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INDUSTRY INSIGHTS SPECIAL ISSUE



STRATEGIC SHIFTS

Airports and airlines are embracing change and realigning priorities to future-proof air freight

INTERVIEWS WITH: LUFTHANSA CARGO • SOLITAIR • DALLAS FORT WORTH INTERNATIONAL AIRPORT • GLASGOW PRESTWICK AIRPORT



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EDITOR
Craig Waters
craig.waters@aviationbusinessnews.com

EDITORIAL DIRECTOR
Lee Hayhurst
lee.hayhurst@aviationbusinessnews.com

ART DIRECTOR
Phil Couzens

SUB-EDITOR
Heather Ford

GROUP COMMERCIAL DIRECTOR
Toby Walton
toby.walton@aviationbusinessnews.com

GROUP COMMERCIAL MANAGER
David Hirsh
david.hirsh@aviationbusinessnews.com

SENIOR BUSINESS DEVELOPMENT MANAGER
Robert Gouge
robert.gouge@aviationbusinessnews.com

CEO
Chris Pitchford

For subscriptions & enquiries:
Barnaby Moore
barnaby.moore@realresponsemedia.com
All enquiries
+44 (0) 20 8444 2554

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16



12



08

04 Cargo Airport

Thanks to its proactive vision, Glasgow Prestwick is fast becoming a major industry player

08 Cargo Airline
How Lufthansa Cargo is navigating economic shifts and investing in automation

12 Cargo Airport

Agility and collaboration are key to cargo success at Dallas Fort Worth International

16 Cargo Airline
SolitAir is on a mission to revolutionise regional air cargo logistics



WELCOME...

In a rapidly evolving global trade environment, air cargo is undergoing a period of intense transformation.

From the surge in cross-border e-commerce to the pressure to meet ambitious sustainability targets, airlines and airports alike are being challenged to rethink their strategies, infrastructure and partnerships.

At the same time, disruptive technologies – from automation to data analytics – are reshaping how freight is handled, tracked and delivered.

This special supplement brings together exclusive insights from leaders at Lufthansa Cargo, SolitAir, Dallas Fort Worth International Airport and Glasgow Prestwick Airport who share how they are tackling today's operational and economic realities, while laying the groundwork for a more agile, digital and customer-centric air cargo ecosystem.

What emerges is a sector that is embracing change with urgency and purpose. Industry leaders are aligning around smarter, more connected solutions to drive efficiency, resilience and sustainability in the next era of air cargo. ●

Craig Waters

Craig Waters
Editor

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A PROACTIVE MINDSET

Glasgow Prestwick Airport's *Nico Le Roux* shares the airport's strategic response to e-commerce disruption, automation trends and sustainability targets

► **In what ways are global economic trends and the rise of e-commerce influencing the air cargo industry, and how is this affecting operations at Glasgow Prestwick Airport (PIK)?**

We closely monitor global economic trends to ensure we remain adaptable to shifting market demands. Identifying growth sectors in air cargo and understanding their needs allows us to serve them as effectively as possible.

A significant disruptor at the moment is e-commerce, and we have been focusing our efforts on supporting this industry for over a year and a half now.

Our involvement in e-commerce began in peak season 2023 when a charter operator approached us with a request to handle e-commerce shipments through PIK. After successfully managing the process,

we decided to expand our services in this sector and become a hub for e-commerce coming into the UK.

Given our infrastructure and location, we are uniquely positioned to provide this solution for e-commerce operations.

A key learning from our experience in e-commerce is the complexity of decision-making in this sector. With multiple stakeholders involved, from carriers and forwarders to charter agents and last-mile providers, it can be difficult to pinpoint who has the final say on routing decisions.

Understanding this dynamic has been crucial to developing PIK's position as an e-commerce gateway, and we have established relationships across all these sub-sectors to ensure we remain engaged at every level.



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► **With the rise of automation and emerging technologies in cargo handling, what impact do you see this having on PIK's facilities and activities?**

In 2024, we invested £2.17 million in new cargo handling equipment to further improve PIK's ability to provide efficient and reliable cargo services.

Specifically, we acquired two high loaders with capacities of 20 tonnes and 35 tonnes, a heavy-duty pushback tractor capable of handling any aircraft type, and 12 new dollies. With our enhanced infrastructure, we now achieve turnaround times of under two hours for 90-tonne loads.

