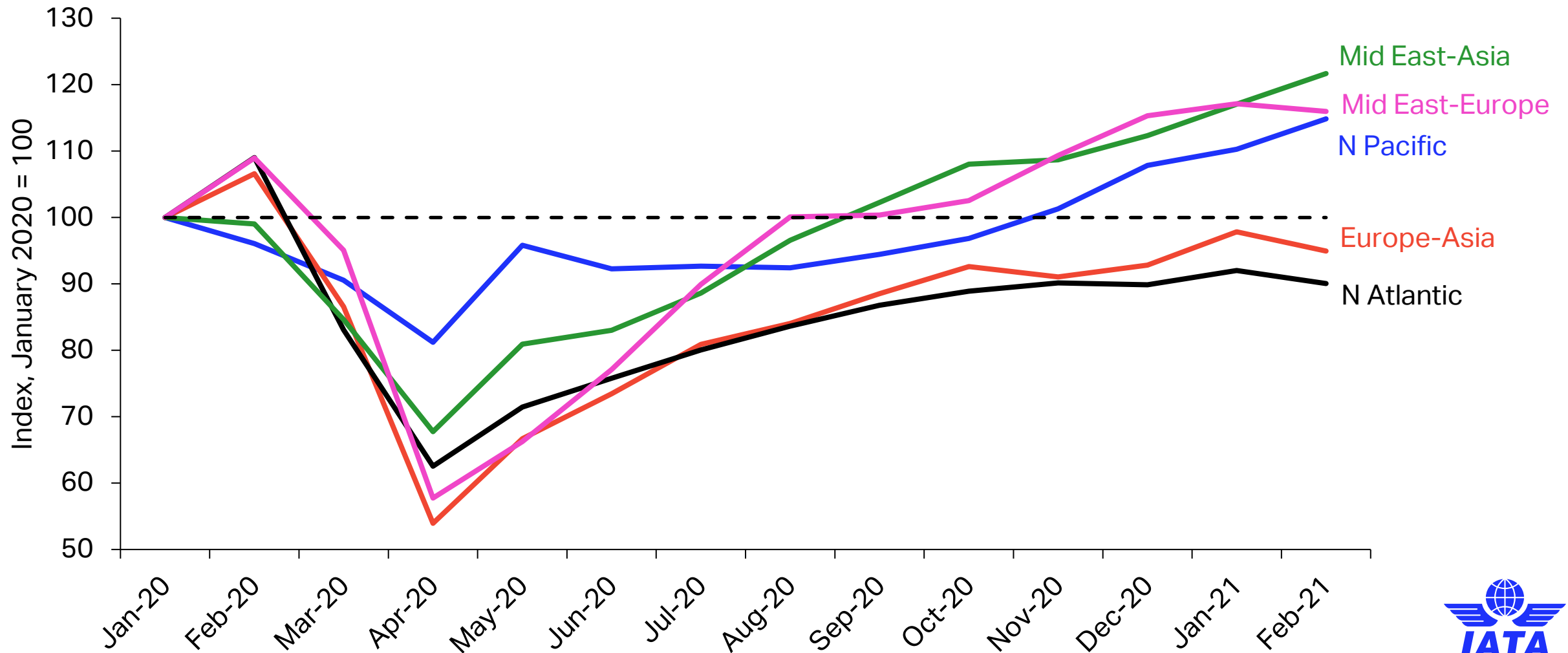
Cargo tonne km (CTK) and passenger km (RPK), Jan 2020 = 100



