

AIR FREIGHT



Global Airfreight, Bremen
Q1 / 2021

COVID-19 – MARKET AND CAPACITY.

Seabury cargo – market development and capacity tracking.

we have taken the chance to pull the latest capacity tracking (week 1 to 10 2021)

The following slides contain an overview of

- Capacity Tracking Global Trends
- Capacity Growth Summary & Weekly flown capacity changes
- Operating Airlines

All above mentioned

- for all operation types (slides 3-5)
 - for operation type charter (slides 6-8)
 - for operation type regular (slides 9-11)
- Trade Lane Summary & Weekly Flown Capacity Changes for several trades (region-region) (slide 13-21)

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - All operation types.

Capacity Tracking Global Trends

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Source: Seabury Consulting

CREATING CHAINS OF TRUST.

Circles display YoY % growth on key trade lanes; arrows represent direction of the flow, while their thickness reflects their volume; global domestic capacity growth includes trade lanes not displayed on the world map; visual based on Capacity Tracking Legs database.



COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes – Year to Date development – All operation types.

Capacity Growth Summary

Share and YoY % growth for selected measure and filters 2021 Wk 1 - 2021 Wk 10

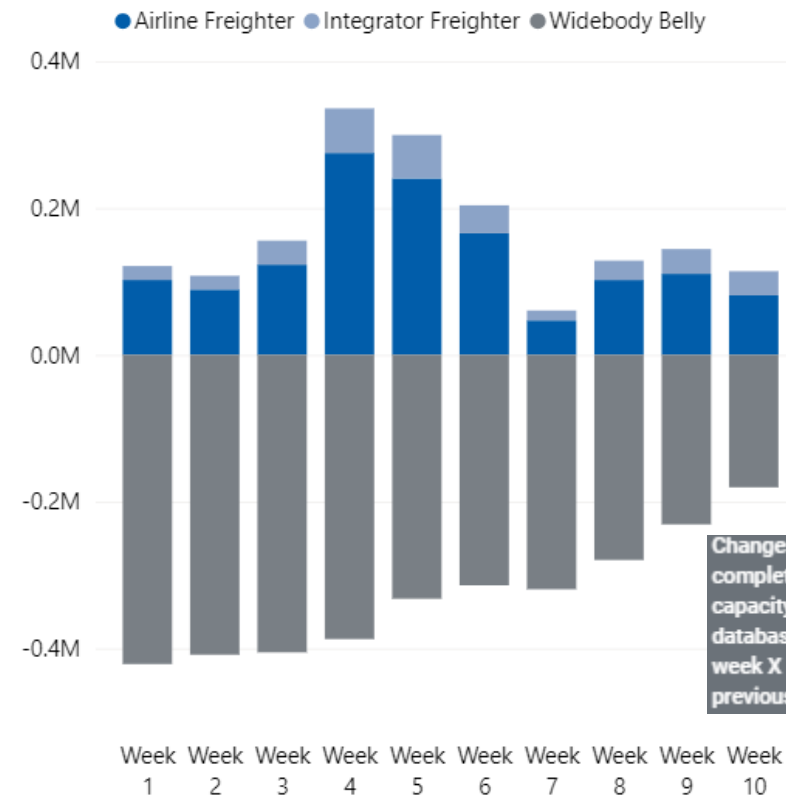


	Share of Global International Capacity	Total YoY Growth	International YoY Growth
Airline Freighter	57.3 %	26.8 %	27.9 %
Integrator Freighter	13.8 %	26.8 %	27.4 %
Widebody Belly	28.8 %	-48.9 %	-53.4 %

Share and YoY % growth figures based on outbound capacity; visual based on Capacity Tracking Legs database.

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters 2021 Wk 1 - 2021 Wk 10



Changes in volumes are displayed up until the latest completed week/month, based on outbound capacity; visual based on Capacity Tracking Legs database. When previous year has 53 ISO weeks, week X of this year is compared to week X+1 of the previous year.

Source: Seabury Consulting

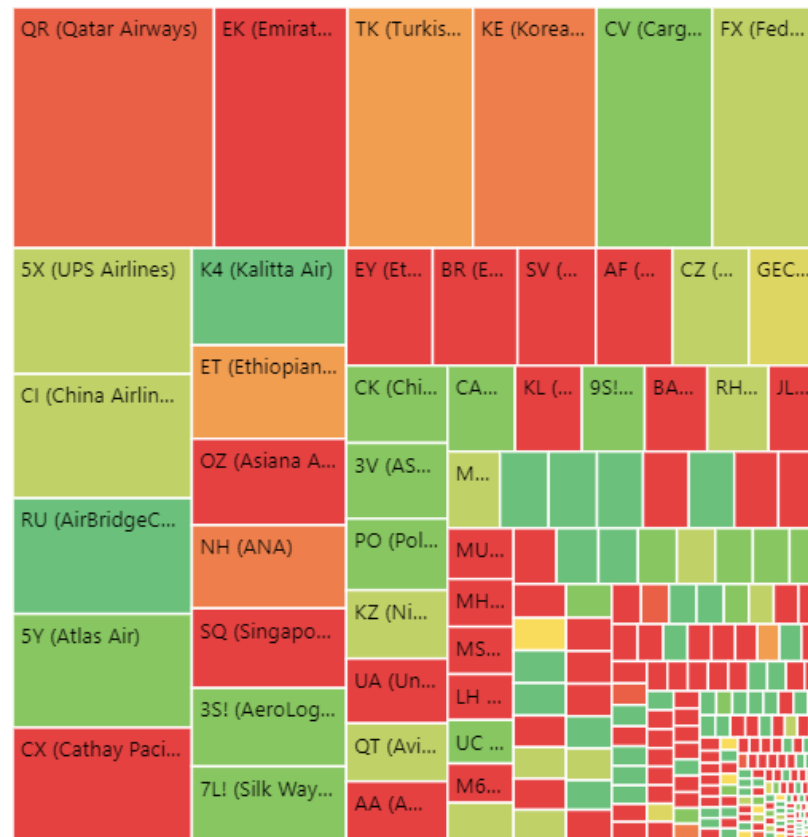
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes – Year to Date development – All operation types.

Operating Airlines

Total and YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Each box represents the contribution to the total outbound capacity per airline for the selected measure and filters; the color of the box reflects the magnitude of the YoY % growth; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Operation type: Charter

Capacity Tracking Global Trends

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Circles display YoY % growth on key trade lanes; arrows represent direction of the flow, while their thickness reflects their volume; global domestic capacity growth includes trade lanes not displayed on the world map; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

CREATING CHAINS OF TRUST.



COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Operation type: Charter.

