

CARGO CLAN

 DRAGONAIR
CARGO

QUARTER TWO 2016
2016年第二季

 CATHAY PACIFIC CARGO



FRESH FROM EUROPE

A look at the import and export
prospects for the EU, plus a focus on
the perishables business

早著「鮮」機

細看歐盟的進口及出口前景
探索鮮貨業務

COOPERATION DEAL

Why Lufthansa Cargo and Cathay Pacific Cargo are working together

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漢莎貨運與國泰貨運簽定合作協議

FINGER ON THE PULSE

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全新藥品運送過程帶動冷凍鏈業務

THE LUCKY SEVENS

A look back in pictures to the Hong Kong rugby tournament

體壇盛事

重溫香港七人欖球賽的精彩時刻

MORE THAN THE SUM OF OUR PARTS

團結締造力量

It makes perfect sense for us to work with a carrier like Lufthansa Cargo. We have a similar standing in terms of network, quality and industry reputation. As long as these sorts of deals comply with all the anti-trust regulations, which this one does, then the combined strength of our two companies means that the offer is bigger than the sum of our two parts. We think the proposition this cooperation will offer our customers is an exciting one (p4).

It's not a global deal. The arrangement is restricted to routes between Europe and Hong Kong. This is very deliberate because our share of that difficult market has shrunk over the past 10 years. These deals are difficult to get past the line as well. They take a long time, and you have to be careful how you share knowledge but there is a lot that we can learn from each other's businesses.

For example, Lufthansa is one of the few carriers that have a bit of a head start on the digitisation technology the industry needs to deliver end-to-end transparency. There is no question we have to get on with introducing this technology to make cargo a better experience for customers (p9 and p22). If we don't, there is a real risk that other competing cargo means will steal a march on air.

Finally, it was great to see many of you at the Hong Kong Sevens. You can see how much fun that was on p24. I wish you every success.

我們最近與德國漢莎貨運航空公司合作，絕對是無可置疑的明智決定。雙方對航空網絡及質量的追求接近，而且在業界的聲譽同樣出眾。這次合作中的細節符合反壟斷條例，讓雙方如虎添翼，締造強大契機，相信對客戶亦大有裨益（第4頁）。

是次合作並非覆蓋全球，適用範圍僅限歐洲和香港之間的航線。但這也是經過深思熟慮的考量，歐洲市場不容易開拓，我們過去十年在該市場的業務佔有率亦逐步收窄。這次合作當然不會立即扭轉局勢，必須假以時日，並要小心如何分享所長，但卻肯定可以從彼此的業務中獲益良多。

例如，漢莎貨運是業內少數率先採用數碼化技術的空運公司，令升降兩地的情況一目了然。我們必須引入這項技術，讓客戶對我們的服務更稱心滿意（第9及22頁）。如果我們拒絕與時並進，便有可能被其他貨運對手搶佔空運的先機。

最後，很高興與你們在香港七人欖球賽見面，你可翻閱第24頁的精彩時刻。祝大家事事如意。

Simon Large

Director Cargo
貨運董事 羅世民



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產品及服務、人物、航線網絡



PRODUCED BY
CEDAR HONG KONG

16/F Cambridge House, Taikoo Place, 979 King's Road, Quarry Bay, Hong Kong, tel +852 2833 9788
cedar.com.hk
General enquiries: cathayenquiries@cedar.com.hk
Editorial enquiries: cargoclan@cedar.com.hk

Colour origination by Rhapsoody, UK
Paper supplied by Antalis
Printed by Toppan Printing Co., (H.K.) Ltd.
1 Fuk Wang Street, Yuen Long Industrial Estate, NT, Hong Kong
承印：凸版印刷（香港）有限公司
香港新界元朗工業村福安街一號

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NETWORK NEWS 網絡快訊

CATHAY PACIFIC CARGO BUCKS TREND

國泰貨運業績
逆勢上升



Cathay Pacific was able to buck the gloomy market predictions to record an increase in mail and cargo carried in April against the same period last year. This news follows final year figures released in April, which were more reflective of the overall weakness in the air cargo market.

General manager cargo sales and marketing Mark Sutch said: 'April saw a better-than-expected performance for our cargo business, at least in terms of tonnage. We managed capacity astutely and were able to capture shipments out of key markets, including mainland China and India, which led to a small improvement in load factor.'

He continued: 'India remains a focus for our cargo business at the moment and we operated a number of additional services to and from the country in April in response to strong demand. The big issue at the moment is yield, which remains under intense pressure due to the overall softness of the market and the big increase in competitor capacity.'

The two airlines carried 147,643 tonnes of cargo and mail in April, an increase of 2.1 per cent compared to the same month last

year. The cargo and mail load factor rose by 0.9 percentage points to 63.5 per cent. Capacity, measured in available cargo/mail tonne kilometres, fell by 0.8 per cent while cargo and mail revenue tonne kilometres (RTKs) rose by 0.6 per cent. In the first four months of 2016, the tonnage carried fell by 1.8 per cent against a 1.7 per cent increase in capacity and a 3.4 per cent drop in RTKs.

The annual financial results recorded the Group's cargo revenue in 2015 as HK\$23,122 million, a decrease of nine per cent compared to the previous year.

This mainly reflected a reduction in fuel surcharges due to lower fuel prices. Capacity for Cathay Pacific and Dragonair increased by 5.4 per cent. The load factor decreased by 0.1 percentage points to 64.2 per cent. Strong competition, overcapacity, unfavourable foreign currency movements and the reduction in fuel surcharges put pressure on yield, which decreased by 13.2 per cent to HK\$1.90. Demand was strong in the first quarter of 2015, assisted by US west coast industrial action at ports. Overall demand was weak for the rest of the year, particularly on European routes.

國泰航空4月公佈的年終數據反映空運業整體不振，但在看淡的市場預測下，今年4月份貨物及郵件運載量與去年同期相比卻略見上升。

國泰航空貨運營業及市務總經理薩孟凱表示：「4月份貨運業務表現較預期理想，至少以運載量而言。我們因應市場需求調整運力，並成功把握中國內地及印度等主要市場的出口需求，令運載率微升。印度仍是國泰貨運業務的重點市場，我們於4月增加航班以迎合強勁需求。整體而言，空運市場仍然疲弱，加上市場運力泛增，收益率仍承受重大壓力。」

國泰及港龍航空4月運載的貨物及郵件合共147,643公噸，較去年同期上升2.1%，運載率為63.5%，上升0.9個百分點。以可用貨物及郵件噸千米數計算的運力下跌0.8%，而貨物及郵件收入噸千米數的升幅為0.6%。今年首四個月的載貨量下跌1.8%，運力增加1.7%，而貨物及郵件收入噸千米數則下跌3.4%。

2015年集團的貨運收益為港幣231.22億元，較上年度減少9%，反映油價下跌導致燃油附加費下調。兩間航空公司的可載貨量增加5.4%，運載率下跌零點一個百分點至64.2%。競爭激烈、可載貨量過剩、不利的匯率變動及燃油附加費下調，令收益受壓，收益率因而下跌13.2%至每單位港幣1.9元。受惠於美國西岸港口的工業行動，2015年首季需求殷切，但年內其餘時間整體需求疲弱，尤以歐洲航線為甚。

147,643

Tonnes of cargo and mail carried in April 2016
2016年4月貨物及郵件的載運噸量（公噸）

2.1%

Increase in tonnage of cargo and mail carried in April 2016
by Cathay Pacific Cargo against April 2015
國泰貨運在2016年4月貨物及郵件噸量的增長率（對比2015年4月）

CATHAY PACIFIC CARGO SCOOPS AWARDS 雙喜臨門

Cathay Pacific was voted best Asia-Pacific cargo airline in the annual Air Cargo News Cargo Airline of the Year Awards at a gala event in London in April.

In a successful month, Cathay Pacific was also crowned the Cargo Airline of the Year by the Monitor Airline Awards in Bangladesh.



今年4月，英國航空貨運雜誌《Air Cargo News》在其每年一度的「Cargo Airline of the Year Awards」頒獎禮上，推選國泰航空為亞太區最佳貨運航空公司。

此外，喜訊接踵而來，國泰航空亦在孟加拉舉行的「Monitor Airline Awards」中，獲選為年度最佳貨運航空公司，實至名歸，可喜可賀。

Winner: regional manager cargo,
Europe Ray Jewell (centre) accepts the award

CATHAY PACIFIC CARGO AND LUFTHANSA ENTER COOPERATION AGREEMENT

國泰貨運與漢莎貨運達成合作協議



Cathay Pacific Cargo and Lufthansa will offer customers access to more direct connections, greater flexibility and time savings along with service enhancements.

The leading cargo carriers in Asia and Europe have joined forces to cooperate in an integrated bilateral deal.

Cathay Pacific Director Cargo Simon Large and Peter Gerber, CEO and chairman of Lufthansa Cargo, signed an agreement in Frankfurt to work together for customers' benefit on routes between Hong Kong and Europe.

As well as the cooperation on routes, both airlines will work closely together on network

planning, sales, IT and ground-handling.

Customers will be able to access the entire joint network via both partners' booking systems. Joint handling, initially at the Hong Kong and Frankfurt hubs, means there will be just one point for export drop off and import delivery.

The first shipments under the cooperation framework will be early next year – initially from Hong Kong to Europe. Eastbound shipments from Europe will follow over the course of the year.

國泰貨運將與德國漢莎貨運航空公司攜手合作，提供更多直航航點、更靈活的班次、更省時的安排及更優質的服務。

亞洲及歐洲兩家空運龍頭宣佈簽定雙邊合作協議，國泰航空貨運董事羅世民及漢莎貨運行政總裁兼理事會主席 Peter Gerber 於法蘭克福簽定合作協議，為客戶開通更完善的香港及歐洲往來航線。

兩大航空公司除於空運航線緊密合作外，未來將加強網絡規劃、銷售、資訊科技及機場地面運作範疇。

客戶亦可透過雙方其中一家的系統預訂共同的空運航班網絡。此外，雙方會首先在香港及法蘭克福的航空樞紐共同處理在機場的地面運作，並在同一地點辦理貨物進出口交收。

在合作框架下，雙方計劃明年初將首批貨物從香港運送至歐洲，由歐洲運往香港的空運服務則將於明年稍後推出。

JOINT GOALS

共同目標

Cathay Pacific director cargo Simon Large and Lufthansa Cargo CEO and chairman Peter Gerber discuss the cooperation
國泰航空貨運董事羅世民及漢莎貨運行政總裁兼理事會主席 Peter Gerber 暢談合作計劃

What are the objectives for this cooperation?

Peter Gerber Our goals are quite clear: we plan to significantly improve our offer on the cooperation routes between Hong Kong and Europe to increase the attractiveness of it to customers. What we plan is a close bilateral cooperation with a high level of process integration. We will work together on network planning, as well as on sales, IT and ground-handling. As a result, customers will get access to the joint network and be able to combine the intercontinental network of both partners with our dense European feeder system.

What will the enhanced offer look like?

Simon Large Through the cooperation both partners will be able to offer customers more than 140 direct flights between Hong Kong and 13 European stations. Lufthansa Cargo



WHAT THE CATHAY-LUFTHANSA TIE-UP OFFERS

國泰和漢莎的互惠合作



173
destinations
42
countries

The cargo carrier serves around 173 destinations in more than 42 countries
貨運服務覆蓋全球超過42個國家，接近173個航點

Customers will have access to belly holds on **CATHAY PACIFIC** and **DRAGONAIR**
利用國泰航空及港龍航空的客機機腹運載

Freighter fleet:

13x **B747-8F**
4x **B747-400F**
1x **B747-400BCF**
6x **B747-400ERF**

機隊包括13架B747-8F、4架B747-400F、1架B747-400BCF及6架B747-400ERF

will be able to multiply its number of flights, gaining additional access to Cathay's non-stop flights to Europe. We, in turn, will be doubling the number of services we offer to Frankfurt, the main European gateway for cargo, as well as gaining access to Lufthansa's dense intra-European feeder network. Together we can offer our customers greatly increased variety, flexibility, as well as significant time savings.

PG By combining our European feeder network and the multitude of intercontinental flights we jointly offer, shipments will in future reach their destination hours earlier. We will also have more options for shipments which need to be transported by freighter.

How will customers access the joint offer?

SL Our joint offer will be easy and efficient to deal with since our customers will get access to the entire joint network via the booking systems of both partners. Joint

handling, initially at the Hong Kong and Frankfurt hubs, will also make things easier for customers since there will be just one point for export drop off and import delivery.

Why engage in such a surprising partnership between two airlines belonging to different passenger alliances?

SL Actually both cargo operations cooperated previously from 1981 to 2006 on the basis of reciprocal blocked space agreements. We know that we share the same dedication to cargo and commitment to quality. As the largest European carrier, based in the most important European cargo hub, Lufthansa Cargo is very appealing to us as a partner. So, when it came to selecting a European partner, Lufthansa Cargo was the clear choice.

PG Cathay Pacific Cargo is the largest Asian carrier and operating the most modern cargo terminal at the largest cargo airport in the world. But, as Simon mentioned, the most important argument for Cathay Pacific as a partner was the equal dedication and spirit which is a prerequisite for a successful cooperation.

When will customers be able to send shipments within the joint network?

PG Coordinating all of the processes takes time, care and a great deal of IT work – from booking to handling. From Hong Kong to Europe we will be ready to go-live in early 2017 and will then enable eastbound bookings over the course of the year.

