



TIACA EVENT – CENTRAL ASIA 2024

SILK ROAD IN THE SKY

KAZAKHSTAN AIR CARGO HUB

CARGO INDUSTRY OVERVIEW

WILSON KWONG

Chief Executive
Hong Kong Air Cargo Terminals Limited



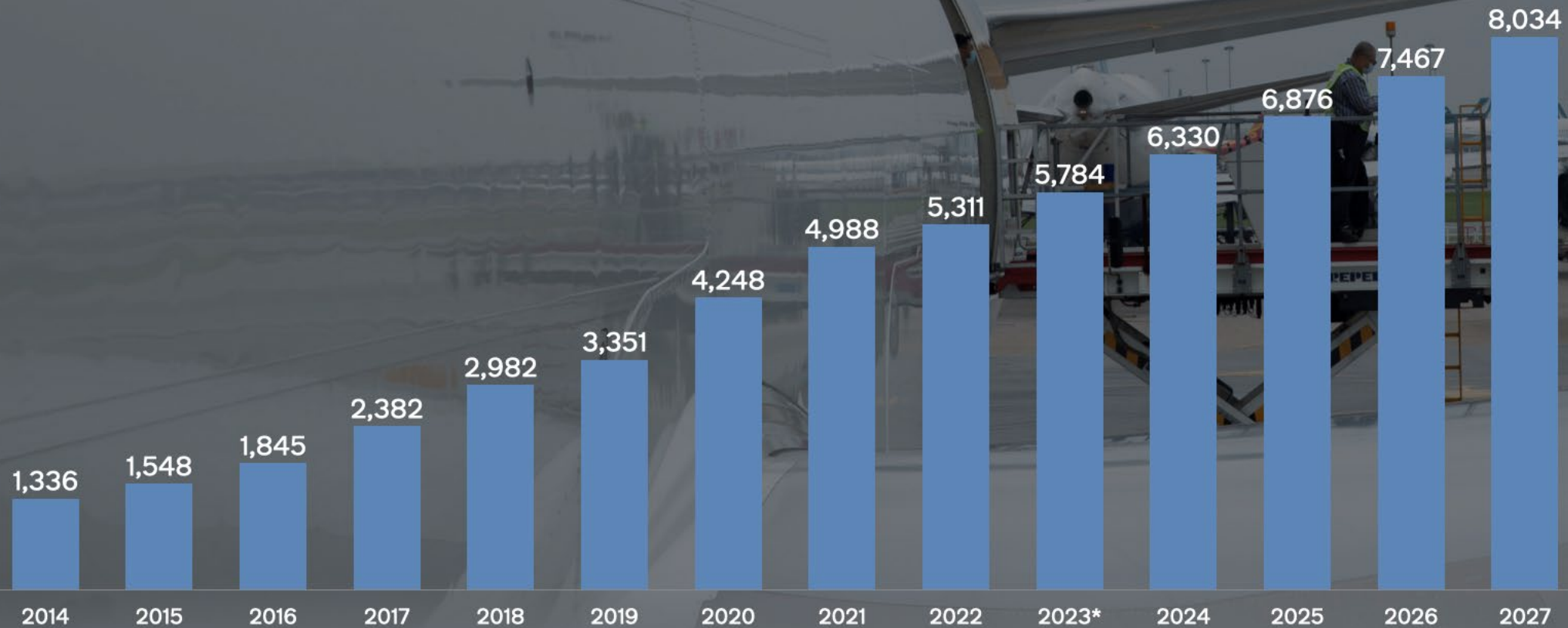
THE WORLD'S LARGEST INDEPENDENT AIR CARGO TERMINAL

USD 1 BILLION
INITIAL INVESTMENT

3.5 MILLION TONNES
HANDLING CAPACITY

PREVAILING GLOBAL CONDITIONS

Retail e-commerce sales worldwide from 2014 to 2027 (in billion U.S. dollars)



Source: Stephanie Chevalier, "Global retail e-commerce sales 2014-2027", Statista, May 22, 2024

CAPACITY VS. DEMAND

Air cargo market in detail - April 2024

| | World share ¹ | April 2024 (% year-on-year) | | | | April 2024 (% year-to-date) | | | |
|----------------------|--------------------------|-----------------------------|--------------|-------------|--------------|-----------------------------|--------------|-------------|--------------|
| | | CTK | ACTK | CLF (%-pt) | CLF (level) | CTK | ACTK | CLF (%-pt) | CLF (level) |
| TOTAL MARKET | 100.0% | 11.1% | 7.1% | 1.6% | 43.9% | 12.7% | 10.3% | 0.9% | 45.5% |
| Africa | 2.0% | 10.6% | 18.7% | -3.1% | 42.9% | 15.5% | 20.7% | -2.0% | 44.5% |
| Asia Pacific | 33.3% | 14.0% | 7.8% | 2.4% | 44.5% | 16.2% | 16.9% | -0.3% | 45.1% |
| Europe | 21.4% | 12.7% | 10.3% | 1.1% | 51.5% | 12.5% | 10.2% | 1.1% | 55.7% |
| Latin America | 2.8% | 11.7% | 9.8% | 0.6% | 38.7% | 10.6% | 7.7% | 1.0% | 37.4% |
| Middle East | 13.5% | 9.4% | 5.7% | 1.5% | 44.7% | 19.5% | 12.2% | 2.8% | 46.4% |
| North America | 26.9% | 7.0% | 4.0% | 1.1% | 38.7% | 5.0% | 2.2% | 1.1% | 40.2% |
| International | 86.6% | 11.6% | 10.2% | 0.6% | 50.1% | 13.5% | 13.2% | 0.3% | 51.3% |
| Africa | 2.0% | 11.1% | 18.8% | -3.1% | 44.0% | 15.6% | 20.6% | -0.1% | 45.7% |
| Asia Pacific | 29.8% | 13.8% | 14.4% | -0.2% | 54.0% | 15.6% | 20.5% | 0.4% | 53.2% |
| Europe | 21.0% | 12.9% | 10.6% | 1.1% | 53.1% | 12.8% | 10.6% | 0.1% | 57.6% |
| Latin America | 2.4% | 8.9% | 10.7% | -0.7% | 42.9% | 9.6% | 9.3% | 1.7% | 42.1% |
| Middle East | 13.4% | 9.4% | 5.7% | 1.5% | 45.0% | 19.5% | 12.3% | 0.4% | 46.7% |
| North America | 17.9% | 8.5% | 6.4% | 0.9% | 47.0% | 6.9% | 6.0% | -1.4% | 47.8% |

Note 1: % of industry CTKs in 2023

Note 2: the total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic. Historical statistics are subject to revision.

E-COMMERCE AND SPECIAL CARGO



W601 W602 W603 W604

GROWTH



HACIS E-COMMERCE FULFILME



CHALLENGES



HOW IS SUSTAINABILITY IMPACTING GROWTH?



THANK YOU