Capacity Growth Summary

Share and YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



	Share of Global International Capacity	Total YoY Growth	International YoY Growth
Airline Freighter	72.4 %	50.0 %	49.7 %
Integrator Freighter	11.7 %	110.3 %	95.8 %
Widebody Belly	15.9 %	50.6 %	50.4 %

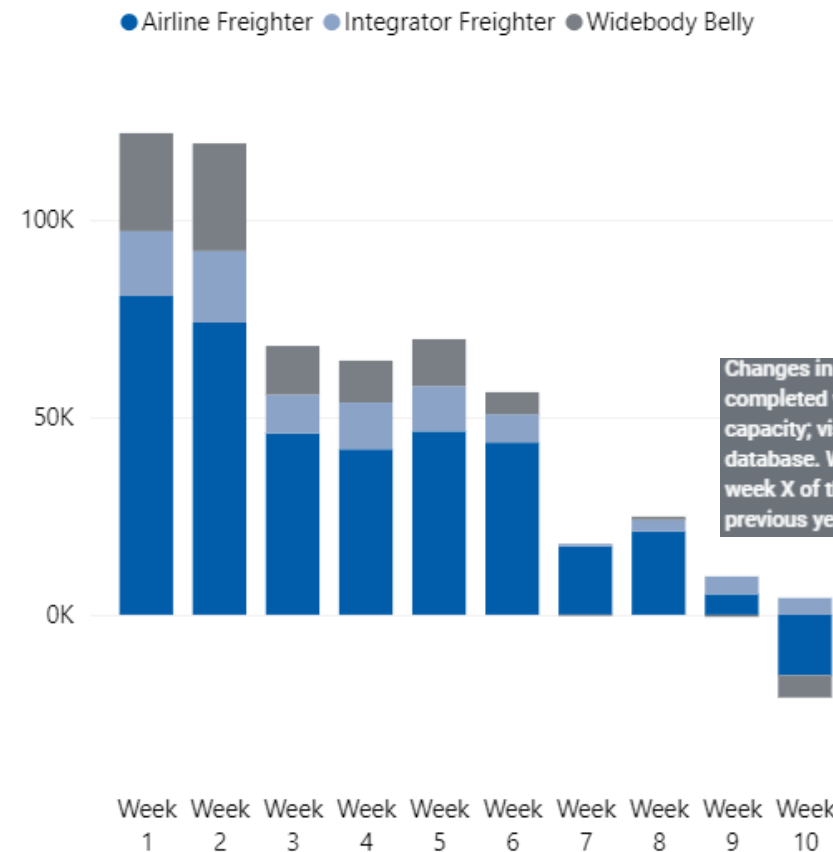
Share and YoY % growth figures based on outbound capacity; visual based on Capacity Tracking Legs database.

< Source: Seabury Consulting >

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



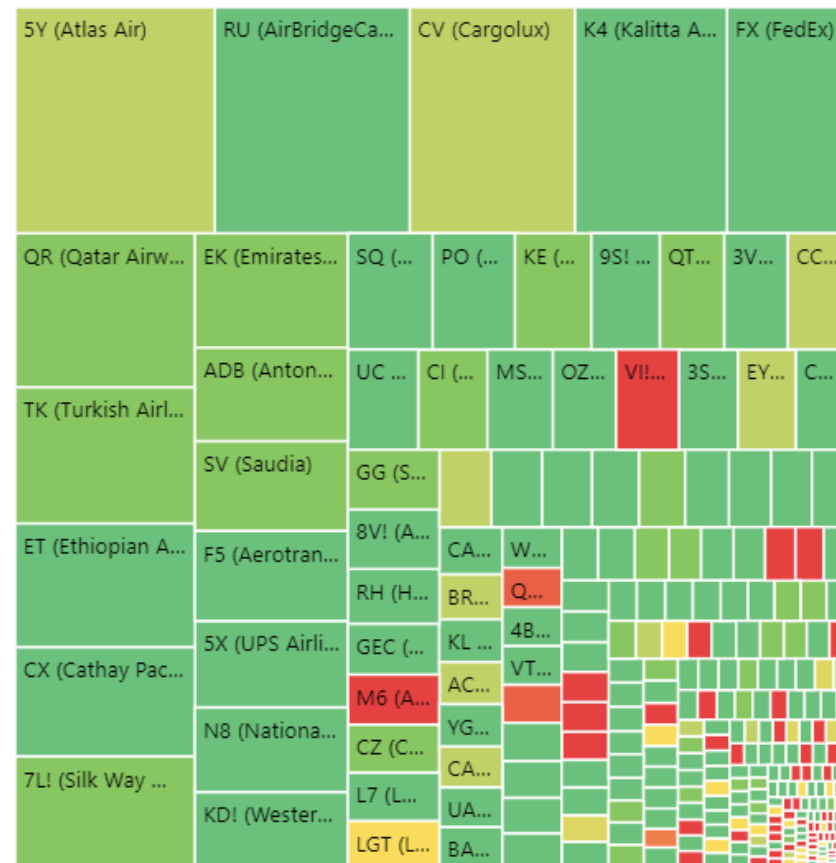
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes – Year to Date development – Operation type: Charter.

Operating Airlines

Total and YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Each box represents the contribution to the total outbound capacity per airline for the selected measure and filters; the color of the box reflects the magnitude of the YoY % growth; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

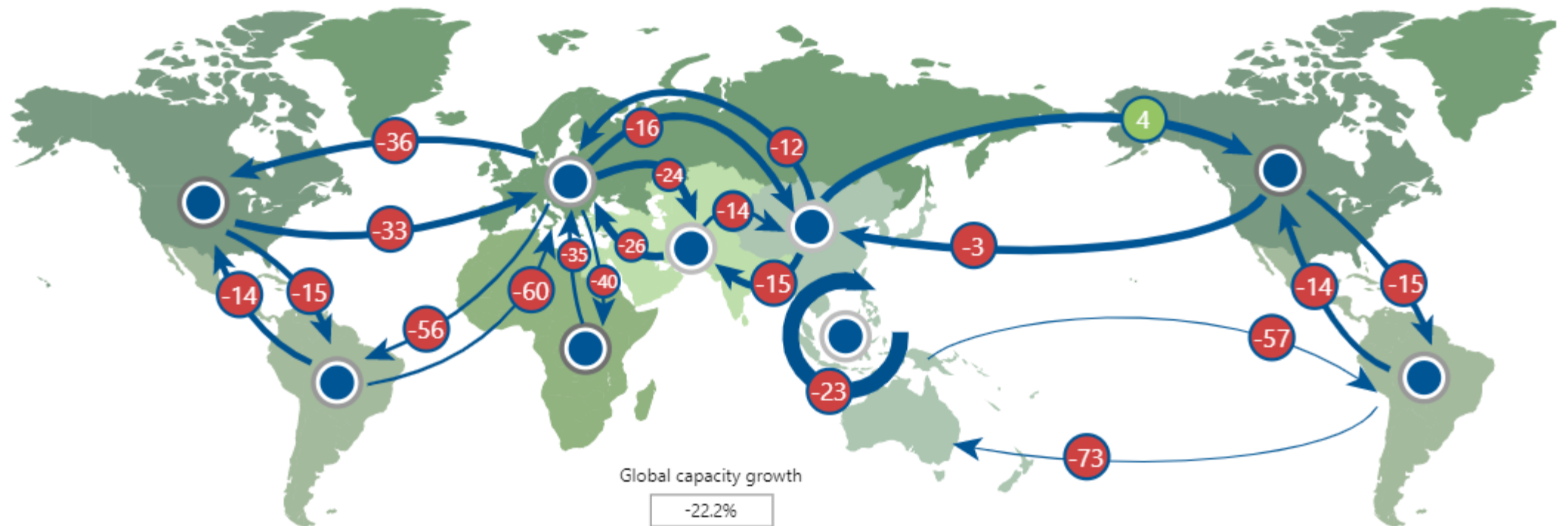
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Operation type: Regular