Our new cold storage facilities, with a controlled range of -30°C to +25°C, is an aspect of the airport that we are looking to develop further as we continue to support Scotland's perishable export market.



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1. PIK is equipped with the full range of freight handling equipment
2. Nico Le Roux, business development director, Glasgow Prestwick Airport (PIK)

“We closely monitor global economic trends to ensure we remain adaptable to shifting market demands”

While we have not yet implemented full automation, it is something we are exploring – particularly for e-commerce processing, which remains labour-intensive.

We are also considering software solutions to provide greater visibility into package movement through the airport, which is currently tracked manually.

► **How is PIK addressing sustainability concerns in its cargo operations? What green initiatives are being implemented?**
One key initiative we have implemented to reduce our carbon footprint

is ensuring that any handling or warehousing equipment that needs replacing is upgraded to electric-powered alternatives. Our overarching goal is to significantly cut emissions by 2030, and we are on track to meet this target.

Our long-term objective is to achieve self-sufficiency and, ultimately, contribute surplus energy back to the grid.

From an operational standpoint, our airport's design offers efficiency advantages. Due to PIK's landing and take-off cycle, our approach and taxiing procedures significantly

reduce CO₂ emissions compared to busier airports. We can help our clients quantify these savings with our software partner, RDC Aviation, which can calculate the emissions volumes from landing and take-off.

► **How is PIK balancing the need for increased security measures with the demand for faster, more efficient cargo processing?**

We have invested in some of the fastest and most advanced screening technology available in the UK.

As part of PIK's development of its infrastructure in 2024, we also invested in a Rapiscan X-ray machine with 7.5mm steel penetration, allowing us to maintain fast processing speeds while making sure cargo is screened accurately and safely.

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1. PIK recently invested over £2 million in new cargo equipment 2. PIK has become a hub for e-commerce coming into the UK

“Everyone at PIK is part of a cohesive unit, working together towards common goals”

► What is the relationship like between PIK and its cargo handling companies?

Unlike many other airports, we handle all cargo operations in-house through Prestwick Aviation Services. This simplifies the process for operators – whether it’s warehousing, ground handling or refuelling, they only need to deal with a single point of contact.

That being said, we also maintain strong relationships with multinational ground handlers, collaborating when needed to provide support at other locations.

► Reflecting on your role as a senior leader at PIK, what significant lessons have you learned about your organisation and the dynamics of the air cargo industry?

One of the key lessons I have learned is that the air cargo industry is constantly

evolving. This is actually my second tenure at PIK – I left 13 years ago when the industry appeared to be slowing down. During that time, I moved to Africa to develop cargo airports but, three years ago, as the industry experienced rapid growth – particularly in e-commerce – I was invited back.

What stands out about PIK is the effectiveness of our in-house team. Unlike larger airports where different departments can operate in silos, everyone at PIK is part of a cohesive unit, working together towards common goals.

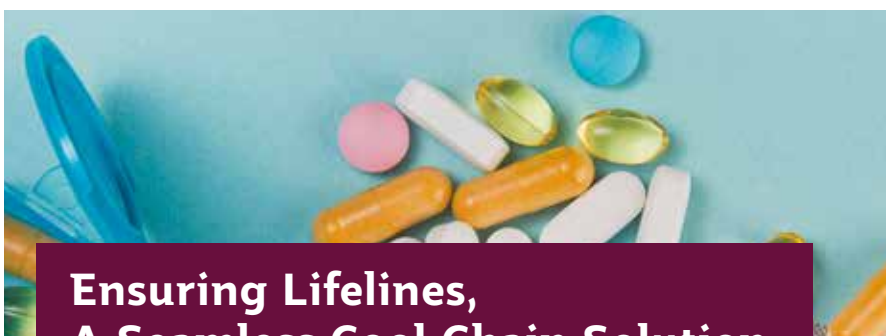
It is this approach that allows us to take on complex projects that others might shy away from; whether it’s handling project cargo or entire flights of livestock, our team consistently rises to the challenge.

I have also been impressed by the foresight of our board in recognising the potential of cargo operations. At many UK airports, cargo is treated as an afterthought, but at PIK it is a priority.

This proactive mindset has positioned us as a leading player in the industry, and I am excited to see how we continue to grow and adapt in the coming years. ●



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WELL POSITIONED

Lufthansa Cargo's *Anand Kulkarni* shares how the airline is navigating economic shifts and investing in new AI and automation initiatives to stay ahead

► **How are global economic conditions impacting air cargo, and what does this mean for Lufthansa Cargo?**

Due to the dynamic, global environment, air cargo is expected to be in high demand. It is likely that supply chains will remain under pressure from current and unforeseen political, economic or natural events. Such disruptions will continue to drive demand for a reliable, fast, flexible and secure mode of air transport.