是次合作有何目標？

Peter Gerber：目的十分明確，我們會大大改善往來香港及歐洲的合作航線，從而增加對客戶的吸引力。我們計劃建立緊密的雙邊合作關係及整合航運流程，合作的範疇包括網絡規劃、銷售、資訊科技及機場地面運作。由此，客戶可使用我們的共同空運航班網絡，並利用我們密集的歐洲支線網絡和兩家航空公司的跨大陸航班網絡運送貨物。

提升後的服務是怎樣的？

羅世民：是次合作讓雙方能夠提供超過140班直航航班，往來香港及歐洲13個航點。此外，漢莎貨運可受惠於國泰貨運前往歐洲的直航航班，從而增加其航班數量；而我們前往法蘭克福的航班數量則會增加一倍，加強與這個主要歐洲貨運樞紐的緊密連結，並活用漢莎貨運密集的歐洲內陸支線網絡。我們攜手合作，向客戶提供更多航線、更靈活的調配和更省時快捷的安排，可謂相得益彰。

PG：透過我們的聯同歐洲支線網絡及大量跨大陸航班，能讓貨物提早數小時到達目的地，此外，若干貨物需以貨機運送，我們亦可提供更多選擇。

客戶可以如何使用你們的合作網絡？

羅世民：客戶可透過雙方任何一家公司的系統預訂共同的空運航班網絡，便捷高效。此外，雙方會首先在香港及法蘭克福的航空樞紐共同處理在機場的地面運作，並在同一地點辦理貨物進出口交收，客戶將更覺便利。

為甚麼兩間各屬不同客運網絡的航空公司會締結合作關係？

羅世民：其實兩間空運公司曾於1981至2006年就貨運聯營安排合作，因此深知大家對空運業均抱有同樣熱誠，而且致力提供優質服務。漢莎貨運是歐洲最大的空運公司，其總部設於當地最重要的貨運樞紐，是出眾的合作夥伴。因此，當我們在選擇歐洲合作夥伴時，漢莎貨運絕對是不二之選。

PG：國泰貨運是全亞洲最大的空運公司，其貨運站極為先進，位踞全球最大的貨運機場之內。但誠如羅世民所言，我們選擇與國泰航空合作的最主要原因，是因為大家對空運業都抱持同樣的熱誠和抱負，這是雙方成功合作的必備條件。

客戶何時可以利用共同空運網絡運送貨物？

PG：協調所有程序需要大量時間和心力，而且處理航班預訂及貨物方面均需資訊科技支援。我們將於2017年初正式提供香港至歐洲的空運服務，由歐洲至香港的空運服務亦將於來年陸續推出。



Taking a lead
The bosses in discussion
業界先驅
兩位貨運巨擘聚頭

300
destinations
100
countries

The cargo carrier serves around 300 destinations in more than 100 countries
貨運服務覆蓋全球超過100個國家，接近300個航點

Customers will have access to belly holds on **LUFTHANSA, AUSTRIAN AIRLINES** and **EUROWINGS**
利用**德國漢莎航空、奧地利航空**和**歐洲之翼航空**的客機機腹運載

Freighter fleet:
14x MD11F
7x Boeing 777-F
機隊包括14架MD11F及7架波音777-F



CATHAY PACIFIC CARGO MOVES INTO NEW HEATHROW HOME

國泰貨運希斯路貨站邁向新里程

Cathay Pacific Cargo's UK team has moved into a brand new and modern facility at Heathrow. The facility is run by ground handling company Dnata, but the entire 5,908m² warehouse and office facility is dedicated to Cathay Pacific. As well as Heathrow operations, the modern offices now house the UK and Ireland sales team.

Unlike Cathay Pacific's previous home, which was off airport, the new facility straddles air and land side.

Andrew Roe, Cathay Pacific cargo manager UK & Ireland said: 'We have a controlled temperature area here for pharma that can take eight lower deck pallets. We've got a vault here for our Secure Lift product and we have room to handle the big stuff.'

There are further efficiencies with a

control centre that will automatically allocate door numbers to truck drivers, cutting down on queuing times. This is part of a suite of technology that will remove paperwork from processing of consignments.

Roe said: 'We are encouraging customers to make use of technology that will allow us to know where a truck is before it gets here so all the paperwork will be processed ahead. When the driver passes through a geo fence, his phone will receive a text message telling him which door to go to.'

'The big thing for us here, is using the e-airway bill, scanning straight into a computer system and doing away with paperwork. It's a new way of working and it will add real efficiency.'



Heathrow connections

Inside the new terminal (top) and the UK and Ireland team with regional manager cargo, Europe Ray Jewell (centre) in the new office 希斯路網絡
全新的貨運中心內部(上)；英國及愛爾蘭團隊與歐洲區域貨運經理 Ray Jewell (中) 攝於新辦事處

OUR AGENT IN... 各地人才

LONDON

倫敦

Andrew Roe

Cargo manager UK & Ireland,
Cathay Pacific Cargo
國泰貨運英國及愛爾蘭貨運經理



Tell me a little about yourself

I started my career at Gatwick as an air traffic control assistant in the control tower and I still live close to the airport. I then worked for an all-cargo airline. When that went bankrupt in 1979 I became a founding member of Northwest Orient Cargo team. I moved to Cathay Pacific at Gatwick in 1982 as a cargo officer. I'm now based at Heathrow managing a UK team of 20 at Heathrow, Manchester –and Gatwick from September.

You must be thrilled about Gatwick

It's been great going back and seeing how it has changed since we left in the 1990s. Now

we have a new aircraft that we need to fill with cargo from southeast England.

Tell me about the UK operation

Heathrow is now five times a day to Hong Kong, plus two freighters a week that stop in India. Manchester has four passenger flights a week and Gatwick will be served by the new Airbus A350 from September. We feed cargo in from customers at Heathrow, the regions and Ireland. We are very much product-oriented, so a lot of pharma, secure cargo, courier and perishables – a lot of salmon and other fish products. The Expert Lift product is big business for us, and we ship a lot of aircraft engines.

And there's a new terminal at Heathrow

This has all the bells and whistles. We have temperature-controlled facilities for pharma, a vault for valuables and the space to handle big consignments. The other big advantage is that we straddle air and landside. We also have automated processes that will eliminate door queues. We're asking all our customers to use e-air waybills to speed up the handling process even more.

How do you respond to the needs of the local market?

We go out in to the market and talk to them to find out their needs. The team is small, a sales team of five plus myself, so we are able to be close to the operation and get first hand experience to share with the customers to solve difficult questions.

What do you do in your spare time?

I'm an aircraft enthusiast, but I like transport in general, especially its history. I'm also a Crystal Palace football fan, I like photography and enjoy walks with my wife, Alison, and our five year old rescue dog, Ruby, a Staffie-Boxer cross, who has lots of energy.



國泰貨運倫敦辦事處在英國希斯路的全新現代貨運中心嶄新揭幕，地勤代理商由Dnata擔任，但廣達5,908平方米的貨倉及辦事處均由國泰航空營運。新的現代貨運中心除了希斯路站的原有團隊外，還有英國和愛爾蘭的營業同事進駐。

新的貨運大樓有別於國泰航空昔日設於機場外的駐站中心，可以同時兼顧機場禁區及地勤範圍。

國泰貨運英國及愛爾蘭貨運經理Andrew Roe說：「我們備有特別為醫藥品而設的溫度控制區，可放滿八層腹艙貨板的藥品。此外，亦設有放置Secure Lift貨品的偌大儲藏地窖，以便處理更龐大的貨運。」

「還有的是，控制中心可為貨車司機自動安排開門號碼，減少排隊時間，提高效率，省卻處理托運時的紙張文件，也是整套新技術的其中一環。」

他還指出：「我們亦鼓勵客戶善用科技，讓我們在運貨車抵達前掌握其位置，預先處理所需的文件手續。當司機通過地理圍欄後，手機便會收到文字訊息，通知他應該前往哪一個閘門。」

「而控制中心內，則一律採用電子提單，直接掃描至電腦系統內，無須再大費周章印列文件。這是全新的運作模式，相信可大大提高效率，事半功倍。」

請介紹你自己。

我以往在倫敦蓋特威克機場的控制塔任航空交通管制助理員，至今仍然居於機場附近，之後轉到全貨運航空公司工作。該公司於1979年倒閉，我成為西北東方貨運的創立成員，在1982年再轉到國泰航空任貨運主任。我現時駐於希斯路，要管理希斯路及曼徹斯特共20名英國員工，還有9月開辦的蓋特威克站。

蓋特威克航線重開你很興奮吧！

我們自1990年代離開後，蓋特威克改變良多，能夠重回舊地真的太好了！現在換上了簇新的飛機，負責運送英國東南部的貨品。

請介紹英國的運作。

希斯路現時每天有五班客機到香港，每周則有兩班貨機途經印度；曼徹斯特每星期有四班客機；而從9月開始，再增設全新空中巴士A350客機往返蓋特威克。我們也會送遞希斯路、毗鄰區域及愛爾蘭顧客的貨運，以貨品為主，如大量醫藥品、貴重的安全貨運、速遞及大量三文魚及其他魚類等鮮

貨。Expert Lift專業貨運更是一大商機，我們也運送很多飛機引擎。

希斯路亦開設了全新貨運站。

這個貨運站擁有各種額外裝置，包括為醫藥品而設的溫度控制設施、儲藏貴重物品的地窖，以及處理大型付運的廣闊空間。我們亦可同時兼顧機場禁區和地勤，成為另一大優勢。此外還安裝了自動流程，可以減少等候時間，並教育顧客利用電子提單，加快貨品的處理時間。

你如何回應本地市場的需求？

我們與代理商交談，瞭解他們所需。我們的營業團隊共有五人，還有我，雖然不算龐大，但可以更熟悉整個貨運操作及流程，還與顧客分享親身經驗，解決他們的疑難。

你閒時有什麼活動？

我非常熱愛飛機，但我根本就是喜歡各種交通運輸，特別是有關歷史方面。我是水晶宮球迷，喜歡攝影，還有與太太Alison及五歲的搜救犬Ruby散步。Ruby是斯塔福郡拳師混種犬，因此精力充沛。

PRESSING MATTER 重要議題

PREMIUM PRESSURE

貨大欺門

Peter Conway

Aviation and logistics journalist
航空及物流記者



Tony Tyler, IATA director general and CEO, recently called on air cargo to 'lift its game' to deal with air freight's increasing specialisation and sophistication. He cited the challenges faced in implementing premium products in areas such as pharma.

There is little doubt there are big opportunities for air cargo companies that can meet such challenges, but it is a mistake to think that premium products are necessarily the answer for everyone.

Three criteria have to be applied. The first is these premium products can be delivered in a way that generates a profit for the airline or forwarder. It is no good offering specialist services if the extra facilities and training required to provide them cost more than the shipper is prepared to pay.

The second criteria is whether the promised service levels can truly be delivered – not just at the headquarters or home hub but throughout the carrier or forwarder's network.

Lastly, one might ask if there are better ways for air cargo to make a profit. In the passenger business, low cost carriers have improved yields by providing a basic service at lower cost. Air cargo might be able to learn from that example.

國際航空運輸協會（IATA）理事長湯彥麟最近呼籲航空貨運界「提升規格」，以應付愈趨專業和精密的空運貨品。他以運送醫藥品等高級產品領域所面對的挑戰為例加以說明。

空運公司如果能夠克服這方面的挑戰，自然坐擁龐大商機，但若以為提供高級產品空運服務便是理想出路，那就大錯特錯了。

要取得成功，先要符合三大條件。首先是運送高級產品的方式，需讓航空公司或貨運代理有利可圖。如果提供空運服務所需的額外設施及培訓花費，超出了托運一方願意支付的金額，那空運公司提供專門服務便得不償失。

其次是空運公司能否真正提供所承諾的服務質素，不但是總部或基地中心的水平，而是整個航空公司或貨運代理的網絡，都必須貫徹服務承諾。

最後，可能有人會問空運界有沒有更好的賺錢妙方。廉價航空公司的客運業務透過以較低成本提供基本服務，藉此提升收入，空運公司亦不妨借鑑。



DATA PACKAGE 數據演繹

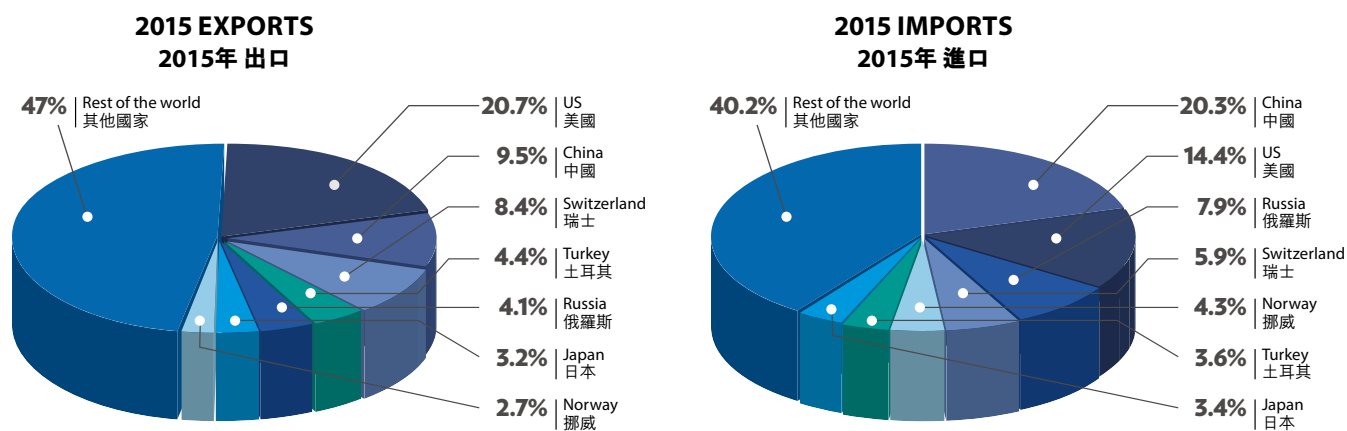
THE EU IN NUMBERS 從數字看歐盟

A snapshot of the principal trade and economic indicators of the European Union

反映歐盟的重要貿易及經濟指標數據

EU EXPORTS AND IMPORTS: MARKET SHARE BY COUNTRY 2015

2015年歐盟的進出口國家比例



The US (exports) and China (imports) are the European Union's biggest single trading partners.

