Airfreight Market Update

May 2025

An overview of the airfreight markets in North Asia, Southeast Asia, South Asia and Middle East. It covers airports, airlines, current issues faced by airports and mitigating options for shippers. The information is sourced online from openly available websites and compiled in this update.

Indemnity Statement

The information presented in this document is compiled from publicly available sources and is intended for general informational purposes only. While efforts have been made to ensure accuracy, we do not guarantee the completeness or timeliness of the data. Readers are advised to conduct their own independent research and due diligence before making any business or operational decisions based on the content herein. We accept no liability for any loss or damage arising from reliance on this information.

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Airport Infrastructure

North Asia

Hong Kong International Airport (HKG): Maintains its position as the world's busiest cargo airport, handling nearly 5 million tonnes in 2024. The airport's infrastructure supports a designed capacity of 10 million tonnes annually, bolstered by facilities like SuperTerminal 1 and the Asia Airfreight Terminal. Only licensed cargo terminal operators like AAT and HACTL are permitted to build up and break down ULDs, ensuring compliance with safety and security standards. Asia Airfreight Terminal (AAT) operates COOLPORT, Hong Kong's first on-airport cold chain facility, featuring an automated pallet-cargo system for temperature-sensitive goods. While specific CEIV Pharma certifications for HKG's terminals aren't detailed, the advanced infrastructure supports stringent cold chain requirements.

Shanghai Pudong International Airport (PVG): Handled approximately 3.78 million tonnes in 2024. Ongoing expansions aim to increase its capacity to 6 million tonnes per year. The presence of major express hubs, including DHL's largest in Asia, underscores its strategic importance. PVG serves as a major hub for express carriers like DHL, FedEx, and UPS, with extensive cargo infrastructure. In October 2024, LOGISTEED China, Ltd. acquired CEIV Pharma certification at PVG, enhancing its pharmaceutical logistics capabilities.

Beijing Capital International Airport (PEK): Handled about 1.84 million tonnes in 2024 making it one of China's business cargo airports. Despite this volume, the airport faces slot congestion and has a designed cargo capacity of 900,000 tonnes, indicating potential overcapacity issues. Some uplift shifting to Daxing (PKX). The airport's cargo terminal includes a cooler with a capacity of 533 cubic meters, suitable for storing perishable goods. Air China Cargo offers the "pharmaCAre" service, providing active and passive solutions for pharmaceutical shipments, including containers with cooling and heating capabilities to maintain required temperatures.

Incheon International Airport (ICN): Processed around 2.95 million tonnes in 2024. Recent expansions have elevated its designed capacity to 6.3 million tonnes annually, positioning it as a central logistics hub in Northeast Asia. ICN is a leading cargo hub in East Asia, with multiple cargo terminals and advanced logistics infrastructure. ICN mandates that only authorized personnel within designated cargo terminals handle ULD assembly, maintaining operational integrity. The Incheon Airport community achieved the world's first IATA CEIV Lithium Batteries certification, reflecting its commitment to specialized cargo handling.

Tokyo Narita International Airport (NRT): Managed approximately 2.4 million tonnes in 2024. Expansion plans, including a new runway and centralized cargo facilities, aim to increase its capacity to 3 million tonnes per year. NRT hosts dedicated cargo terminals, including ANA Cargo's facilities. At NRT, pallet build-up is managed by certified handlers such as ANA Cargo, with strict adherence to regulatory requirements. ANA Cargo was the first Japanese airline to obtain IATA's CEIV Pharma certification at Narita, ensuring high standards in pharmaceutical logistics.

Osaka Kansai International Airport (KIX): In 2023, KIX handled approximately 682,338 metric tonnes of cargo, ranking it among Japan's top airfreight hubs. KIX operates 24/7 with multiple 4,000-meter runways, allowing for efficient ULD operations. The airport has designated areas for cargo terminal expansion, totaling approximately 170 hectares on Stage 2 Island. Facilities at KIX are equipped to handle perishable goods, including temperature-controlled storage areas to maintain the integrity of sensitive shipments. The NEX-PHARMA Logistics Hub at KIX focuses on pharmaceutical cargo, complying with Japan's Good Distribution Practice (GDP) guidelines. Nippon Express has joined the KIX Pharma Community to obtain IATA's CEIV Pharma certification.

Nagoya Chubu Centrair International Airport (NGO): In fiscal year 2023, NGO handled approximately 130,713 metric tonnes of cargo. The airport's cargo facilities are designed for efficient ULD operations, with comprehensive bonded zones allowing for cargo unloading, handling, storage, and distribution within the same area. NGO's facilities include air-conditioned areas suitable for storing perishable goods, ensuring temperature-sensitive cargo is maintained appropriately. While specific certifications are not mentioned, the airport's infrastructure supports the handling of pharmaceutical products, with temperature-controlled environments to maintain product integrity.

Taipei Taoyuan International Airport (TPE) serves as a key cross-border e-commerce hub due to proximity to mainland China and rapid regional demand. TACT's facilities include lowerable workstations, a comprehensive cargo storage system, and an automatic porterage system, facilitating efficient handling of diverse cargo types. At TPE, the assembly and disassembly of Unit Load Devices (ULDs) and pallets are typically managed by authorized terminal operators. TPE is a major cargo hub with facilities supporting temperature-sensitive shipments. The Taiwan Air Cargo Terminal (TACT) offers dedicated storage areas for frozen, cooled, and temperature-controlled goods, ensuring the integrity of perishable items during transit. Both EVA Air and Evergreen Airline Services Corp. (EGAS) have renewed their IATA CEIV Pharma certifications, verifying their adherence to the highest standards in cold chain air and ground service operations at TPE. China Airlines has also achieved CEIV Pharma certification, further enhancing TPE's capabilities in pharmaceutical logistics.