# But big differences between major trade lanes

## Strongest trade lanes between Asia & N America and over M East hubs

Cargo tonne km flown by major trade lane, indexed Jan 2020=100, segment basis

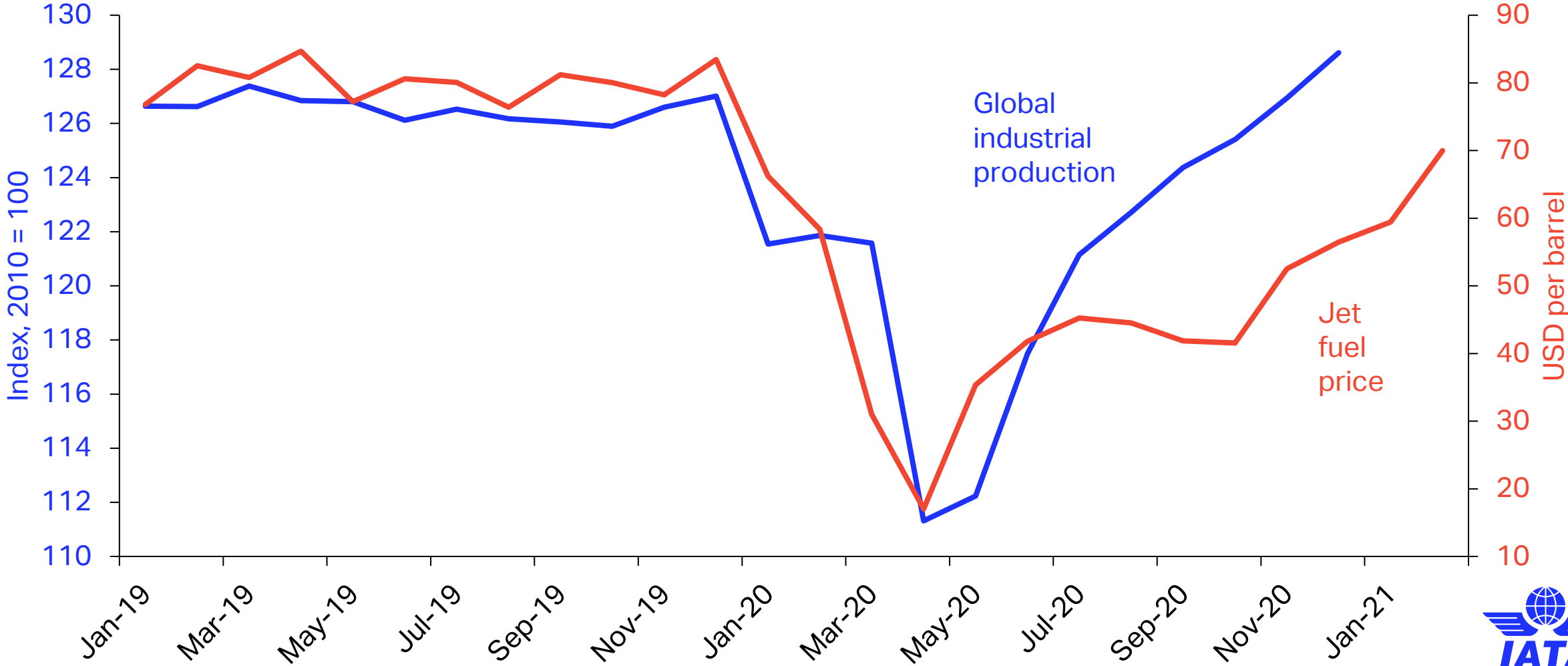




# 'V-shape' economic recovery has driven cargo demand

Global output back above pre-crisis levels but has pulled fuel costs up

Global industrial production and jet fuel prices

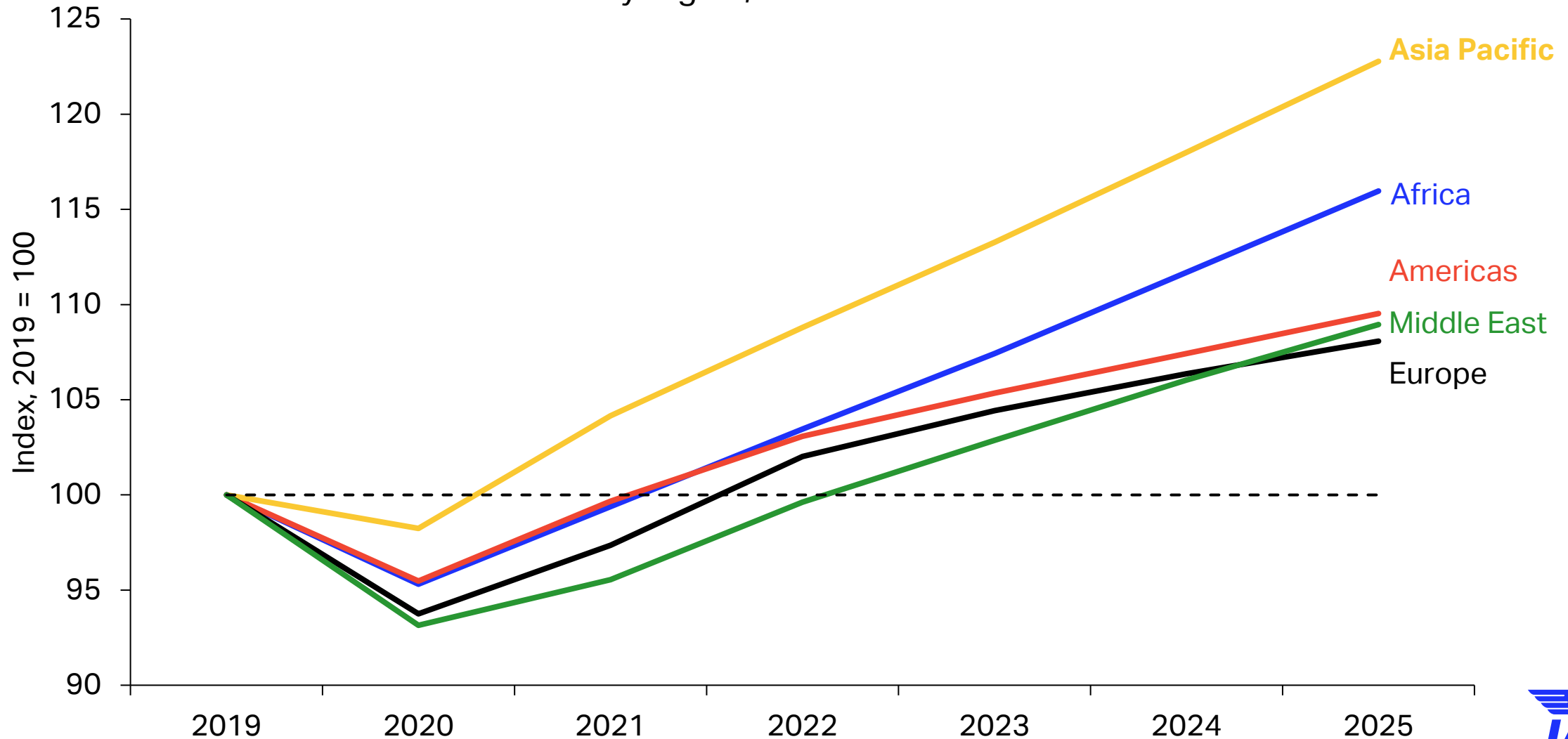


Source: IATA Economics using data from Refinitiv Datastream and Platts

# Trade lanes reflect relative economic strength of regions

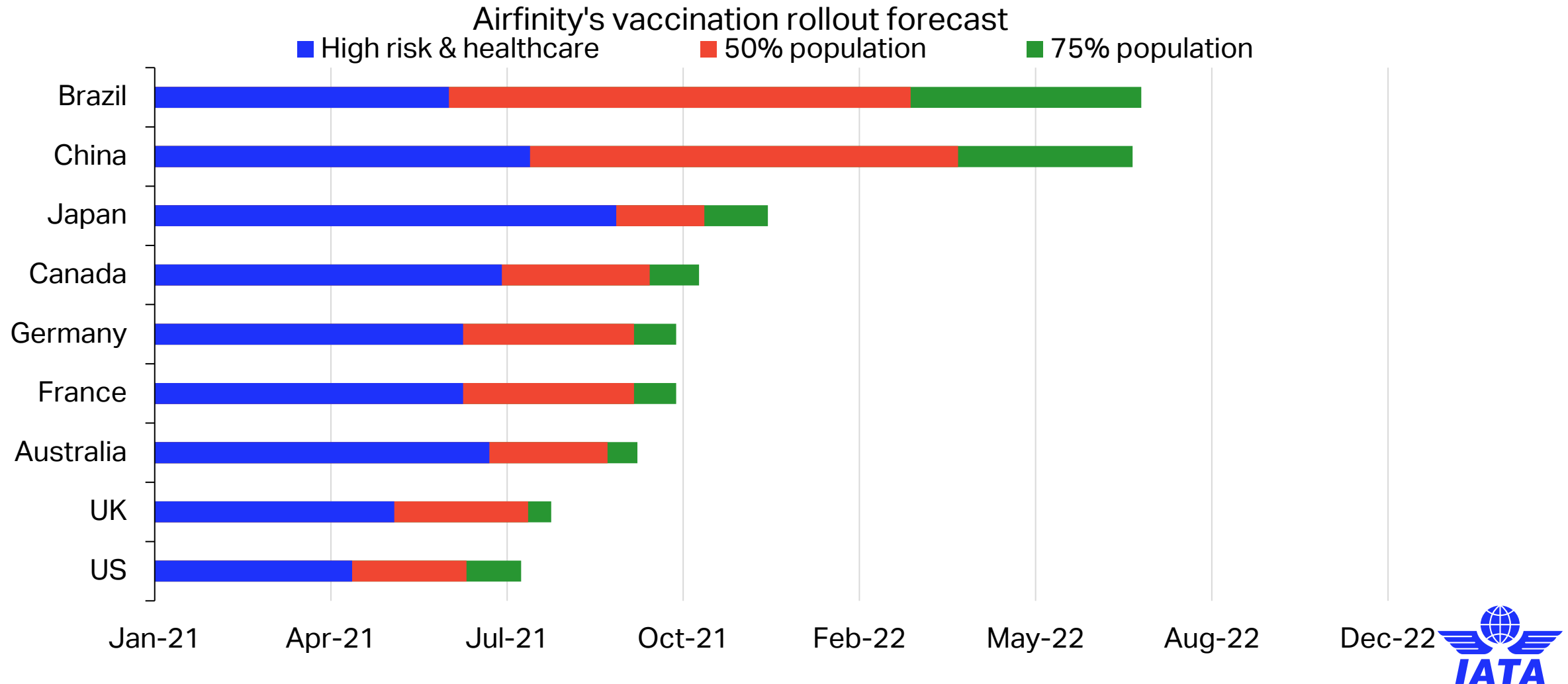
Asia and N America relatively strong vs Europe. Outlook +ve for all.

GDP by region, indexed to 100 in 2019



# Vaccine rollout brings recovery but large differences

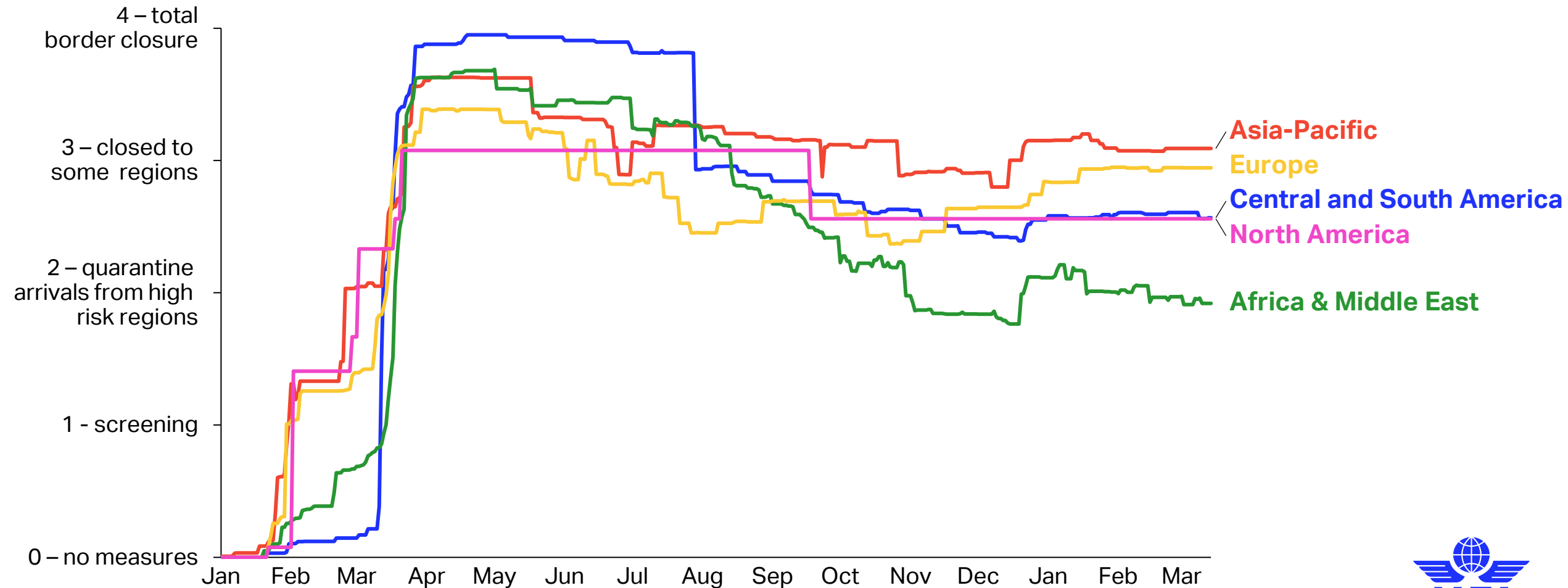
## Widespread vaccination only in advanced economies by late 2021



# Governments have mostly kept borders closed to travel

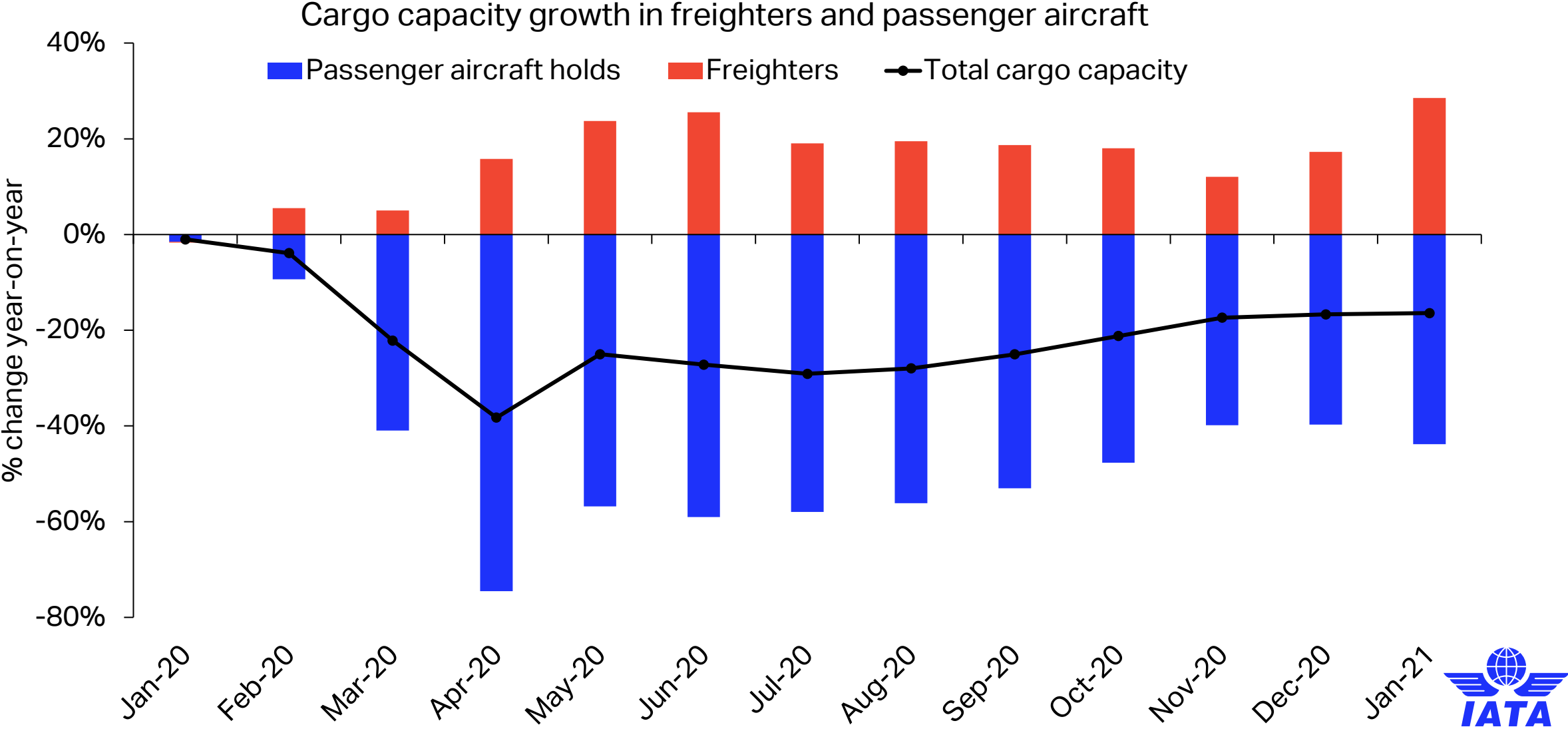
## Travel restrictions tightened in January keeping international travel low

International travel stringency index weighted by population (Jan 2020-March 2021)



