

# CARGO CLAN

QUARTER TWO 2014

## The China strategy

Following growth  
on the mainland

中國策略  
經濟增長創商機

Flies to  
**90+**  
destinations  
飛往逾90個航點



**ASIAN STYLE**  
The flourishing  
fashion market  
**亞洲風格**  
時裝市場現活力



**PHARMA** **LIFT**  
New cold  
chain product  
**乾冰技術**  
提供冷凍鏈服務



### Our expansion strategy for China 中國市場拓展策略

Despite a slowdown in growth, China is the world's second-largest economy and remains an important driver of global economic activity. In this issue of *Cargo Clan*, we discuss our China strategy, and our dynamic team explains the growth that has sprouted from the "Go West" campaign, the postal and delivery services that have evolved as a result of online shopping and the integration of trucking to extend the Cathay Pacific network.

Our business-development team is continually scanning the economic horizon and we follow trade activity wherever it occurs. In March, we launched a freighter service to Columbus, Ohio – our 12th freighter destination in North America – and a three-time-a-week scheduled freighter service to Mexico City. In June, the frequency of flights to Columbus increases to three a week and in Q3 our Mexico services will also increase, to five flights a week.

Cargo volumes are improving, although yields remain under pressure. We look forward to strong volumes as we move towards the Q4 peak season and hope rates will also then move back up to sustainable levels.

雖然經濟增長放緩，但中國仍然是全球第二大的經濟體，也是推動全球經濟增長的重要力量。本期《Cargo Clan》除探討國泰航空在中國的發展策略之外，我們朝氣蓬勃的團隊亦分析如何透過「開發西部」策略而促進增長，還有由網上購物帶來的郵遞及速遞服務，以及結合陸路運輸業，拓展國泰的聯運網絡。

貨運發展跟國際貿易息息相關，我們的業務發展團隊一直緊貼國際貿易發展動向，不斷探求新的航空貨運商機。我們在3月開辦了美國俄亥俄州哥倫布市貨運航線，這是我們於北美洲的第12個貨運航點；同時又提供每周三班前往墨西哥城的貨運服務。及至6月，哥倫布航線已增至每周三班，而墨西哥城的貨運服務也將於第三季增至每周五班。

儘管貨運量有所增長，但收益率依然受壓。我們期待載貨量在第四季高峰時期持續上升，並期望屆時價格亦會重回可持續發展的水平。

James Woodrow  
Director Cargo  
國泰貨運董事章靖

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China is now the second-largest air cargo market in the world, after the United States. China is now the second-largest air cargo market in the world, after the United States. 中國現在是僅次於美國的全球第二大空運市場

# Master plan 宏圖大計

By Leo Williams

Cathay Pacific Cargo has made considerable strides in expanding the key market of China by focusing on trends, team structure and product design strategies

國泰貨運憑藉專注於市場趨勢、改善團隊架構及制訂產品服務策略，在中國的主要市場取得可觀增長

**C**ATHAY PACIFIC Cargo's aim of nurturing the core China market requires more than just servicing current demand. Rather, the airline company's cargo managers in China have put in place a business strategy and team structure to ensure growth and maximum utilisation of the huge mainland market, which is proving ever more pivotal to Cathay Pacific's success in Asia and farther afield.

Aaron Chan, Cathay Pacific's Manager Cargo, China, describes how the situation has changed from having traditional air cargo export production bases in the Yangtze and Pearl river deltas. "More and more, producers are following the country's 'Go West' policy and moving their production from coastal areas to central and western China, which explains the gradual shift to these areas."

Hunter Chen, Cargo Services and Product Development Manager, China, says Cathay Pacific since 2011 has been adding freighter frequency to key production bases in Chengdu (CTU), Chongqing (CKG) and Zhengzhou (CGO). "Today, we are the largest and only airline that serves both traditional markets like PVG and XMN [Shanghai Pudong and Xiamen Gaoqi] and

emerging markets with freighters," he says.

"China, as the second-largest air cargo market after the United States, is a key market and revenue contributor to Cathay Pacific and Dragonair. To date, Cathay Pacific and Dragonair have been flying to 20 cities across the country, including freighter services to CKG, CTU, CGO, PVG and XMN, as well as 16 other cities."

Aaron Chan identifies e-commerce as a key growth area for the China strategy. "More individual consumers around the world buy from China's big and small online shops. They require immediate delivery from China to their homes. These shipments won't take sea transportation.