Airport	2024 Cargo Volume (tonnes)	Designed Capacity (tonnes/year)	Infrastructure Highlights
Hong Kong International Airport (HKG)	4,938,211	10,000,000	Three-runway system; SuperTerminal 1 (2.6M tonnes/year); Asia Airfreight Terminal (1.5M tonnes/year)
Shanghai Pudong International Airport (PVG)	3,778,331	6,000,000	Ongoing expansion; DHL's largest express hub in Asia
Incheon International Airport (ICN)	2,946,902	6,300,000	Recent expansion; advanced logistics infrastructure
Tokyo Narita International Airport (NRT)	2,399,298	3,000,000 (projected)	Expansion plans to increase capacity; new centralized cargo facility under construction
Osaka Kansai International Airport (KIX)	802,162 tonnes	1.2 million tonnes	Key international cargo gateway; supports major logistics carriers.
Nagoya Chubu Centrair International Airport (NGO)	130,713 tonnes	750,000 tonnes	Focused on automotive and semiconductor cargo; serves central Japan.
Beijing Capital International Airport (PEK)	1,840,000	900,000	Slot congestion; limited cargo infrastructure
Taipei Taoyuan International Airport (TPE)	2.3 million tonnes	3 million tonnes	Major hub for China Airlines and EVA Air; significant growth in e-commerce cargo.

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Southeast Asia

Singapore Changi Airport (SIN): Handled approximately 1.99 million tonnes in 2024, nearing its designed capacity. Ongoing expansions aim to accommodate future growth. Changi Airport is the only airport in Southeast Asia that allows freight forwarder to build ULD's and pallets. SATS Coolport, Asia's first on-airport perishable handling center, is dedicated to the cold chain handling of time- and temperature-sensitive cargo. Singapore Airlines has obtained IATA's CEIV Fresh certification, ensuring compliance with stringent standards for transporting perishable cargo.

Bangkok Suvarnabhumi Airport (BKK): Processed over 1.18 million tonnes in 2024, with infrastructure to support up to 3 million tonnes annually. ULD handling is conducted by authorized personnel within designated cargo terminals. BKK has expanded its cargo infrastructure to handle a variety of goods, including perishables. Information on CEIV certifications at BKK is limited; however, the airport continues to develop its capabilities in handling specialized cargo.

Kuala Lumpur International Airport (KUL): Managed around 656,762 tonnes in 2023, with facilities capable of handling 1 million tonnes, and potential expansion to 3 million tonnes. MASkargo at KUL manages ULD assembly within its facilities, maintaining the integrity of cargo handling processes. MASkargo operates a perishable center at KUL, providing an "unbroken cool chain" with cold rooms capable of storing up to 16 ULDs. While specific CEIV certifications are not mentioned, MASkargo's facilities support the handling of temperature-sensitive cargo, including pharmaceuticals.

Ho Chi Minh City Tan Son Nhat Airport (SGN): Operating at its full capacity of 700,000 tonnes, prompting the development of Long Thanh International Airport to alleviate congestion. ULD handling is conducted by authorized personnel within designated cargo terminals.

Jakarta Soekarno-Hatta Airport (CGK): Estimated to handle around 1 million tonnes, with ongoing enhancements to support increasing demand. ULD operations are managed by several ground handling agents, including PT Jasa Angkasa Semesta (JAS), PT Gapura Angkasa, and PT Angkasa Pura II. These agents are responsible for the build-up and breakdown of ULDs.

Penang International Airport (PEN): Handled over 103,000 tonnes in 2024, notable for its high export value despite smaller volume. ULD handling is conducted by authorized ground handling agents under the supervision of Malaysia Airports Holdings Berhad (MAHB).

Phuket International Airport (HKT): Processed approximately 57,655 tonnes in 2024, reflecting growth in cargo linked to tourism and regional trade.

Ninoy Aquino International Airport (MNL): Handled approximately 616,478.52 metric tons of cargo, marking a 26.88% increase from the previous year. Projections for 2025 estimate cargo volumes to reach around 699,689 metric tons. The New NAIA Infrastructure Corporation (NNIC) is undertaking significant upgrades, including the construction of Terminal 5, to enhance capacity and improve operational efficiency. NAIA has dedicated cargo terminals operated by various ground handling agents, including Philippine Airlines Cargo and other logistics providers and is equipped to handle perishable goods. ULD build-up and breakdown operations are primarily conducted by authorized ground handling agents such as Philippine Airport Ground Support Solutions Inc. (PAGSS).

Airport	2024 Cargo Volume (tonnes)	Designed Capacity (tonnes/year)	Infrastructure Highlights
Singapore Changi Airport (SIN)	1,990,000	2,000,000	Advanced cargo terminals; ongoing expansions to enhance capacity.
Bangkok Suvarnabhumi Airport (BKK)	1,184,260	3,000,000	Major cargo hub with extensive facilities; plans for further expansion.
Kuala Lumpur International Airport (KUL)	656,762	1,000,000	KLIA Advance Cargo Center with potential expansion to 3 million tonnes/year.
Ho Chi Minh City Tan Son Nhat Airport (SGN)	700,000	700,000	Three cargo terminals; capacity constraints leading to development of Long Thanh Airport.
Jakarta Soekarno-Hatta Airport (CGK)	1,000,000 (estimated)	1,000,000	Indonesia's primary cargo gateway; ongoing infrastructure enhancements.
Penang International Airport (PEN)	103,423	150,000	Significant export value; second-largest cargo volume in Malaysia.

Airport	2024 Cargo Volume (tonnes)	Designed Capacity (tonnes/year)	Infrastructure Highlights
Phuket International Airport (HKT)	57,655	60,000	Growing tourist destination with increasing cargo handling.

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South Asia

India's air cargo sector has shown robust growth, with total volumes reaching approximately 3.26 million tonnes in 2024.

Mumbai Chhatrapati Shivaji Maharaj International Airport (BOM): Remains India's busiest cargo hub, handling over 900,000 tonnes annually. ULD assembly and disassembly are managed by authorized ground handling agents. BOM features a comprehensive Air Cargo Complex, including facilities for perishable goods and specialized storage areas. The airport has dedicated cold storage facilities to manage temperature-sensitive cargo. Plans are underway to enhance cargo infrastructure, including the development of additional facilities to accommodate growing demand.

Delhi Indira Gandhi International Airport (DEL): Manages around 800,000 tonnes per year, supported by a dedicated cargo terminal. DEL operates both brownfield and greenfield cargo terminals, managed by Celebi Delhi Cargo Management and Delhi Cargo Service Centre, respectively. ULD operations are conducted by certified ground handlers. The airport is equipped with temperature-controlled zones and has received CEIV Pharma certification, ensuring the safe handling of pharmaceutical products., adhering to international safety and operational standards. DEL is expanding its cargo handling capacity, with plans to increase from the current 1.8 million metric tonnes to over 2.5 million metric tonnes.