# Cargo faces a continuing capacity shortage

## Freighters highly utilized but much capacity in passenger fleet is grounded

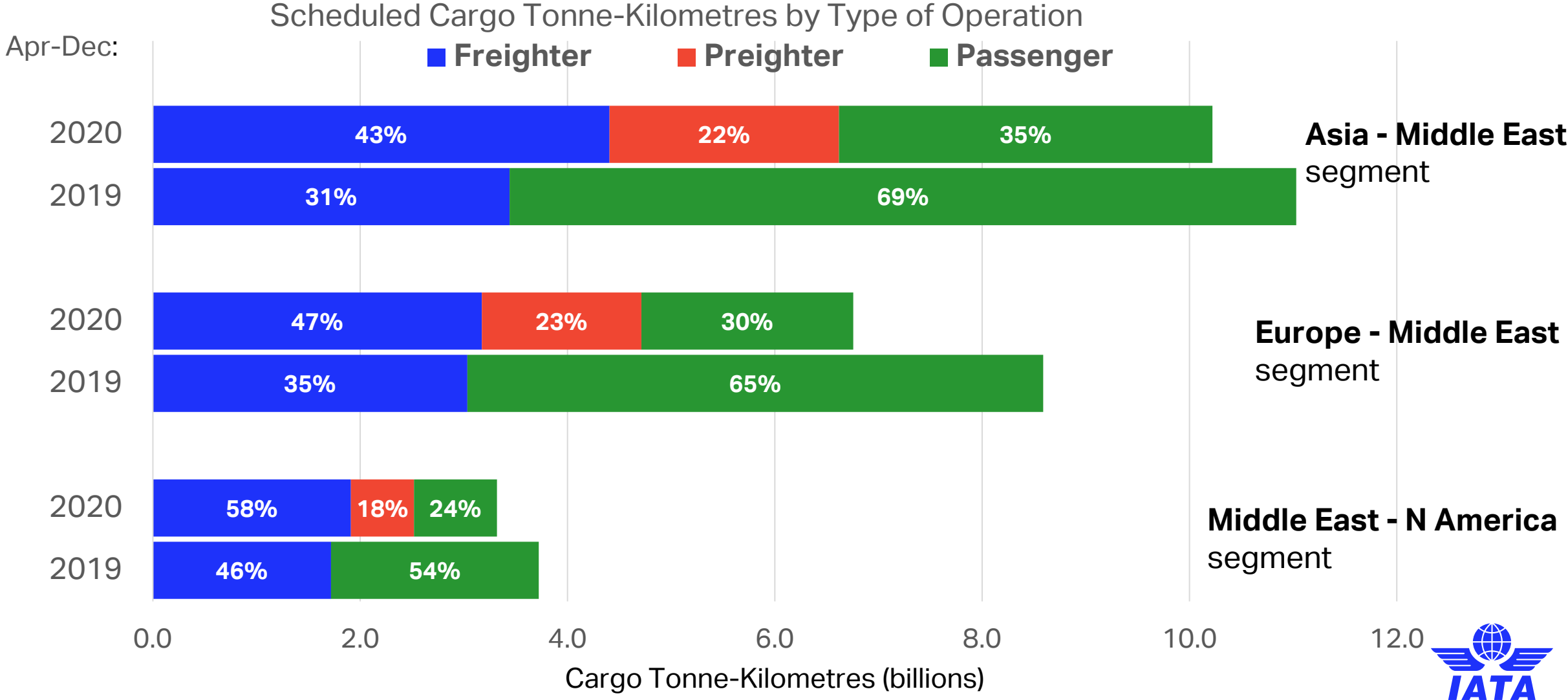


Source: IATA Economics using data from IATA Monthly Statistics



# 'Preighters' have played important role on some markets

More than one fifth of cargo carried by preighters on top ME trade lanes

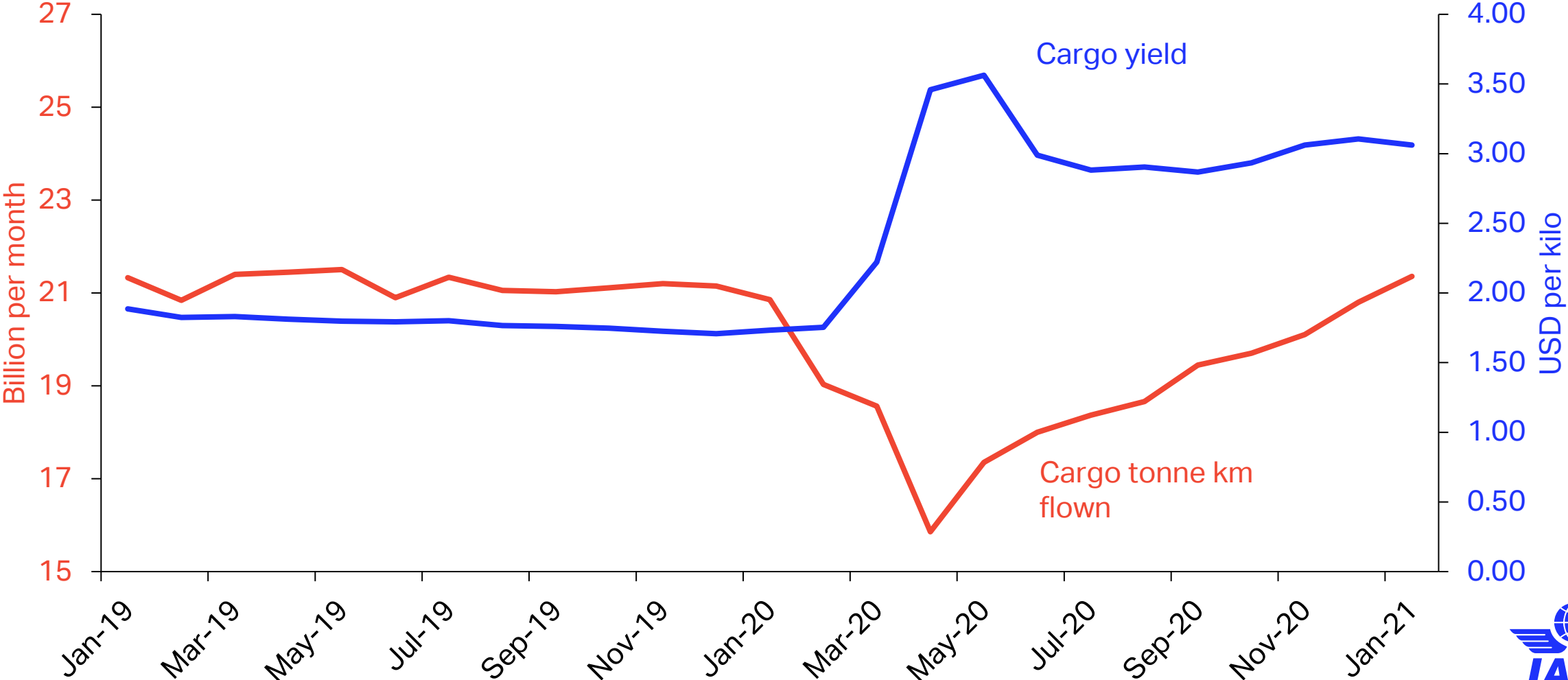


Source: IATA Economics using data from IATA Monthly Statistics

# Capacity shortage has elevated yields and revenues

## Slow opening of borders to travel likely to support cargo strength in 2021

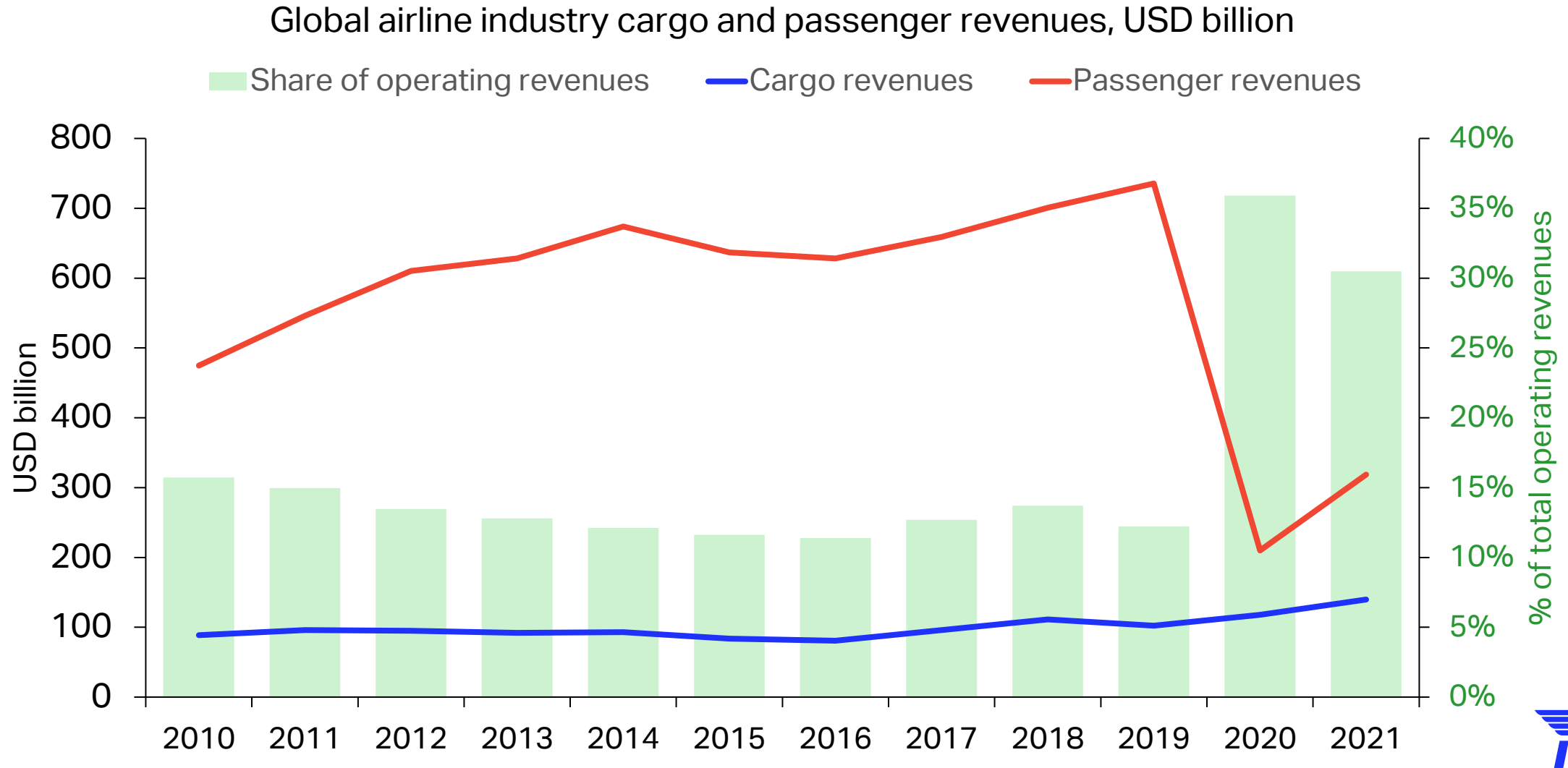
Cargo yields (inc surcharges) and cargo tonne km flown



Source: IATA Economics using data from IATA Monthly Statistics and CargoS

# Cargo is now one-third of the typical airline business

In the past air cargo was marginal at 10-15% revenues. Now 30-35%.