Capacity Tracking Global Trends

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Circles display YoY % growth on key trade lanes; arrows represent direction of the flow, while their thickness reflects their volume; global domestic capacity growth includes trade lanes not displayed on the world map; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Operation type: Regular.

Capacity Growth Summary

Share and YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



	Share of Global International Capacity	Total YoY Growth	International YoY Growth
Airline Freighter	54.5 %	20.0 %	21.9 %
Integrator Freighter	14.3 %	18.6 %	20.3 %
Widebody Belly	31.2 %	-53.8 %	-56.6 %

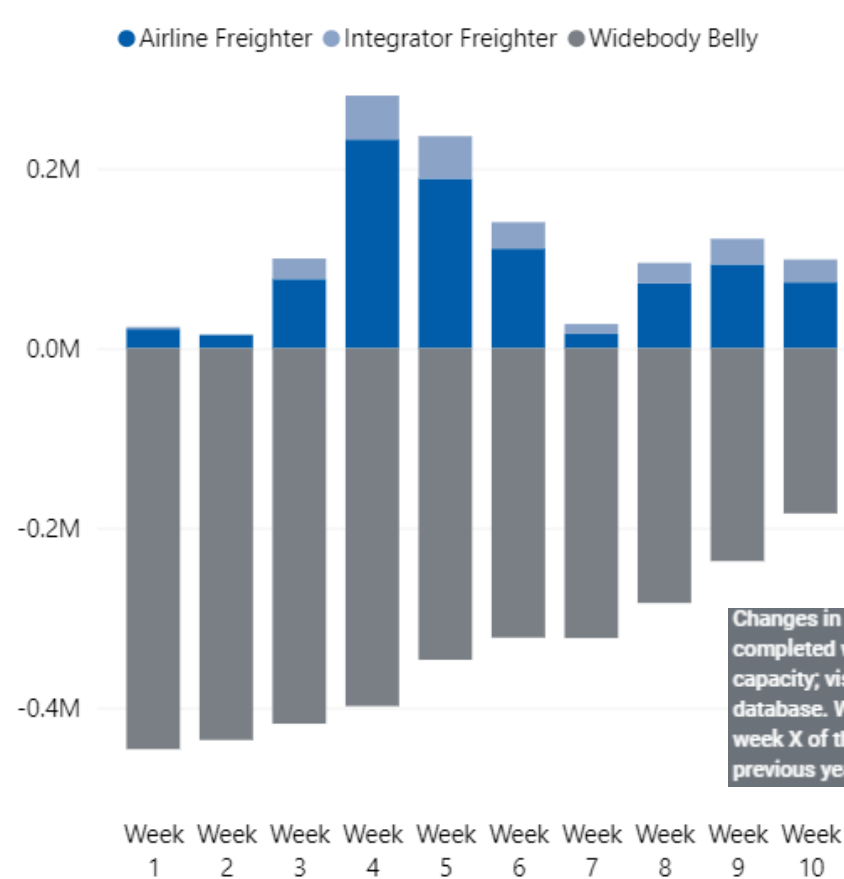
Share and YoY % growth figures based on outbound capacity; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Changes in volumes are displayed up until the latest completed week/month, based on outbound capacity; visual based on Capacity Tracking Legs database. When previous year has 53 ISO weeks, week X of this year is compared to week X+1 of the previous year.

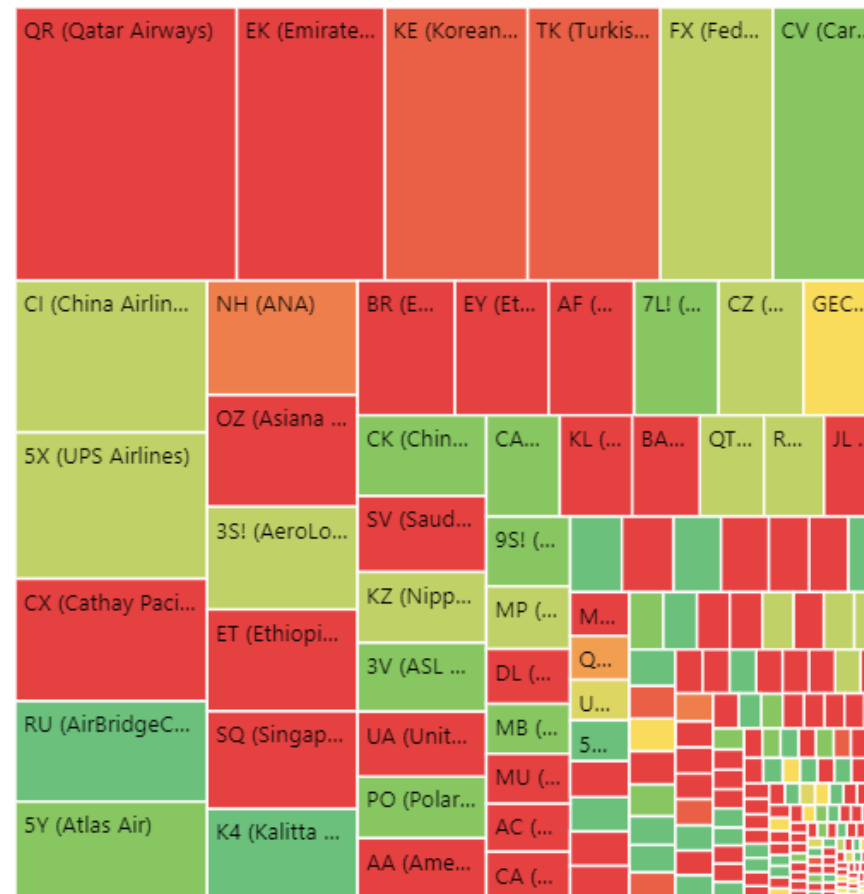
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes – Year to Date development – Operation type: Regular.