Hyderabad Rajiv Gandhi International Airport (HYD): In calendar year 2024, HYD handled 180,914 metric tonnes of cargo, reflecting a 22% year-on-year growth. HYD features a dedicated cargo terminal with facilities for handling various types of cargo, including perishables and pharmaceuticals. The airport has specialized zones for temperature-sensitive cargo and is a leading hub for pharmaceutical shipments in India. ULD assembly and disassembly are managed by authorized ground handling agents. HYD is developing a new cargo terminal to substantially increase its handling capacity, with the first phase expected to become operational this year.

Bangalore Kempegowda International Airport (BLR): Processes approximately 400,000 tonnes annually, benefiting from its strategic location in the tech corridor. ULD assembly and disassembly are managed by authorized ground handling agents. BLR has established itself as a leading hub for perishable cargo in India, with specialized facilities to maintain the cold chain for temperature-sensitive goods. The airport's cargo terminals are equipped with temperature-controlled zones suitable for pharmaceutical products, ensuring compliance with global standards.

Ahmedabad Sardar Vallabhbhai Patel International Airport (AMD): The perishable cargo terminal, with a capacity of 40,000 tonnes per year, resumed operations in May 2025 after a two-year hiatus. ULD assembly is managed by authorized personnel within the cargo terminal. The Centre for Perishable Cargo (CPC) at AMD has resumed operations, offering temperature-controlled storage across five distinct ranges, suitable for various perishable goods. The CPC's facilities are equipped to handle pharmaceutical products, ensuring compliance with temperature requirements.

Chennai International Airport (MAA): In the fiscal year 2024–25 (April 2024 to March 2025), MAA handled approximately 379,154 tonnes of cargo, marking an 11.3% increase from the previous year. ULD operations are conducted by certified ground handlers. MAA features dedicated cold storage facilities within its cargo complex, catering to the storage and handling of perishable items. The airport's infrastructure supports the handling of pharmaceutical cargo, with temperature-controlled environments to maintain product integrity.

Karachi Jinnah International Airport (KHI): In 2024, Emirates handled over 27,000 tonnes of cargo from Karachi, indicating its significance in Pakistan's air freight sector. ULD operations are conducted by certified ground handlers, following the guidelines set by the Pakistan Civil Aviation Authority (PCAA). KHI has facilities to handle perishable cargo, including cold storage units to maintain the required temperature for sensitive goods. The airport's infrastructure supports the handling of pharmaceutical products, with temperature-controlled environments to ensure product integrity.

Islamabad International Airport (ISB): Recognized as Pakistan's largest cargo airport, with infrastructure capable of supporting substantial freight operations. ISB features a dedicated cargo terminal equipped with modern facilities to handle various types of cargo, including perishables and pharmaceuticals. ULD assembly and disassembly are managed by authorized ground handling agents. The airport is equipped with temperature-controlled storage facilities to handle perishable goods and pharmaceutical products, maintaining the integrity of temperature-sensitive cargo.

Lahore Allama Iqbal International Airport (LHE): Serves as a key cargo hub, with recent developments including a new air cargo route to China, enhancing its connectivity. In the fiscal year 2021–22, LHE handled approximately 86,774 metric tonnes of cargo. The airport's infrastructure supports the handling of perishable and pharmaceutical cargo, with temperature-controlled environments to maintain product integrity.

Dhaka Hazrat Shahjalal International Airport (DAC): Handled 229,481 tonnes of cargo up to November 2024. The completion of the third terminal is set to increase the airport's cargo handling capacity from 200,000 to 500,000 tonnes annually. ULD assembly and disassembly are managed by authorized ground handling agents, ensuring adherence to safety and operational protocols. DAC features facilities for handling perishable cargo, including cold storage units to maintain the necessary temperature conditions. The airport's infrastructure is equipped to handle pharmaceutical products, ensuring compliance with temperature requirements.

Colombo Bandaranaike International Airport (CMB): In 2024, CMB handled approximately 195,379 metric tonnes of cargo, marking a 35.2% increase from the previous year. CMB provides cargo handling services with a capacity of 250,000 metric tonnes, featuring over 25,000 square meters of storage space. ULD assembly and disassembly are managed by authorized ground handling agents. The airport is equipped with temperature-controlled storage facilities to handle perishable goods and pharmaceutical products, maintaining the integrity of temperature-sensitive cargo.

Airport	2024 Cargo Volume (tonnes)	Notable Developments
Mumbai Chhatrapati Shivaji Maharaj (BOM)	~900,000	India's busiest cargo hub
Delhi Indira Gandhi (DEL)	~800,000	Dedicated cargo terminal

Airport	2024 Cargo Volume (tonnes)	Notable Developments
Hyderabad Rajiv Gandhi (HYD)	180,914	22% YoY growth in 2024
Bangalore Kempegowda (BLR)	~400,000	Strategic location in tech corridor
Ahmedabad Sardar Vallabhbhai Patel (AMD)	N/A	Perishable cargo terminal resumed operations in May 2025
Karachi Jinnah (KHI)	27,000+ (Emirates only)	Emirates' significant cargo operations
Islamabad International (ISB)	N/A	Largest cargo airport in Pakistan
Lahore Allama Iqbal (LHE)	N/A	New cargo route to China established
Dhaka Hazrat Shahjalal (DAC)	229,481	Capacity expansion to 500,000 tonnes with new terminal
Colombo Bandaranaike (CMB)	N/A	Primary international gateway for Sri Lanka

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Middle East

Dubai International Airport (DXB): Handled 2.2 million tonnes of cargo in 2024, marking a 20.5% increase from the previous year. The airport's infrastructure supports a designed capacity of 3 million tonnes annually. Managed by dnata, DXB's Cargo Mega Terminal (CMT) features 57 docks, including 14 dedicated to pharmaceutical cargo and 12 for perishables. Equipped with specialized facilities to handle perishable goods efficiently. Emirates SkyPharma offers a purpose-built facility exclusively for temperature-sensitive pharmaceutical shipments. Plans are underway to transition operations to Al Maktoum International Airport (DWC) by 2035.