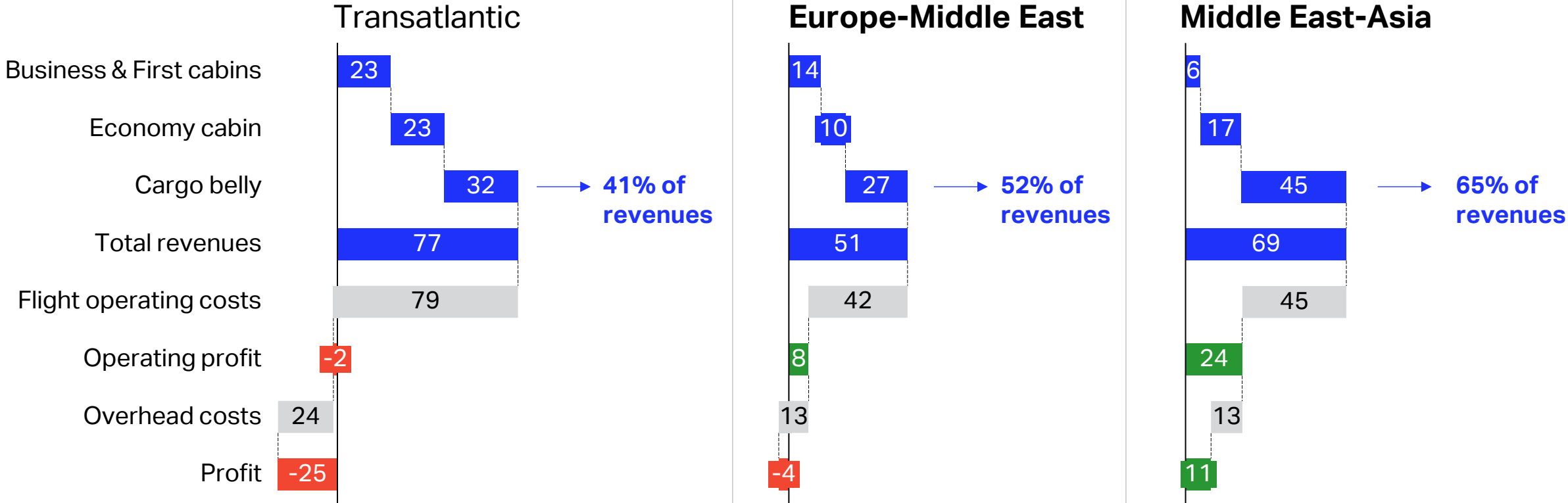


# Cargo has kept some long-haul services cash positive

## Strong cargo replaced loss of high yield passengers on some markets

Estimated economics of an average B777-300 operation on different route areas in Mar-Aug 2020, (USD '000s)

■ Revenues ■ Profit  
■ Costs ■ Loss



Source: IATA Economics analysis based on data from SRS, DDS, ACMG, Cargo IS, IATA Statistics, Platts

# Contacts

[economics@iata.org](mailto:economics@iata.org)

[www.iata.org/economics](http://www.iata.org/economics)



# COVID-19 Vaccine Distribution - COVAX Status Update

**Mounir Bouazar**  
COVID-19 Vaccine Global Logistics Lead  
**UNICEF**





# COVID-19 vaccine delivery update

—  **21 April 2021**  —

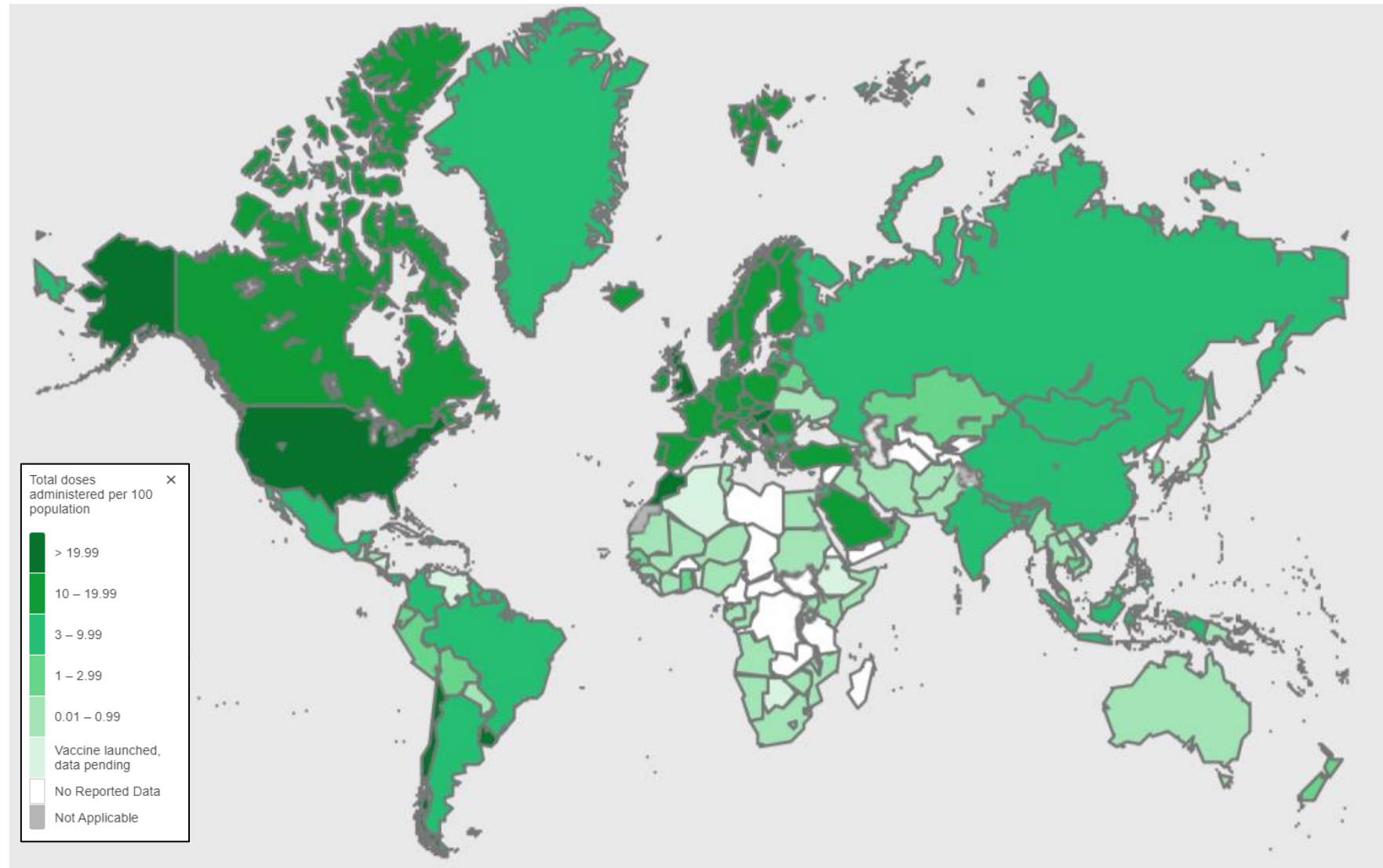
# COVAX

CEPI



ACTaccelerator  
ACCESS TO COVID-19 TOOLS

# Total doses administered per 100 population



SOURCE: WHO COVID-19 Dashboard at <https://covid19.who.int/>

Note: The designations employed and the presentation of these materials do not imply the expression of any opinion whatsoever on the part of WHO concerning the legal status of any country, territory or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. Dotted and dashed lines on maps represent approximate border lines for which there may not yet be full agreement.

## ADVOCACY ACTION – UNICEF Exec. Director Statement – 6 Apr 2021

“We need speed and simplicity to remove barriers to the acquisition, manufacture and distribution of COVID-19 vaccines globally”

### Three urgent actions:

- **Simplify Intellectual Property Rights (IPR) through voluntary and proactive licensing by IPR holders.** UNICEF calls on governments to build on and increase recent manufacturing partnerships and supports proactive partnership and cooperation between manufacturers.
- **End vaccine nationalism.** Governments should remove direct and indirect export- and import-control measures that block, restrict or slow down exports of COVID-19 vaccines, ingredients and supplies
- **Ensure equal access to vaccine supplies.** Governments that have contracted to receive more ‘future doses’ than required to vaccinate their entire adult populations this year, should immediately loan, release or donate most or all excess contracted doses for 2021 to COVAX. Countries with a sufficient, current supply of manufactured doses should consider donating at least 5% of their available manufactured doses right away, and commit to making further contributions on a continued, rolling basis throughout the year, scaling up their contributions in line with rising supply.

# Map:

## unicef | Implementation Overview

Map

Table

The Implementation Overview dashboard presents allocated COVID-19 vaccine doses, contracted with suppliers, on shipment and delivered to countries and territories.

Doses allocated, through May  
**251,625,450**

Doses Ordered, cumulative  
**119,656,570**

Doses released for shipment, cumulative  
**42,777,370**

Doses on shipment in transit  
**253,400**

Doses Shipped, cumulative  
**40,787,140**

Countries and territories, doses shipped  
**117**

Region  
All

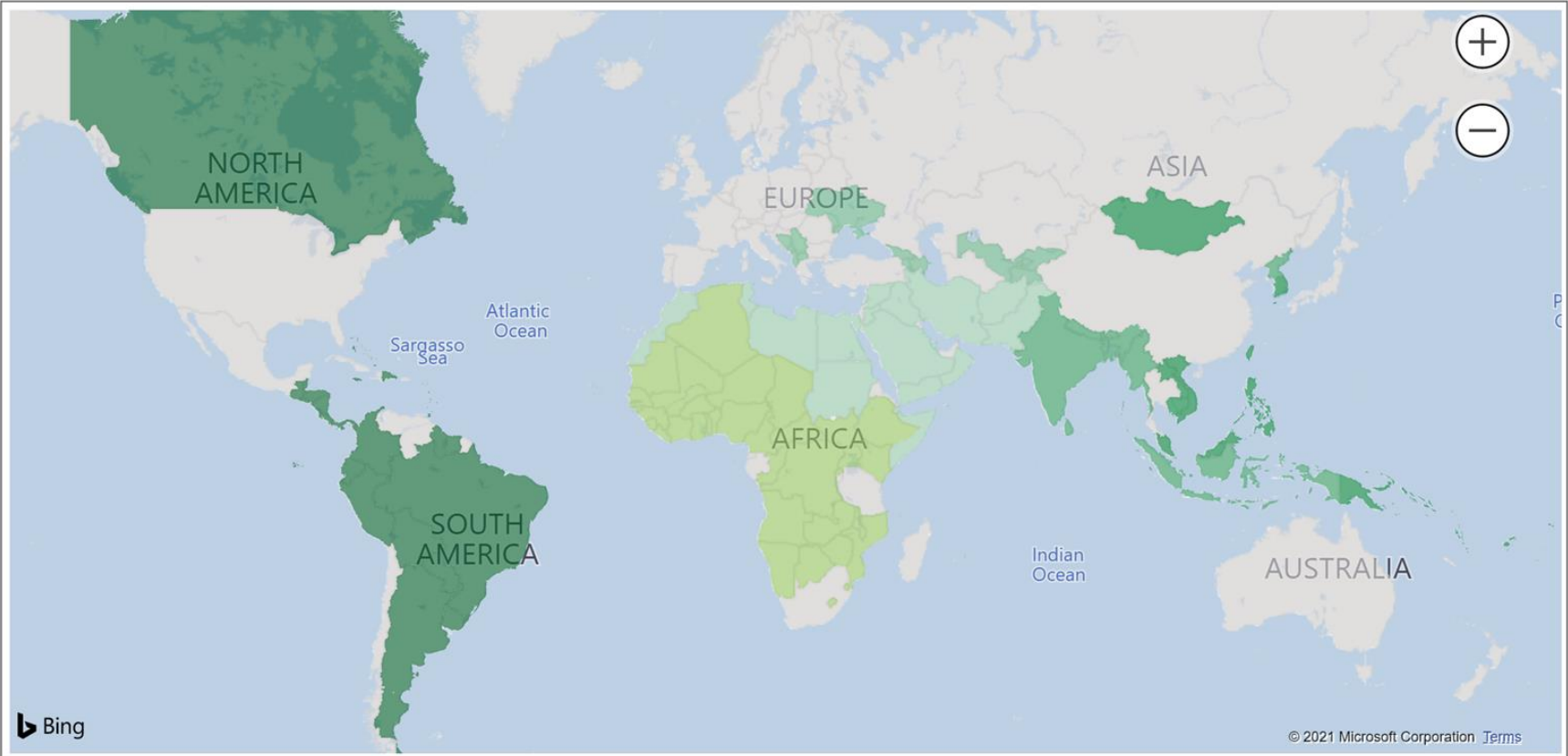
WHO countries and territories  
All

Vendor Name  
All

AMC countries and territories  
All

Planned shipments

WHO countries and territories	Planned Shipment EndDate
Mongolia	21/04/2021
Syrian Arab Republic	21/04/2021
Syrian Arab Republic	22/04/2021
Malaysia	23/04/2021
Honduras	26/04/2021



The information displayed reflects the status of deliveries based logistics information in a highly dynamic context and subject to change. This visual may not display the most recent data at all points.