Operating Airlines

Total and YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Each box represents the contribution to the total outbound capacity per airline for the selected measure and filters; the color of the box reflects the magnitude of the YoY % growth; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - All operation types - Freighters only.

Capacity Tracking Global Trends

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Circles display YoY % growth on key trade lanes; arrows represent direction of the flow, while their thickness reflects their volume; global domestic capacity growth includes trade lanes not displayed on the world map; visual based on Capacity Tracking Legs database.

Source: Seabury Consulting

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COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



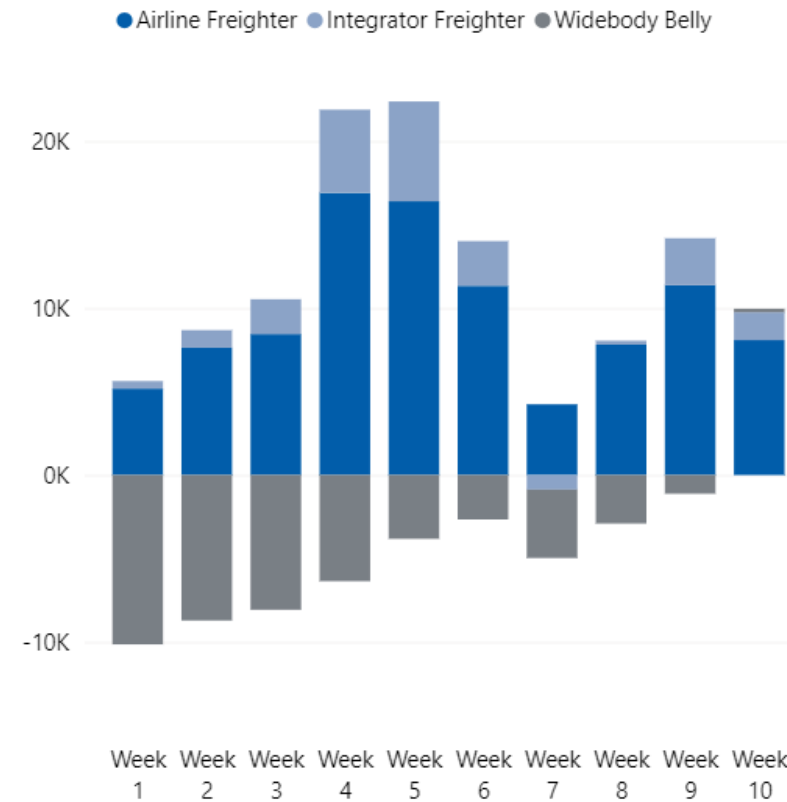
North East Asia to Western Europe

Total	Airline Freighter	Integrator Freight	Widebody Belly
▲ 18.7%	▲ 68.5%	▲ 28.5%	▼ -42.7%

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Widebody Belly
Group Change	209
Group Week's Capacity	7,308
Group YoY Growth	3 %
Total Change	9,961
Total YoY Growth	32 %

Week	Week 10
Group	Integrator Freight
Group Change	1,670
Group Week's Capacity	9,451
Group YoY Growth	21 %
Total Change	9,961
Total YoY Growth	32 %

Week	Week 10
Group	Airline Freighter
Group Change	8,082
Group Week's Capacity	24,215
Group YoY Growth	50 %
Total Change	9,961
Total YoY Growth	32 %

Source: Seabury Consulting

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

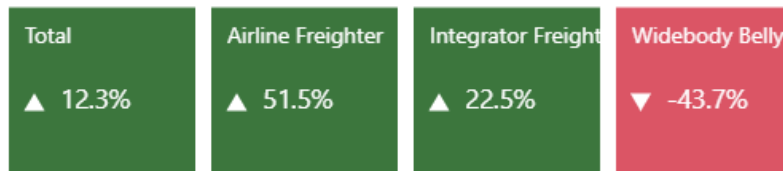
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Western Europe to North East Asia

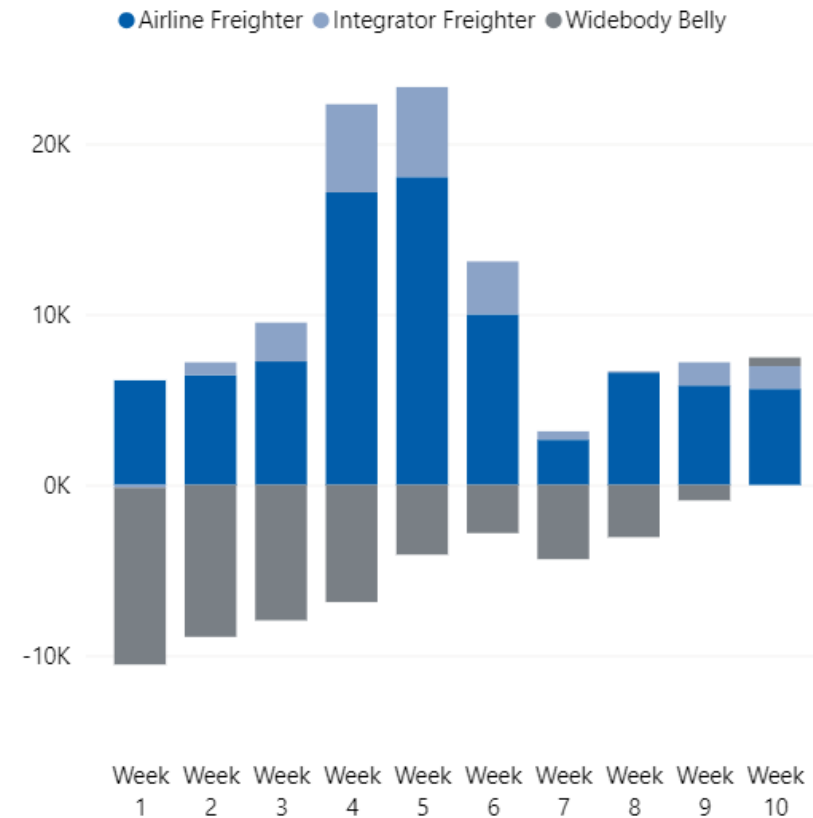


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Integrator Freighter
Group Change	1,330
Group Week's Capacity	9,997
Group YoY Growth	15 %
Total Change	7,470
Total YoY Growth	21 %