美國（出口）和中國（進口）分別是歐盟最大的單一貿易夥伴

Source: Eurostat

MAIN EXPORTS/IMPORTS BY TYPE

主要出口 / 進口貨品種類

EXPORTS 出口

42%	Machinery and transport equipment 機器及運輸設備
22.5%	Other manufactured goods 其他製成品
17.6%	Chemicals and related products 化學品及相關產品
4.8%	Mineral fuels, lubricants 礦物燃料及潤滑劑
6.3%	Food, drinks and tobacco 食物、飲料及煙草
2.4%	Raw materials 原材料
4.4%	Other 其他

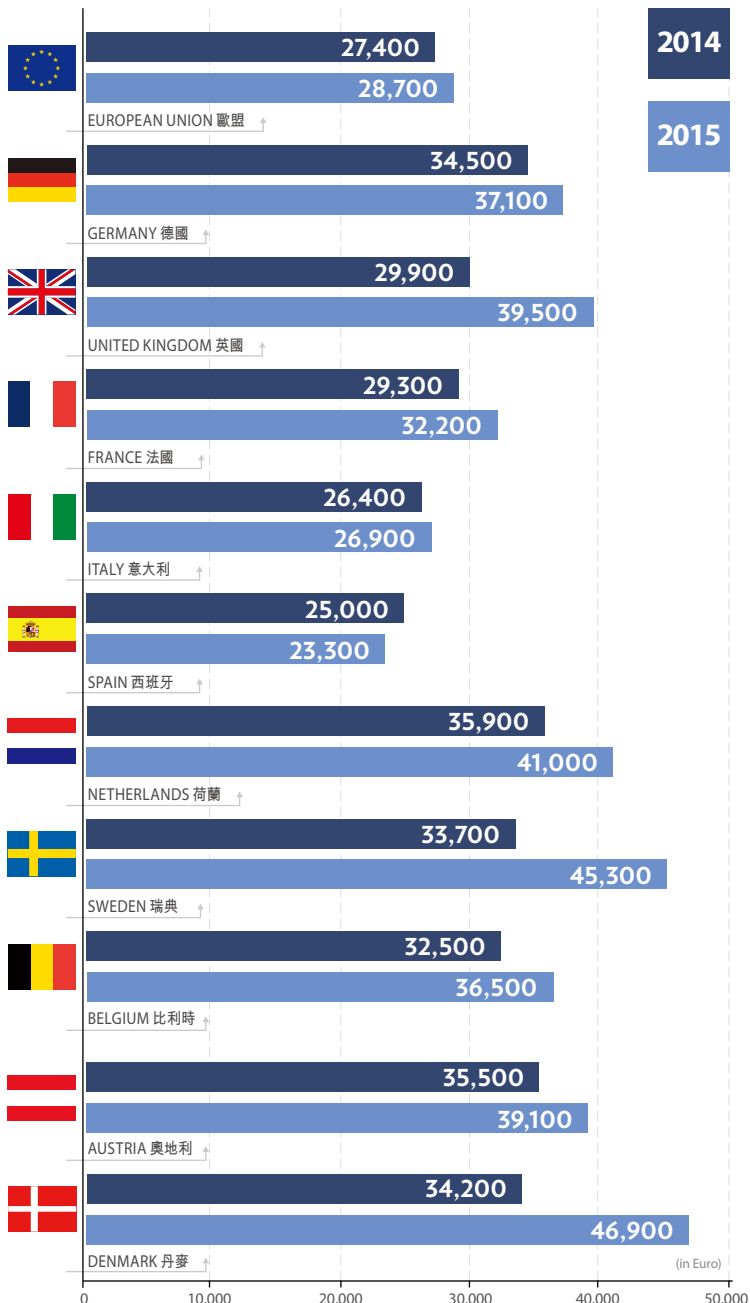
IMPORTS 進口

31%
26.1%
10.7%
19%
6.3%
4.2%
2.7%

Source: Eurostat

GDP PER CAPITA ACROSS EU COUNTRIES, 2014/15 2014 / 15年歐盟各國的人均本地生產總值

The GDP per capita reflects higher standards of living in Northern Europe
人均本地生產總值反映北歐國家的生活水平較高



Source: Eurostat



PUTTING THE PREMIUM BACK INTO AIR CARGO

空運服務，重現高峰

Glyn Hughes

Global head, Cargo, IATA
國際航空運輸協會貨運業務總監



We know that air cargo is of tremendous value. But how do we measure that? We know the global economy thrives on speed and connectivity – precisely what air cargo offers. But for many airlines bottom-line value is falling and shippers tell us we don't provide value for money. 2015's Global Shipper's Survey revealed that air cargo rated an average satisfaction score of seven out of 10. Not enough for what should be a premium service.

Our challenge is to increase the service quality of air cargo. That means remaining true to our top priority of safety but also modernising processes, providing a personalised customer service, and creating a better relationship between the actors in the value chain.

We have relaunched Cargo2000 as Cargo iQ and it will continue to set benchmarks, define quality standards, and improve industry transparency.

In recent years, the airline passenger business has been completely reinvigorated and we need to be inspired by that. Maybe new entrants in the market will arrive with disruptive innovations, or e-commerce will ignite change. But change is coming. If the air cargo business stays focused on the customer, delivers a reliable, competitive high-quality service, and builds on our speed and flexibility, then it will survive and prosper.

我們都明白空運擁有龐大的價值，但這種價值如何計算？我們亦理解全球經濟都倚賴速度和互相連繫而蓬勃發展，這正正是空運提供的服務。但很多航空公司的「底線價值」都下降，托運人亦告訴我們，空運服務變得物非所值。去年的全球付貨人調查顯示，空運的平均滿意度在十分中只取得七分，成績強差人意，絕對稱不上是優秀的服務。

當前急務是提升空運服務水平。除了謹守最重要的安全原則外，亦要推動現代化的過程、提供私人化客戶服務，以及促進價值鏈中各方的良好關係。

我們已經把Cargo2000重新修訂為Cargo iQ認證，繼續成為業界的服務基準，以此訂定優質的標準，進一步提高空運業的透明度。

近年客運業務欣逢振興，我們應該好好借鑑。重大的改變已是無可避免，也許貨運業的新經營者會帶來石破天驚的創意，或者電子商貿會帶動轉變。如果空運業保持以客為本，提供值得信賴、頂級而具競爭力的服務，並善用我們的速度和靈活性，那麼，業界自然能夠絕處逢生，蓬勃發展。



BOOM OR BUBBLE?

牛市或泡沫？

Will lower growth, political uncertainty and
a strong euro adversely affect trade in Europe?

增長放緩、政局不穩及歐元強勢
會不利歐洲的貿易發展嗎？



Ruth Emery

Deputy money editor, *The Sunday Times*
《星期日泰晤士報》財經版副總編輯

Sluggish economic growth, political uncertainty, an influx of refugees – and potentially a fresh banking crisis – are just some of the headaches causing concern in Europe. And although this may be one of the smallest continents, the rest of the world should sit up and take notice. The European Union, made up of 28 countries, is the world's biggest trader. With just seven per cent of the world's population, the EU's trade with the rest of the world accounts for about 20 per cent of global exports and imports.

And the outlook this year is not too sunny. John Mills, founder of JML, a UK-based consumer goods retailer and distribution company, says: 'The European economy has significant challenges including economic instability in Greece and other countries, which is only being exacerbated by the influx of migrants from the Middle East. In my view, we're looking at very slow growth at best this year.'

James Sym, a European fund manager at the investment firm Schroders, adds: 'Europe as ever faces its challenges and our forecast is for low but positive growth in 2016 and 2017.'

Last year the eurozone economy grew by 1.5 per cent. While 2015 started on a promising note, the pace of expansion

slackened to an average quarterly rate of 0.3 per cent in the second half of the year. Indeed, eurozone GDP in the final three months of last year was still below its pre-crisis peak of early 2008.

The European Commission is forecasting a mixed picture for individual countries this year. It estimates GDP growth will be above four per cent for countries like Romania and Ireland, but just 0.5 per cent for Finland.

European banks are again under the spotlight: Italy created a €5bn bailout fund in April 2016 to rescue its weakest lenders and avoid another financial crisis. There are still worries about the health of Portuguese and Greek banks.

While Britain enjoys a more robust financial system, its number one issue this summer is a looming referendum [on 23 June] over whether the country should leave the EU. The current uncertainty is arguably denting business investment and consumer confidence.

And what about the euro? Last year it was kept weak – helping European exporters – thanks to the introduction of negative interest rates by the European Central Bank in June 2014. But now it has strengthened again. Sym says: 'The euro tends to be surprisingly strong in troubled times and we are seeing that now. In fact recent comments from policymakers Ⓣ

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濟增長疲軟、政治不明朗、難民湧入，還有一觸即發的新一波銀行業危機，不過是令歐洲頭痛不已的部分問題。歐洲的面積雖然在七大洲中算是比較細小，但全球都應該屏息注視其一舉一動。由 28 個成員國組成的歐盟，是全球最大的貿易集團，雖然人口只佔全球百分之七，但與各國的對外貿易，卻佔全球出口貨品總量約兩成。

今年的經濟前景不容樂觀。英國的消費品零售及分銷公司 JML 的創辦人 John Mills 表示：「歐洲經濟面對多項重大挑戰，包括希臘及其他國家經濟不穩，再加上中東難民湧入，令情況進一步惡化。我個人認為，今年的經濟極其量是十分緩慢地增長，情況甚至更差。」

施羅德投資公司的歐洲基金經理 James Sym 補充說：「歐洲依舊面對各種

挑戰，我們預測 2016 及 2017 年的經濟雖有正增長，但增幅極小。」

歐元區經濟去年錄得 1.5% 增長。雖然 2015 年初市況向好，但下半年的季度平均增長率已放緩至 0.3%。歐元區的國內生產總值在去年最後一季，仍然低於 2008 年初金融海嘯爆發前的頂峰。

歐盟委員會預測今年各成員國的經濟情況差距甚大，估計羅馬尼亞及愛爾蘭等國家的國內生產總值會有高於 4% 的增長，但芬蘭則只會上升 0.5%。

歐洲銀行亦再次成為焦點：意大利在 2016 年 4 月設立 50 億歐元救助基金，以援助最弱小的借貸機構，藉此迴避新一輪金融危機。不過，葡萄牙和希臘銀行的財務情況仍然令人憂慮。

英國的金融體系較為穩健，雖然今年夏季（6 月 23 日）舉行的全民公投將決定國家會否退出歐盟，但目前的不明朗 Ⓣ

regarding interest rates make us think that the euro is likely to hold its own against the dollar for the time being, having been very weak for the past two years, as the market hoped the US economy was strong enough for them to raise rates. Brexit [the phrase coined to describe Britain exiting the EU] is a risk for sterling [the UK pound] so here we would see some further euro strength too if the vote goes against the “stay” camp.’

A strong euro will, of course, hurt European companies exporting outside of the continent. Indeed, London-listed Unilever, the consumer goods giant, saw its sales fall two per cent in the first three months of this year due to the euro’s strengthening against emerging market economies. About two-thirds of Unilever’s sales come from outside the eurozone.

is the world’s second smallest continent (Australia is the tiniest). The whole of Europe put together is only slightly bigger than China.

Exports out of Europe are mainly by sea or air though. Relatively low-value bulky goods tend to travel by sea – only a little by land across Russia – while air freight tends to be concentrated on high-value, compact or perishable goods. This may include fresh produce, healthcare products and electronic consumer products.

About 14.4 million tonnes of air freight was carried through EU airports in 2014, an increase of 27 per cent against 2009 – although that was a low year due to the financial crisis. Germany’s airports deal with the bulk of this freight, followed by the UK and France.

JML’s Mills says: ‘Generally, Europe sells

China’s biggest import from Switzerland is clocks and watches (think Rolex and Cartier), while from Germany it is vehicles (think BMW and Audi). French wine is already shipped over to Asian drinkers thirsty for Champagne and cognac. But Italy may soon be increasing its export of prosecco, which has surpassed Champagne to be the world’s favourite bubbly. Alibaba boss Jack Ma spoke at VinItaly in April, a showcase for the country’s wine. He told the audience that the internet could link Italy’s 300,000 producers with potentially the biggest wine market in the world, as reported by Agence France-Presse. He was quoted as saying: ‘China will be home to half a billion upper-to-middle-class consumers in the next 10 years. You must reach out to them where they are.’



20

per cent

China’s share of imports to the European Union
中國佔歐盟總進口量的比例

TRADING IN AND OUT OF EUROPE

Europe is naturally very inter-dependent, due to the single market that was created with the birth of the EU in 1993. Goods, capital, people and services can move freely through the Union. Once goods have arrived in the market they cannot be subject to customs duties or import quotas as they travel internally. Even non-EU states like Iceland, Norway and Switzerland are able to participate in the single market.

The value of cross-border trade between EU member states grew from €800bn in 1992 to €2,800bn in 2013, according to official figures. Sym says: ‘This increase in trade has been one of the most positive impacts of the EU. A particular area of strength we are seeing at the moment is in the automobile space and in fact most consumer products are doing pretty well.’

Most of this trade is done by land. Don’t forget that, by land mass, Europe

luxury upmarket goods to the Far East and imports more run-of-the-mill products. I don’t see this changing in the short term. But, the UK in particular has an [overvalued] currency. This is having a significant effect on the UK’s ability to export, and, in time, countries like China will look to fill this gap.’

According to Sym, the biggest export category is machinery and transport equipment. He says: ‘For example, state of the art German machine tools are exported to China where they are used to make products that China then exports. In this sense Germany has been a big enabler of China’s growth in trade over the past couple of decades – and the slowdown in China now is having a negative impact on Europe.’

The rise and rise of the middle class across southeast Asia continues to fuel demand for luxury goods. Bar machinery,

In terms of imports, the EU receives the most from China (making up 20 per cent of all imports), followed by the US and Russia. Overall, energy is one of the biggest imports into the EU.