Data last refreshed on : 20/04/2021

# Table:

## unicef Implementation Overview

[Map](#)
[Table](#)

Doses allocated, through May	Doses Ordered, cumulative	Doses released for shipment, cumulative	Doses on shipment in transit	Doses Shipped, cumulative	Countries and territories, doses shipped
251,625,450	119,656,570	42,777,370	253,400	40,787,140	117

Region

- Select all
- Africa
- Americas
- Eastern Mediterranean
- Europe
- South-East Asia
- Western Pacific

WHO countries and territories

All

AMC countries and territories

All

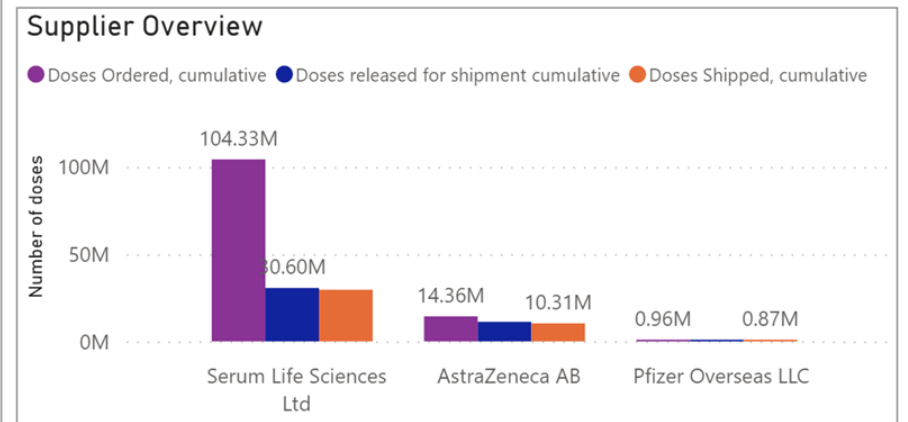
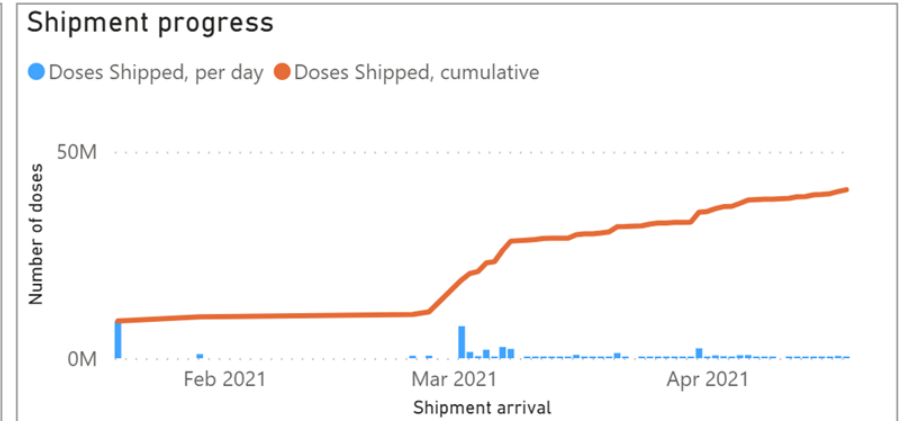
Vendor Name

All

Material Number

All

WHO Countries and territories	Doses Allocated	Doses Shipped, cumulative	Allocated doses shipped, in %
Andorra	26,400	26,400	100.00%
Dominica	28,800	28,800	100.00%
Nauru	7,200	7,200	100.00%
Saint Kitts and Nevis	21,600	21,600	100.00%
Tuvalu	4,800	4,800	100.00%
Jordan	477,750	290,400	60.78%
Antigua and Barbuda	40,800	24,000	58.82%
Tonga	43,200	24,000	55.56%
Albania	143,400	79,200	55.23%
Grenada	45,600	24,000	52.63%
Saint Vincent and the Grenadines	45,600	24,000	52.63%
Georgia	160,020	72,450	45.28%
El Salvador	417,480	181,080	43.37%
West Bank and Gaza	308,400	133,440	43.27%
Republic of Moldova	233,190	86,970	37.30%
Bermuda	26,400	9,600	36.36%
Rwanda	947,580	342,960	36.19%
<b>Total</b>	<b>251,625,450</b>	<b>40,787,140</b>	<b>16.21%</b>

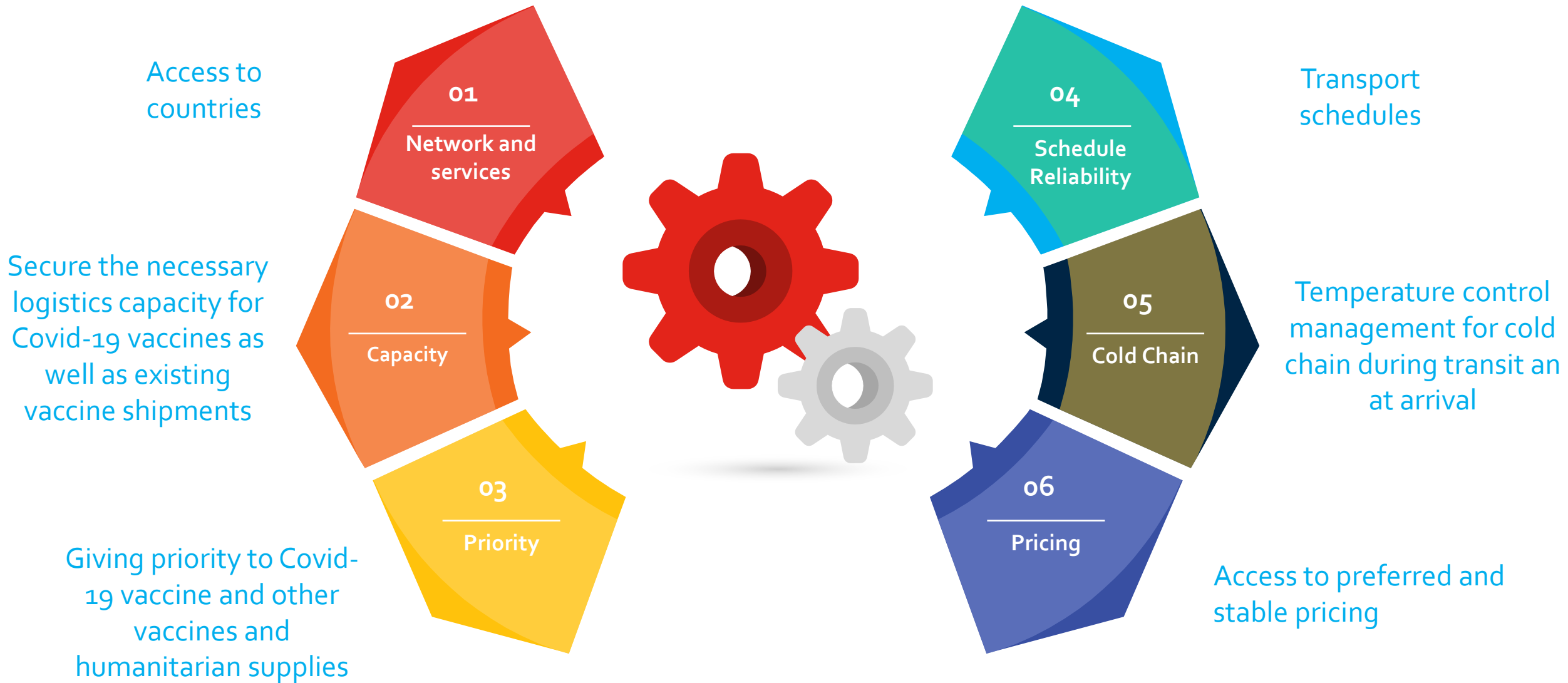


The information displayed reflects the status of deliveries based logistics information in a highly dynamic context and subject to change. This visual may not display the most recent data at all points.

Data last refreshed on : 20/04/2021



# Logistics industry contribution to UNICEF/COVAX efforts



# Next steps and future engagement with airlines

- Tri-partite collaboration for planning preparedness activities with the COVAX logistics control tower:
  - Capacity
  - Services availability
  - Flights information sharing
  - Specialized targeted solutions
- Airlines to express interest in supporting UNICEF/PAHO through engagement on logistics preparedness or partnerships / In kind donations
- Commercial engagement will continue to be managed through our global 3PLs

Thank You



# How Air Cargo Responded to the Covid-19 Vaccines Global Distribution

**Jaisey Yip**  
Cargo & Logistics Development  
**Changi Airport**





# How air cargo responded to the Covid-19 vaccines global distribution

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# At the beginning, there was an unprecedented level of urgency and uncertainties in the pharma world impacting logistics