Week	Week 10
Group	Widebody Belly
Group Change	508
Group Week's Capacity	7,241
Group YoY Growth	8 %
Total Change	7,470
Total YoY Growth	21 %

Week	Week 10
Group	Airline Freighter
Group Change	5,631
Group Week's Capacity	25,887
Group YoY Growth	28 %
Total Change	7,470
Total YoY Growth	21 %

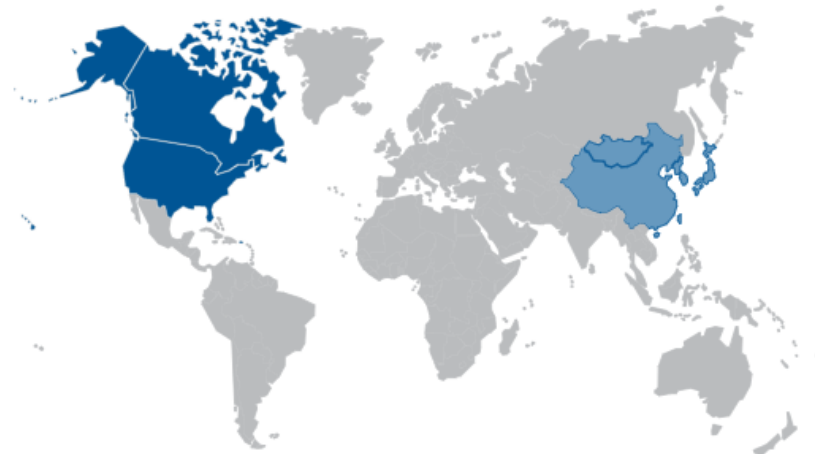
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

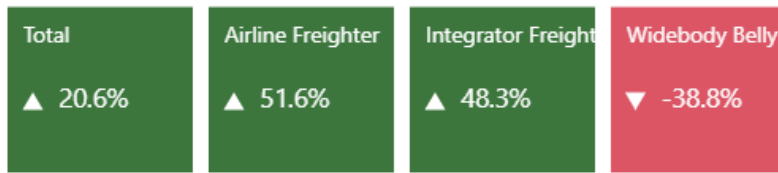
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



North East Asia to North America

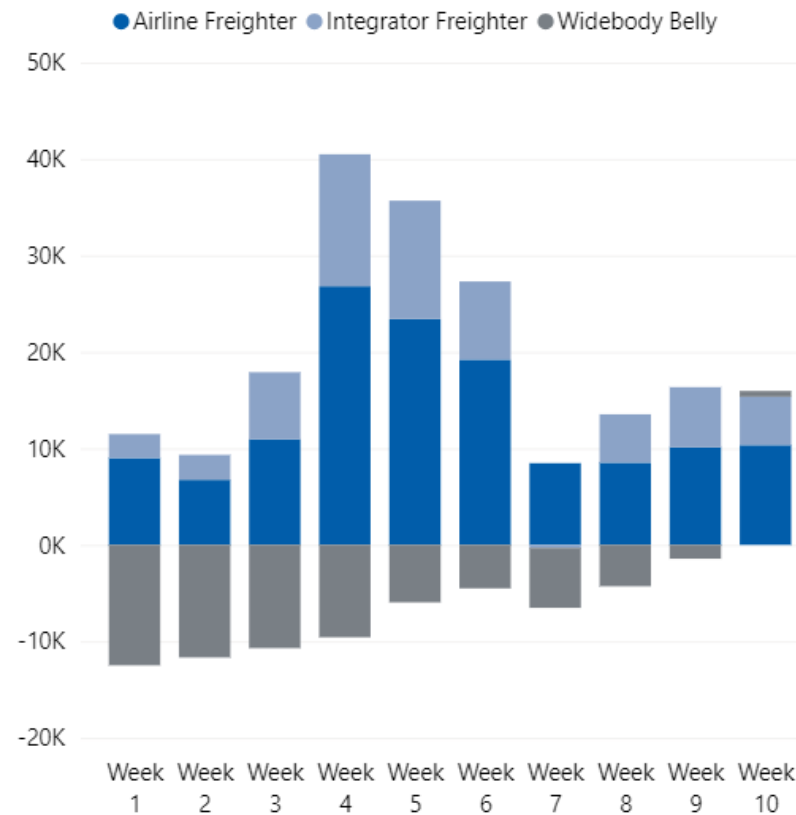


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Widebody Belly
Group Change	592
Group Week's Capacity	12,870
Group YoY Growth	5 %
Total Change	15,949
Total YoY Growth	28 %

Week	Week 10
Group	Integrator Freighter
Group Change	5,014
Group Week's Capacity	19,747
Group YoY Growth	34 %
Total Change	15,949
Total YoY Growth	28 %

Week	Week 10
Group	Airline Freighter
Group Change	10,344
Group Week's Capacity	40,813
Group YoY Growth	34 %
Total Change	15,949
Total YoY Growth	28 %

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

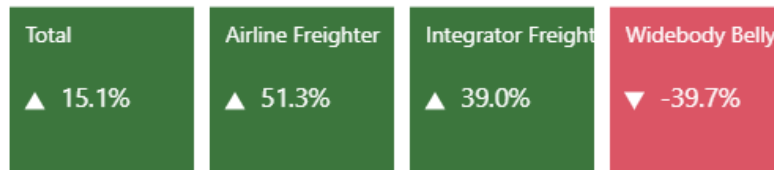
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



North America to North East Asia

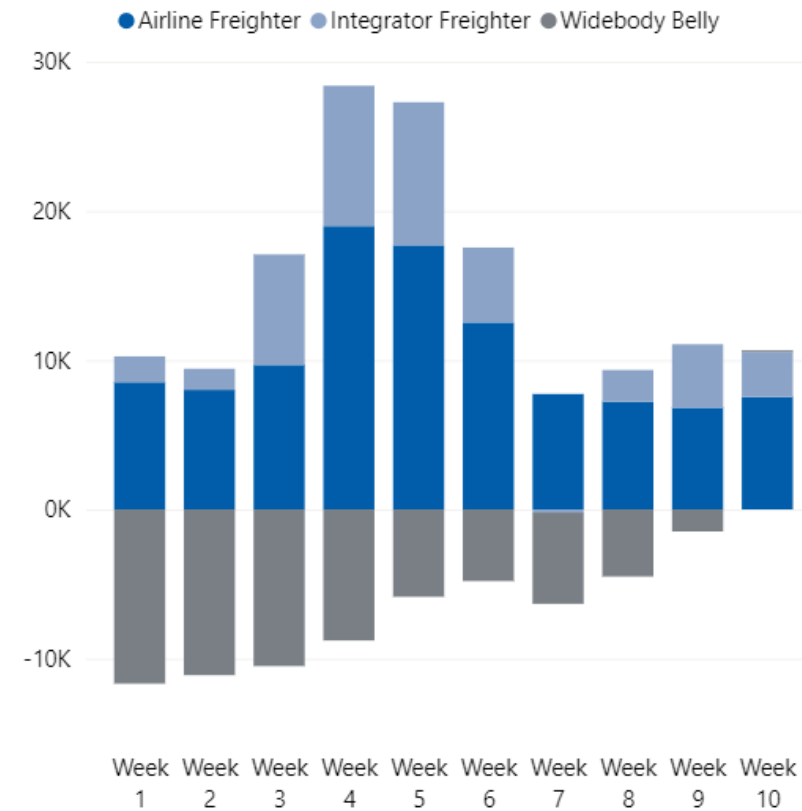


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Integrator Freighter
Group Change	3,011
Group Week's Capacity	15,720
Group YoY Growth	24 %
Total Change	10,654
Total YoY Growth	22 %

