

Cargo Operations Challenges

Navigating headwinds for
operational efficiency

September 2025



Impact of Tariffs & Trade

Global supply chains are
realigning



Current headwinds

- Customs, security, compliance & emissions scrutiny
- Significant regional differences

Regulatory & Compliance

Capacity & Infrastructure

Sustainability & Environmental

Geopolitical & Market risk

Digitalization & Technology

Current headwinds

- Airport congestion, limited freighter availability, and labor shortages are straining operations."
- "optimizing 30% of unutilized capacity can save up to one flight for every seven to eight flights."
 - Approximately USD \$2.5 billion in industry-wide profits with just a 3% improvement in cargo capacity.

Regulatory & Compliance

Capacity & Infrastructure

Sustainability & Environmental

Geopolitical & Market risk

Digitalization & Technology

Current headwinds

Need support for SAF production
Customers and regulators
expectations

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Capacity & Infrastructure

Sustainability & Environmental

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Current headwinds

Conflicts, sanctions, political uncertainty disrupting trade lanes.

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Current headwinds

- Progress made, more needed.
- ONE Record + IoT = bedrock for AI solutions.

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Strategic Adaptation

- Innovations in cargo handling and tracking
- Collaboration across stakeholders
- Investment in resilient infrastructure



Source: BECON Projects GmbH

Vision for the Facility of the Future

**SAFE &
SECURE**

AUTOMATED

SMART

ADAPTABLE

Modular infrastructure
Digitalization
Resilience planning

SUSTAINABLE

CONNECTED

Mixture of optimism & caution

- Inventory / Sales ratio continuous improvement
- Freighter utilization at record highs – 15 block hours.
- Collaborative projects on the rise

- A visible shift to global geopolitical dynamics is clearly unfolding.
- On balance, downside risks to the macroeconomic and air transport outlooks have increased.
- 25 months of uninterrupted growth
- Ocean reliability increasing

Thank you

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