## 1. Fast-track development of Covid-19 vaccines

- 4x acceleration than any preceding vaccines

## 2. Many vaccine manufacturers in the race

- Over 250 vaccines<sup>1</sup> in development

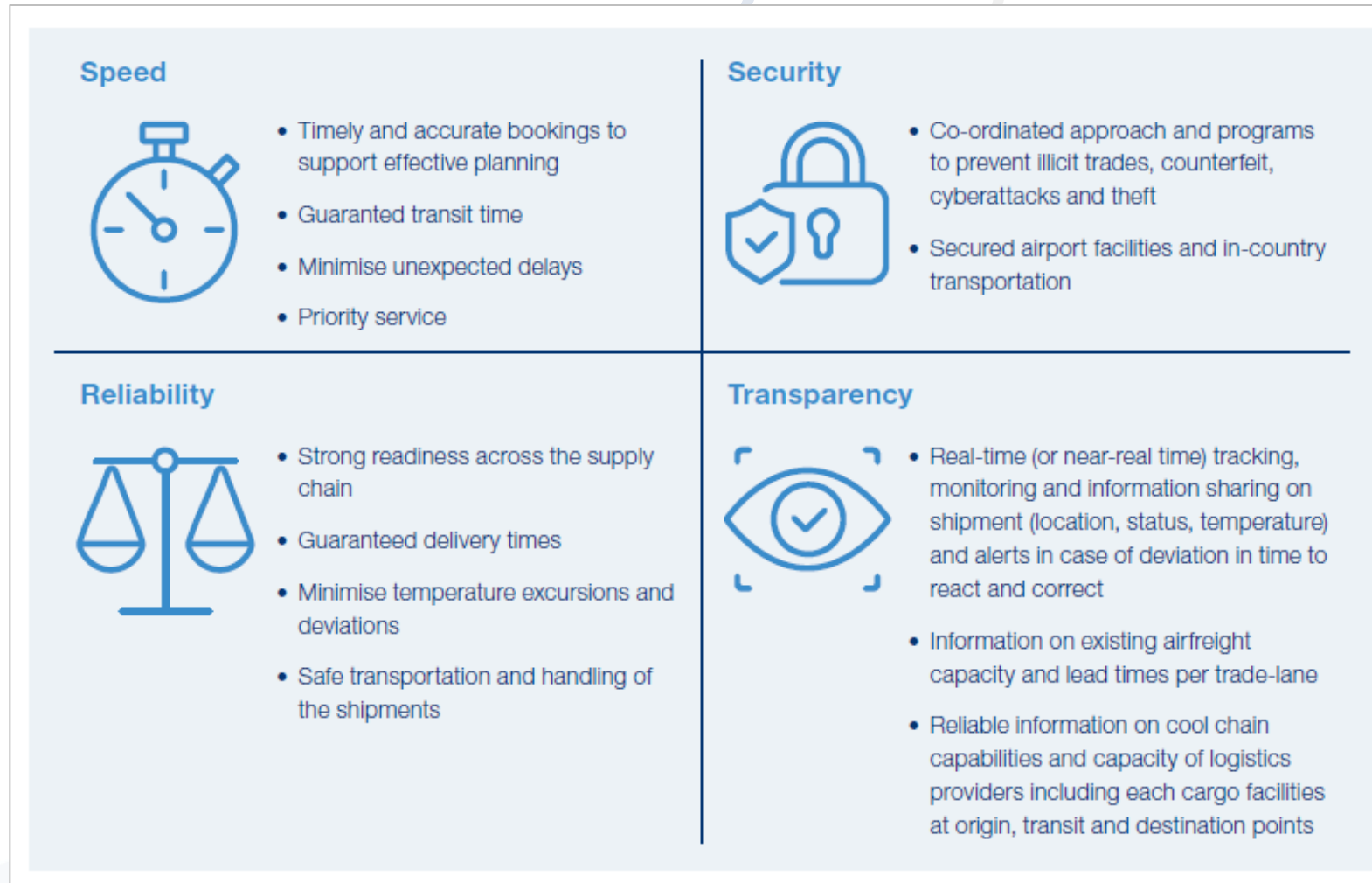
## 3. Many types of vaccines in the race

- 10 different vaccine platforms<sup>1</sup>

- **Limited time for logistics** players to strategize, invest, deploy adequate infrastructure and develop required skills and processes
- **Long list of unknowns:** packaging, containers (active or passive), use of dry-ice or not, transportation and handling conditions etc.
- Little information on manufacturing production and schedule, so **no possibility to identify and prepare the trade lanes and air capacity**

Source: World Health Organisation

# Yet, the global Covid-19 vaccine distribution mission demands air cargo to deliver in the highest degree of *Speed*, *Security*, *Reliability* and *Transparency*



# The air cargo industry had a jittery start when preparing for the first Covid-19 vaccines approval


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World

## The World's Supply Chain Isn't Ready for a Covid-19 Vaccine

By [Brendan Murray](#) and [Riley Griffin](#)  
July 25, 2020, 2:00 AM EDT

- ▶ Freight companies say they need a coordinated strategy fast
- ▶ Air cargo capacity has shrunk and shipping costs are elevated



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CALIFORNIA TOPS NEW YORK AS STATE WITH MOST CONFIRMED COVID CASES

## Top Concerns of Covid-19 Vaccines Handling and Transportation



Source: Project Sunrays

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# Project Sunrays, a joint initiative launched by TIACA and Pharma.Aero

- Create **transparency** between pharma shippers and air cargo professionals
- Deliver useful **guidelines** for the airfreight industry to get ready to handle, store, transport and deliver future Covid-19 vaccines



A joint steering group composed by Board members from TIACA and Pharma.Aero

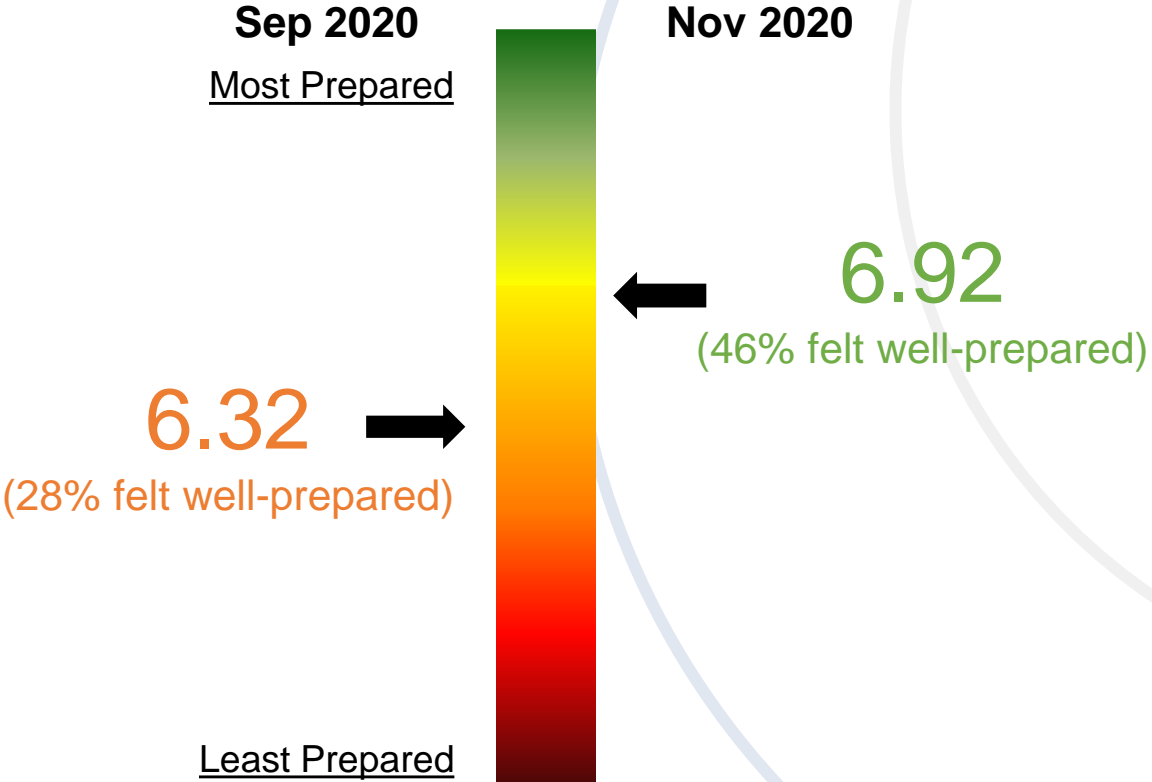
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# With information availability over time, the air cargo industry felt more prepared with Covid-19 vaccines handling and transportation

## Global Air Cargo Industry Readiness

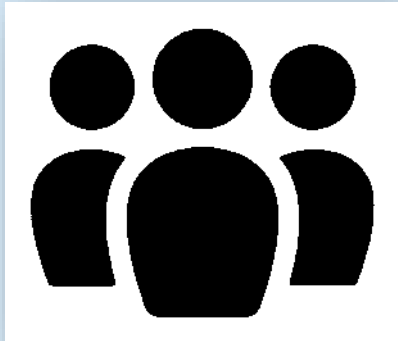


- Airports and ground handlers scored the lowest)
- Ground handlers' score was most improved

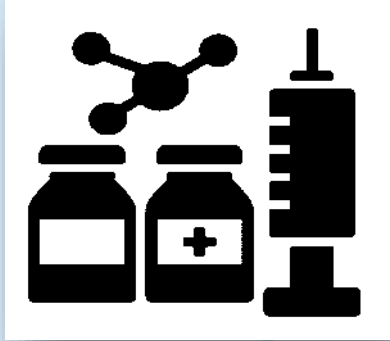
Source: Project Sunrays Air Freight Readiness Survey  
Respondents which felt very well prepared, scored 8, 9 or 10 to the question "how well-informed and prepared is your organization in the global air transportation of COVID-19 vaccines"

# Effective distribution requires open communication and strong collaboration across the air cargo supply chain

## 'Winning Formula' for Respondents with Highest Readiness Score



**Dedicated Team**



**Collaboration with  
Vaccine Manufacturers**



**Collaboration with  
Supply Chain  
Partners**

Source: Project Sunrays Air Freight Readiness Survey

# Several air cargo communities have since established joint task forces as a way to strengthen collaboration at local level



**BRUcure Task Force**



**YEG CEIV Cargo Community Ready Response**



**HKIA Community Task Force for COVID-19 Vaccines Handling**



**MIAVAC Task Force**



**Changi Ready Task Force**



**Hope Consortium**

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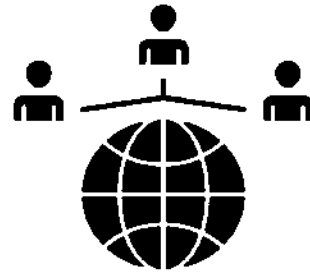
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# In the task force formation, air cargo communities highlighted and underscored five key imperatives



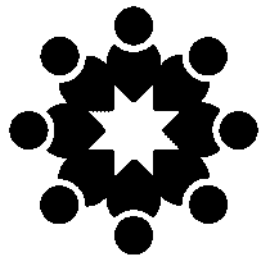
**Clear local air cargo community objectives**