## Fully committed

"With our extensive 20-port network in China, Cathay Pacific and Dragonair are well positioned to cater for this increasing demand. We are different from other airlines in two key aspects: high frequency, 400 flights a week ex-China, and a comprehensive international network from Hong Kong to major worldwide consumer markets."

Winson Zhou, Cargo Market Development Manager, China, Dragonair, oversees development



泰貨運致力拓展中國核心市場的業務，目的不僅為滿足現時的服務需求！國泰貨運的中國貨運經理建立的業務發展策略及團隊架構，在確保增長的同時，還要充分利用內地市場規模龐大的優勢，因為這對於國泰航空在亞洲以至其他海外市場取得成功，起着愈來愈重要的作用。

國泰航空中國區貨運經理陳慶輝指出，長江及珠江三角洲作為傳統空運出口生產基地的局面已出現轉變。「愈來愈多生產商響應國家的『西部大開發』政策，將生產基地由沿海地區遷移到中國內陸及西部，逐漸形成生產基地向中西部轉移。」

中國區貨運服務及產品發展經理陳俊紅則表示，自2011年起，國泰已增加前往成都（CTU）、重慶（CKG）及鄭州（CGO）等主要生產基地的貨運航機班次。他說：「今天，國泰是唯一同時為上海浦東（PVG）、廈門高崎（XMN）等傳統市場，以及新興市場提供貨機服務的最大型航空公司。」

「中國是僅次於美國的第二大航空貨運市場，也是國泰及港龍的主要市場，帶來重大收益。國泰及港龍航機現時飛往中國20個城市，包括往返重慶、成都、鄭州、上海及廈門的貨機服務，以及另外16個以貨車聯運接駁的城市。」陳慶輝指出，在中國的發展策略中，電子商貿是重要的增長領域。「在全球各地，愈來愈多消費者在中國的大小網上商店購物，他們要求貨品即時從中國運送到家中，而這些貨品不會經由船運送遞。」

「國泰及港龍在中國的航空網絡覆蓋20個航點，佔取競爭優勢，可滿足這方面的增長需」

## ON THE FAST TRACK IN CHINA 中國快遞

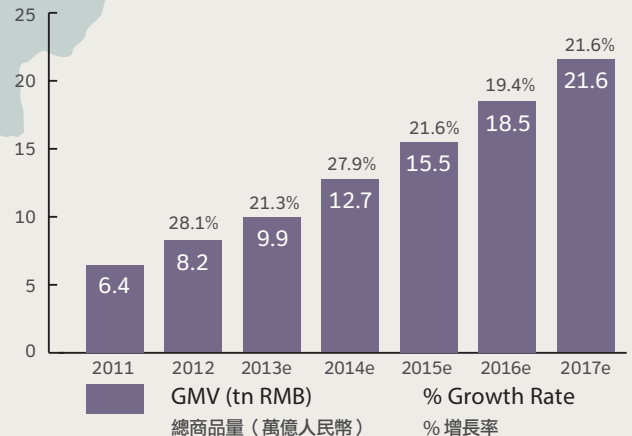
Online shopping has become so popular in China that delivery has emerged as a growth industry. Earlier this year, China's Premier Li Keqiang described express delivery and e-commerce as "twin brothers" and Li praised the role of logistics, saying it was a "dark horse" in emerging industries. In the first quarter of 2014, express deliveries in China reached 2.6 billion, a 51.9 percent increase on the same period in 2013, according to Xinhua. The majority of deliveries in China occur by road, but the rest is via air.

隨著網上購物在中國愈來愈普及，速遞業也成為高速增長的行業。今年較早時，中國總理李克強曾形容速遞業與電子商務猶如「孿生兄弟」，並稱讚物流運輸發揮重要作用，表示速遞業是中國經濟的「黑馬」。在2014年第一季，中國的速遞量激增至26億件，較2013年同期增加51.9%。中國的速遞大部分是經陸路運送，其他都是以空運送遞。



Source: China GMV. © Jan. 2014 iResearch Global Inc.  
資料來源：中國總商品量，© Jan. 2014 iResearch Global Inc.

## 2011-2017 CHINA E-COMMERCE MARKET GMV 2011-2017年 中國電子商務市場總商品量



## CATHAY PACIFIC AND DRAGONAIR MAIL AND COURIER SERVICES 國泰航空及港龍航空的郵件及速遞服務

of the mail business in China and is actively involved in Cathay Pacific Cargo's project to revamp mail handling procedures. Winson is fully committed to the e-commerce strategy, and with good reason. "In 2013, mail revenue was close to a 3.2 percent share of the total China cargo revenue for Dragonair and Cathay Pacific," he says. "Hopefully, mail revenue will exceed 350 percent growth in 2014."

