Project Sunrays
Getting ready for COVID-19 vaccines logistics by air
Airfreight readiness survey results (executive summary)
Insights from airfreight industry

- **Industry survey** to collect insights from airfreight sector on capabilities, readiness, concerns and needs
  
  181 answers received from 8 to 20 September 2020, analysed and presented by Change Horizon

- **Deep dive talks** with air pharma logistics specialists
- **Research** and compilation of information, available on public domain

Objective was to have a better understanding on current readiness level in the airfreight supply chain for the future COVID-19 vaccines, plans to get ready and existing capabilities to handle, store, transport and deliver the vaccines
Airfreight preparedness
How well-informed and prepared is your organisation in the global air transportation of Covid-19 vaccines?

6.32

12% feel very unprepared
28% feel well prepared

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (181 answers received)
Airfreight preparedness: engage with pharma shippers!

How well-informed and prepared is your organisation in the global air transportation of Covid-19 vaccines? Is your organisation already engaging the vaccines developers/ shippers on supply chain requirements for global manufacturing and distribution? Has your organization already formed a dedicated team to prepare for the global air transportation of Covid-19 vaccines? Have you started strategizing/ collaborating with your other supply chain partners and subcontractors to handle the logistics of COVID-19 vaccines?

Companies already engaging the vaccines manufacturers feel much more prepared for the coming challenge of COVID-19 vaccines logistics.

- 87% have the right structure in place with a dedicated team
- 61% are already in close engagement with their supply chain partners and 31% have either started or will start engaging them soon

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (181 answers received)
Airfreight preparedness: the sooner, the better

How well-informed and prepared is your organisation in the global air transportation of Covid-19 vaccines?
Is your organisation currently involved in the air transport of Covid-19 vaccines which are in clinical trials?

Companies involved in clinical trials logistics feel more prepared for the coming challenge of COVID-19 vaccines logistics

Stakeholders not involved in the air transport of Covid-19 vaccines which are in clinical trials

Stakeholders already involved in the air transport of Covid-19 vaccines which are in clinical trials

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (181 answers received)
Feedback from companies involved in clinical trials logistics

Is your organisation currently involved in the air transport of Covid-19 vaccines which are in clinical trials?

Based on the air transportation of vaccines in clinical trials, did your organisation adjust your existing processes to fulfill shippers/clients’ requirements? Please share the adjustments made by your organisation in facilitating the transportation of the Covid-19 vaccines undergoing clinical trials.

- 20% of the respondents are already involved in logistics of COVID-19 vaccines in clinical trials
  - 65% explained their existing processes were compliant with clients’ requirements
  - 35% declared there were additional requirements beyond the standard pharma services they used to provide, such as:
    - Setting up a **specialized team** to manage COVID-19 vaccines related orders (all stakeholder types)
    - Integrating methods / solutions to **track, collect and share data** on the shipment (solution providers such as ULD, Packaging, IT solution providers)
    - Developing new/better **packaging and dry-ice solutions** (solution providers such as ULD and Packaging providers)
    - Defining **final mile delivery solutions** (mainly forwarders)
    - Expanding **network capabilities** with CEIV Pharma certified partners and adequate cargo facilities (airlines, forwarders, handlers, airports)

- Difficult to collect more information at this stage as this is sensitive (competitive advantage)

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (181 answers received)
Airfreight preparedness: don’t leave the GHAs and airports behind!

How well-informed and prepared is your organisation in the global air transportation of Covid-19 vaccines?
Which segment of the air cargo industry does your organisation represent?

Ground handlers and airports feel less prepared than forwarders and airlines overall.

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (181 answers received)
Top concerns

What are your biggest concerns with respect to air transportation and last mile distribution of Covid-19 vaccines shipments?

- Temperature excursions
- Lack of adequate infrastructure (facilities, cool chain ground equipment, and containers, etc)
- Lack of air cargo supply chain transparency on shipment transport conditions
- Availability of cargo space
- Transportation time
- Unexpected delays e.g. customs clearance

All respondents

- Reliability
- Capabilities
- Visibility
- Capacity
- Speed
- Border efficiency

Other concerns

- Security
- Costs
- End-to-end connectivity

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (132 answers received)
New services

In ensuring timely and reliable global air transportation of Covid-19 vaccines, is your organisation planning to introduce additional and/or premium services for shippers/clients?

49% will introduce additional and/or premium services

42% may introduce additional and/or premium services

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (132 answers received)
Additional infrastructure

In ensuring timely and reliable global air transportation of Covid-19 vaccines, is your organisation planning to invest in additional physical and/or digital infrastructure?

36% will invest in additional physical and/or digital infrastructure

41% may invest in additional physical and/or digital infrastructure

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (132 answers received)
Monitoring shipments: what can be done?

Based on current processes, what levels of visibility would your organisation be prepared to provide shippers/clients with? How fast would you be able to provide the above data to your shippers/clients?

- Shipment location data
- Shipment location & temperature data
- Piece-level location data
- Piece-level location and temperature data
- No data

Airlines recommend shippers and forwarders to
1. Use airlines’ own tracking devices
2. Use an already approved device by the airline(s) you plan to work with
3. For non-approved devices, start the approval process now as it can take some time

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (132 answers received)
Existing cool chain capabilities

Is your organisation currently able to handle/store/transport temperature-controlled shipments?

- 45% of organizations able to handle sub-zero temperature declared they have such capabilities across all their physical locations.
- 80% of organizations can handle shipments within 15°C to 25°C.
- 70% of organizations can handle shipments within 2°C to 8°C.
- 20% of organizations can handle shipments within -20°C to -150°C.
- 10% of organizations are not able to handle temperature-controlled shipments.

Source: TIACA and Pharma.Aero - Sunrays airfreight readiness survey, September 2020 (132 answers received)
What airfreight providers need: information as early as possible

Information is needed on:
- Trade-lanes
- Product specifications
- Specific handling, storage and security conditions
- Packaging details
- Real-time shipment monitoring requirements
- Use of dry-ice or not
- Use of active containers needing power supplies
- List of monitoring devices customers will use

The sooner, the better!