**Equal importance with global collaboration**



**Recognition that the first vaccines are just the beginning**

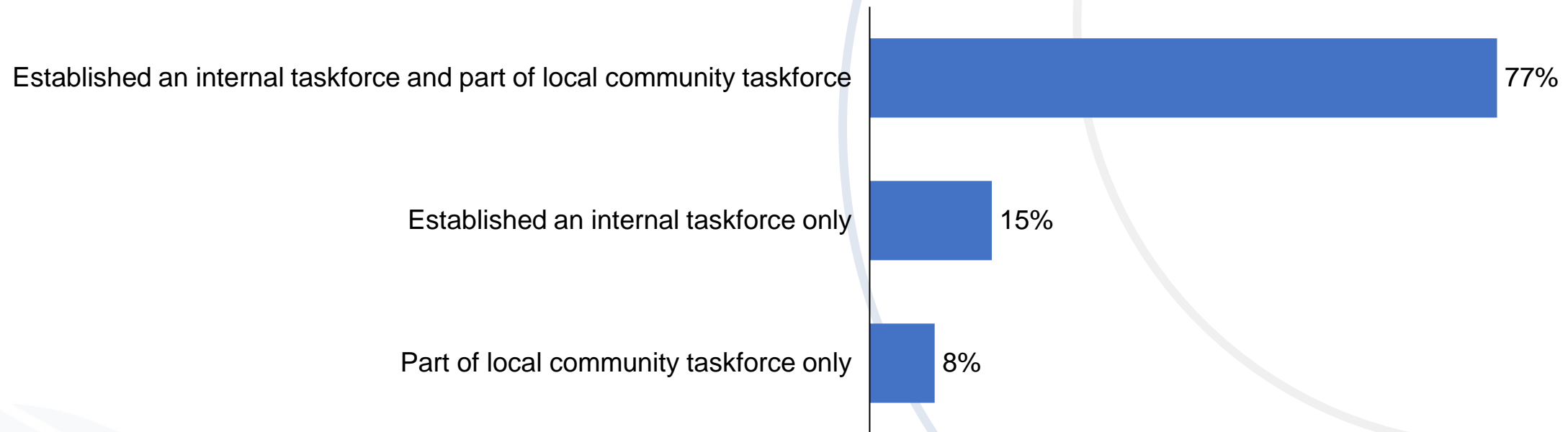


**Inclusive organized structure**



**Build collaboration and trust**

# Majority of our members, which have started handling Covid-19 vaccine shipments, are already part of an internal and local air cargo community task force



Source: Pharma.Aero's Member Survey April 2021 (based on respondents which have handled actual Covid-19 vaccine shipments)

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# Action plans and measures implemented by air cargo stakeholders



## Speed

- Assign parking bays close to cargo terminals
- Expedited custom clearance procedures
- Streamlined handling processes across entire air cargo community



## Security

- Security risk assessment for Covid-19 vaccine shipments
- Auxiliary police deployed for apron transportation
- Police escort from airport to warehouse



## Reliability

- Cold chain capacity mapping across airport environment
- Unique commodity code for Covid-19 vaccines and COVAX shipments
- Conduct operational drills and test shipments
- Institute a Covid-19-tailored SOP guideline detailing all new and existing procedures relevant to vaccine handling, followed by validation of the airport community and issuance of Covid-19 readiness label to compliant stakeholders
- Introduction of temperature-controlled pre-clearance area for Covid-19 vaccines
- New dry ice limitations based on different sublimation rates



## Transparency

- Pre-shipment notifications
- Visibility on availability and cost of dry-ice
- Track and trace from airport to airport, increased data metrics, piece-level tracking
- A community data-sharing solution to offer full transparency of all pharma shipments

Source: Project Sunrays Second White Paper and Pharma.Aero's Member Survey April 2021

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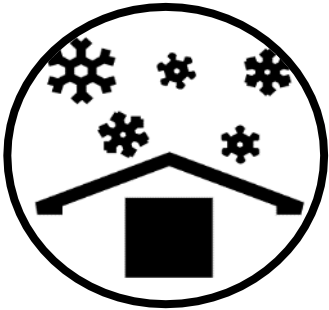
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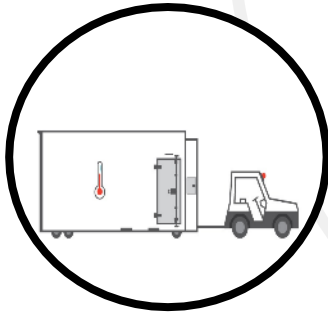
# Some of our members have made new investments on cold chain infrastructure and capabilities



**Cold Rooms**



**Airside Staging Area**



**Cool Dollies**



**Temperature loggers and  
Data-sharing Platforms**

Source: Pharma.Aero's Member Survey April 2021



# Current risks and observations



- Vaccine production challenges
- Volatile delivery schedule
- Lack of full visibility on packaging, dry ice requirements, shelf life of packaging
- Ad-hoc adjustments to flight schedules
- Collaboration amongst industry stakeholders could still improve

# Following Project Sunrays, Pharma.Aero and TIACA will be jointly rolling out a regular industry newsletter

**Work-In-Progress**

**the VAC scene**

PHARMA AERO | TIACA

Volume 1

<b>11,2 Billion</b> Approved Vaccines Production	<b>22</b> Vaccine Producing Countries / manufacturing sites	<b>7 Billion</b> Signed Country Deals	<b>91%</b> Transport Temperature +2 to +8 °C	<b>291</b> Ongoing Clinical Trials	<b>680 million</b> Total population with at least 1 vaccine
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**Foreword**

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**Updates on the Covid-19 vaccine global production**

Company name /logo	Vaccine name	Production sites	Approved production	Signed deals	Approved countries
AstraZeneca	AZD1222	16	3 Billion	2.420.100.000	83
Biontech	BNT162b2	5	2,5 Billion	1.556.970.075	81
Moderna	mRNA - 1273	5	700 Million	803.000.000	44
Sinopharm	BBIBP-CoV (Beijing)	2	1 Billion	147.000.000	30
Sputnik V	Sputnik V	5	390 Million	303.987.500	59
CanSinoBio	Ad5-nCoV	3	500 Million	28.360.000	4
Covishield	Covishield	1	200 Million		32
Bharat Biotech	Covaxin	2	150 Million	26.000.000	5
Janssen	Ad26.COV2.S	7	1 Billion	1.035.000.000	37
Sinovac	Coronavac	4	1,75 Billion	480.220.000	20
RBD-Dimer	RBD-Dimer	1	1 Million	0	2
BEKTOP	EpiVacCorona	1	5 Million	0	2

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***‘A Chain Is Only as Strong as Its Weakest Link’***

**Thank you**

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# Proactive Efforts in Fulfilling the Mission of Quick Vaccine Distribution

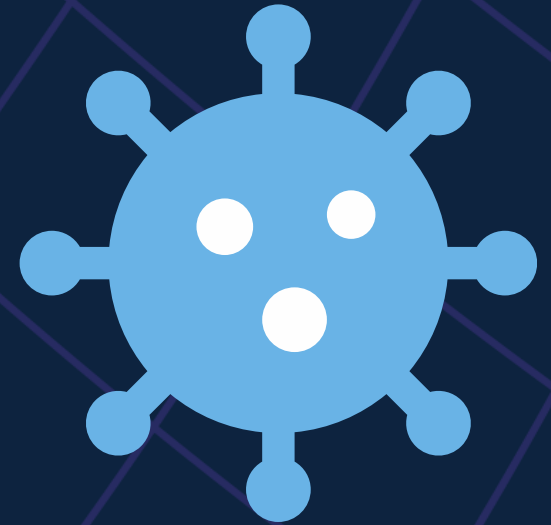
**Jennifer Haigh**  
Head of Specialty Products, Americas  
**United Cargo**



# Proactive efforts in fulfilling the mission of quick vaccine distribution

**Jennifer L Haigh**

Head of Specialty Products, Americas  
United Cargo



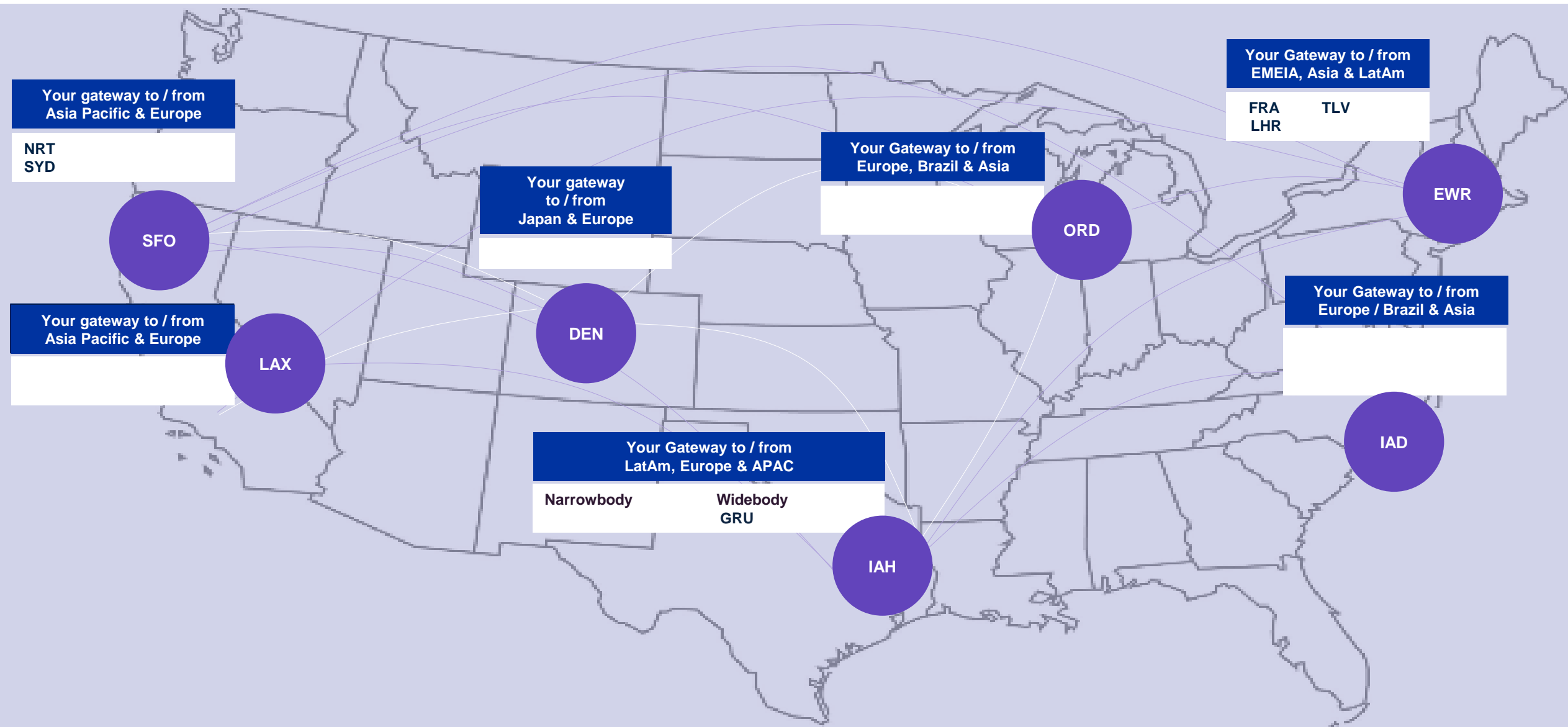
# COVID-19 impact for an airline

- Worst case scenario based upon 9/11
- Passenger demand fell by almost 100%
- Many talented employees were furloughed across the industry, while led to issues with staffing and hours of operation
- Remain compliant with complex regulatory framework
- Unpredictability
- Distancing; not prepared
- Cost focus (high fixed costs)
- Built a “skeleton” schedule/network from scratch
- Increased supply chain cost



# United's international service changed drastically with COVID-19 shutdowns

We reduced service in late March from 5,000 flights per day to only 6 international destinations last April