Turbulence in the Chinese market and the strength of the US dollar is having an effect on those companies whose job it is to carry trade. Sym is hopeful air freight in Europe will grow though, saying: ‘Although the vast majority of goods will always be freighted by land due to cost, when there is lots of demand and supply chains become tight we tend to see an increase in air freight as carefully crafted land logistics plans fall over. As the economic recovery continues slowly but surely, this is a growth area.’

Maybe it will fall to initiatives like that between Jack Ma and the Italian wine producers to help put the fizz back into the European market. ■



GERMANY HAS BEEN A BIG ENABLER OF CHINA'S GROWTH IN TRADE

德國可以說是中國近幾十年
貿易增長的一大推手

狀況，無疑減低了英國的商業投資及消費者信心。

歐元的情況又如何？全賴歐洲央行在2014年6月引入負利率，令歐元去年繼續處於低匯率，有利歐洲出口商。不過歐元現在再次轉強。Sym表示：「局勢不穩時，歐元往往表現強勢，一如現在的情況。近期決策者對利率的評語，更讓市場認定歐元經過兩年低匯價後，有可能穩守目前兌美元的水平；箇中原因，是市場期望美國經濟保持強勁，讓他們有加息的空間。英國脫歐會對英鎊構成一定風險，假如投票結果是反對「留歐」，歐元走勢將進一步加強。

強歐元定必會拖累歐洲的出口表現。由於歐元兌新興市場經濟貨幣的價位高企，從Unilever此倫敦上市的消費品巨擘的業績可見，其銷售額在今年首三個月已錄得2%跌幅，而三分之二的銷售額來自非歐元區。

歐洲對內及對外貿易

1993年歐盟成立，此後歐洲便成為單一市場，區內國家因而相互依賴。歐盟內的貨物、資金、人力及服務均自由流通，貨物抵達市場後，在成員國之間轉移，完全沒有關稅和入口配額限制。即使冰島、挪威、瑞士等非歐盟國家，也能享受這個單一市場的好處。

官方統計數字指出，歐盟成員國之間的跨境貿易額，由1992年的8,000億歐元增加至2013年的2.8兆歐元。Sym指出：「貿易額增長是歐盟帶來的其中一個最正面的影響。以目前所見，區內的汽車業走勢特別強勁，而大部分消費產品亦有穩健增長。」

這些商貿大部分經陸路完成——事實上，以面積而言，歐洲大陸是全球第二小的陸地（最小為澳洲），整個歐洲的土地加起來，面積僅僅超越中國。

而歐洲的出口商品則主要經海運或空運。較便宜的大件貨品通常以海路運輸，只有少量商品會經陸路跨越俄羅斯送遞；而貴價品、體積小巧的商品或鮮貨，包括新鮮農產品、藥物及電子消費品，則主要取道空運。

歐盟各個機場於2014年共處理約1,440萬噸空運貨量，較2009年增加27%；其中德國機場處理的貨量最多，其次為英國及法國。（註：2009年受金融海嘯拖累，因此空運貨量低迷。）

JML的Mills表示：「歐洲普遍將高檔奢侈品運銷到遠東市場，並入口日常用品。我相信，這情況在短期內不會改變。不過由於英鎊的估值過高，令英國的出口能力受到顯著影響，中國等國家將乘時搶佔市場。」

Sym亦指出，歐洲最主要出口類別為機械及運輸器材：「譬如，德國的先進機械出口至中國後，中國便利用這些工具生產產品，並出口到其他國家，所以德國可以說是中國近幾十年貿易增長的一大推手。中國現在經濟放緩，勢必對歐洲帶來負面影響。」

東南亞國家的中產階級崛起，大幅帶動當地對奢侈品的需求。除了機器之外，中國從瑞士入口最多的產品是鐘錶（例如勞力士和卡地亞），從德國輸入的則是汽車（例如寶馬及奧迪）。法國洋酒早已通銷亞洲，滿足區內對香檳及干邑的渴求。而意大利普羅賽克葡萄酒早已力壓香檳，成為全球最受歡迎的氣泡酒，因此出口量勢必遽升。法新社報導，阿里巴巴集團主席馬雲今年4月在意大利葡萄酒展Vinitaly中指出，互聯網可將意大利30萬葡萄酒生產商，連繫到最有潛力成為全球最大葡萄酒市場：中國。據報道他更聲稱：「未來十年，中國將有五億人成為中產階級，你必須到中國銷售商品。」

入口方面，歐盟主要從中國進口商品（佔總入口量20%），其次是美國和俄羅斯。整體上，能源是歐盟的主要入口商品之一。

中國市場的經濟波動情況及美元強勢，均對從事貿易的公司帶來一定影響。但Sym對歐洲空運貨量增長仍然樂觀，並解釋說：「由於成本關係，大部分商品都會經陸路運送，不過當需求增加，供應鏈就會變得緊張，即使優良的陸路物流方案或也難以維持，屆時空運貨量自然增加。雖然歐洲經濟仍在緩慢地復蘇，但是絕對是有所增長。」

也許歐洲市場真的需要靠更多像馬雲與意大利酒商的支持，才能重現活力。■

Ray Jewell

Regional manager cargo, Europe
Cathay Pacific
國泰貨運歐洲區域貨運經理



Europe is a leading market in the Cathay Pacific Cargo network for all types of specialisations, including our highly developed Pharma Lift product. We also move a lot of fine foods, flowers and fresh fish with our Fresh Lift; machinery, aircraft engines, even whole helicopters via Expert Lift; and we handle urgent goods of all kinds with Priority Lift.

The efficient and tailored handling of these products is central to our strategy in Europe, our bread and butter – or our 'Pharma and Flowers.'

A vital part of this success is our expert team. Thanks to them and close working relationships with our loyal customers we will continue to succeed.

In addition, another important element of our service in Europe is our frequency, which is second to none. We fly Boeing 747-8F freighters and cargo friendly B777s to Hong Kong and on to our extensive network in Asia.

It's this diversity, the challenges that crop up and the people I work with in the industry that make my job so enjoyable.

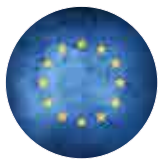
歐洲是國泰貨運所有專業服務的主要市場，包括發展完善的Pharma Lift產品。我們會以Fresh Lift送遞大量優質食品、鮮花和鮮魚；Expert Lift運送機械、飛機引擎，甚至整架直升機；而Priority Lift則優先及特快處理急需運送的物品。

我們在歐洲的主要策略，便是為客戶設計有效率的方案以處理上述貨物，當中主要收入來自運送藥品及鮮花。

歐洲市場得以成功，全賴背後的專業團隊，憑著他們的努力，與忠實的顧客保持緊密合作，我們的業務定能蒸蒸日上。

此外，班次頻密是歐洲服務成功的另一重要因素。我們以波音747-8F貨機和適合貨運的B777客機，能夠把貨物運送到香港以及我們亞洲廣泛的網絡。

我的工作既多變化，又時有新挑戰，加上與業內人士合作，令我樂在其中。



THE PULSE QUICKENS

脈動加速

Track and trace regulations and new business models are increasing specialisation and shortening lead times

藥物追蹤條例及全新的經營模式，令醫護送遞變得更專門，並縮短前期預備時間



Ian Putzger

Aviation and logistics journalist
航空及物流記者

The healthcare industry is in a race against the clock. Legislative moves against counterfeit drugs are ushering in new track and trace regulations in more than 40 markets, including the European Union, US, South Korea, Brazil and China. According to industry tracker Tracelink by the end of 2018, more than 75 per cent of the globe's prescription medications will be covered by new rules, which require tracing by serial number.

Tracelink CEO and president Shabbir Dahod says: 'The life sciences supply chain is at a tipping point, with new and emerging track and trace regulations driving transformative changes to critical business processes and infrastructure requirements.'

At the same time, the US and the EU are moving towards regulations covering

醫護業正在與時間競賽，急起追上新法例要求。歐盟、美國、南韓、巴西及中國等超過 40 個市場為打擊假藥，將以立法手段推行藥物追蹤法。業界追蹤服務公司 Tracelink 表示，在 2018 年底，將有逾 75% 全球處方藥物受新例規管，必須申請序號以追溯來源。

Tracelink 行政總裁及主席 Shabbir Dahod 指：「各地不斷實施新的追查條例，令業界的重要業務流程和基建要求出現翻天覆地的改變，生命科學的供應鏈現已達至臨界點。」

與此同時，美國和歐盟正計劃進一步立法追蹤醫護器材，預期於 2019 年實行。CEVA Logistics 環球醫護營運部高級副總裁 Kamaljit Hunjan 指出，業界只有很少時間為醫護產品推行序列化，經營商已盡力探索現有的方法，但至今「仍未找到可行的現成方案。」

Videojet Technologies 表示，具備相關知識及資源的供應商短缺，令業界在取得合規資格上陷於瓶頸。

醫護業向來受法例規管，對改變抱持保守態度。Hunjan 解釋業界偏向將重要步驟收歸公司內部負責，而不願意冒險將程序外判。



the track and trace of medical devices, which are expected to be in play by 2019. Kamaljit Hunjan, senior vice-president, global healthcare operations of CEVA Logistics, notes that the time for the industry to be ready for serialisation is short. He comments that while operators have explored different methodologies there are, so far, 'no established solutions in place'.

According to Videojet Technologies, the industry is facing a bottleneck on the road to compliance due to a scarcity of providers with the requisite expertise and resources.

Governed by regulations and compliance issues, the healthcare industry has shown a conservative approach to change. Hunjan notes that companies are less likely to experiment with outsourcing but keep critical functions in-house.

Still, legislation is not the only driver for change in healthcare logistics. Cost pressures are making supply chains leaner too. 'Big companies have taken out about 60 warehouses in Europe last year,' says Hunjan. 'They are centralising distribution.'

Josette Wells, director of quality and compliance at forwarder IJS Global GEFCO, has become aware of this. 'Our customers are increasingly operating to "just in time" type production models and this does mean that the freight forwarder has short timelines for delivery as there is less stock within the market,' she says.

David Bang, CEO of LifeConEx, the temperature controlled logistics provider arm of DHL that caters to the life sciences and healthcare industry, noted that speed to market has been constantly accelerating. 'In the past, the timeline for launching new products was a few months, now it's weeks,' he says.

At the same time, the extent to which logistics providers have been involved has gone up considerably. A few years ago healthcare firms would determine the packaging and the routing of a shipment and ask their logistics partners to develop solutions around these elements. Now the forwarder is brought in earlier, sometimes before the product is launched. Bang adds that this has raised the bar for logistics firms in terms of their skillsets.

Hunjan sees a trend towards using 4PLs to manage the whole process. With this comes a greater expectation to drive

此外，立法並非唯一因素致使醫護物流業改革，成本壓力亦令供應鏈進一步精簡。Hunjan 說：「去年，一些大公司關閉了約 60 個歐洲倉庫，以統一處理產品分銷工作。」

IJS Global GEFCO 貨運公司的品質控制主管 Josette Wells 亦有注意到這情況。她述說：「我們的顧客所採用的生產模式越來越趨向『及時生產』，市場的存貨量因而減少，貨運公司運送貨物的時間亦相應縮減。」

LifeConEx 是 DHL 的溫度調控空運服務，為生命科學及醫護業提供相關服務。其行政總裁 David Bang 指新產品推出市場的時間日益加快，並說：「以前推出新產品需要數月，現在則只需要數星期。」

另一方面，物流商的參與程度亦顯著提高。數年前，醫護公司會自行決定付運批次的包裝方法及運送途徑，然後請物流服務夥伴按這些要求安排合適的運送方案。Bang 表示，現在物流公司於很早

Lucas Kuehner

Global head of airfreight, Panalpina
瑞士泛亞班拿物流全球空運主管



QUALITY FOCUS

以質取勝

The healthcare business is a quality-focused business. We rely on partners such as Cathay Pacific to make investments in the cool chain and go through the necessary GDP certification, and we also rely on them to know exactly when shipments depart, arrive, and where they are at every stage.

The customers demand this information, and also about temperature control, of course. This visibility is crucial, because it allows us to intervene if necessary. Together we have to prove to customers that we provide the quality they demand – or run the risk of losing business to ocean freight. Increasingly, the perception of healthcare companies is that ocean freight

is starting to deliver the same quality as air freight. We are faster, but to succeed in the long-run we have to be better at overall quality, too.

醫護行業十分重視質量，我們需倚靠如國泰航空等貨運商夥伴，投資冷凍鏈並取得所需的良好分銷規範認證。此外，我們亦要靠他們掌握準確的出貨期和抵埗時間，還有貨物各階段的位置。客戶非常重視這些資料，以及控制溫度的情況。因此貨運商必須保持高透明度，以便有需要時我們可以介入。我們與貨運商一同向客戶證明所提供的服務質素符合他們的要求，否則或會把生意拱手送給船運公司。愈來愈多醫護公司覺得船運可媲美空運，速度上我們當然佔優，但要維持長遠的優勢，便必須提高貨運服務的整體質素。

costs out of the supply chain, he adds. Logistics firms without the adequate infrastructure and track record need not apply. Good Distribution Practice (GDP) certification is expected. According to Hunjan, the top criteria for selecting logistics providers are service quality and on-time performance, followed by cost. ISO 9002 certification is a given and GDP widely requested. IATA's CEIV programme is adding a further layer of certification that is gaining acceptance.

The drive to cost reduction has led shippers to look to ocean freight. But Hunjan says, the existing packaging solutions are not ready for long ocean transits. To meet performance and cost reduction expectations, logistics providers are having to automate processes and use technology. The latter aspect extends across a number of technologies, such as GPS and RFID (radio frequency identification), as each has its strong and weak points. But Bang says: 'It's more what you do with the data and how you use it.'

He stresses that to maintain its relevance to the healthcare industry, the air cargo industry needs to break down data silos within companies and departments and

enable better flow between the various parts of the supply chain. Requirements on logistics firms' technology and industry expertise are set to rise higher as medicine is moving from generic drugs towards medications and treatments tailored to the specific health profiles of individual patients.