Winson explains there are three main types of mail products in China:

- Express mail service (EMS) is mainly for B2B traffic and 10 percent growth is forecast for 2014.
- The e-packed mail service primarily provides a service to e-buyers and 30 percent growth is forecast for the year 2014.
- The small packed mail service mainly provides a service to e-commerce merchants and

40-50 percent growth is forecast for 2014.

"For international mail delivery, Beijing, Guangzhou and Shanghai Pudong are the top three air hubs, accounting for 80 percent of the total mail volume," says Winson. "The rest is shared by secondary ports in China."

Apart from network development, Aaron Chan says Cathay Pacific reorganised its team last year to meet changing trends in demand. "Now we have dedicated people to look after China cargo sales and China e-commerce development," he says. "For instance, the cargo sales manager, China, mainly looks after our agents and shippers of hi-tech products. He is responsible for providing total solutions because these agents and shippers take care of exports from different parts of China.

"In the past we only had a local

sales team in each port. Now the market development manager looks after cargo-related e-commerce business like mail, courier, priority cargo and traffic from integrators. He is also responsible for co-ordinating with our operations team to ensure our services meet the unique requirements of customers."

### Strong potential

"Additionally, in 2013, we set up a two-person team to manage China cargo services and product development. Our belief is that our business can only be as big as our services are good, so in response to market developments we tailor our product offerings."

Specialised Cathay Pacific products are experiencing firm sales, says Gray Ge, Cathay Pacific and Dragonair's Cargo Sales Manager, especially the transportation of pharmaceuticals and dangerous goods.

## CATHAY PACIFIC AND DRAGONAIR AIR AND ROAD DELIVERY CENTRES 國泰航空及港龍航空的空運及陸路運送中心

CX and KA fly to 20 cities across the country, including freighter services to five major hubs (CKG/CTU/CGO/PVG/XMN), as well as 17 other cities that can be reached via road feeder services (RFS).

國泰航空及港龍航空的航機往返全國20個城市，包括覆蓋五個主要樞紐（重慶CKG/成都CTU/鄭州CGO/上海（浦東）PVG/廈門XMN）的貨機服務，以及通過陸海空聯運服務（RFS）到達另外17個城市。

- Dangerous goods 危險品
- Pharma goods 醫藥品
- Fresh cargo 鮮活貨品
- Live animals 活體動物
- Valuable cargo 貴重貨品
- Expert cargo 專業貨運

### Priority 優先貨品 6%

- Priority LIFT
- General LIFT Plus
- Courier 速遞
- Mail 郵件

### Special 特別貨品 29%



### General 一般貨品 65%

- ✈️ FRTR & PAX Ops port: 5  
貨機及客機機腹載貨航點: 5
- ✈️ PAX Ops port: 15  
客機機腹載貨航點: 15
- 🚚 Other offline port: 17  
其他以貨車聯運接駁城市: 17

"China is a key pharma market due to its growing middle class," says Gray. "PHARMA LIFT product marketing has grown very quickly in China over the past few years. We are experienced with PHARMA LIFT handling and now have more potential clients, since Cathay Pacific and Dragonair have become preferred carriers with pharma services."

Gray says dangerous goods shipping is also showing strong potential. "Cathay Pacific and Dragonair have 12 stations with a Dangerous Goods Licence to handle such products. With a strong worldwide network and good frequency for passenger and freighter flights, Cathay Pacific and Dragonair in Shanghai have taken around 26 percent of the dangerous goods market share."

Hunter Chen adds: "The China team is working to renew and expand DG licences to most of the other

求。我們與其他航空公司主要有兩大分別：班次頻密，每周有400次中國航班，以及全面覆蓋香港前往世界主要消費市場的國際網絡。"

港龍航空中國區貨運商務經理周勇主管中國的郵件業務發展，積極參與國泰貨運重整郵件處理程序的計劃。他專注於發展電子商貿的策略，原因顯而易見。「2013年，郵件業務收益佔國泰及港龍整體中國貨運收益近3.2%，預期2014年郵件業務收益增長將激增逾3.5倍。」

### 增長潛力

他表示中國郵件產品主要分為三大類：

- 特快專遞（EMS）主要是B2B（企業對企業）商業模式，預計2014年增長一成
- 電子包裹郵件服務主要為電子產品買家而設，預計2014年增長三成
- 小型包裹郵件服務主要為電子商貿商家而設，預計2014年增長四至五成