Dubai World Central (DWC): Currently estimated to handle around 600,000 tonnes. DWC's Cargo Terminal spans 41,129 sqm, providing state-of-the-art infrastructure for various cargo types. Features cold and specialized storage facilities to maintain the integrity of perishable goods. Offers specialized air cargo charter services for temperature-sensitive medicines and vaccines, ensuring compliance with international standards. DWC is undergoing a $35 billion expansion to become the world's largest airport, with a projected cargo capacity of 12 million tonnes annually.

Hamad International Airport (DOH): Processed approximately 2.6 million tonnes in 2024, a 12% increase from the previous year. Recent expansions have elevated its designed capacity to 3.2 million tonnes annually, positioning it as a central logistics hub in the region. DOH is ranked 9th globally in cargo handling and serves as a key hub for Qatar Airways Cargo. Qatar Aviation Services (QAS) manages cargo operations, ensuring efficient ULD handling. DOH operates in accordance with Good Distribution Practice (GDP), offering proactive monitoring of perishable shipments to ensure a seamless cool chain process. Adheres to the highest pharmaceutical industry standards, ensuring consistent storage, transportation, and handling under suitable conditions.

King Khalid International Airport (RUH): Managed around 573,000 tonnes in 2024. ULD’s are managed by Saudi Arabian Logistics Company (SAL), providing comprehensive airside cargo handling services. SAL's facilities include 5,000 sqm of storage, capable of handling up to 365,000 tonnes of cargo annually, with specialized areas for perishables. Features dedicated facilities for pharmaceuticals, equipped with temperature and humidity monitoring systems to maintain product integrity. Strategic investments aim to increase its cargo handling capacity to 1 million tonnes per year.

King Abdulaziz International Airport (JED): Handled approximately 461,000 tonnes in 2024. JED is the busiest airport in Saudi Arabia and a key cargo gateway. ULD Handling services are provided by Swissport. Equipped with cold storage facilities to handle temperature-sensitive goods effectively. Saudia Cargo has inaugurated modern cold storage facilities for pharmaceuticals and medicines, catering to the growing demand for temperature-controlled shipments. Ongoing developments are set to boost its capacity to 1 million tonnes annually.

Abu Dhabi International Airport (AUH): Processed 678,990 tonnes in 2024, reflecting a 21% increase from the previous year. Etihad Airport Services Cargo oversees ULD operations. Etihad Cargo has deployed cool dollies to protect perishable shipments during transportation within the airport. Etihad Cargo offers the PharmaLife product for pharmaceutical shipments, providing dedicated cool chain solutions. Infrastructure enhancements are underway to support continued growth in cargo operations. AUH is enhancing its cargo capabilities with investments in advanced logistics infrastructure.

Muscat International Airport (MCT): MCT has modern cargo facilities and serves as a hub for Oman Air Cargo. Oman SATS LLC manages cargo operations, providing comprehensive ULD handling services. MCT has been awarded IATA's CEIV Fresh certification, recognizing excellence in handling perishable materials. Also holds IATA's CEIV Pharma certification, ensuring adherence to international standards in pharmaceutical logistics.

Airport	2024 Cargo Volume (tonnes)	Designed Capacity (tonnes/year)	Infrastructure Highlights
Dubai International Airport (DXB)	2,200,000	3,000,000	Major hub for Emirates SkyCargo; ongoing expansions to enhance capacity.
Dubai World Central (DWC)	600,000 (estimated)	12,000,000	Future mega hub with significant planned capacity; part of Dubai's long-term strategy.
Hamad International Airport (DOH)	2,600,000	3,200,000	Advanced cargo facilities; recent expansions to accommodate growing demand.
King Khalid International Airport (RUH)	573,000	1,000,000 (projected)	Strategic location in Riyadh; investments to enhance cargo handling capabilities.
King Abdulaziz	461,000	1,000,000 (projected)	Key gateway in Jeddah; ongoing developments to boost cargo capacity.

Airport	2024 Cargo Volume (tonnes)	Designed Capacity (tonnes/year)	Infrastructure Highlights
International Airport (JED)			
Abu Dhabi International Airport (AUH)	678,990	1,000,000	Home to Etihad Cargo; infrastructure enhancements to support growth.

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Airline Cargo Capacity

North Asian Airlines

China Cargo Airlines

- Fleet: Operates 15 Boeing 777 Freighters.
- Recent Developments: Launched a new scheduled cargo route between Liege Airport (Belgium) and Hefei Xinqiao International Airport (China) starting 23 May 2025.

Air China Cargo

- Fleet Size: 20 dedicated freighter aircraft.
- Aircraft Types: Operates a mix of Boeing 747-400F, Boeing 777F, and Airbus A330-200F aircraft.
- Operations: Provides scheduled freighter services to over 20 cities in 12 countries, with its main base at Beijing Capital International Airport.
- Ownership: Jointly owned by Air China (51%) and Cathay Pacific (49%).
- Recent Developments: On December 30, 2024, Air China Cargo went public through an initial public offering on the Shenzhen Stock Exchange, marking the largest IPO in the Chinese A-share market for that year.

Cathay Pacific

- **Fleet**: 14 Boeing 747-8F and 6 Boeing 747-400ERF freighters.
- **Destinations**: Operates extensive cargo services connecting Asia with Europe and North America.
- Cargo Operations: Reported an 11% rise in cargo tonnage in 2024.
- Recent Developments: Faced a 2% drop in cargo capacity between China/Hong Kong and the U.S. following the suspension of "de minimis" tariff exemptions in May 2025.

Korean Air

- Fleet: Operates 23 dedicated freighters, including 12 Boeing 777Fs, 7 Boeing 747-8Fs, and 4 Boeing 747-400ERFs.
- Destinations: Provides cargo services across Asia, Europe, and North America.
- Recent Developments: Reported a 9% increase in cargo revenue in 2024. However, experienced a 22% drop in U.S.-bound cargo capacity between May 2 and 13, 2025, due to changes in U.S. tariff policies.

Air Incheon

- Fleet: 4 freighter aircraft.
- Destinations: Serves cities including Dhaka, Chengdu, Chongqing, Haikou, Qingdao, Yantai, Sapporo, Tokyo, Kuala Lumpur, and Yuzhno-Sakhalinsk.
- Recent Developments: Acquired Asiana Airlines' cargo unit, including 11 Boeing 767 and 747 freighters. Plans to modernize the fleet over the next five to seven years.