E-commerce will also remain a driving force behind the current growth we experience in global air cargo. Especially on the routes from Asia to Europe and the US, this new commodity is creating an additional need for air cargo capacity.

We also observe that the global economy, and especially trade, is in the

process of adjusting to recent political tensions. Trade is further diversifying and new air cargo markets are benefiting, such as Vietnam and India.

Lufthansa Cargo tackles these challenges and opportunities with a dense global network, which we steer along our customers' needs and thus follow our purpose of 'enabling global business'.

► **How is Lufthansa Cargo leveraging advancements in digitalisation to optimise operations?**

We have successfully implemented several promising use cases that highlight the potential of artificial intelligence (AI) and automation to improve efficiency, reduce costs and drive innovation.



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For example, taking the first steps in automated rebooking in the event of unforeseen flight changes at the Frankfurt hub, or automated written statements in our service centres. This enables Lufthansa Cargo to respond to customer enquiries more quickly and efficiently, especially in irregular situations, which has significantly improved the customer experience.

Looking ahead, we plan to continue investing in new AI and automation initiatives to stay at the forefront of the air cargo industry and provide exceptional value to our customers.

Being involved in the IATA ONE Record initiative, we are a pioneer in the digitalisation of the air freight industry and actively working to establish an open industry-wide data standard to make progress in digitalisation benefitting all – including shippers.

“E-commerce will also remain a driving force behind the current growth we experience in global air cargo”



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Lufthansa Cargo



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► **Can you discuss Lufthansa Cargo's efforts towards sustainability?**

Lufthansa Cargo is pursuing a clear strategy for a more sustainable future and, together with the Lufthansa Group and partners, has set itself ambitious climate protection targets. We aim to achieve a neutral CO₂ balance by 2050 and to halve net CO₂ emissions by 2030, compared to 2019.

As an airline, our greatest CO₂-saving potential lies in the air. In addition to the use of sustainable aviation fuel (SAF), more sustainable aviation also requires major efforts for a modern fleet and efficiency improvements in flight operations. In 2024, fuel efficiency measures have saved approximately 9,000 metric tonnes of kerosene, or 28,000 metric tonnes of CO₂ emissions.

Since October 2021, we have switched our long-haul fleet completely to the Boeing 777F – today's most modern freighter with the best environmental performance in its class. We have seven

Boeing 777-8 freighters featuring the latest technology on order and expect them to be delivered by 2030.

► **Where do you see the biggest opportunities for growth in the air cargo sector, and how is Lufthansa Cargo positioned to capitalise on these opportunities?**

Our world is becoming more complex. This is also true for global trade and economic developments. Therefore, offering flexible solutions along the supply chain is crucial to grow in this challenging environment. Especially with our subsidiaries within Lufthansa Cargo, we can offer exactly that.

Our wholly owned subsidiary, heyworld, focuses entirely on the needs of the e-commerce industry. The offer is aimed at online retailers, digital marketplaces, webshop providers and freight forwarders and includes configurable, transparent and reliable transport solutions.

Additionally, our subsidiary CB Customs Broker offers all standard customs procedures across various industries, as well as automated complete solutions. It is the first customs clearance agency in Germany to have fully digitalised the necessary customs clearance processes by using its own e-commerce customs clearance software.

With 'time:matters', we have an expert in time-critical emergency transport and customised supply chain solutions with over 20 years of experience in the industry. I'm confident that Lufthansa Cargo is very well positioned to capitalise on the current and upcoming market opportunities, given our knowledge, expertise and customer-centricity. 📍

1. The Boeing 777F is today's most modern freighter with the best environmental performance in its class
2. Anand Kulkarni, head of global markets, Lufthansa Cargo
3. Nose-to-nose, a B777F and A321F



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Rob Stolk, Project Manager, AFI KLM E&M



“It was a pleasure to be able to speak at PAM. My team and I were super impressed with the production of the conference and the associated events and it proved to be very worth our time.”

Mike Roemer, Senior Manager, United Airlines

“PAM Dublin was an exceptional event, and I was honoured to present about aircraft health monitoring at SAS. Sharing insights on predictive maintenance alongside industry pioneers was inspiring. The focus on innovation and collaboration reinforced my belief in shaping the future of aviation safety and efficiency.”