周勇說：「北京、廣州及上海浦東是國際郵件運送的三個主要航空樞紐，佔郵件量的八成，其餘經二級口岸運送。」

除了拓展網絡外，陳慶輝也透露，國泰去

年重整團隊架構，以配合需求趨勢的轉變。「現在，我們有專人負責中國貨運業務及中國電子商貿發展。例如，中國區貨運營業經理主要負責與高科技產品的貨運代理和付運人接洽。他的職責是提供全面解決方案，因為這些代理及付運人要處理來自中國不同地方的出口產品。」

他補充說：「過去，我們在每一個口岸只有一個本地營業團隊。現在由市務發展經理處理與貨運相關的電子商貿業務，例如郵件、快遞、優先處理貨物及聯運業者的流程等。他也負責與營運團隊合作，確保服務能配合客戶的獨特要求。」

「此外，我們於2013年更設立二人隊伍管理中國貨運服務及產品發展。我們相信只有提供優質服務，業務才會不斷增長，因此，我們因應市場的發展來制定產品服務。」

國泰及港龍中國區貨運銷售經理戈睿說，國泰航空的專業運送服務，尤其是運送醫藥品及危險品的業務穩步增長。

「隨著中產階級崛起，中國已成為主要醫藥市場。PHARMA LIFT服務過去數年在中國增長迅速。我們的PHARMA LIFT服務擁有豐富





**Flowers, mushrooms and other produce account for 90 percent of the daily goods exported via Kunming**

鮮花、蘑菇及其他產品，在每天經昆明出口的貨物中佔了九成

online ports. CX/KA may become the pioneer carrier, with the most online China ports and variety of DG carriage services.”

Gray says that valuable cargo demand for commodities such as gold is growing. “Diamonds and jewels are a growing consumer market in China, and CX/KA also handles tablets and smartphones. Our vulnerable cargo handling provides a value-added service from Secure Net and extra attention at Hong Kong transit.”

Hunter says not all products have grown at an equal pace. “The various ports have their own hit products. For example, 90 percent of the daily goods exported via Kunming are fresh-cut flowers, mushrooms and so on. In 2013, 1,554 tons of **FRESH UFT** cargo was carried via Dragonair from Kunming to the world, while the ex-Wenzhou flights are almost all mail bags.”

Hunter says Cathay Pacific's ability to tailor product solutions in China makes the company stand out and gives the example of its intra-China trucking and transferring service. “As the country is so vast, 20 online ports may not serve all the shipping needs,” he says, “so we have set up a truck and transfer cargo control centre [TCC], where any cargo that has entered China via PVG, PEK [Beijing Capital International Airport], CGO, XMN, CKG, CTU or TAO [Qingdao]

can be effectively and efficiently linked to 30-plus destinations throughout mainland China.

“We have a newly signed contract with a trucking company that can provide schedule trucking services to northern China ports like TSN [Tianjin], DLC [Dalian], SHE [Shenyang], PEK and so on. This will help provide quicker, cheaper trucking services for inbound cargo to the final destination via PVG.

### Growing demand

“We have also started an export trucking service to carry odd-sized and super-heavy cargo from non-freighter ports to PVG and other freighter ports, to expand the **EXPERT UFT** to inland ports: for example, special cargo from WUH [Wuhan] to PVG, or dangerous goods from HGH [Hangzhou] to PVG by truck.”

Aaron Chan believes that China will continue to expand production of hi-tech products, especially in central and western China over the next five years. “E-commerce demand will grow rapidly between China and both developed and developing countries. Apart from expanding our air network in and out of China in terms of frequency and capacity in the next five years, it is likely that we will link our hub in Hong Kong with truck transport.”

經驗，現在又有更多潛在客戶，因為國泰及港龍已成為醫藥貨運的首選航空公司。」

戈睿表示，危險品貨運業務也具增長潛力。「國泰及港龍在12個口岸擁有處理危險品的許可證。由於我們的國際航空網絡覆蓋廣泛，客機及貨機的班次頻密，國泰及港龍在上海的危險品貨運市場佔有率約達26%。」

陳俊紅補充說：「中國團隊正爭取危險品許可證續期，並將許可證的適用範圍擴大至國泰網絡覆蓋的航點。國泰及港龍有可能開創先河，成為獲認可運送危險品到最多中國航點、貨品種類最多的航空公司。」