All Nippon Airways (ANA)

- Fleet: Operates 8 dedicated freighters: 4 Boeing 767-300Fs, 2 Boeing 767-300BCFs, and 2 Boeing 777Fs. Additionally, has 2 Boeing 777-8Fs on order, with deliveries expected in 2028.
- Recent Developments: Announced plans to expand cargo operations in response to increasing demand in the Asia-Pacific region.

Nippon Cargo Airlines (NCA)

- Fleet: Operates 8 Boeing 747-8F freighters.
- Destinations: Serves 20 destinations across Asia, Europe, and North America, including cities like Shanghai, Hong Kong, Milan, Amsterdam, Taipei, Bangkok, Anchorage, Chicago, Dallas, Los Angeles, New York, and San Francisco.

MIAT Mongolian Airlines

- Fleet: Operates 1 Boeing 757-200PCF freighter.

- Destinations: Operates cargo services to cities including Beijing, Guangzhou, Shanghai (starting July 2, 2025), Frankfurt, Hong Kong, Osaka, Tokyo, Seoul, Bangkok, Phuket, Istanbul, and Ho Chi Minh City.
- Recent Developments: Plans to transform Mongolia into a major air transit hub, leveraging its strategic geographical location between Europe and Asia.

China Airlines Cargo Fleet

- Boeing 777 Freighters: 10 aircraft in service.
- Boeing 747-400 Freighters: 8 aircraft currently operational.
- Boeing 777-8 Freighters: 4 aircraft on order, with deliveries expected to commence in 2030.
- In total, China Airlines Cargo operates 18 dedicated freighter aircraft as of May 2025.
- Destinations: Serves 33 destinations across Asia, Europe, and North America.
- Belly Cargo Capacity: Utilizes the cargo space of China Airlines' passenger fleet, which includes 67 aircraft such as Airbus A321neos, A330-300s, A350-900s, Boeing 737-800s, and 777-300ERs.
- Fleet Expansion: In May 2025, China Airlines placed a firm order for four Boeing 777-8 freighters and ten Boeing 777-9 passenger aircraft, with options for additional units. Deliveries are expected to begin in 2030.
- Strategic Growth: These new aircraft will enhance China Airlines' long-haul capabilities, particularly on routes to North America and Europe, and will replace older Boeing 747-400 freighters.

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Southeast Asian Airlines

Singapore Airlines

- Cargo Volume: Handled 1.1 million tonnes of cargo in FY2025, marking a 16% year-on-year increase.
- Cargo Capacity: Expanded by 10.1% to 10.8 billion tonne-kilometers.
- Cargo Load Factor: Increased by 1.6 percentage points to 56.1%.
- Network: Served 132 destinations across 37 countries and territories.

Thai Airways

- Fleet: Operates 78 aircraft, including Airbus A320s, A330s, A350s, and Boeing 777s and 787s.
- Cargo Operations: Primarily utilizes belly cargo space in passenger aircraft; no dedicated freighters currently in operation.
- Developments: Initiated conversion of Boeing 777-300ERs to freighters in partnership with KMC.

Malaysia Airlines (MASkargo)

- Fleet Expansion: Added 30 new aircraft to enhance cargo capacity and international shipping capabilities.
- Operations: Operates daily Airbus A350-900 passenger and cargo services connecting Paris and Kuala Lumpur.
- Developments: Seeking to expand regional operations with Boeing 737-800 freighter aircraft.

Garuda Indonesia

- Cargo Volume: Reported a 5% increase in cargo volume in Q1 2025 compared to the previous year.
- Fleet: Operates two Airbus A330-300 aircraft converted from passenger to freighter configuration.
- Developments: Planning to add 20 aircraft by the end of 2025 to expand operations.

Vietnam Airlines

- Cargo Volume: Carried 230,000 tonnes of cargo in 2024.

- Developments: Partnered with SATS to develop a new air cargo terminal at Long Thanh International Airport, expected to handle up to 1.2 million tonnes of cargo annually upon completion.

Philippine Airlines (PAL)

- Cargo Volume: Carried 52.6 million kilograms of cargo in Q1 2025.
- Developments: Partnered with digital air freight platform cargo.one to offer cargo capacity in the digital booking market.

AirAsia (Teleport)

- Operations: Utilizes belly cargo space across a fleet of over 200 aircraft operated by six local airlines.
- Developments: Confirmed delivery of 14 new aircraft in 2025 to support expansion of cargo operations.

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South Asian Airlines

Air India

- Cargo Capacity: Plans to increase annual cargo capacity to 2 million tonnes over the next five years, representing a 300% growth.
- Fleet Expansion: Adding 34 Airbus A350-1000, 6 A350-900, 20 Boeing 787 Dreamliners, and 10 Boeing 777X aircraft to enhance belly cargo capacity.
- Dedicated Freighters: Integrating 15 dedicated freighter aircraft by December 2025 as part of a cargo consolidation strategy.

IndiGo (IndiGo CarGo)

- Cargo Fleet: Operates 3 Airbus A321-200/P2F freighter aircraft.
- Fleet Expansion: Wet-leased 6 Boeing 787s and 2 Boeing 777s to meet growing demand.

SpiceJet (SpiceXpress)

- Cargo Fleet: Operates 3 Boeing 737-700BDSF and 3 De Havilland Canada Dash 8-400F aircraft.
- Fleet Plans: Aims to expand its operational fleet to 200 airplanes by 2026.

Quikjet Airlines

- Cargo Fleet: Operates 2 Boeing 737 freighters.
- Operations: Provides domestic cargo services and operates for Amazon Air in India.

Afcom Holdings

- Cargo Fleet: Operates 2 aircraft based out of Chennai International Airport.
- Operations: Commenced regular scheduled operations in early 2025.

SriLankan Airlines

- Recognition**: Awarded 'Emerging Cargo Airline' at the Arabian Cargo Awards 2024.
- Capacity Expansion**: Plans to expand infrastructure and invest in advanced air cargo solutions.

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Middle Eastern Airlines

Emirates SkyCargo

- Cargo Volume: Handled 2.3 million tonnes in FY2024–2025, marking a 7% year-on-year increase.
- Fleet Expansion: Took delivery of two new Boeing 777 freighters, expanding its fleet to 11 B777Fs.
- Freighter Network: Expanded to 38 destinations, including new routes to Tokyo Narita and Copenhagen.
- Future Plans: Aims to double its freighter fleet to 21 aircraft by the end of 2026.