Matias Bjerregaard, PAM Specialist, Scandinavian Airlines



CONNECTED CARGO OPERATIONS

Dallas Fort Worth International Airport's
Milton De La Paz emphasises that agility and collaboration
are critical to its cargo operational success

► **How are global economic conditions impacting air cargo, and what does this mean for Dallas Fort Worth International Airport (DFW)?**

Global economic factors have impacted air cargo in multiple ways over the past couple of years. Geo-political conflict in the Ukraine and Middle East have resulted in moderate modal shifts from sea to air with the challenges of shipping through the Red Sea and Suez Canal. These shifts have driven airlines to redeploy capacity to meet demand in different lanes.

In addition, the continued accelerating growth in international e-commerce from China to Europe and the Americas has driven demand for charters, putting further pressure on capacity on key markets for DFW which has been exacerbated by aircraft delivery delays.

DFW is fortunate to have a central US location with an omni-directional distribution radius, along with a strong manufacturing sector and a diverse base of industries that drive global trade.

We have also adopted a strategic focus to grow key vertical markets in alignment with our overall business objectives. E-commerce, aerospace, automotive, perishables, pharma and transborder Mexico trade are all verticals that are important to our cargo business.

► **What are the biggest challenges for air cargo airports in the next 5-10 years, and how is DFW preparing?**

Airports face the ongoing challenge of providing infrastructure that meets evolving industry needs, supports sustainability goals and avoids capacity imbalances. Developing the right-sized



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airside capacity, aligned with future growth and specialized facilities, must be balanced with landside infrastructure – ensuring efficient roadway access and collaboration across the cargo community to reduce congestion and optimise goods movement.

Talent recruitment, training and retention, along with integrating AI and advanced technologies, also remain key challenges for airport communities.

At DFW, we're addressing these through initiatives such as a campus-wide 5G network and a new road to improve access. Our dedicated Innovation Department, with its own budget, enables us to continuously explore creative solutions. For example, our cargo and innovation teams are leveraging truck driver data loggers to optimise stoplight timing in cargo zones – part of our ongoing efforts to enhance efficiency.

► **What trends are you seeing in cross-border e-commerce, and how is DFW adapting?**



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“As we look to the future, we want to ensure our cargo business initiatives align with our digital transformation strategy”

Volumes of e-commerce continue to grow exponentially each year. In FY 2023, DFW had 20.3 million e-commerce clearances and in FY 2024 ended with 52.2 million clearances. Numbers at DFW continue to grow more than double each year since FY 2020.

The e-commerce companies that are operating dedicated charters are facing capacity challenges finding aircraft for new contracts. We've heard from large shippers that even more e-commerce cargo could come to DFW because of our central location, but capacity is not always available to increase the number of flights.

With that in mind, we have two existing companies operating multiple weekly charters to DFW who both expect to add frequencies in 2025.

The primary demand of cross-border e-commerce shippers is the speed of clearance and particularly targeted inspections.

The growing international e-commerce volumes, particularly from China, coupled with the requirement for speed in clearance and the Department of Homeland Security and US Customs and Border Protection's (CPB) commitment to protect and safeguard our security and commerce, has resulted in a trend to develop

1. E-commerce, aerospace, automotive, perishables, pharma and transborder Mexico trade are all verticals that are important to the DFW cargo business
2. Milton De La Paz, vice president of airline relations and cargo business development, Dallas Fort Worth International Airport (DFW)
3. Volumes of e-commerce activity at DFW continue to grow exponentially each year

on-airport Centralised Examination Station (CES) facilities.

To facilitate faster resolution of inspections, we have partnered with CBP and dnata USA to open the first airside CES at any US airport. Dnata operates the facility and CBP has officers on-site to perform inspections expeditiously, enabling transfers both ramp-side and landside to meet the needs of the brokers and e-commerce companies resulting in a more efficient e-commerce ecosystem at DFW.

CBP has a goal to come to a resolution (release, seizure, additional paperwork, etc.) on cargo requiring physical inspection within one business day after it is transferred to the CES. This is possible because CBP officers do not have to spend time driving between bonded warehouses spread over a large geographic area, resulting in a more efficient allocation of CBP's time and resources.

► How are automation and new technologies shaping DFW's cargo operations?

