

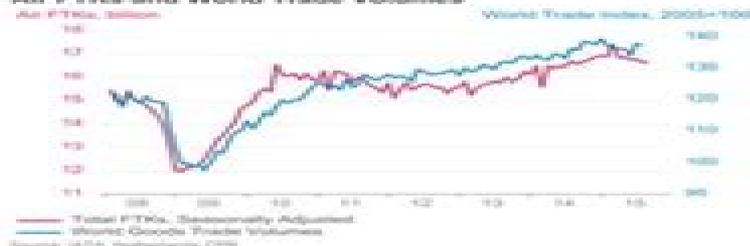
AIR FREIGHT MARKET ANALYSIS

AUGUST 2015

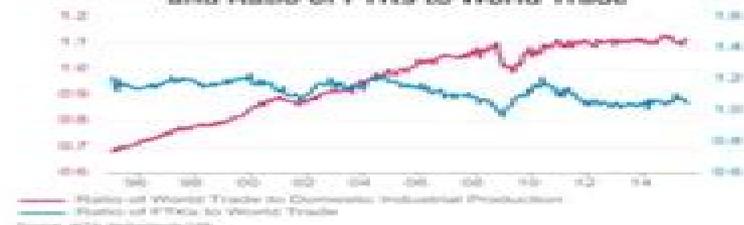
KEY POINTS

- ➔ Air freight volumes were broadly unchanged in August compared to a year ago, with freight tonne kilometers 0.2% higher. The August data shows a pause in earlier declines in air freight volumes, consistent with developments in world trade activity. That said, the trend in air freight volumes and world trade has been in decline for the best part of 2015.
- ➔ The first chart below shows the growth trend in air freight volumes and world trade. FTKs were broadly unchanged in August compared to July, but due to recent declines, the industry is still almost 2% smaller in August than it was at the end of 2014. The downward trend in world trade volumes appears to have paused, at least for the time being, and that has helped contain further weakness in air freight markets.
- ➔ Airlines in Asia Pacific continue to experience weakness, but declines in volumes have eased up a bit as trade to/from emerging Asia has stopped shrinking. A slight improvement for European carriers also helped contain further declines in the industry result, with airlines in that region seeing a small 0.7% rise on a year ago. Recent improvements in Eurozone manufacturing business activity could finally be starting to support air freight demand.
- ➔ Continued growth in air freight carried by Middle Eastern airlines (up 10.4% in August year-on-year), helped offset some of the decline that North American carriers are experiencing (down 3.3% in August year-on-year). Airlines in North America continue to see significant falls in FTK volumes since the boost from modal shift due to sea port congestion earlier in the year.
- ➔ Some of the conditions that led to the decline in world trade this year – a combination of weaker than expected global economic growth, particularly in emerging markets, as well as shifts toward the domestic market in China – are persisting. There are some tentative signs that things won't get worse – export orders have stabilized – but if the current trend were to continue, we would see negative year-on-year comparisons in the coming months.

Air FTKs and World Trade Volumes



Ratio of World Trade to Domestic Industrial Production and Ratio of FTKs to World Trade



Year on Year Comparison

	Aug 2015 vs Aug 2014			YTD 2015 vs. YTD 2014		
	FTK	AFTK	FLF	FTK	AFTK	FLF
International	0.5%	6.0%	43.9%	2.9%	6.3%	47.6%
Domestic	-1.3%	4.8%	28.4%	0.5%	2.9%	29.4%
Total Market	0.2%	5.8%	40.9%	2.6%	5.6%	43.6%

Month on Month Comparison

Aug 2015 vs. Jul 2015		
FTK	AFTK	FLF pt
0.0%	0.3%	-0.1%
0.4%	-0.2%	0.2%
0.1%	0.2%	0.0%

FTK: Freight Tonne-Kilometers; AFTK: Available Freight Space Kilometers; FLF: Freight Load Factor. All figures are expressed in % change Year on Year except FLF which are the load factors for the specific month.

Data are seasonally adjusted. All figures are expressed in % change Month except FLF which are the percentage point difference between load factors of two months.

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Chao Zhang



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