'We are seeing a lot of growth in personalised medication,' says Hunjan. This requires a more sophisticated order management system for CEVA to manage delivery schedules in communication with patients, as well as the healthcare firms with end-to-end visibility to both parties. 'Logistics firms need chemists on site at the warehouse to manage the process. We act like a pharmacist over the counter.'

All of these changes makes for a closer involvement of logistics providers in client supply chains. Given the growth of the sector and the margins involved, suppliers welcome this, but the pressure on them keeps rising. ■

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CUSTOMERS ARE INCREASINGLY OPERATING TO JUST IN TIME PRODUCTION MODELS

顧客所採用的生產模式越來越趨向及時生產

階段已需要就位，有時甚至在產品尚未推出市場已加入商討過程，這種趨勢更加請求物流公司在各方面的能力。

Hunjan 了解到業界正流行使用第四方物流（4PL），指出這種做法大有可能減低供應鏈的成本。但缺乏足夠基礎設備及相當追蹤能力的物流公司便難以實行，而參與的公司需取得良好分銷規範（GDP）認證。據 Hunjan 所說，顧客選擇物流公司時，最主要的考慮因素是服務質素和準時配送，其次是收費。他續說，取得 ISO 9002 認證現已成為必然條件，大部分客戶還要求物流商擁有 GDP 認證，而國際航空運輸協會的獨立醫藥物流驗證中心計劃（CEIV），提供更多一重的認證保證，亦漸得到物流業的支持。

為減低成本，付運公司開始考慮海運方式。然而 Hunjan 表示，現有的包裝設計並不適宜長途船運。為了保持業績及同時減低成本，物流商必須將過程自動化和善用科技，例如 GPS 導航系統和無線射頻識別（RFID）標籤等不同技術，但當然各有優劣。不過 Bang 表示：「重點是如何運用這些數據，而不是你使用哪種科技。」

他強調空運業如想持續緊貼醫護業的需要，各公司及部門就需要開放自己的數據庫，互相分享資料，令供應鏈各階段的運作更順暢。隨著付運的藥物已由非專利藥物轉變為個別病人的特定藥物或指定療程所需的藥物，醫護業對物流公司的技術配套及業界知識的要求亦相應提高。

Hunjan 指出：「我們看到個人治療所需的藥物有長足增長。」因此 CEVA Logistics 需要引入更精密的訂單管理系統，以便與病人及醫護公司溝通和妥善管理貨運日期，讓供求雙方均能清楚掌握情況。物流公司更需要有駐場藥劑師在貨倉管理物流過程。Hunjan 說：「我們的工作就跟櫃檯的藥劑師一樣。」

以上種種因素，令物流公司成為顧客供應鏈的重要一環。此舉有助業界發展及增加利潤，物流商固然無任歡迎，但他們所承受的壓力亦必持續上升。■



EUROPE ON A PLATE

歐洲盤中飧

The fine foods of France and Italy have become a staple for high-end shops and restaurants across Asia. PHIL HEARD investigates how they get there

法國和意大利的精緻食材，成為亞洲一帶高級食品店及餐廳的美食之源。PHIL HEARD 追蹤這些貨品的運送過程

For foodies, it's a sight to both gladden the heart – and harden the arteries; a European market bulging with fresh fruit, vegetables, cured meats, seafood and cheese. Products such as Italy's Parmigiano Reggiano, Spain's Iberico ham or France's soft unpasteurised cheeses have become part of the repertoire of restaurants and feature behind the glass of deli counters the world over, and particularly in Asia.

'Europe has a long tradition of fine foods that are enjoyed throughout the world,' says Cathay Pacific regional manager cargo, Europe Ray Jewell. 'The perishable air cargo sector, is a key part of our business out of Europe to Hong Kong and beyond, with a 10 per cent share of our European revenue and growing.'

嘴饞的人走進歐洲的菜市場，滿眼盡是林林總總的美食——新鮮水果、蔬菜、醃肉、海鮮、芝士，定必食指大動，健康也不顧了。意大利的高級 Parmigiano Reggiano 芝士、西班牙的黑毛豬火腿或未經高溫殺菌的法國軟芝士等可口食材，均已成為世界各地許多餐廳的賣點，尤其是亞洲食店。

「歐洲美食歷史悠久，廣受全球歡迎。」國泰航空歐洲區域貨運經理 Ray Jewell 說。「歐洲至香港和其他地區的重要業務之一便是鮮貨空運，佔我們歐洲收入約一成，並且還在持續增長。」

法國和意大利是鮮貨空運業務中兩個重點國家，兩國均擁有歐洲最精緻的料理及眾多食物製品。

貨運商 New Special Deliveries 位

“

AGRIBUSINESS IS A VERY IMPORTANT PART OF ITALY'S TRADE. ITALIAN PRODUCE IS WELL KNOWN AND RECOGNISED AND IN DEMAND ACROSS THE GLOBE

農產業是意大利的重要貿易項目。意大利農產品享譽全球，世界各地的需求量相當龐大

The two countries with the most to contribute to this business also offer, arguably, Europe's finest cuisines and hundreds of artisanal products – France and Italy.

Renzo Carrara, along with his three daughters, runs New Special Deliveries, a freight forwarder based less than ten miles from Milan's Malpensa Airport. 'In Italy, agribusiness is very important and a significant part of the country's trade. Italian produce is well known and recognised and in demand across the globe,' he says.

New Special Deliveries specialises in the export of perishables. Carrara adds: 'Our company was founded to provide service quality and efficiency in the export of Italian foodstuffs. It's a very regulated business and we have to operate in line with very strict rules, which is why we had to invest in a refrigerated warehouse. It's 100 per cent of our business.'

The company's prime markets are Hong Kong, Singapore, Japan, Korea, China, plus Australia, the Middle East and the Americas. And the products shipped are a who's who of appellation contrôlée (unique geographically protected) products. These include hams, salamis, vegetables, mushrooms and seafood, and cheese, which is a staple of Cathay Pacific's bellyholds on daily flights from Milan and Rome, which falls to four times weekly in winter.

The biggest exports tend to be cheese, as Alberto Brandi, Cathay Pacific cargo

manager explains. 'Italy has more than 450 types of cheese,' he says. 'There are many that are more sensitive to time and temperature, which need to fly, such as Mascarpone and Mozzarella.'

Not forgetting Gorgonzola, Burrata, Taleggio, Fontina, Stracchino, Provolone, Robiole, Caciotte and, of course, adds Carrara: 'Parmigiano Reggiano – not to be confused with "parmesan", which is an imitation of this Italian product.' Demand for this ever popular hard cheese means that it flies frequently to satisfy demand.

And while seasonality tends to drive exports at particular times of year, summer is a critical period for sensitive cargos such as these as Brandi explains. 'Forwarders will use specific packaging at the warehouses depending on the season. The tarmac transfers in both Italy and Hong Kong, while quick, can be hot so in summer they use cooltainers, which are temperature regulated with dry ice. They will also deliver consignments to the airport in refrigerated trucks.'

Across the border in France, the pattern is much the same, both in terms of demand and seasonality, according to Jean-Luc Py, Cathay Pacific, cargo manager France. 'It is a large part of our business, more than half the available space on the 10 flights per week out of Paris will be allocated to

perishables,' he says. 'This will go up depending on the season, particularly around those fiesta times – Chinese New Year, Christmas, Easter and so on. French produce has a quality reputation, and it's very popular with restaurants and shops in Hong Kong and across Asia.'

Cathay Pacific offers the market two advantages, according to Py. 'There are only two airlines operating direct flights to Hong Kong from Paris,' he says. 'Direct flights minimise time on the ground, and time is very much of the essence for cheese, salad vegetables, fish and seafood.'

Secondly the timings are ideal for customers at both ends. 'We fly at around noon from France and arrive very early the following morning in Hong Kong, which gives us a big advantage,' Py adds.

This fits with market timings. Christine To is part of the commercial team at Bolloré Logistics in Paris. Although its shippers are based around France – and other parts of Europe – one of the biggest is the spectacular Rungis Market, the largest of its type in Europe. This giant covered food market to the south of Paris covers 232





Market forces

Cheese is the big export to Asia from the huge Rungis Market outside of Paris

市場動力
巴黎附近的Rungis食品市場的芝士，是出口至亞洲的主要食品



hectares and turns around 1.7 million tonnes of produce each year – little wonder that it reportedly has the biggest turnover of any market of its kind in the world.

‘We export a wide range of products from chilled to frozen products,’ To says. ‘The mainstays would be cheeses and vegetables, but also seafood, such as oysters and mussels.’

‘Perishables are a very important part of our business,’ she adds. ‘We are at the mercy of people’s consumption habits and regulation. For example, export of some products was disrupted by an outbreak of bird flu in France earlier this year. We also are affected by seasons; our peaks are during the Beaujolais Nouveau period and Christmas, but also on the season of the produce – for example, we are in peak asparagus season currently.’

Cathay Pacific’s Py says that as with Italy, Hong Kong is the prime market for French produce, which again plays to Cathay Pacific’s strengths, as To explains. ‘Cathay Pacific is one of our strategic partners, she says. ‘The service is good quality, and it offers a direct daily flight to Hong Kong. The follow up is always well handled. By using Cathay Pacific we can be sure the bookings are secured, and last, but not least, the cold chain is always applied.’ ■

於距離米蘭不到 10 哩的馬爾彭薩機場，由 Renzo Carrara 與三個女兒一起經營。他說：「農產業對意大利非常重要，這是我們國家的重要貿易項目。意大利農產品享譽全球，因此世界各地的需求量相當龐大。」

New Special Deliveries 專營鮮活貨物的出口業務。Carrara 補充道：「我們的成立宗旨，是提供高質量及高效快捷的意大利食品出口服務。這是受規管的行業，必須遵守非常嚴格的規定，所以我們要投資設置冷藏貨倉，以全面經營我們的業務。」

該公司的主要市場是香港、新加坡、日本、韓國、中國、澳洲、中東和美洲。接受托運的法定產區 (contrôlée) 產品包括火腿、莎樂美腸、蔬菜、蘑菇、海鮮和芝士，國泰航空每日從米蘭和羅馬出發的多班航班，其機腹裝的主要就是這些貨物。（冬天航班則會減少至每周四班。）

國泰航空貨運經理 Alberto Brandi 指出，芝士是最大的出口品。他解釋：「意大利有超過 450 種芝士，其中有許多均會受時間和溫度影響，如 Mascarpone 和 Mozzarella，必須仰賴空運。」

意大利芝士種類多不勝數，還有 Gorgonzola、Burrata、Taleggio、Fontina、Stracchino、Provolone、Robiole 及 Caciotte 等。Carrara 特別提到：「可別把巴馬臣當成了 Parmigiano Reggiano，前者只是模仿後者的產品。」由於這種硬芝士大受歡迎，需求殷切，因此須時常空運以應所需。

Brandi 解釋，食物的時令性亦會令每年特定時間的出口量大增，對於講究時效和溫度的貨物而言，夏天絕對是棘手時期。「貨運商會根據季節，在倉庫採用特殊包裝包裹貨物。意大利和香港兩地在停機坪轉移貨物的速度雖然快速，但夏天天氣炎熱，所以當地會使用冷藏貨櫃，並利用乾冰控制溫度。此外，他們也會以冷藏貨車運送貨物到機場。」

法國出口的需求和時令性與意大利相若，國泰航空法國貨運經理 Jean-Luc Py

表示：「鮮貨佔了我們業務的一大部分，我們每周有十班從巴黎起飛的航班，每班機超過一半的位置是運載鮮貨。到了某些特定季節貨量還會上升，特別是重大節日，如農曆新年、聖誕節、復活節等。法國農產品的品質素有信譽保證，深受香港及亞洲各地的餐館和商店歡迎。」

根據 Py 所說，國泰航空在這個市場擁有兩項優勢：「只有兩間航空公司提供香港至巴黎的直航班機。直航可減少食品在地面停留的時間，這一點對芝士、沙律菜、鮮魚和海鮮尤為重要。」

其次，對兩地的客戶而言，國泰貨運的起飛及抵埗時間也非常理想。Py 補充：「我們大約中午從法國起飛，第二天清晨抵達香港，可說佔盡優勢。」這個時間亦非常配合食品市場的營業時間。

在巴黎物流公司 Bolloré Logistics 商務組任職的 Christine To 指出，公司的托運人主要位於法國和歐洲其他地區，其中法國巴黎南部偌大的 Rungis Market 是歐洲最大的有蓋食品市場，佔地 232 公頃，每年交易約 170 萬噸農產品，據說這個成交額超越世上任何市場。

她說：「我們出口的產品五花八門，從冷藏到冷凍的都有，最主要是芝士和蔬菜，也有海鮮，如生蠔和青口。」

「鮮貨是我們業務非常重要的一部分。」她補充：「我們受制於人們的消費習慣和相關規例。舉例來說，今年初法國爆發禽流感，導致某些產品禁止出口。另外，季節也會影響業務，例如 Beaujolais Nouveau 採摘期和聖誕節都是我們的高峰期，而農產品的時令季節亦然，好像現在正是蘆筍的產季。」

國泰航空的 Py 表示，一如意大利，香港也是法國農產品的主要市場，因此讓國泰航空能有效發揮能力。To 說：「國泰航空是我們的策略合作夥伴之一。他們不僅提供優質服務，而且每天都有直飛香港的航班，後續程序亦處理得宜。使用國泰航空的服務，我們可以肯定每項訂單安全無誤，還有值得一提的是，冷凍鏈總能派上用場。」 ■

Please visit www.cathaypacificcargo.com for more information about Cathay Pacific Cargo's Fresh Lift product.

欲查詢國泰貨運 Fresh Lift 產品詳情，請瀏覽 www.cathaypacificcargo.com



FOOD FIGHT 美食之爭

Cathay Pacific cargo managers for Italy and France, Alberto Brandi (A) and Jean-Luc Py (JL), met in neutral Switzerland to talk pride and produce 意大利和法國貨運經理 Alberto Brandi (A) 及 Jean-Luc Py (JL) 在中立之地瑞士碰面，為家鄉的驕傲和農產品爭一日之長短



Q BORDEAUX OR BAROLO?