We were one of the first airports in the US to implement a cargo community system, the DFW Cargo Cloud. This programme was built to improve overall efficiency at the airport by allowing automated data-sharing between airlines, ground handlers, forwarders and trucking companies.

We are aware many of our airline and ground handler partners are working on their own automation initiatives for things including performing nightly inventory with drones, automated pallet retrieval systems and AI for camera systems, among others.



▲ DFW is fortunate to have a central US location with an omni-directional distribution radius

“We want to add our voice where it’s needed, learn from others and contribute to the positive direction of the global air cargo business”

As we look to the future, we want to ensure our cargo business initiatives align with our digital transformation strategy and we will continue to work with our dedicated innovation colleagues to optimise technology and automation in alignment with our sustainability goals.

► How is DFW addressing sustainability concerns in its cargo operations?

DFW is an industry leader for sustainability and resiliency with a goal to reach net-zero carbon emissions by 2030, 20 years ahead of the global aviation industry.

We are the largest carbon-neutral airport in the world and the first airport in North America to have achieved that milestone in 2016. Since 2010, DFW has reduced carbon dioxide emissions by 81%.

DFW is building an electric Central Utility Plant set to open in 2025 that will be powered by 100% renewable energy and will improve local air quality by decreasing ozone precursor emissions.

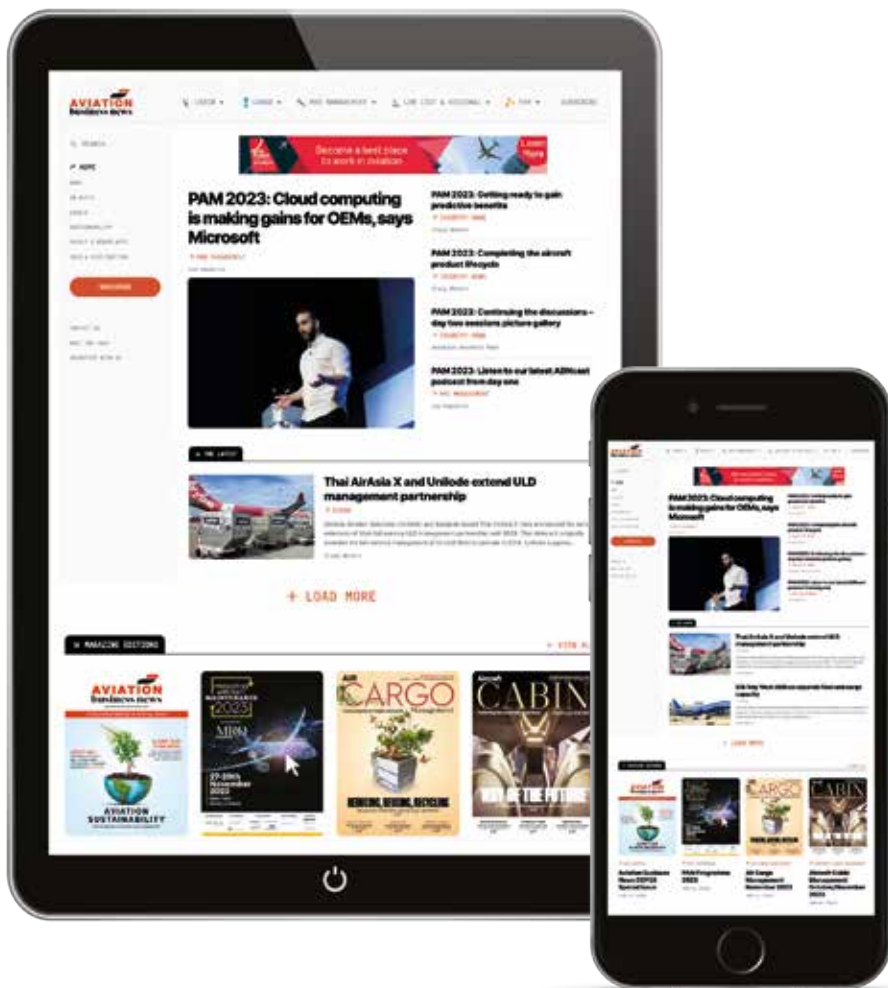
In addition to carbon emissions, DFW has an additional goal of producing zero waste and we have partnered with one of our cargo handlers, Menzies Aviation, to recycle cardboard from e-commerce overpack boxes that were being broken down in the Menzies CFS. With an overwhelming volume of cardboard for the Menzies waste management vendor, DFW was able to provide containers for the cardboard at no charge, with the cardboard ultimately going to our recycling vendor, diverting over 21 tonnes of cardboard from landfills.