Week	Week 10
Group	Airline Freighter
Group Change	7,532
Group Week's Capacity	32,345
Group YoY Growth	30 %
Total Change	10,654
Total YoY Growth	22 %

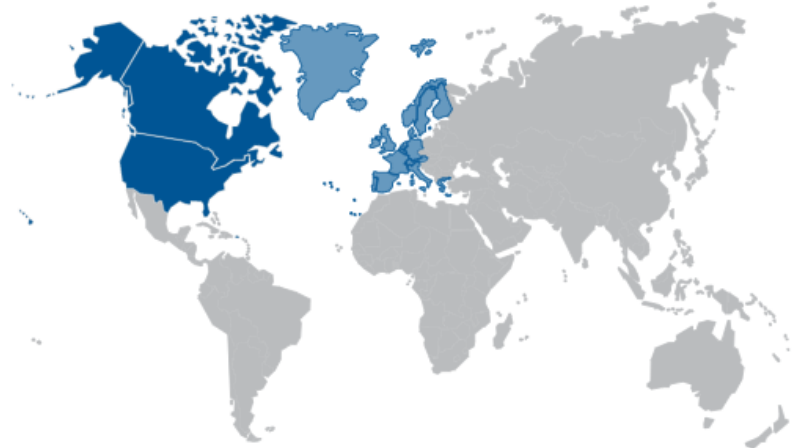
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

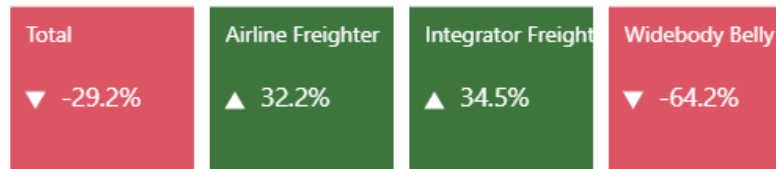
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Western Europe to North America

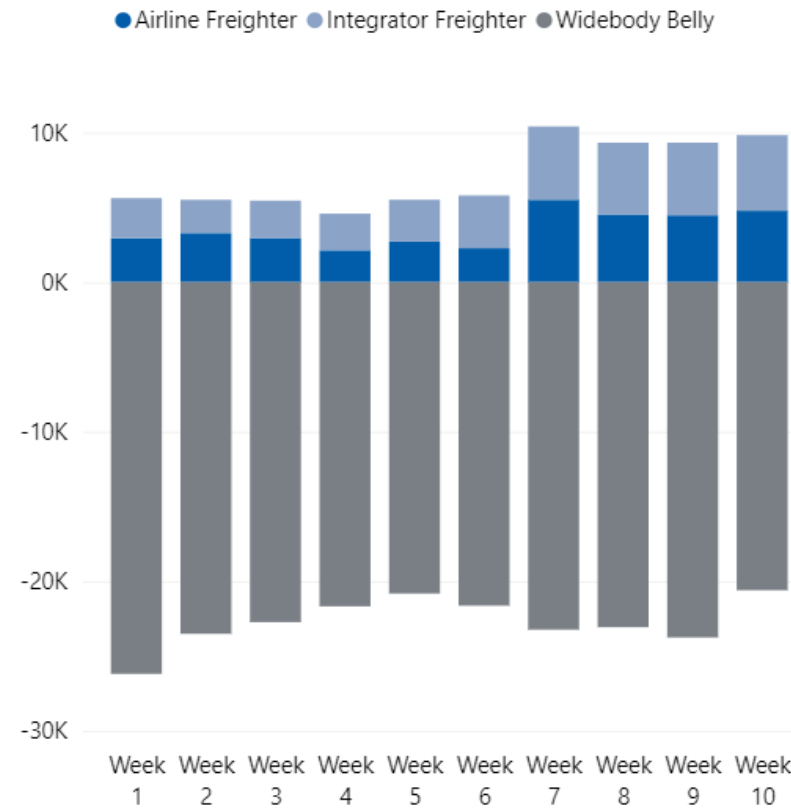


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Integrator Freighter
Group Change	5,042
Group Week's Capacity	14,010
Group YoY Growth	56 %
Total Change	-10,770
Total YoY Growth	-20 %

Week	Week 10
Group	Airline Freighter
Group Change	4,785
Group Week's Capacity	15,380
Group YoY Growth	45 %
Total Change	-10,770
Total YoY Growth	-20 %

Week	Week 10
Group	Widebody Belly
Group Change	-20,597
Group Week's Capacity	14,412
Group YoY Growth	-59 %
Total Change	-10,770
Total YoY Growth	-20 %

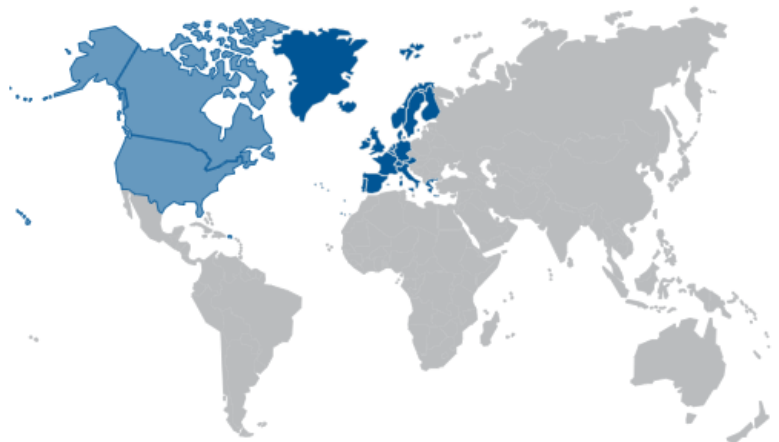
COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