A: They're both very good

JL: I think we have to be honest. French wine is much more famous.

A: Because of marketing... I'm not an expert on wine but someone told me Italy has more variety.

JL: Come on – Asti.

A: Yes, alright, that's not good but you have Beaujolais.

JL: Okay. Be careful with Beaujolais. Beaujolais wines can be very good, but Beaujolais nouveau is not so good. In France, we are so proud of our products that we can forget to take care of them.

波爾多還是巴羅洛？

A: 兩者都不錯。

JL: 來吧，老實點。法國酒毫無疑問較知名。

A: 不過有賴市場推廣策略罷了……我雖然不是美酒專家，但有人告訴我，意大利擁有更多品種的佳釀。

JL: 就如 Asti。

A: 我知道，這款可能不夠好，但你也 Beaujolais 呀。

JL: 好吧，但需知道 Beaujolais 佳釀可以相當不錯，只是 Beaujolais nouveau 的確有待改善。我們都以自己的產品為榮，因此有時候可能忽略了好好照顧。

Q CHAMPAGNE OR PROSECCO?



JL: Champagne.

A: No. That's just because of its popularity...

JL: If you think Champagne is just wine with bubbles, fine. Have some Asti.

A: There are varieties from the Veneto area that are very good. It's not Champagne, but it's good.

JL: Listen, I'm not going to compare a Ferrari with a Citroën. Champagne is Champagne.

A: Next time, I will bring you a good one. I don't have to pay €2,000 for a bottle just because it's Champagne.

JL: I can get a very good bottle for €20.

香檳還是 Prosecco 汽水？

JL: 香檳。

A: 不可能，唯一原因只是其大受歡迎。

JL: 如果你認為香檳只是有氣泡的酒，那就不如喝 Asti 吧。

A: Veneto 區有不錯的汽水，雖然不是香檳，但品質上乘。

JL: 聽著，我不會把法拉利和雪鐵龍比較，香檳就是香檳。

A: 下次我會帶一瓶頂級汽水讓你品味。我毋須付 2,000 歐元買一瓶汽水，只因為它具有「香檳」之名。

JL: 我也可以用 20 歐元買一瓶上佳之選。

Q PARMA HAM OR JAMBON DE BAYONNE?



JL: Italian prosciutto – I'll give you that.

A: Yes. I agree. Prosciutto. Although to be honest, we are both under threat from Spain.

JL: Yes, true. And jambon de Bayonne is not French.

巴馬火腿還是巴約訥火腿？

JL: 意大利帕爾瑪，這個我毫無異議。

A: 同意，必定是帕爾瑪。其實西班牙才是我們的最大威脅。

JL: 說的沒錯。而且巴約訥也非法國的。

Q GORGONZOLA OR PARMESAN?



A: I'm not saying French cheese is bad, but the quantity and diversity of Italian cheeses...

JL: Come on. Be serious. You can have no clue about the diversity of French cheeses.

A: I like cheese from all over the world.

JL: What? Don't tell me you like Gouda or Edam. After I made a special effort to compliment you on prosciutto! Look, Parmesan is just one cheese. Unlike Camembert, Brie and...

A: It's still just Camembert...

JL: This guy is crazy!

Gorgonzola 藍芝士還是巴馬臣？

A: 我沒說法國芝士不好，但我們的產量和品種無疑較多。

JL: 你想清楚吧，你根本不認識琳琅滿目的法國芝士。

A: 我其實喜歡世界各地的芝士。

JL: 甚麼？你不會也喜歡 Gouda 或 Edam 吧。枉我還特別讚揚帕爾瑪！你只得巴馬臣，我們有 Camembert、Brie 等。

A: 我只知道 Camembert……

JL: 這個人真的不可理喻！

Q NATIONAL DISH?



JL: In France, there are too many and it varies by region.

I don't think we can say there is one dish. But Italy, easy, people will say pasta or pizza.

A: Wait – there are 2,000 ways to make a pasta.

JL: You're right. But if you think of France, you don't think about just one or two dishes.

A: Basic pasta with tomato, done the old way, is very simple – yet still the best you can ever have.

JL: In France we can make any meat or vegetable miraculous.

招牌國菜？

JL: 法國的菜式多不勝數，每區各有代表作，不能只點出一道。意大利菜則簡單得多，很多人都會說意粉或薄餅。

A: 不對，單是烹調意粉便有 2,000 種方法。

JL: 你說得對，但無可否認，法國肯定不只一或兩道名菜。

A: 就說最基本的番茄意粉，以傳統方法烹調，簡單不過，但依然是最美味的。

JL: 我們可以把任何肉類或蔬菜造出千變萬化的菜式。

Q WHAT ABOUT COFFEE?



JL: Okay, okay, look here's something we can agree on.

Do you know why the English drink tea?

A: Why?

JL: Have you tasted their coffee?

咖啡又如何？

JL: 好了好了，我們終於有共識了。你知道為什麼英國人經常喝茶嗎？

A: 為什麼？

JL: 你嚐過他們的咖啡便自然明白。

iHOLA MADRID!

向馬德里問好

The Spanish capital joined the Cathay Pacific network in June. What can customers expect?

國泰航空於6月直飛馬德里，為顧客帶來什麼服務？

The countdown is complete for the launch of Cathay Pacific's new route to the Spanish capital Madrid. The service's timings are ideal for cargo, particularly for perishables, leaving Hong Kong after midnight and arriving in the Spanish capital before 9am in the morning, and setting off from Madrid at noon for a 7am arrival in Hong Kong. The four flights a week run from Hong Kong on Tuesdays, Thursdays, Saturdays and Sundays, and offer the opportunity to connect with services from Latin and South America that fly to Madrid Barajas Airport. While those are plentiful, the Cathay Pacific service from there will be one of the few direct flights to Asia and the sole direct link to Hong Kong.

Maria Garcia is Cathay Pacific cargo manager, Spain. 'Our services will start out on the Boeing 777-300, which is a good aircraft for cargo, and it will be our job to fill it with high yield cargo,' she says. 'The focus for Europe is product related business – especially pharma and perishables. There are a number of pharma companies based around Barcelona. Then there is also a lot of fruit and vegetables, and the famous cured ham. Tuna is a big market to Japan.'

Spain is also a very big player in the fashion industry, and is home to well known brands such as Zara and Mango.

Since February, Garcia has been Spain-based, moving from Paris. Although Garcia's parents are Spanish, she grew up in France so this is not a return home for her. 'Previously, I was assistant manager cargo sales for Spain, and so was involved in the market here, though we worked together with a GSA,' she says. 'Now we have our own team in Spain and so we can visit our customers more intensely to develop business.'

As well as running RFPs for the GHA, with whom she shares office space, and



Capital asset
Madrid will open
up access to routes
in South America

直達首都
從馬德里可接連前往
南美的航線

Madrid flight factsheet

馬德里航班資料

Number of flights per week:

每周航班次數

4 flights

Service started: 2 June 2016

啟航：2016年6月2日

Days of operation (from HK):

Tuesday, Thursday, Saturday, Sunday
航班（香港往馬德里）：星期二、四、六、日

Aircraft type:

Boeing 777-300

機型：波音777-300

the trucking company, part of Garcia's role has been building a new team and ensuring that they are trained, committed and knowledgeable. 'We have a team of three in Madrid, one in cargo sales, one in space control and one supervisor, plus a sales person in Barcelona,' she says. 'The exciting thing has been building this operation from scratch. The challenge now is that this is a competitive market we need to fill the aircraft. A lot of our competitors from Europe and the Middle East are already in place. However, we have an advantage of a direct flight straight to the heart of Asia.' ■

國泰航空直飛西班牙首都馬德里的新航線正式啟航。這項新服務的往返時間非常適合貨運，尤其是運送鮮貨更為理想：午夜後從香港起飛，翌日上午9點前抵達西班牙首都；或是中午從馬德里出發，翌日上午7點抵達香港。每星期二、四、

六、日，共四個航班從香港出發，並提供連接飛往馬德里巴拉哈斯機場的拉丁美洲和南美洲航線。航班選擇相當充足，國泰航空提供的服務不僅是當地少數前往亞洲地區的直航班機，更是唯一前往香港的直航服務。

國泰航空西班牙貨運經理 Maria Garcia 說：「新航線的服務將以波音 777-300 營運，這個機型非常適合貨運，我們會付運高效益的貨品。歐洲業務以運送產品為主，特別是藥品和鮮貨。巴塞羅那有不少製藥公司，還有很多水果和蔬菜，以及著名的火腿，而吞拿魚則主要應付龐大的日本市場。」

西班牙在流行時裝的地位亦舉足輕重，如風靡各地的 Mango 及 Zara 等。

自 2 月以來，Garcia 已經從巴黎調駐西班牙。Garcia 的父母都是西班牙人，但她自小在法國成長，所以這也不算是返國定居。「之前我擔任西班牙貨運銷售助理經理，已經有一群基本客戶，但都是由地勤代理處理。現在我們自行承接業務，可以更頻密拜訪客戶，建立業務關係。」

除了與地勤代理（與他們共用辦公室）和貨運公司擬定需求計劃書，Garcia 的職責還包括建立新團隊，確保他們得到相關培訓，具備專業知識，能夠盡忠職守。「目前我們的馬德里辦公室有三名成員，包括一名銷售人員、一名調控人員和一名主管，另外巴塞羅那也有一名銷售人員。」她說：「從零開始建立起這支團隊實在令人振奮，目前的挑戰是在競爭激烈的空運市場爭一杯羹。我們必須面對很多比我們早進駐的歐洲和中東對手。然而，我們擁有直航亞洲心臟地帶的卓越優勢。」 ■

CARGO INTELLIGENCE

集思廣益

Cargo iQ has a mission to create and implement quality standards for the air cargo industry. What's in it for all of air freight's parties?

Cargo iQ為空運業制定及執行品質標準，對業界各方帶來甚麼影響？

Cargo iQ is a not-for-profit membership group supported by IATA composed of more than 80 major airlines, freight forwarders, ground handling agents, trucking companies and IT providers.

Cargo iQ members developed a system of shipment planning and performance monitoring for air cargo based on common business processes and milestones.

As part of that system, the Cargo iQ Master Operating Plan (MOP), which has been endorsed by IATA as a recommended industry practice, describes the standard end to end process of transporting air cargo.



Ariaen Zimmerman
Executive director, Cargo iQ

We are at the dawn of big changes in the industry with the rise of new technologies such as e-commerce and advanced routing models based on thorough piece level tracking and control. In order to fulfil the value proposition shippers demand, we have to focus on delivering quality.

Cargo iQ marks that next step. Since the launch of (then) Cargo2000 the industry has changed. Every airline has some sort of process control and shipment track and trace. People perceive the use of e-air waybills, the Cargo iQ Data Management Platform, and the Master Operating Plan (MOP) as normal now.

We are planning on playing an even bigger role by providing a platform for people to get together and talk the same language to provide the standards and the

platform on which change can be organised.

We want to be faster about implementing our new procedures and more vocal about what we achieve. We have changed the way we measure our members' performance to look at how the shipment was processed from origin to destination, looking at every single step, not just to know whether it passed or failed.

The end game is to improve the quality of the shipment process – and to make it measurable so that we can continue to analyse the data so that all parties can benchmark it and improve performance.



Alan Glen

GM cargo services, and Cargo iQ board member

Cathay Pacific is proud to be a long-time member of Cargo iQ. This vital industry group has representatives from airlines, forwarders and now GHAs on the board. It's a powerful mix of people to get round a table to agree to how processes work.

At Cathay Pacific Cargo, every shipment we carry is logged into Cargo iQ. Even if the forwarder is not a member we still follow the process. We use the data to prepare an internal scorecard measuring our own performance. Additionally, we also want to be able to track performance of our GHAs.

Since Cargo2000 was set up, the industry has been gathering a lot of data – that's tens of millions of transactions. The group has started an initiative to combine this data analysis. We will be able to, for example, find out the average performance between Shanghai and

FORMER
STATUS

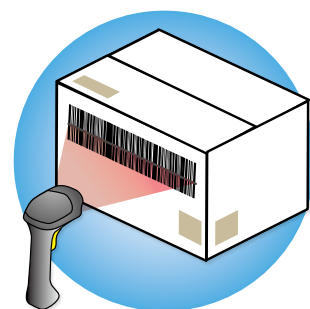


AIRLINE
IT SYSTEM



REPORTS

CARGO
iQ



AIRLINE
IT SYSTEM



Heathrow direct or via any intermediate point. If I were a forwarder, I would be able to see which routing is quicker and which airline performs best.

Another initiative we are looking at is piece level tracking. This will be great for small forwarders because they only see one end of the consignment. When enacted they will be able to see performance from door to door, and this will enable shippers to also see the end to end performance. It is the one place that can tell its members how long each shipment takes. It's enabled us to smash the myth that air cargo takes six to seven days end to end.