戈睿透露，貴重貨物如黃金的貨運需求也不斷增長。「鑽石及珠寶是中國不斷增長的消費市場，國泰及港龍也處理平板電腦及手機的貨運。我們的易損壞貨物處理服務在香港轉運時，提供Secure Net增值服務及特別的照料。」

陳俊紅指出，並不是所有產品都以同一速度增長。「不同的口岸各自有其熱門產品，例如每天自昆明運送出口的貨物有九成是鮮花及蘑菇等。2013年，1,554噸**FRESH UFT**貨物經港龍從昆明運往世界各地，而由溫州出發的航班幾乎全為郵包。」

### 需求持續

陳俊紅表示，國泰有能力因應中國市場需要提供度身設計的服務，令公司脫穎而出，他以中國境內貨車運輸及轉運服務為例：「中國幅員廣大，20個網絡航點並未能應付全部貨運需求，因此，我們設立貨車及轉口貨物控制中心（TCC）。任何經上海浦東、北京首都國際機場（PEK）、鄭州、廈門、重慶、成都或青島（TAO）進入中國的貨物，都可以高效率連接內地30多個目的地。」

「我們剛與一間貨車運輸公司簽新合約，可以提供到華北口岸的貨車運輸服務，包括天津（TSN）、大連（DLC）、瀋陽（SHE）及北京等。經上海浦東的入口貨物將可獲得更快捷、更便宜的貨車運輸服務到達最終目的地。」他說。

「我們也開始提供出口貨車運輸服務，運載形狀奇特及超重貨物從非貨機航點的口岸，前往上海浦東及其他貨機航點城市，以拓展**EXPERT UFT**服務到內陸口岸，例如從武漢（WUH）運往上海浦東的特別貨物，或從杭州（HGH）到上海浦東的危險品。」

陳慶輝相信，中國高科技產品的產量在未來五年將持續增長，尤其是在華中及西部。「中國與發達及發展中國家之間的電子商貿需求將迅速增長。未來五年，除了擴展進出中國的航空網絡、提升運力及增加班次，我們還將以貨車運輸連接香港的樞紐。」 **CC**

By Leo Williams

# In the zone

## 瞄準商機

Pudong International Airport is part of Shanghai's free-trade zone. Air transportation is seen as key to cross-border trade

浦東國際機場是上海自由貿易區的組成部分，空運被視為跨國貿易的重要環節

Airlines are eyeing business opportunities created by China's new free-trade zone in Shanghai

航空公司正張望中國新設立的上海自貿區帶來的商機

**T**HE CHINA (Shanghai) Pilot Free Trade Zone was launched in September, but the details of how it will operate and the broader implications it will have for transport and logistics are still to be fully realised.

"Things are still evolving," says Aaron Chan, Cathay Pacific's Manager of Cargo, China. "At present, the zone has no specific policy related to air transportation because the [central] government is still considering it."

The free-trade zone (FTZ) integrates four existing special customs zones – including the Pudong Airport Comprehensive Free Trade Zone – to cover a total of 29 square kilometres. The goal of an FTZ is to promote investment and trade by adopting economic reforms.

Opening China's highly controlled financial-services industry to foreign interests is the central government's greatest concern, but other areas of focus include shipping and logistics, professional services, commercial

trade, social services and culture and entertainment.

"The zone is to experiment on how to conduct free trade between China and the world," Aaron says. "It will surely promote more trade to and from China in the future."

It is still unclear how airlines will operate, but they have had success within these types of zones around the world. Airlines have already noted in particular the potential of e-commerce within the FTZ.

If the Shanghai pilot is successful, other Chinese cities are expected to follow the model, opening more of the country to further foreign participation. And each place is expected to offer logistical opportunities.

"The zone is on a trial basis for China, not only Shanghai," Aaron says. "Imagine that the zone in Shanghai may be similar to Hong Kong. There might be a few more 'Hong Kongs' in other parts of China, and perhaps the entirety of China, eventually."