Etihad Cargo

- Capacity Increase: Expanded main deck capacity by 18% to support increased demand in Greater China. ([World Airline News][3])
- Belly Hold Capacity: Increased belly hold cargo capacity via 880 passenger flights per week in November 2024, growing to over 900 by March 2025.
- Network Expansion: Introduced new routes and increased frequencies across Europe, Southeast Asia, and the Middle East to enhance cargo connectivity.

Qatar Airways Cargo

- Capacity Expansion: Added 100 tonnes of additional weekly cargo capacity to/from Chicago as of May 2025.
- New Routes: Commenced twice-weekly freighter operations to Atlanta with over 200 tonnes of weekly capacity.
- Partnerships: Collaborated with Virgin Australia to offer customers an additional 180+ tonnes of cargo capacity per week.

Saudia Cargo

- Fleet: Operates a fleet that includes Boeing 747-400F and Boeing 777F aircraft.
- Recent Developments: Welcomed a new CEO to drive air cargo growth and signed a ground handling deal with Swissport at Nairobi Airport.

Turkish Cargo

- Fleet: Operates a fleet of Boeing 777F and Airbus A330F aircraft.
- Performance: Reported strong performance in January 2025, with significant cargo volumes handled.

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Current Backlog or uplift issues faced by Airports

North Asia

Shanghai Pudong is currently facing significant cargo handling delays. Recent COVID-19 cases among ground handling staff have led to the suspension of cargo handling operations to prevent further spread. This has resulted in massive delays in air freight cargo departing China, with many cargo freighters and passenger-converted cargo flights canceled. The shortage of ground staff, due to quarantine measures and the "14+7+7" close-loop staff rostering, has further exacerbated the situation, leading to multiple airlines suffering from no fit positions or empty flights out.

Beijing Capital Airport continues to grapple with slot congestion issues. The Civil Aviation Administration of China (CAAC) has historically refrained from assigning slots or permits for technical stops or crew rests, particularly within the same day, due to the airport's heavy daily traffic. This limitation affects cargo operations, especially for flights requiring technical stops or crew rest periods.

Incheon Airport is undergoing significant changes with the sale of Asiana Airlines' cargo business to Air Incheon. The transition, expected to finalize in June, involves the integration of personnel and fleet, which may temporarily affect cargo operations during the handover period. However, the airport is also expanding its capacity, with recent improvements adding 1.3 million tons to its freight capacity, raising the total to 6.3 million tons annually.

Narita Airport has commenced runway enhancement construction aimed at functional improvements, with plans to construct a third runway and extend existing runways by the end of March 2029. While these developments are aimed at increasing capacity, they may cause temporary disruptions to cargo operations during the construction phase.

Hong Kong International Airport remains the world's busiest cargo airport, handling over 4.9 million tonnes in 2024, a 14.1% increase from the previous year. While no specific backlog issues have been reported, the high volume of cargo traffic suggests that the airport is operating at near-full capacity, which could lead to potential delays if disruptions occur.

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Southeast Asia

Changi Airport is facing congestion issues, leading to backlogs of 1–2 days. This is primarily due to a surge in e-commerce demand and increased airfreight volumes from Southeast Asia to the U.S., as shippers reroute cargo away from China following recent tariff changes. The heightened demand has strained cargo handling capacities, causing delays.

Major airports in the Philippines, including Manila and Cebu, are experiencing similar congestion, with backlogs of 1–2 days. The increased demand for airfreight services, particularly for e-commerce shipments to the U.S., has outpaced the airports' handling capacities, leading to delays.

Tawau Airport has been operating beyond its designed capacity, leading to congestion and delays. The airport, originally built to handle 1.4 million passengers annually, recorded over 1.8 million passengers in 2019. Despite plans for expansion, the airport continues to face capacity issues, affecting both passenger and cargo operations.

A significant earthquake on March 28, 2025, caused substantial damage to Nay Pyi Taw International Airport, including the collapse of the air traffic control tower and runway damage. The airport was temporarily closed, disrupting cargo and passenger flights. While operations have resumed, recovery efforts are ongoing, and some delays persist.

Ho Chi Minh City's Tan Son Nhat International Airport is experiencing increased cargo volumes, leading to congestion. To alleviate pressure, the development of Long Thanh International Airport is underway, with Phase 1 expected to be operational by 2026. However, until then, capacity constraints at existing facilities may continue to cause delays.

Soekarno-Hatta International Airport in Jakarta remains one of the busiest in Southeast Asia. While there are no specific reports of cargo backlogs, the airport's high traffic volume necessitates careful scheduling and capacity management to prevent potential delays.

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South Asia

Mumbai Airport had initially planned to cancel landing and take-off slots for cargo carriers post-August 16, 2025, citing construction activities. However, following protests from the International Air Transport Association (IATA) and airline representatives, the airport reversed its decision, reinstating all historical slots for the winter 2025 schedule.

In response to India's air strikes in Pakistan and Pakistan-occupied Kashmir, Kolkata Airport suspended scheduled runway repairs and has been placed on high alert. The Air Traffic Control (ATC) is managing an increased load due to heightened security and altered flight operations.

Kushinagar Airport has been struggling with operational issues leading to its temporary closure since 2023. Efforts are underway to resolve these problems, with a target to resume operations in the latter half of 2025.

Following India's Operation Sindhoor missile strikes, Pakistan closed its airspace to all Indian carriers on April 24, 2025. This closure escalated to a total airspace shutdown, affecting all commercial flights at major airports, including Islamabad and Lahore. The airspace was reopened to non-Indian carriers on May 8, 2025.

While specific backlog issues at Bangladeshi airports have not been reported, the regional geopolitical tensions and airspace closures have likely caused disruptions and rerouting of flights, potentially leading to operational challenges.

The geopolitical tensions between India and Pakistan have introduced critical operational constraints for air cargo networks in South Asia. The closure of airspace and heightened security measures have led to increased flight times, rerouting, and potential delays in cargo handling across the region.

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Middle East

In April 2024, DXB faced significant operational disruptions due to severe flooding, leading to the cancellation of 31% of flights and causing substantial cargo backlogs. While recovery efforts have been ongoing, the airport continues to manage high cargo volumes, which may contribute to occasional delays.