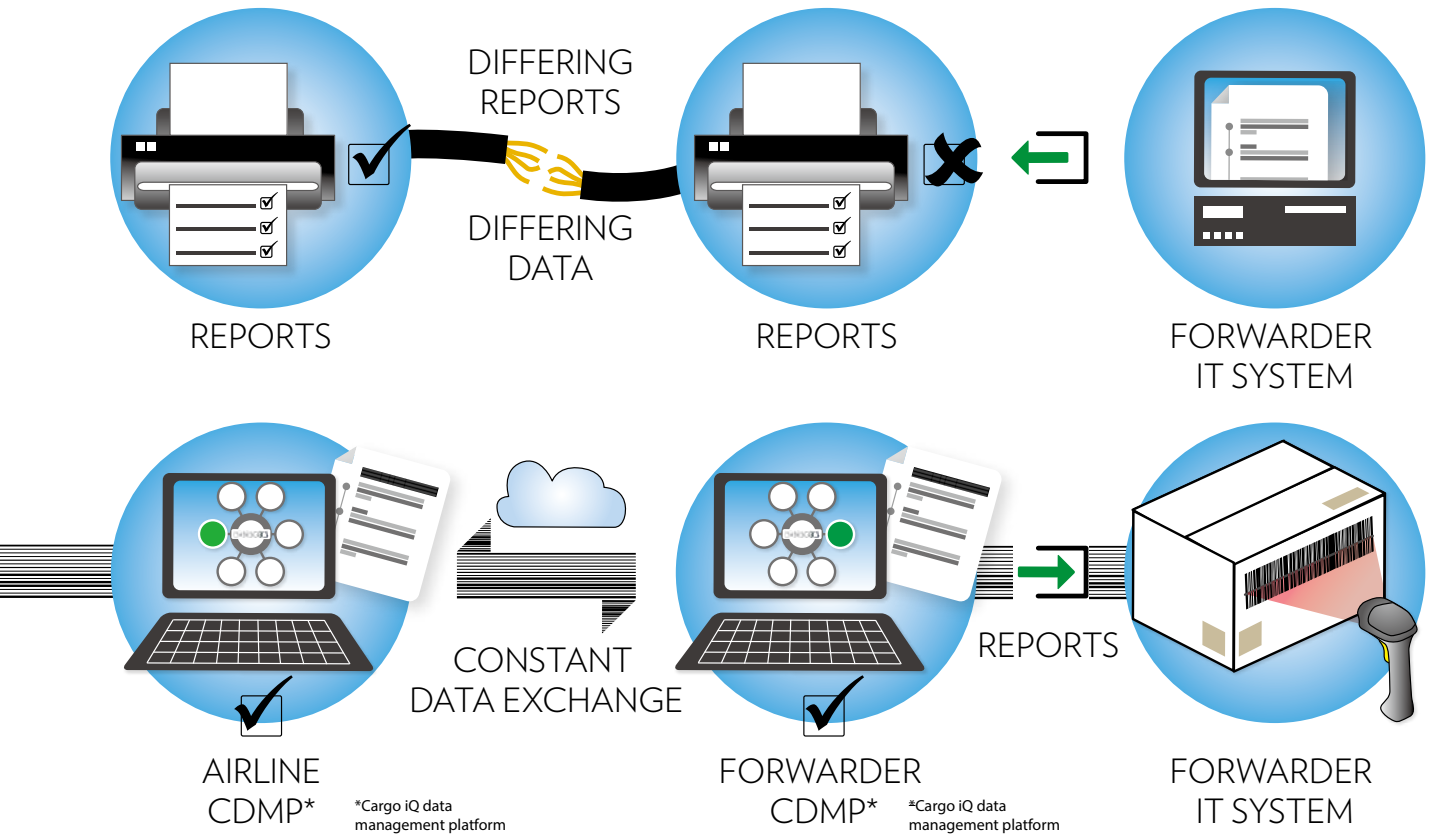
Claude Picciotto

Air freight middle-office director,
Bolloré Logistics

We heard of Cargo iQ (then C2K) when it was first introduced to the industry. At the Bolloré Group, we feel it is very important to stay close to our industry and its developments and evolution.

Signing up to and meeting the Cargo iQ standards will assist us in progressing towards IATA's e-freight goals and enable us to achieve operational excellence.

The key performance indicators (milestones) allow us to benchmark carriers.



As quality is one of the main objectives of the Bolloré Group, we can then push them to increase their quality performance, mainly in terms of FAP (Flown as Planned) and NFD (Notify for Delivery). It also allows us to take corrective actions in order to improve our own performance on FWB data quality (e-AWB).

Smaller freight forwarders should consider that customers are willing to subcontract services in order to find the reliability and quality they should expect. ■

這是由國際航空運輸協會 (IATA) 支援的非牟利會員組織，成員包括 80 多家主要航空公司、貨運代理、地勤代理、運輸公司及 IT 供應商。Cargo iQ 會員針對空運業的共同業務流程和發展里程碑，開發了一套貨運計劃和績效監測系統。作為該系統的一部分，Cargo iQ 總營運計劃 (MOP) 清楚列明空運貨物的標準運送流程，並獲得 IATA 認可為值得推薦的作業方式。

Ariaen Zimmerman, Cargo iQ 行政總監

我們正處於空運業大時代的起步點，隨著電子商貿及其他新技術興起，加上先進的路線安排模式，讓我們得以全面追蹤和監控個別貨物。而為了達成托運人要求的市場價值定位，我們必須著力提供優質服務。

Cargo iQ 正是未來的指標。自推出前身的 Cargo 2000 以來，空運業已今非昔比。每家航空公司都有各自的過程監控和貨物追蹤服務，而電子空運提單、Cargo iQ 數據管理平台及 MOP 已成必備程式。

我們計劃擔起更大的重任，提供一個讓業界聚首商討的平台，共同制定標準及研究統籌應變的方法。

我們期望加快實踐新流程的步伐，進一步宣揚我們的成果。我們已經改變了評估各成員表現的方式，觀察貨物從出發地到目的地的運送過程，除了知道貨物是否通關或滯留，更仔細研究每個步驟，最終提高運送流程的品質，並且定下衡量標準，這樣就可以一直分析數據，讓各方制定基準，從而提升表現。

Alan Glen, 貨運服務總經理及 Cargo iQ 董事會成員

國泰航空是 Cargo iQ 的長期會員，Cargo iQ 這個業界組織舉足輕重，代表包括航空公司、貨運代理，以及最新加入的地勤服務代理，匯聚各方代表有效地共同商討貨運流程，爭取共識。

國泰貨運的職員會將每一張貨運訂單輸入 Cargo iQ 的資料庫，即使貨運代理不是會員，我們仍會依照流程辦事。我們會根據數據製作僅供內部使用的記分卡，藉此評量自己的表現。此外，我們也希望能夠持續觀察地勤服務代理的表現。

自 Cargo 2000 成立以來，貨運業界藉此獲得大量數據，涉及數千萬的交易資料。

Cargo iQ 正著手統合數據做分析。舉例說，我們可藉此知道上海直飛倫敦希斯路機場或經過任何中轉站的平均營運表現。如果我是貨物代理商，便能從中知道哪條路線比較快和哪家航空公司表現最佳。

這套系統的另一個用途是個別追蹤貨物，這一點對小型貨運代理相當有利，因為他們通常只能見到貨物運送的其中一端的資訊。採用系統之後，他們就能見到整個貨運過程的表現如何。會員可在這裡得知每件貨物的運輸時間，讓我們明白空運需時六至七天完全是誤解。

Claude Picciotto, Bolloré Logistics 空運中台總監

我們在 Cargo iQ (即前身的 Cargo 2000) 首次在業界推出時，已經聽說這個系統。Bolloré Group 非常著重緊貼業界脈搏，了解其發展和改革。

加入 Cargo iQ，並達到其所定標準，有助我們進一步追隨 IATA 的電子貨運計劃目標，使我們的營運表現更卓越。

我們可以透過關鍵業務表現指標 (里程碑) 設定空運公司的基準。Bolloré Group 最重視品質，我們可以藉此推動他們提高表現水準，尤其是準點率 (FAP) 和送貨通知 (NFD) 這兩方面。此外，我們也可以修正措施，提高我們在貨物運單數據的表現 (電子空運提單)。

至於小型貨運代理，他們應該明白客戶會為了得到他們期望的可靠優質服務，而使用外判服務。 ■



CLAN GATHERINGS 共聚一堂

The Hong Kong Sevens is always a calendar highlight and was preceded by the annual business development and partnerships meeting. Plus: celebrations as new Heathrow terminal opens

香港國際七人欖球賽乃城中盛事，此前國泰貨運舉辦了業務發展與夥伴合作會議。還有，希斯路貨運設施揭幕



SEVENS HEAVEN 七人狂歡

Cathay Pacific Cargo welcomed guests to the Hong Kong Stadium to share and experience two days of sport and spectacle that is the Hong Kong Sevens. Top-level sport was interspersed with colourful crowds, singalongs and crowd pleasing entertainment.

國泰貨運迎來一眾賓客到香港大球場觀看香港國際七人欖球賽，投入為期兩天的體育盛事，感受緊張熱鬧的氣氛。觀眾們悉心打扮，穿上鬼馬繽紛的服飾，又不時全場高歌，為球隊吶喊助威，加上球隊的精彩表現，令主客同歡。



Sporting setting: The Hong Kong Stadium was a picture-perfect setting for world-class action



Cheers: Mark Sutch, GM Cargo sales and marketing (right 右), with DHL's Ross Wyeth



Cabin crew control: Cathay Pacific flight attendants get into the spirit of the occasion congratulating Hong Kong's star player Salom Yiu Kam-shing (centre 中)



Party people: Jacky Lam from Trans-Am Air Freight (HK) Ltd with companion



From left: Cathay Pacific's Anand Yedery, Expolanka's Saifulla Yusoof and UTI Worldwide's Ravinder Katyal



Box fresh: Cathay Pacific Cargo guests get ready for the action on the pitch in their Cathay Pacific tops



Star turn: ex-All Black Simon Mannix (right 右), Simon Large and Mark Sutch



Team bonding: the Hong Kong team huddles before taking the field



Box rocking seats: a lot of enthusiasm in the Cathay Pacific Cargo box



From left (左起): Hankyu Hanshin's Minoru Tanabe, Tamotsu Ishizuka and Takahiro Ito with Cathay Pacific's Wallace Tsang (second from right 右二)



Flashpoint: The traditional closing fireworks display



Colour spectacular: fancy dress in the South Stand entertained as much as the rugby



Winning feeling: Fiji were the ultimate champions after three days of competition





BUSINESS BEFORE PLEASURE 商務聯誼

Cathay Pacific Cargo held the annual Cathay Pacific Business Development & Partnership meeting in March. Simon Large, director cargo, kicked off the meeting by thanking customers for their support while Mark Sutch, GM cargo sales & marketing, gave a business update, followed by Alan Glen GM cargo services, who gave a presentation on cargo services and the terminal. The event ended with a dinner followed by a two-day experience at the Hong Kong Sevens.

今年3月，國泰貨運舉行一年一度的業務發展與夥伴合作會議，先由國泰貨運董事羅世民致辭，感謝顧客過去一年的支持，接著貨運營業及市務總經理薩孟凱匯報最新的業務現況，然後由貨運服務總經理Alan Glen暢談貨運服務及貨運站的發展。會議結束後，與會人士一起共晉晚餐，並於其後一連兩天觀看香港國際七人欖球賽的精彩賽事，盡興而回。



From left (左起): Yusen Logistics' Toru Kamiyama with Cathay Pacific Cargo manager, Japan, Shuichi Ueba



From left (左起): Cathay Pacific's Ivy Yip; Jose Ubeda, Sean Francisco and Kapil Kumar from Expeditors; and Cathay Pacific's Virginia Chan



From left (左起): Samir Kapoor from DSV Air & Sea; Cathay Pacific regional manager, South Asia, Middle East and Africa Anand Yedery; Alex Shum from CPSL; Saifulla Yusoof from Expolanka Freight; Ravinder Katyal from UTI; M Afzal Malbarwala from Galaxy Freight



Cathay Pacific Cargo's Ray Jewell and Simon Large flank Panalpina's Lucas Kuehner (centre 中)

Diabetics do it better

What if we only hired diabetics to work in the active cold chain? Would they take more care handling healthcare products? We think they would. They know what happens if they don't get insulin.

Of course we don't just employ diabetics. But we do share their understanding of the value of what we ship in our containers.

We educate the members of the active cold-chain on the difference they make to the lives of diabetics and others who rely on healthcare products. Because people do a better job when they understand the importance of why they are doing it.

Gunay Hadjimehmed is a diabetic. And his son Mehmet works for us.

envirotainer.com

Envirotainer[®]
The Active Cold Chain



LONDON CALLING 倫敦新里程

A little piece of Hong Kong came to Heathrow in April with the opening of the new and state of the art Cathay Pacific Cargo terminal. Guests were entertained by a lion dance and refreshments in the automated facility.

國泰貨運位於倫敦希斯路機場的嶄新貨運設施今年4月隆重啟用，嘉賓一起參與揭幕儀式，並欣賞舞獅表演及享用精美小點。



Filled to capacity: guests gather for the opening speeches in the purpose-built facility that will be operated by Dnata



Pharma charmer: guests look around and take in the controlled temperature zone



Roaring success: the colourful lion prepares to make its entrance

MEET THE ELITE 業界精英

Tell me a bit about yourself

I have been in my current role for three years but with the company for 16 years. I spent 12 years in the US, starting in operations and eventually managed the US division. I was asked to take this role so I moved back to Switzerland four years ago.

What do you like best about the business?

It's exciting. We see so many aspects of trade; pharma, fashion, high tech, telecoms, oil and gas, all with different supply chain needs. Our industry makes the world go round. While it's competitive, it's also collegiate – a community – and the people really know their stuff.

Future challenges and opportunities?

There is a lot of talk about e-commerce, with companies like Amazon moving in. Why would our industry be different to others that have been disrupted? Time will tell. Ours is still very much a people business, but we can use technology to make things more efficient, like communications and cooperation between the different supply chain partners. This has to be a top priority.

What do you do in your spare time?

I'm a bit of a history buff. I like to travel with my family to sites of interest. Often we think we have all the answers, sometimes people 2,000 years ago knew better. It's also a joy to have two healthy boys, 11 and 13, so lots of wild things go on in our house.

Why Cathay Pacific?

It's a top quality supplier, based in a fantastic home market, which gives it lots of scope from Asia. Also the team has been there for many years, they know the business and are a pleasure to work with.