**中**

國(上海)自由貿易試驗區於去年9月成立，但具體的運作模式，以至對運輸物流業所產生的影響，仍有待觀察。國泰航空中國區貨運經理陳慶輝指出：「自貿區仍在演變，目前還沒有針對空運業的特定政策，中央政府仍在探討中。」

上海自貿區由包括浦東機場綜合保稅區在內的四個海關特殊監管區域組成，總面積接近29平方公里。設立自貿區的目的，是通過經濟改革來促進投資及貿易。

中央政府最大的關注，是對外資開放高度監管的中國金融服務業。除此之外，其他備受關注的行業包括有航運和物流、專業服務、商業貿易、社會服務及文化娛樂。陳慶輝說：「自貿區是中國嘗試與世界進行自由貿易的試驗場，未來定會促進中國的進出口貿易。」

航空公司對相關的運作仍不很清楚，但在全球各地，類似的自貿區均有成功例子，並注意到自貿區的發展潛力，特別是電子商貿。

上海自貿區試驗若成功，其他城市就會仿效，意味著中國進一步對外資開放，而這些地方的物流需要也會增加。陳慶輝說：「自貿區是為全中國而設的試驗區，並不只是為上海。假如上海自貿區發展成像香港那樣，中國其他地區可能會出現更多的『香港』，最終甚至會遍及全中國。」 **CC**



# Spending spree

## 消費熾熱

With a taste for the good life, China's rising middle class is fuelling a surge in imports  
隨著中國崛起的中產階級追求更高級的生活品味，進口貨的需求也水漲船高

By Leo Williams

**J**UST ABOUT everywhere in the world, people are familiar with the manufacturing might of China. Less well known though is the nation's growing consumerism that has come with economic success. "We see very great growth potentials for China imports," says Mandy Ng, Manager, Cargo Sales & Marketing of Cathay Pacific. "Five years ago, China export volumes far outweighed import

tonnages, creating a severe directional imbalance. We would see full flights filled with cargo going out of China, while flights flying into China were only half-full."

But in recent years, Mandy says, this directional imbalance is slowly rectifying with more and more air imports into China. "It is driven by a growing middle class in China with rising consumption power for import products ranging from fresh produce to high-end fashion," she says.

Mandy identifies several areas of imports in the greatest demand for Chinese consumers: fresh produce, such as California cherries; fresh seafood, such as lobsters from New Zealand and the Americas; dairy products from Australia and Europe; clothing, footwear and high-end fashion from Italy; electronics from Thailand,

**Mandy Ng, Manager, Cathay Pacific's Cargo Sales & Marketing, sees great growth potential for imports in China**

國泰貨運營業及市場經理吳潔文表示，中國的進口業務有很大的增長潛力



Malaysia and Taiwan (including raw materials for production of high-end IT products); and cars, engines and spare parts from Europe.

To meet this import demand, Cathay Pacific now has penetration into 20 Chinese cities, greater dangerous-goods handling capabilities, and enhanced mail and e-commerce services.

"Cathay Pacific also offers our **FRESH LIFE** product, bringing perishables such as cherries, live crabs and lobsters that increasingly suit the appetites of more affluent Chinese consumers," says Mandy.





Luxury fashion is in high demand among Chinese consumers, along with imported produce, seafood, dairy products and electronics

中國消費者對高級時裝、進口貨品、海產、乳製品及電子產品的需求與日俱增

眾

所周知，中國的製造業實力雄厚。但一般人可能還未意識到，隨著中國經濟發展成績斐然，消費主義也在抬頭。國泰貨運營業及市務經理吳潔文表示：「我們認為，中國的進口業務有很大的增長潛力。五年前，中國的出口貨運量遠遠高於進口量，進出口量的失衡非常明顯。當時，從中國出發航機的貨艙經常是爆滿的，但飛進中國的航機只用了一半的載貨空間。」

但近幾年來，隨著空運至中國的進口貨量逐漸增加，這種失衡的情況也逐步得到修正。她指出：「這主要是由中國日益增加的中產階級推動，他們的購買力不斷上升，對鮮貨以至高端時尚物品等進口貨的需求因而與日俱增。」

吳潔文指出，中國消費者需求最大的進口貨品包括以下數個類別：

產自加州的櫻桃等新鮮農產品；來自紐西蘭和美國的龍蝦等鮮活海產；由澳洲和歐洲生產的乳製品；來自意大利的成衣、鞋履和高級時裝；由泰國、馬來西亞和台灣製造的電子產品（包括製造高端資訊科技產品的原材料）；以及來自歐洲的汽車、引擎和零配件等。

為了配合進口業務的增長潛力，國泰航空的空運服務目前已覆蓋至20個中國城市，並提升了對危險品的運送能力，同時加強電郵和電子商務服務。吳潔文表示：「國泰航空亦提供FRESH 127服務，專門運送櫻桃、活螃蟹和龍蝦等鮮活貨物，以滿足愈來愈富裕的中國消費者的胃口。」 CC

## CHINA 中國

(2013 ESTIMATE 估值)

GDP (purchasing power parity):  
國內生產總值（購買力平價）：

US\$13.39 trillion  
萬億美元

GDP per capita 人均國內生產總值：

US\$9,800

Exports 出口：

US\$2.21 trillion  
萬億美元

Imports 進口：

US\$1.95 trillion  
萬億美元

Imports (commodities):

Electrical and other machinery;  
oil and mineral fuels; nuclear  
reactor, boiler and machinery  
components; optical and medical  
equipment, metal ores, motor  
vehicles; soybeans

進口貨(商品): 電子及其他機械；原油和礦物燃料；核子反應堆、鍋爐及機械部件；視光和醫療儀器、金屬礦、汽車；大豆。

Chinese spending on luxury items is now the highest in the world.