► What value is there in DFW having partnerships with industry associations such as TIACA, IATA and ACI?

DFW has a strategic geographic location, is in the fourth largest and fastest growing metropolitan statistical area in the country, and is increasingly developing and being recognised as a major cargo hub in the global supply chain.

We believe in the mantra, ‘act locally, think globally’, so all the investments and initiatives we mentioned that we do locally related to community, trade growth, technology, communication, safety and security, are critical on a global scale as we connect our region to the world and facilitate international trade across a broad range of commodities.

Air cargo drives economic growth, improves overall well-being and, as we witnessed during Covid-19, saves lives as well. We want to add our voice where it’s needed, learn from others and contribute to the positive direction of the global air cargo business. ●



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DRIVEN BY DEMAND

SolitAir's *Hamdi Osman* shares how the UAE-based cargo operator is navigating global economic shifts, scaling to meet e-commerce demand, embracing sustainability and building a people-first company to shape the future of air logistics

► How are global and regional economic developments influencing SolitAir's strategy and operations?

Despite economic challenges, e-commerce continues to drive air cargo demand. By 2027, it's expected to account for nearly a quarter of global retail sales, with the need for rapid delivery keeping air cargo volumes stable.

Ongoing supply chain disruptions in the Red Sea and Panama Canal – such as port congestion and labour shortages – are also pushing businesses toward air cargo for time-sensitive shipments.

Regional economic conditions further influence cargo volumes. China's economic slowdown is reducing exports, while other regions follow different trends. Closer to home, the Gulf Cooperation Council (GCC)

countries are seeing moderate growth, supported by diversification and infrastructure investment, boosting trade volumes and demand for logistics.

Oil price fluctuations are impacting operational costs for air cargo carriers, while major investments in Gulf airport infrastructure are enhancing capacity and reliability.

SolitAir benefits from its strategic location at Al Maktoum International Airport (DWC) in Dubai South, offering efficient operations and access to key global south markets within six hours.

Rising demand for reliable logistics – especially for e-commerce, pharma, and perishables – aligns with our services. We plan to expand our fleet and routes, including to India, Africa and other key markets, to capitalise on regional trade growth.

► What strategic advantage is there for SolitAir being based in the UAE?

SolitAir benefits strategically from being based in the UAE due to its central location at the crossroads of Europe, Asia and Africa. This enables fast, efficient access to major global markets, with over four billion consumers within a six-hour flight radius.

The UAE also offers world-class airport infrastructure, including Dubai International Airport (DXB) and Al Maktoum International Airport (DWC), with advanced cargo handling and high throughput – DXB alone handles 2.8 million tonnes of freight annually.

Additionally, the UAE's supportive regulatory environment, favourable tax policies and efficient customs processes foster cost-effective operations. Its proximity to high-growth markets in the Middle East, Africa and South Asia allows SolitAir to tap into rising regional demand and expand its market reach.

Finally, the UAE's integrated logistics network – including multimodal transport and the upcoming Etihad Rail – enhances operational efficiency and enables comprehensive logistics solutions for clients.

► How is SolitAir scaling up to meet the growing demands of e-commerce logistics?

We are actively growing our fleet to enhance capacity and reach. We currently operate four aircraft – three Boeing 737-800 BCF freighters, one of which is under a dry lease agreement, and one 737-400 BCF. We are also exploring the integration of electric



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Georgiy Piskunov

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“We aim to set a new standard in the industry, offering service levels that our clients can only dream of”

aircraft to complement our existing fleet, demonstrating a commitment to innovation and sustainability.

Our state-of-the-art facility at DWC is equipped to handle a wide range of cargo, including e-commerce, pharmaceuticals, perishables, dangerous goods and high-value shipments, supporting efficient and rapid processing of goods.

Our middle-mile logistics model ensures 12- to 24-hour delivery, meeting the speed needs of e-commerce players. We also offer tailored solutions like multi-sector flights, optimisation of operations through real-time tracking and data analytics, and we are building strategic partnerships to streamline end-to-end delivery.

▶ Can you discuss SolitAir’s efforts towards sustainability?