讀自我介紹。

我從事目前的工作已三年，而在公司已16年，其中首12年駐於美國，負責營運操作，後來便管理美國分部。接著我獲安排現在的職位，所以四年前重返瑞士。

你最喜歡現職哪個環節？

最令人興奮的是可接觸不同範疇的商貿，如醫藥、時裝、高科技、電訊、石油及天然氣等，各有不同的供應鏈需求。物流業令世界運轉，雖然業界競爭激烈，但也是一小群體般自成一國，且每個人對運作均瞭如指掌。

Lucas Kuehner

Global head of air freight, Panalpina
瑞士泛亞班拿物流全球空運主管



未來面對的挑戰及商機？

很多人提到電子商貿的趨勢，加上亞馬遜也加入競爭，我們可能也要順應時勢。雖然物流仍然是以人為本的業務，當然科技可使工作事半功倍，加強溝通，甚至促進不同供應鏈通力合作。因此這都是我們首要的考慮。

你閒時會做些什麼？

我喜愛歷史，喜歡與家人到名勝古蹟旅遊。有時我們以為自己掌握一切，但其實2,000年前古人的智慧更勝一籌。我有兩名分別11及13歲的兒子，因此閒時在家裡也可玩個痛快。

為什麼會選擇國泰貨運？

國泰貨運是服務一流的空運商，其總部位處優越，因此可以放眼亞洲。而且團隊熟知一切，大家合作極為愉快。



DIRECTORY 索引

The directory this issue introduces the regional and country managers for Cathay Pacific Cargo in Europe

本期索引介紹國泰貨運在歐洲的區域經理



EUROPE 歐洲

Ray Jewell

Regional manager cargo, Europe
區域貨運經理



BELGIUM 比利時

Gerry Heiremans

Cargo manager, Belgium & Luxembourg
比利時及盧森堡貨運經理



NETHERLANDS 荷蘭

Marcel Bakker

Cargo manager, the Netherlands
貨運經理



SPAIN 西班牙

Maria Garcia

Cargo manager, Spain
貨運經理



FRANCE 法國

Jean-Luc Py

Cargo manager, France
貨運經理



ITALY 意大利

Alberto Brandi

Cargo manager, Italy
貨運經理



UK & IRELAND 英國及愛爾蘭

Andrew Roe

Cargo manager UK & Ireland
貨運經理



FRANKFURT 法蘭克福

Steffen Braig

Cargo revenue manager, Europe
歐洲貨運收益經理



SWITZERLAND 瑞士

Philippe Queloz

Cargo manager Switzerland
貨運經理



GERMANY 德國

Michael Spiegel

Cargo manager, Germany & Eastern Europe
德國及東歐貨運經理



SWEDEN 瑞典

Anna Malmberg

Cargo manager, Scandinavia and Finland
斯堪的納維亞及芬蘭貨運經理

CARGO IN THE PALM OF YOUR HAND 追蹤貨物就在指掌之間

The Cathay Pacific Cargo app offers cargo customers a convenient way to track shipments, as well as a wealth of news and other services and functions relevant to the operations of Cathay Pacific Cargo. Using the app, customers can track shipments on smartphones or tablets anytime, anywhere, along with much of the functionality of the www.cathaypacificcargo.com website

國泰貨運的應用程式為貨運客戶提供方便，讓他們可以輕易追蹤貨件的運送情況，並提供國泰貨運多項相關的資訊、服務及功能。客戶可以隨時隨地使用智能電話及平板電腦，透過應用程式追蹤貨物，以及使用 www.cathaypacificcargo.com 網頁的大部分功能。



● TRACK & TRACE 貨件追蹤

Track multiple way bills on one convenient page
在單一頁面追蹤多份貨單的狀況

● ARRIVALS & DEPARTURE 抵達及出發時間

Keep up to the minute with live flight arrivals and departures
每分鐘更新航機的抵達及出發時間

● OFFICE LOCATOR 辦事處位置

Maps of all of Cathay Pacific Cargo offices worldwide
在地圖上標示全球各地國泰貨運辦事處的位置

● FLIGHT SCHEDULE 航班時間表

Check the flight schedule for all Cathay Pacific and Dragonair flights – including freighters
查看所有國泰及港龍航班的時間表，包括貨機班次

● CHECK LOADABILITY 查詢裝載可能性

Enter the dimensions to check if your cargo can get on board on every Cathay Pacific aircraft type
輸入貨件尺寸，查詢能否裝進國泰機隊使用的航機種類

● NEWS 最新消息

The latest updates on the issues across the network
提供國泰網絡的最新資訊及相關事項

CATHAY PACIFIC CARGO PRODUCTS 國泰貨運 專業服務

Please visit www.cathaypacificcargo.com for more information about Cathay Pacific Cargo's range of products

請瀏覽 www.cathaypacificcargo.com 查詢國泰貨運各項產品及服務詳情



Priority handling with money-back guarantee.
貨物得到最優先處理，並提供原銀奉還保證。



Small parcel service with fast customs clearance.
小型包裹之速遞服務，確保清關快捷。



Comprehensive temperature management for pharmaceutical products.
配合不同藥品需要，全程以精確溫度監察運送。



Dangerous goods under the care of certified professionals.
危險品專業運送服務，全程由專業人員遵照嚴格安全守則處理。



Tailor-made solutions for premium wine.
方案度身訂造，運送葡萄酒首選。



High security for high-value shipments.
專為貴重物品提供可靠運送。



Effective cold-chain management to ensure shipments arrive fresh.
高效可靠的冷凍鏈管理，確保貨物新鮮抵達。



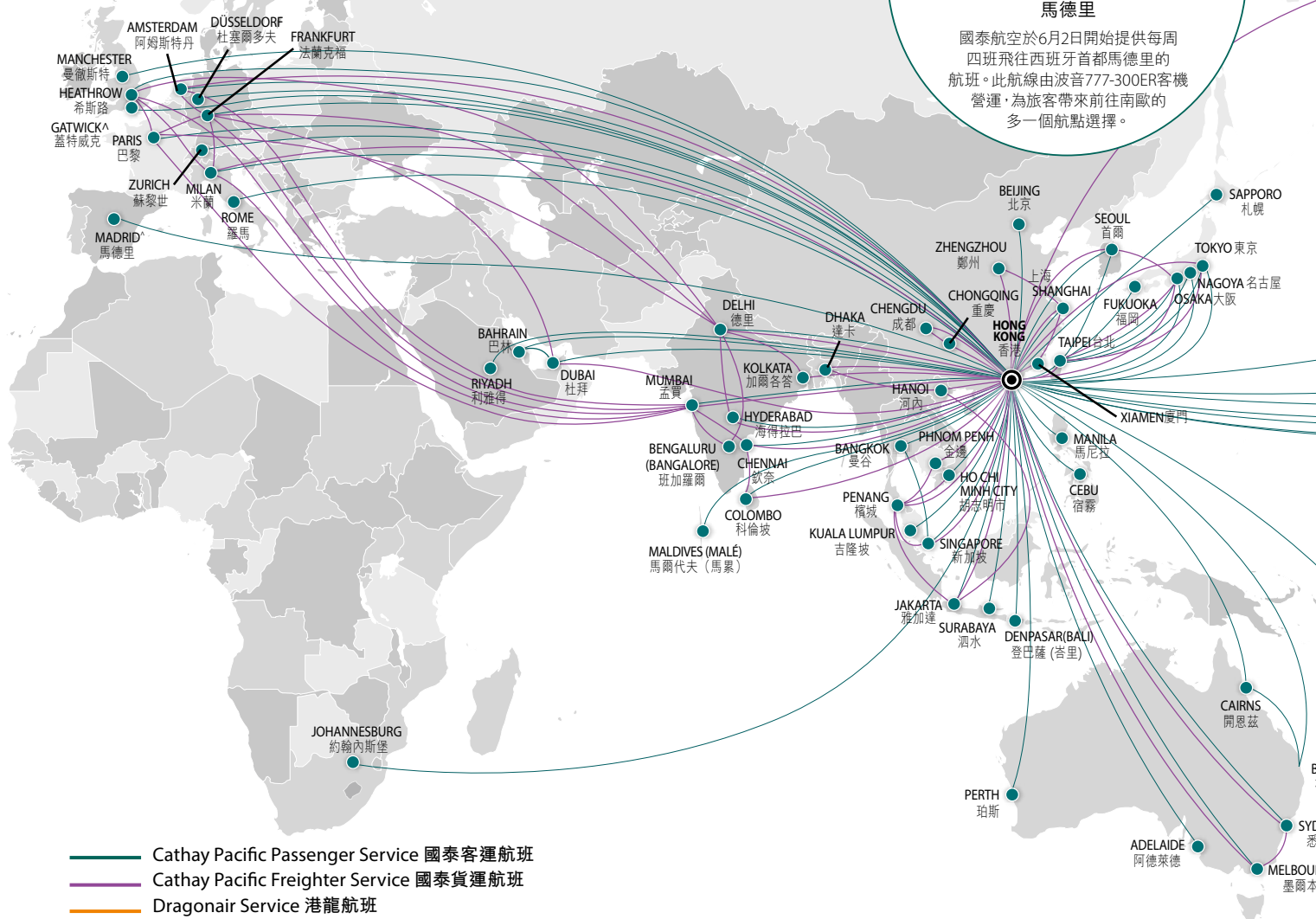
Tender, special care for live animals.
貼心周到的服務，為付運動物提供最妥善的照料。



Tailor-made solutions for special shipments.
為需要特別處理的貨物，度身訂造最合適的運送方案。

CATHAY PACIFIC GROUP NETWORK

國泰集團 航線網絡



MADRID

Cathay Pacific starts a four-times weekly service to Madrid, Spain's capital using the Boeing 777-300ER from 2 June, offering another access point to southern Europe.

馬德里

國泰航空於6月2日開始提供每周四班飛往西班牙首都馬德里的航班。此航線由波音777-300ER客機營運，為旅客帶來前往南歐的多一個航點選擇。

Technical stop only 技術性停站

* No cargo uplift service 不提供貨運服務

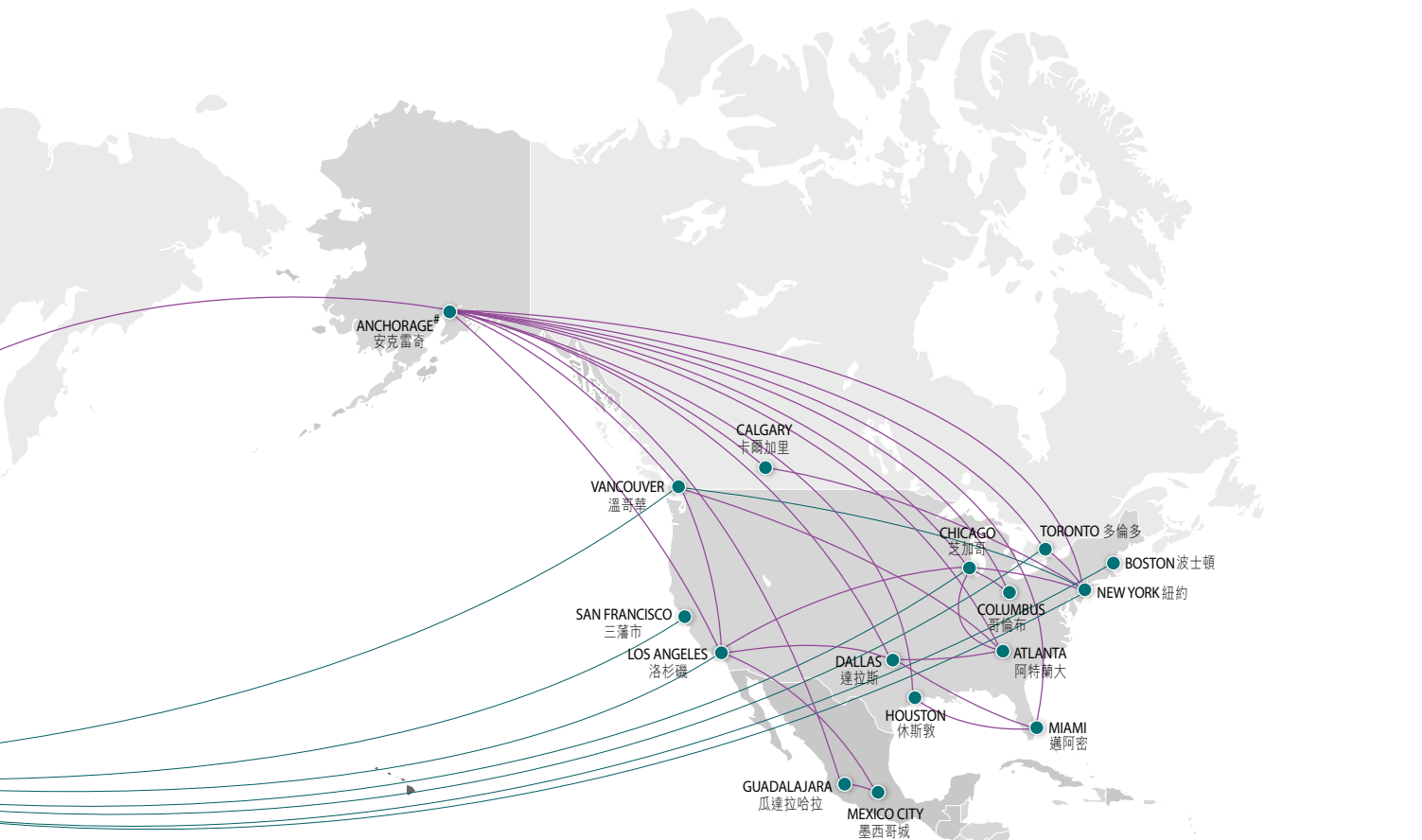
^ Cathay Pacific passenger services to Madrid and London Gatwick commence from 2 June 2016 and 2 September 2016 respectively

國泰航空前往馬德里及倫敦蓋特威克的客機服務於2016年6月2日及9月2日啟航

Information correct at time of printing. Please check the latest availability of service on

www.cathaypacificcargo.com or www.dragonaircargo.com

所有資料以編印時為準，如欲查詢最新資料，請登入www.cathaypacificcargo.com或www.dragonaircargo.com



DRAGONAIR NETWORK 港龍航線網絡