China is expected to make up one-third of the world's luxury spending by 2015. Consumer confidence is also high. Due to higher domestic taxes and the increasing ease of overseas travel, overseas demand for luxury goods is expected to grow at about the same rate as domestic demand. China domestic demand for luxury goods has been growing at 16 percent to 20 percent per annum.

中國的奢侈品消費已經位居世界第一。到了2015年，預料中國的奢侈品消費金額將佔全球三分之一。鑑於內地稅率較高，加上出境旅遊的政策日趨寬鬆，中國旅客在海外的奢侈品消費需求，估計與內地的需求增長率相若。中國本土的奢侈品消費每年增幅達到16%至20%。

Sources: McKinsey Insights China report and CIA World Factbook

資料來源：McKinsey的Insights China、美國中情局出版的《世界概況》

By/撰文 Cheng Zhuo/程卓

# High achievements

## 西部遺珍

Just outside China's south-western metropolises, mountainous UNESCO sites offer fascinating natural beauty and extraordinary cultural experiences

中國西部得天獨厚的天然環境和歷史文化，造就多個令人驚嘆的世界文化與自然遺產

**I**N CHINA, 45 sites are included on the UNESCO World Heritage List, a figure bettered only by Italy with 49. Whereas culturally significant sites are concentrated in China's northern region, the natural beauty of the country's south-western areas offers numerous spots valued for both cultural and aesthetic reasons. Here, we introduce three stunning sites in the region that are not far from major cities.

### Mount Emei Scenic Area

Situated about 160 kilometres south and a two-hour highway drive away from Chengdu, the Mount Emei Scenic Area covers 154 square kilometres and includes within it the Leshan Giant Buddha.

Mount Emei, famed for its beauty, is the highest of China's four mountains that are sacred to Buddhists, and religious ceremonies take place frequently at the dozens of temples that dot the mountain. Its steep slopes are home to more than 3,000 species of plants, including numerous rare

species. The mountain's resident wild monkeys, which implore tourists for food, have become a major attraction. Spring and autumn are the best seasons to visit the mountain, when the climate is mild. Visitor numbers are smaller in the winter, but the sight of the snow-blanketed mountains offers a different kind of beauty.

The nearby Leshan Giant Buddha, the largest Buddha statue in the world at 71 metres tall, is positioned at the confluence of three rivers: the Minjiang, Qingyi and Dadu. The magnificent seated statue – depicting Maitreya, who is regarded as a future Buddha – is carved into a steep cliff wall of Mount Lingyun on a riverbank, facing Leshan City across the water. Work began on the statue in the eighth century and took 90 years to complete.

### Sichuan Giant Panda Sanctuaries

China's giant pandas are beloved throughout the world for their cuddly appearance, and the gentle beasts have long been used by China as

# 在

聯合國的《世界遺產名錄》內，中國擁有45個文化與自然遺產，僅次於意大利的49個，當中有多個位於自然資源豐富的西部地區，我們在這裡介紹離大城市較近的其中三個。

### 峨眉山—樂山大佛

被列為「世界文化與自然雙遺產」的峨眉山—樂山大佛分別位於四川省峨眉山市與樂山市，距成都以南160多公里，使用高速公路的話，大概需要行駛兩小時左右。

樂山大佛，又名凌雲大佛，位於岷江、青衣江和大渡河的三江匯流處，巨型彌勒佛坐像就雕鑿在岷江東岸的凌雲山棲霞峰臨江峭壁上，與樂山市隔江相望，是唐代摩岩造像的藝術精品之一，建造歷時90年，整座佛像（包括基座）共高71米，乃世界上最大的彌勒石刻大佛。