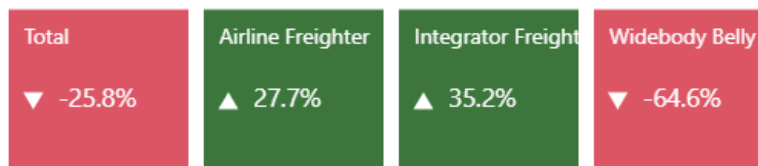
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



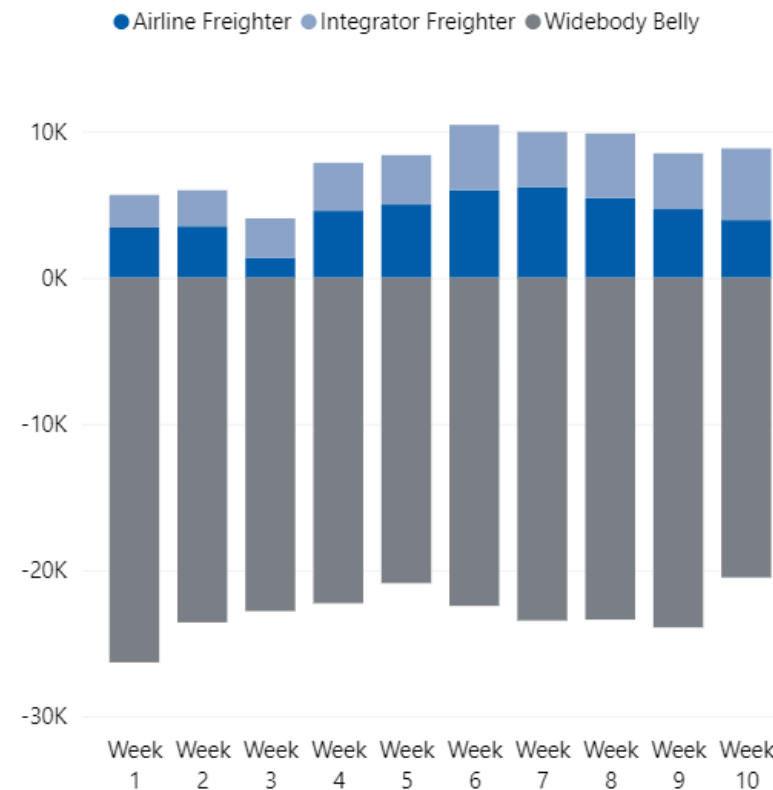
North America to Western Europe



Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Airline Freighter
Group Change	3,945
Group Week's Capacity	20,646
Group YoY Growth	24 %
Total Change	-11,651
Total YoY Growth	-19 %

Week	Week 10
Group	Integrator Freight
Group Change	4,903
Group Week's Capacity	14,233
Group YoY Growth	53 %
Total Change	-11,651
Total YoY Growth	-19 %

Week	Week 10
Group	Widebody Belly
Group Change	-20,500
Group Week's Capacity	14,310
Group YoY Growth	-59 %
Total Change	-11,651
Total YoY Growth	-19 %

Source: Seabury Consulting

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

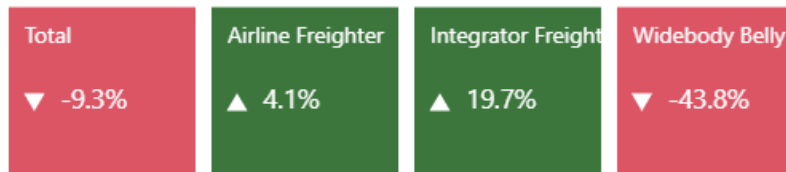
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



North America to South America

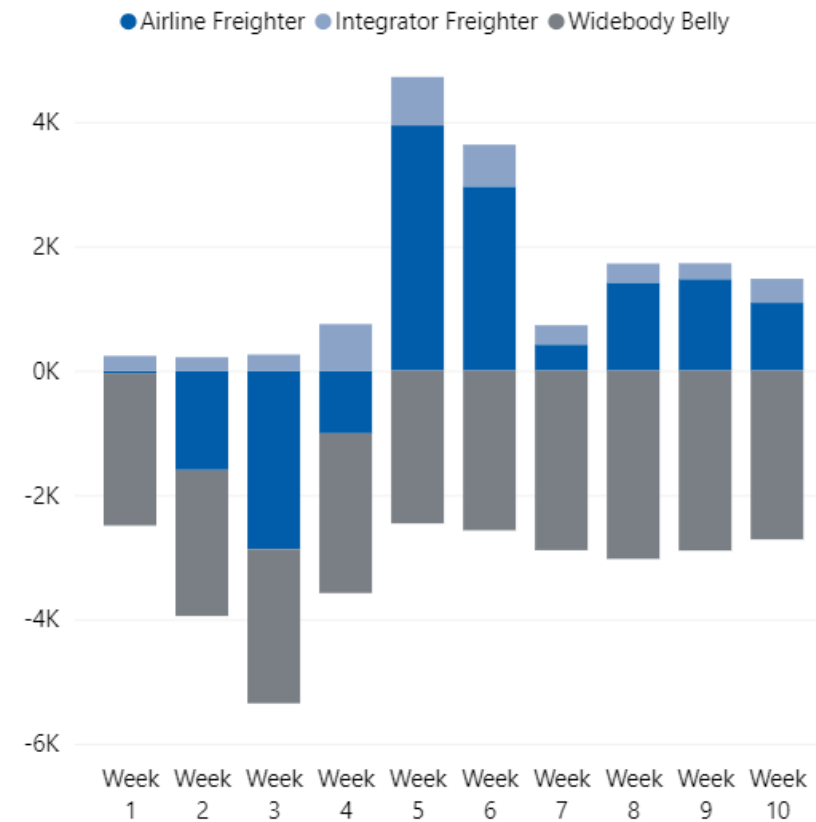


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Integrator Freighter
Group Change	386
Group Week's Capacity	2,000
Group YoY Growth	24 %
Total Change	-1,236
Total YoY Growth	-7 %

Week	Week 10
Group	Airline Freighter
Group Change	1,091
Group Week's Capacity	10,909
Group YoY Growth	11 %
Total Change	-1,236
Total YoY Growth	-7 %

Week	Week 10
Group	Widebody Belly
Group Change	-2,713
Group Week's Capacity	3,177
Group YoY Growth	-46 %
Total Change	-1,236
Total YoY Growth	-7 %

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

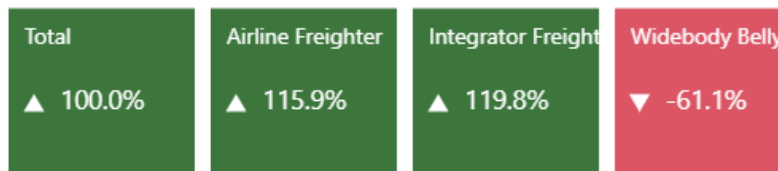
Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