Our Boeing 737-800CFs are equipped with winglets to improve flight efficiency and overall performance. The aircrafts are powered by two CFM56-7BE turbofan engines which deliver a maximum thrust of 32,900 lb and reduce fuel consumption and carbon dioxide (CO₂) emissions by 15-20% compared to the original first-generation 737s.

We are also exploring electric aircraft investments and have already signed contracts with two electric aircraft manufacturers. We are set to receive several electrically powered aircraft by the end of the decade, further reducing the environmental impact of our operations.

▶ How is SolitAir leveraging advancements in technology and digitalisation to enhance cargo handling?

We are utilising advanced tracking systems to provide real-time visibility of shipments which enables our customers to monitor cargo throughout its entire journey, ensuring transparency, reliability and improved customer confidence.

At DWC we employ automated cargo handling systems which streamline loading and unloading processes. This results in reduced handling times, minimising errors and improved operational efficiency.

1. Hamdi Osman, founder and chief executive, SolitAir

2. SolitAir’s 737-800CFs are equipped with winglets to improve flight efficiency and overall performance



Markus Minko/Adobe Stock

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“We plan to expand our fleet and routes, including to India, Africa and other key markets, to capitalise on regional trade growth”

We also analyse data on cargo volumes, routes and delivery times, which help us to make informed decisions that improve efficiency, reduce costs and enhance service quality.

Furthermore, SolitAir has integrated digital platforms to facilitate seamless booking, tracking and management of shipments. These platforms provide customers with easy access to information and services, improving the overall customer experience and enhancing operational transparency.

We are also exploring the use of sustainable technologies, such as electric ground handling equipment and fuel-efficient aircraft, to reduce our environmental impact.

► How does SolitAir invest in its workforce, and what initiatives are in place to attract and retain top talent?

Our approach to workforce investment and attracting top talent is deeply rooted in my leadership philosophy. As founder and chief executive of SolitAir and drawing from my extensive experience in the logistics industry, including 34 years at FedEx, we have implemented a people-centric strategy at SolitAir that focuses on three key principles.

The first is ‘people, people, people’. This philosophy emphasises that without the right people, no company can survive or thrive in the competitive air cargo industry.

The second is attracting and retaining top talent. SolitAir searches for top talent in the industry and only the most qualified candidates are brought on board. Once they are hired, employees receive thorough training to excel in their roles. We also prioritise looking after our workforce, ensuring their needs are met.

The third principle is our mantra ‘focus on people, service, profit’ which underscores our priorities: a) people come first, as they are the foundation of the organisation; b) service excellence follows when you have the right people in place; and c) profit is the natural result of focusing on people and service.



1. SolitAir's operational hub is at Al Maktoum International Airport, also known as Dubai World Central (DWC)
2. SolitAir is the UAE's only dedicated cargo airline operating express daily scheduled services between Dubai and high-yield key trade routes across the Global South
3. The growth of e-commerce and international trade distribution will drive continued demand for air cargo services

businesses may increasingly rely on air transportation to navigate uncertainties and maintain supply chain flexibility. This will help ensure that the industry remains dynamic and resilient.

▶ What are the main goals of SolitAir for 2025?

Our main goal for 2025 is to provide our customers with the highest level of service, delivering an unparalleled experience that exceeds their expectations. We aim to set a new standard in the industry, offering service levels that our clients can only dream of.

Additionally, we plan to strengthen our network by connecting Africa to the Middle East and the Indian subcontinent, enhancing trade and logistical connections between these key regions. 📍

▶ Reflecting on your role as founder and chief executive of SolitAir, what significant lessons have you learned about your organisation, and of the dynamics of the air cargo industry?

The most significant lesson I have learnt in life is to keep the main thing 'the main thing'.

For SolitAir, this means staying true to our mission of revolutionising regional air cargo logistics, continuously investing in our workforce, and maintaining a customer-centric approach to service.

▶ What major trends do you foresee impacting the air cargo industry in the next five to 10 years?

As the global road and sea transportation networks continue to evolve, air cargo is expected to remain a critical and trusted mode of transportation. The growth of e-commerce and international trade distribution will drive continued demand for air cargo services.

Additionally, the ongoing trade tensions and potential trade wars in the coming years could further stimulate growth in the air cargo industry, as



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DID YOU KNOW...

Results from a recent survey revealed that salary and benefits (48%) is the dominant factor that would encourage air cargo professionals to stay working in the industry. But other retention factors – such as 'greater work-life balance' (34%) and 'better career advancement opportunities' (30%) – highlight the need for improvements beyond just pay.

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