DWC is undergoing a major expansion project aimed at increasing its capacity to handle up to 12 million tonnes of freight annually. During this transition period, some cargo operations may experience temporary adjustments or delays as facilities are upgraded.

Hamad International Airport processed 2.6 million tonnes of cargo in 2024, marking a 12% increase compared to the previous year. While the airport has managed this growth effectively, the sustained high volumes may lead to occasional congestion and handling delays.

JED handled 461,000 tonnes of cargo in 2024. The airport is undergoing expansion projects, including the construction of a new terminal and runway enhancements, which may temporarily impact cargo handling efficiency.

RUH managed 573,000 tonnes of cargo in 2024. Similar to JED, ongoing infrastructure developments aimed at increasing capacity may lead to short-term operational challenges affecting cargo throughput.

AUH experienced a 21% increase in cargo traffic in 2024, handling 678,990 tonnes. The airport is expanding its cargo facilities to accommodate this growth, but during the expansion phase, some delays in cargo processing may occur.

Infrastructure Strain: Rapid growth in cargo volumes across Middle Eastern airports is placing pressure on existing infrastructure, leading to potential delays and backlogs.

Weather Disruptions: Extreme weather events, such as the flooding in Dubai, have highlighted vulnerabilities in airport operations, affecting both passenger and cargo flights.

Shifting Trade Dynamics: Changes in global trade patterns, including increased e-commerce demand and alterations in trade routes, are impacting cargo flows through the Middle East, necessitating adjustments in logistics planning.

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Mitigating strategies

The mitigating strategies mentioned herein need to be cross references with any current issues an airport may be facing and if the airport itself has the capacity to manage the cargo and provides the services required.

North Asia

- Rerouting and Transshipment via Alternative Hubs
    - Use Southeast Asia (SIN, BKK, KUL) or South Korea (ICN) as alternate transshipment points to bypass congestion at PVG (Shanghai) and PEK (Beijing).
    - Turkish Cargo's IST hub and Doha (DOH) also serve as efficient gateways for Europe-bound and Middle East cargo.
    - Consider Japan (KIX, NGO) as lower-congestion alternatives to NRT and HND for intra-Asia routing.
- Capacity Reallocation and Dynamic Scheduling
    - Shift non-time-sensitive cargo to ocean freight or rail (China-Europe block trains) to reduce pressure on airfreight lanes.
    - Reallocate freighter and belly space dynamically based on airport throughput reports (e.g. temporarily redeploy aircraft away from PVG).
    - Use night-time slots or secondary airports where available (e.g., Zhengzhou CGO, Hangzhou HGH) to reduce dwell time.
- Buffer Stock and Forward Positioning
    - Create regional buffer inventory at strategic locations such as Singapore or Hong Kong for high-turnover SKUs.
    - Forward-position critical items in less congested hubs close to final delivery zones (e.g., Busan, Osaka, or Kaohsiung).
- Enhanced Stakeholder Communication and Forecasting

- Share advanced shipping notices (ASNs) and regular updates with GHA, carriers, and customs to align expectations.
  - Improve forecasting accuracy with AI tools to model airport delays and advise customers proactively.
- Flexible Procurement Contracts
  - Negotiate contracts with multi-hub uplift options and priority access clauses for time-definite shipments.
  - Incorporate SLAs that allow for temporary changes in routing due to disruption-related exceptions.
- Ground Handling and Facility Investment
  - Collaborate with GHAs to co-invest in off-airport bonded facilities to relieve apron-side congestion.
  - Accelerate digital twin and warehouse automation projects to increase throughput during peak surges.
- Diversification of Carrier Partnerships
  - Avoid overreliance on carriers heavily exposed to PVG or PEK; expand partnerships with ANA Cargo, Asiana, Korean Air, and SF Express operating from alternate hubs.

South Asia

- Rerouting Cargo Through Alternative Gateways
  - Use alternate airports within India (e.g., Hyderabad, Ahmedabad, Bangalore) to bypass congested hubs like Mumbai (BOM) or Kolkata (CCU).
  - Reroute via Colombo (CMB), Dubai (DXB), or Doha (DOH) to access South Asia when regional airports face geopolitical restrictions or slot limits.
  - For Pakistani-bound cargo, consider transiting through Muscat (MCT) or Dammam (DMM) and utilizing bonded trucking solutions where feasible.
- Airspace Contingency Planning
  - Develop contingency flight paths with carriers in response to airspace closures (e.g., due to India–Pakistan tensions).
  - Coordinate with freight forwarders and GSAs to monitor NOTAMs and rapidly adjust flight schedules and routings.
- Flexible Scheduling and Use of Night Slots
  - In congested airports like Mumbai or Delhi, utilize off-peak hours or nighttime landing slots to secure cargo uplift capacity.
  - Adjust shipping cutoffs to align with those slots and manage ground handling more effectively.
- Collaboration with Government and Civil Aviation Authorities

- For Indian airports, engage with AAI (Airports Authority of India) and MoCA (Ministry of Civil Aviation) to secure historical slots and resist reductions.
- Lobby for freighter prioritization during runway works or infrastructure upgrades.

- Use of Multimodal Logistics
  - Shift inbound freight to sea-air or land-air combinations, particularly through southern India (Chennai + Bangalore) or Mumbai–Delhi road-air transfers.
  - Develop multimodal corridors connecting ports (JNPT, Kolkata Port) to inland airports for faster customs clearance and domestic delivery.
- On-Ground Process Optimization
  - Digitize customs documentation using ICEGATE (India), WeBOC (Pakistan), or ASYCUDA (Bangladesh) platforms to reduce manual errors and clearance times.
  - Introduce advanced cargo screening, bonded storage, and e-invoicing integrations for faster throughput.
- Inventory and Risk Management
  - Maintain buffer stock in non-hotspot zones (e.g., Gujarat, Sri Lanka FTZs) to hedge against last-mile delays in congested cities.
  - Segment SKUs into critical vs. non-critical to prioritize cargo booking on high-risk lanes (e.g., BOM–LHE).
- Carrier and Network Diversification
  - Avoid overreliance on state carriers or single airlines in India and Pakistan—use carriers like Emirates, Qatar Airways, Turkish Cargo, or regional players like SpiceXpress, IndiGo CarGo, and SriLankan Cargo.
- Emergency Protocols and Communication SOPs
  - Establish real-time communication protocols with customers and agents in case of geopolitical disruptions or airport shutdowns.
  - Offer pre-approved "Plan B" shipping routes based on scenario mapping (e.g., war zone, curfew, NATCON strike).