# Cargo keeps the supply chain moving



**Ensures  
frontline health  
works have the  
supplies they  
need**



**Cold chain  
processes  
transport  
pharma,  
medicines and  
vaccines**



**Maintains the  
flow of all goods  
to mitigate  
impact to  
commerce and  
trade**



# COVID Vaccine Readiness Task Force

## Vision statement & responsibilities

- Developed an all-encompassing plan for COVID-19 vaccine air cargo transport
- Created structures & processes
- Remained fully aligned, cross-divisional effort to maintain safe operations and provide humanitarian support
- Created a strategy to ensure other life-saving flows were not affected



# COVID Vaccine Readiness Task force

Started as a team within Cargo, but quickly expanded across several teams at United



## Involvement from groups across the airlines

### Teamwork & collaboration

- NOC
- Flight / Tech Ops
- IT
- Crewing
- Scheduling
- Security
- Airport Ops
- Corp Comm
- Govt
- Engineering
- E Team



## New Special Handling Codes

### CVD & CV2

- Key Prioritization
- Speed
- Security
- Highest visibility in UA



## Improving existing handling procedures

### Helps to move shipments quickly

- Deliver ASAP at destination
- Dedicated Control Tower for bookings & follow up



## Increase maximum dry ice limit

### Available on B777-200F

- Special handling code
- First vaccine charters in the world (BRU-ORD)



## Cool Storage

### Available at all key import and export locations

# A cohesive cross-functional effort to ensure safe and timely carriage of vaccines

- **CRITICAL PATH** – increase of dry ice for use on cargo charters in Q42020
  - Engineering reports
  - Inter-airline discussions
  - Policies and procedure reviews
  - Dangerous Goods review
  - Regulator discussions
  - Focused on specific aircraft type
  - Collaboration between shipper and packaging company is key



## 2 SHCs available for COVID-19 related shipments

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- COVID-19 SHC codes were created to ensure visibility across all United divisions
  - Cargo, Airport Ops, Flight Ops, Contact Centers...a joint team effort!
- SHC codes give shipments higher boarding priority

SHC Code	Type of Shipment	Boarding Priority
<b>CVD</b>	COVID-19 vaccines	Highest
<b>CV2</b>	COVID-19 support materials such as test kits, PPE, etc.	High

# Remember: CV2 and traditional pharma shipments are important too!

While all the attention is focused on CVD vaccines now, CV2 shipments are also critically important to fighting the pandemic and saving lives.

- While vaccinations are increasing in the US, most people in the rest of the world will not have any access to COVID vaccines until the summer or fall
- Until the vaccines come, they must also fight new versions of COVID such as the Brazil variant, which is more deadly and contagious
- **CV2 shipments are medicines that can fight variants and save lives! Treat them with care.**

## Brazil plunges into crisis as a second wave and deadly new variant overwhelm hospitals

Pharma

**Eli Lilly COVID-19 antibody combo aces study, cutting hospitalizations and deaths by a whopping 87%**

## Antibody 'cocktails' effective against SARS-CoV-2 variants



**Brazil's Nurses Are Dying as Covid-19 Overwhelms Hospitals**

# Looking forward

# Key lessons learned

- Cooperation within the entire airline is key.
- Be(come) an agile and flexible organization.
- We are not all “in the same boat”, but we are all in the same storm.
- Airlines & forwarders seem to be prepared for vaccine movements
- Discussion between the airlines, forwarders and pharma companies are key
- Every vaccine shipment keep on require a lot of attention and dedication.
- Communication with all stakeholders is crucial (*GHA's, airports and regulators play a big role for the entire industry*)
- The airline industry will bounce back! (*Although it will be a long & painful process*)



# Keeping the global supply chain moving

Since March 19, 2020, United has moved...



**937M+ lbs.**

of cargo moved on both passenger and cargo-only flights



**146M+ lbs.**

of critical medical shipments moved overall



**4M+ lbs.**

of military shipments moved overall



**11,900+**

cargo-only flights operated worldwide



**628M+ lbs.**

of cargo moved on cargo-only flights alone



# Vaccine transportation effort is a **global & industry-wide** effort

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The airline industry will only return to “normal” once we reach herd immunity. We have an **obligation** to support this effort as quickly and efficiently as possible!

As an industry, **we must work together** to keep these vaccines moving and do our part to bring this crisis to an end.



**Thank you!**



# Panel and Q&A

Please use the Q&A box and send to "Everyone"



**Andrea Gruber**  
Head, Special Cargo  
**Moderator**

**Manu JACOBS**

Managing Director Specialty Products, **United Cargo**

**Jaisey YIP**

Cargo & Logistics Development, **Changi Airport**

**Mounir BOUAZAR**

COVID-19 Vaccine Global Logistics Lead, **UNICEF**

**Eddy WEYGAERTS**

Transportation Manager, **Pfizer**

**Terence SELL**

Global Pharma Product Manager, Air Logistics, **K&N**



## Wrap up & Closing Remarks

**Andrea Gruber**  
Head, Special Cargo  
IATA



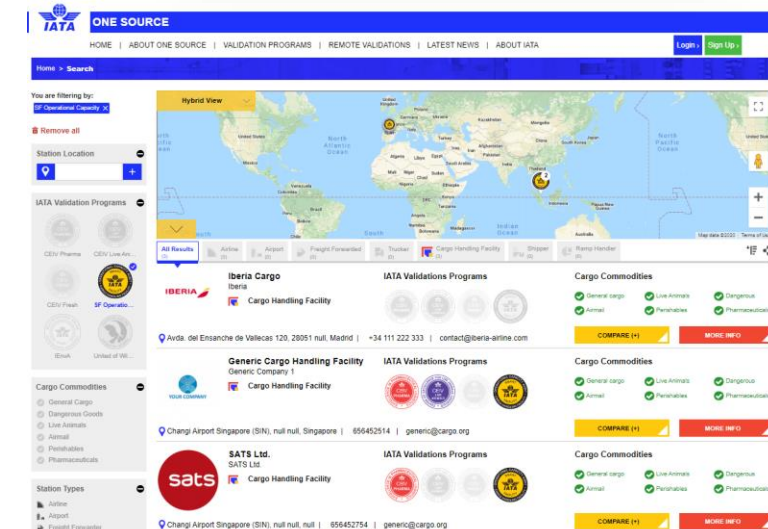
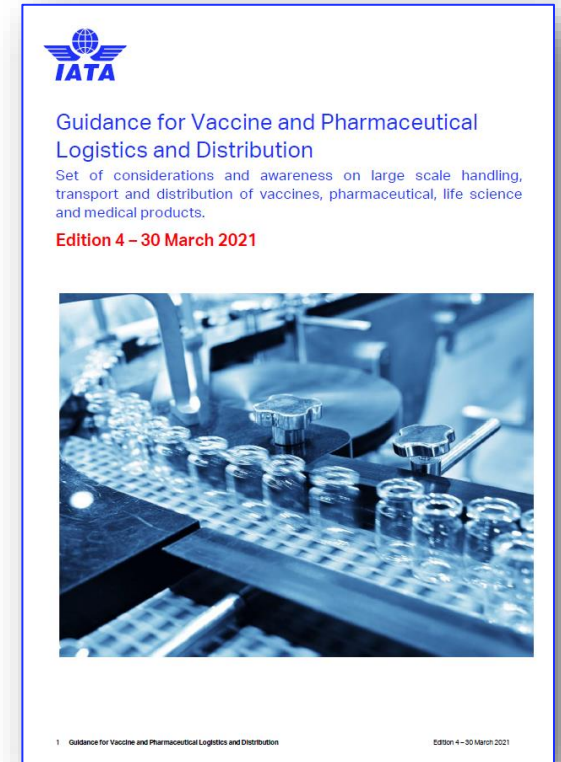
# Lessons Learned since the first vaccine roll out



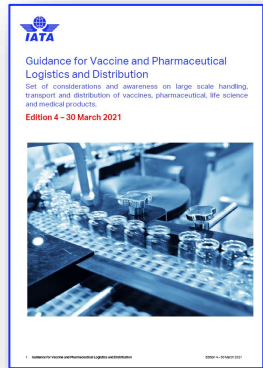
- **Capacity**
- **Regulatory**
- **Infrastructure**
- **Public- Private Partnership**
- **Communication**
- **Collaboration**
- **Sustainability**
- **Focus on quality**
- **Security**

# Industry Call To Action

- **Sharing information - Global Collaboration**
  - Plan - Prepare - Perform
  - Engage and communicate with partners/suppliers on scale up projects and initiatives to support COVID-19 vaccines distribution or humanitarian aid
  - Accessible on [iata.org/cargo](https://iata.org/cargo)
- **Capabilities & infrastructure industry platform – ONE Source**
  - Visibility of facilities with validated information
  - Demonstrate competencies in handling expertise
  - Showcase adherence to quality standards
  - OneSource accessible [here](#)



# Industry Readiness and Preparedness



## Guidelines

4<sup>th</sup> Edition  
30 March 2021



## Regulations

Global Standards



## Training

3,2K people trained



## Certification – Risk Mitigation

296 certified  
75 in progress  
26 communities



## Registry

400+ companies



# Additional Outreach & Resources

## THREE-PART WEBINAR SERIES : TRANSPORT OF VACCINES AND LIFE SCIENCE PRODUCTS BY AIR CARGO

Webinar 1: Readiness for vaccine and life science products transportation - [21 October 2020](#)

Webinar 2: Global distribution and the flow of vaccines throughout the supply chain - [24 November 2020](#)

Webinar 3: Key learnings in the aftermath of the vaccine distribution effort and paving the way for the future – [21 April 2021](#)

VISIT [iata.org/events/webinars/](https://iata.org/events/webinars/)

## Action Cargo: COVID-19



### Enabling global trade

Airlines transport over 52 million metric tons of goods a year, representing more than 35% of global trade by value but less than 1% of world trade by volume. That is equivalent to \$6.8 trillion worth of goods annually, or \$18.6 billion worth of goods every day. Find out more [interesting air cargo facts](#) (pdf)

VISIT [iata.org/cargo](https://iata.org/cargo)

## Transportation of COVID-19 Vaccine



Air cargo plays a key role in the distribution of vaccines through well-established temperature-sensitive distribution systems, using cutting-edge technology and procedures.

This capability will prove crucial to the quick and efficient transport of COVID-19 vaccines once available. This will naturally require careful planning by every segment in the entire cargo supply chain to ensure full preparedness when vaccines for COVID-19 are approved and ready for distribution.

### Supporting the industry

IATA offers solutions and services to support cold chain capacity and resources for the anticipated scale of transporting and distributing COVID-19 vaccines.

[CERTIFICATION](#) | [PUBLICATION](#) | [TRAINING](#) | [WEBINARS](#) | [ONESOURCE](#) | [CONTACT US](#)

VISIT [iata.org/vaccine-transport](https://iata.org/vaccine-transport)



# Thank you

- Please visit [iata.org/vaccine-transport](https://www.iata.org/vaccine-transport) to register for the upcoming webinars
- Please visit [iata.org/cargo](https://www.iata.org/cargo) for all COVID-19 resources

For further information, contact us at  
[cargo@iata.org](mailto:cargo@iata.org)