North East Asia to South America

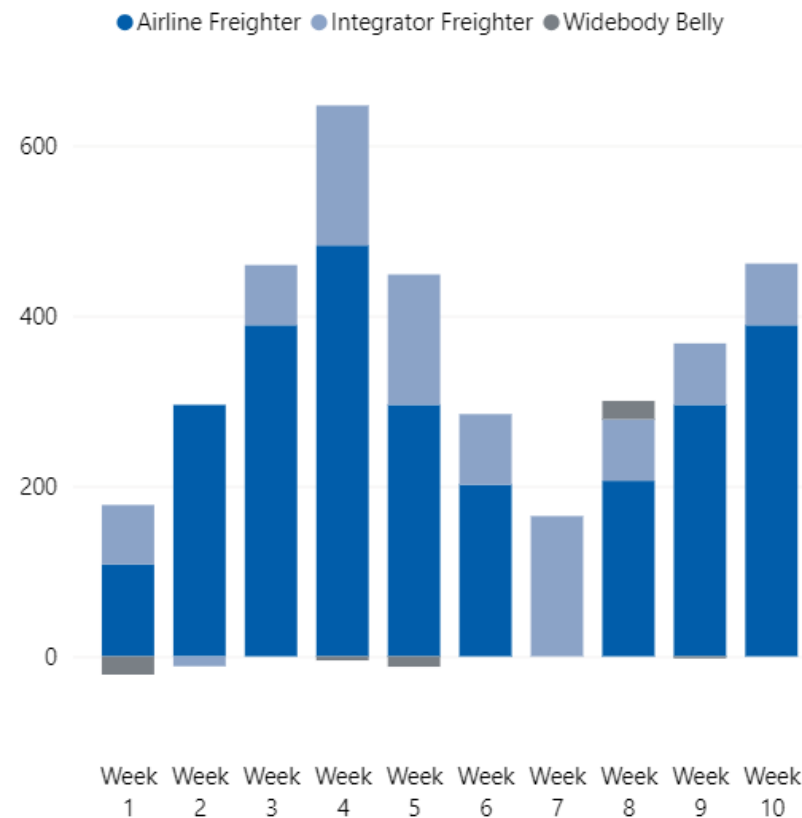


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Integrator Freighter
Group Change	72
Group Week's Capacity	166
Group YoY Growth	77 %
Total Change	430
Total YoY Growth	138 %

Week	Week 10
Group	Airline Freighter
Group Change	389
Group Week's Capacity	576
Group YoY Growth	208 %
Total Change	430
Total YoY Growth	138 %

COVID-19 - CAPACITY TRACKING.

Capacity in metric tonnes - Year to Date development - Tradelane Development.

Trade Lane Summary

YoY % growth for selected measure and filters

2021 Wk 1 - 2021 Wk 10



Western Europe to South America

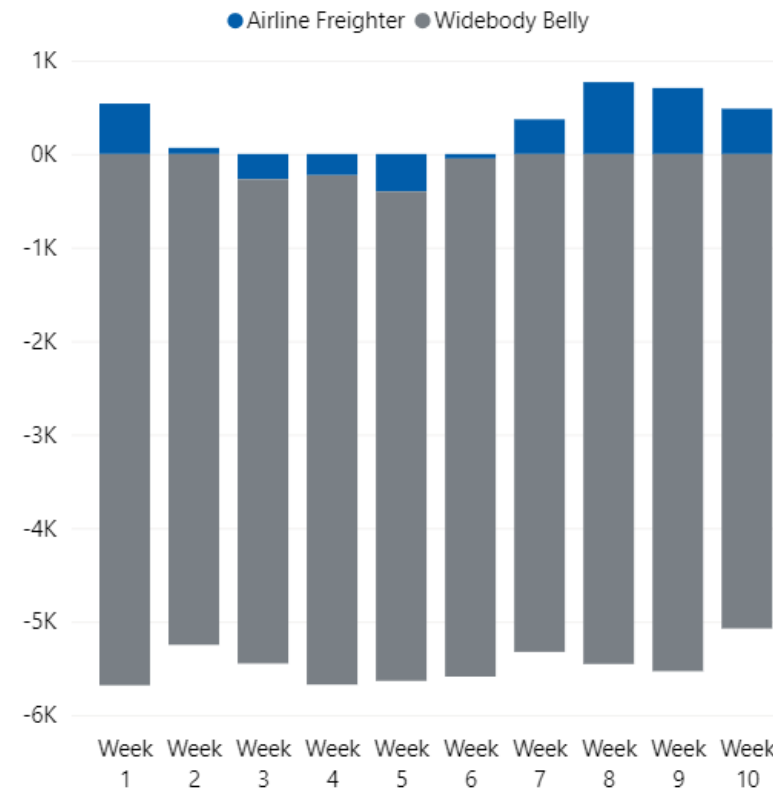


Source: Seabury Consulting

Weekly Flown Capacity Changes

Total YoY weekly change for selected measure and filters

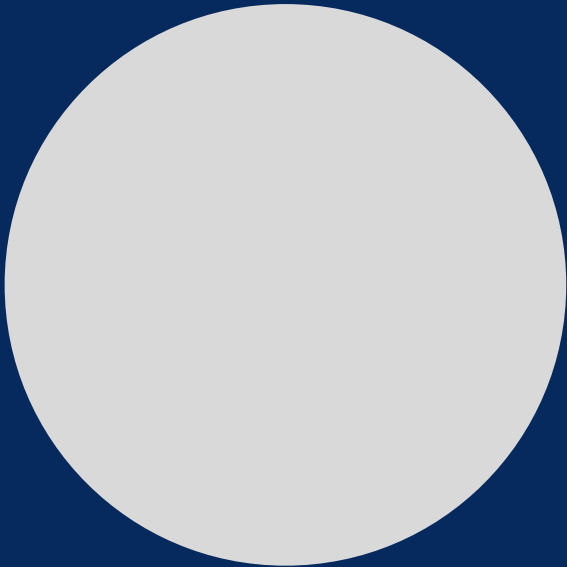
2021 Wk 1 - 2021 Wk 10



Week	Week 10
Group	Airline Freighter
Group Change	484
Group Week's Capacity	3,242
Group YoY Growth	18 %
Total Change	-4,589
Total YoY Growth	-45 %

Week	Week 10
Group	Airline Freighter
Group Change	484
Group Week's Capacity	3,242
Group YoY Growth	18 %
Total Change	-4,589
Total YoY Growth	-45 %

CONTACT



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