Southeast Asia

- Diversify Uplift Points Across the Region
  - Shift cargo from congested hubs (e.g. SIN, MNL) to emerging or secondary airports:
  - Vietnam: Use Da Nang (DAD) or Hanoi (HAN) as alternates to SGN.
  - Malaysia: Consider Penang (PEN) or Kuala Lumpur (KUL) over overstretched regional hubs.

- Indonesia: Leverage Surabaya (SUB) or Balikpapan (BPN) as alternates to CGK.

- Night-Time or Off-Peak Operations
  - Utilize off-peak slots (midnight to 6am) where infrastructure strain is lower and slot availability is better.
  - Coordinate closely with GHAs (ground handling agents) to prioritize high-yield or temperature-sensitive shipments during these hours.
- Regional Transshipment via Well-Equipped Hubs
  - Tranship via efficient regional hubs such as:
  - Bangkok Suvarnabhumi (BKK) – excellent connectivity and cargo infrastructure.
  - Kuala Lumpur International (KUL) – often underutilized relative to SIN and BKK.
  - Singapore Changi (SIN) – still viable for bonded consolidation if warehousing is leveraged.
- Pre-clearance and Electronic Documentation
  - Reduce ground handling delays by adopting:
  - e-AWB (electronic airway bill)
  - Pre-customs clearance submission in AHTN or HS Code format
  - e-Certificates and QR-tagged commercial invoices for pharma, FMCG, or controlled goods
- On-Airport and Off-Airport Buffer Warehousing
  - Use bonded off-airport warehouses near key ports (e.g. Tuas in Singapore, Laguna in Philippines) to reduce dwell time at terminals.
  - Establish pre-staging areas for exports and deconsolidation zones for imports, managed with WMS-integrated systems.
- Collaborative Forecasting with Airlines
  - Share shipment forecasts with airlines and GHAs to align on available capacity.
  - Pre-book block space agreements with built-in flexibility to avoid ad hoc rates and rejection.
- Sea-Air or Road-Air Alternatives
  - For time-tolerant shipments, use:
  - Sea-Air via Port Klang or Tanjung Pelepas to Dubai or Europe
  - Trucking networks from Penang–Bangkok–Ho Chi Minh (ASEAN corridor)
  - Feeder vessels into Singapore or Batam, then airlifted
- Digital Capacity and Rate Marketplaces

- Engage with digital freight platforms like WebCargo, Cargo.one, Freightos to dynamically access underutilized routes or last-minute uplift options.
    - Monitor rate volatility and backhaul opportunities to optimize cost and speed.
- Carrier Network Flexibility
    - Work with multicarrier logistics providers or 4PLs to hedge against disruptions by shifting cargo across multiple carriers such as:
    - Singapore Airlines Cargo, Qatar Airways Cargo, Thai Cargo, Emirates SkyCargo, and AirAsia Cargo

Middle East

- Leverage Multiple Gateways Across the Region
    - Redistribute cargo across the region to reduce dependency on single congested hubs:
    - Use Al Maktoum (DWC) over Dubai International (DXB) for freighter-heavy routes.
    - Shift volume to Abu Dhabi (AUH) or Sharjah (SHJ) if DXB is impacted by weather or overbooking.
    - Consider Salalah (SLL) or Dammam (DMM) for Gulf-bound airfreight when Saudi airports are under expansion stress.
- Align Schedules with Infrastructure Projects
    - For airports undergoing expansion (e.g. JED, RUH, AUH), schedule non-urgent shipments outside of runway or terminal work periods.
    - Proactively request slot reservations or off-peak handling for time-critical goods.
- Utilize Purpose-Built Cargo Facilities
    - Redirect shipments to airports with high cargo automation capabilities:
    - Hamad (DOH) and DWC are optimized for e-commerce and pharma, with faster turnaround.
    - Avoid mixed-use terminals (e.g., DXB T1 or T3) for large freighter shipments unless priority access is secured.
- Weather Risk Contingency Planning
    - Given past flooding at DXB, create pre-agreed rerouting SOPs with carriers for alternate uplift via DWC, AUH, or MCT (Muscat).
    - Include force majeure clauses in SLAs to protect against delay penalties during weather-related shutdowns.
- Strengthen Digital and Customs Processing
    - Utilize pre-clearance programs, such as:

- UAE's Bayan System
- Saudi Arabia's Fasah
- Qatar's Al Nadeeb
- Digitize airway bills, invoices, and permits to cut customs clearance time and avoid on-ground bottlenecks.

- Carrier Diversification and Block Space Agreements (BSAs)
  - Split volume among Emirates SkyCargo, Qatar Airways Cargo, Etihad Cargo, Saudia Cargo, and Turkish Cargo (via IST) to maintain flexibility.
  - Negotiate BSAs with contingency terms, allowing temporary reallocation during regional disruptions.
- Pre-Position Inventory in Regional Free Zones
  - Stock high-rotation items in Dubai Airport Free Zone (DAFZA), Qatar Free Zone, or King Abdullah Economic City (KAEC) to mitigate last-mile risks.
  - Use these zones for pick-pack-ship models serving GCC customers with 24–48 hour delivery cycles.
- Use Feeder Services and Sea-Air Options
  - Consider feeder flights from South Asia or Africa into DWC or AUH to reduce pressure on trunk routes.
  - Use sea-air transshipment via Jebel Ali + DWC, especially for Asia–Europe lanes.
- Collaborate on Ground Handling Efficiency
  - Encourage GHAs (e.g., dnata, Menzies) to:
  - Implement predictive cargo arrival tools and automated slot booking
  - Enhance dock scheduling and ULD tracking to cut ramp dwell times

Certifications

The IATA Center of Excellence for Independent Validators (CEIV) certification program was created to help organizations throughout the air cargo supply chain get on the right track to achieve operational excellence in the handling and transportation of special cargo. Parties that can get certified include airlines, freight forwarders and airport. There are three areas of certification, Pharma, Live Animals and Perishables. (https://www.iata.org/en/services/certification/special-cargo/)