



E-COMMERCE DISRUPTION IN THE AIR CARGO INDUSTRY

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ADDRESS EVOLVING TRENDS & NEEDS OF NEW E-COMMERCE PLAYERS

TREND

IMPACT

LONGEVITY

Growth

- E-Commerce volumes forecast to reach 40% growth rate in 2024 (Accenture)



Maturity

- Most key E-Commerce operators begin to leave their start-up phase behind & adapt a blue chip modus operandi



Customs & Policy

- Change of thought at key customs authorities: E-Commerce increasingly seen as “necessary evil”



Consumer Needs

- Decreasing consumer tolerance to false advertising, insufficient item quality
- Increasing demand for end-to-end real-time tracking on item level



IN ORDER TO HARNESS E-COMMERCE VALUE ADD, INDUSTRY MUST ACT NOW

CONSEQUENCES FOR AIR CARGO...

- **Vertical integration**
 - Reduction of number of layers & sub-contractors involved in E-Commerce value chain
 - **Who is truly essential? What is the minimum number of involved warehouses?**
- **Horizontal integration**
 - Concentration of volumes on large players who can deliver services at scale & share efficiency savings with E-Commerce operators
- **Professionalisation**
 - Accrued experience reduces scope for improvisation & ad-hoc solutions



... AND ACTION NEEDED

- **Introduce universal standards**
 - How do we measure E-Commerce handling performance?
 - What sort of standardised checklist content do we need to ensure compliance?
 - Do we need an E-Commerce SHC?
- **Launch dedicated forum space**
 - Do we need a TIACA E-Commerce group to synchronise key developments (analogous to Cargo IQ)?
- **Provide advocacy & industry voice**
 - How do we come together and introduce the positions of air cargo players to policy makers & E-Commerce customers?



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