而緊鄰樂山大佛的便是風光秀甲天下的名山峨眉，它是中國四大佛教名山之一，乃普賢菩薩的道場，有寺廟約26座，佛事頻繁。峨眉景區面積154平方公里，最高峰萬佛頂海拔3099米。地勢陡峭，風景秀麗，氣候多樣，植被豐富，共有3000多種植物，包括世界上稀有的樹種。大群野生獼猴沿途向遊人討食嬉戲成為山中一大特色。

春秋兩季為峨眉山的最佳旅遊季節，氣候





The 71-metre-tall  
Leshan Giant Buddha  
(top) took 90 years  
to complete

Temples are a common  
sight on Mount Emei,  
one of four mountains  
in China that are  
sacred to Buddhists

樂山大佛通高71米，建造  
歷時90年才完成

峨眉山寺廟處處，是中國  
四大佛教名山之一





diplomatic gifts. The country's breeding programmes have successfully lifted panda numbers in captivity, and at the centre of that activity are the Sichuan Giant Panda Sanctuaries. More than 30 percent of the world's giant pandas live on the listed site, which encompasses Wolong National Nature Reserve, Mount Siguniang and the Jiajin Mountains. Indeed, the world was first introduced to the giant panda in 1869 courtesy of French missionary and naturalist Armand David, who encountered the bear in the Jiajin Mountains of Ya'an.

Wolong nature reserve, which includes a panda conservation centre, was a prime area to see the creatures until the 2008 Sichuan earthquake destroyed much of the research base, which remains closed to the public. Visitors may instead head to bases in Bifengxia or Chengdu to spend time with pandas.

In addition to giant pandas, this sanctuary – covering 9,245 square kilometres – is also known for its lush natural environment. In particular, Mount Siguniang – meaning “four maidens” – is famous for its imposing, steep ridges, with peaks that are snow-capped throughout the year. This mountain houses thick foothill forests,

green pastures and babbling streams, and it is where foliage transforms with the seasons – a stunning setting that many have referred to as the Alps of the Orient.

Mount Siguniang is about 230 kilometres, or six-hours' drive, from Chengdu, and a car ride would pass through Wolong nature reserve as well as the Dujiangyan irrigation system, a man-made marvel of engineering that is also listed by UNESCO.

### Dazu Rock Carvings

Located in Dazu County in the south-western municipality of Chongqing, these religious hillside carvings date back to the ninth century. This group of ancient rock carvings is comprised of intricate images of Chinese Buddhism, Taoism and Confucianism, alongside depictions of ordinary life at the time.

The first carvings were created in 892, with work continuing for more than 250 years until their completion in 1146. There are more than 100,000 carvings, most of them figures in various postures and dress. The most famous statues are found at the mountains of Beishan and Baodingshan, while other popular carvings are at Nanshan,



Shizhuanshan and Shimenshan. These sites are about two hours from Chongqing's city centre.

The Dazu Rock Carvings are an example of the highest level of Chinese cave temple art from the ninth to 13th centuries. Rich and diverse in content, these colossal, exquisitely crafted and well-preserved works are considered on a par with the three most famous Buddhist sculptural sites: the Mogao Caves of Dunhuang, Gansu Province; the Yungang Grottoes in Datong, Shanxi Province; and the Longmen Grottoes in Luoyang, Henan Province.





Sichuan Giant Panda Sanctuaries, which includes Wolong National Nature Reserve, is home to about 30 percent of the world's panda population

全球約三成大熊猫均生長在四川大熊猫棲息地，當中包括臥龍自然保護區



Among the roughly 100,000 intricate works at the Dazhu Rock Carvings are the Circle of Life (top) and the Niche of Sakyamuni Entering Nirvana (above)

大足石刻共有約100,000件精雕細琢的作品，當中包括「六道輪迴圖」（頂圖）及「釋迦涅槃聖跡圖」（上圖）

適中，景致迷人，冬日遊人雖少，但滿山遍野的雪後銀裝也別具美態。

### 四川大熊猫棲息地

跟前者的名山氣勢和宗教氛圍不同，全球最大最完整的四川大熊猫棲息地則以培植珍稀的動物——國寶級的大熊猫而成為世界自然遺產，這也是中國在國際上的一張閃亮名片。

全球30%以上的野生大熊猫皆棲息於此，涵蓋了臥龍、四姑娘山和夾金山脈，面積達9245平方公里。除了聞名遐邇的大熊猫之外，這裡也以其得天獨厚的自然資源而成為旅遊景點。

世界第一隻大熊猫是由法國傳教士兼生物學家阿爾芒·戴維於1869年在雅安市寶興縣的夾金山脈發現的，這裡緊鄰另一個世界文

化與自然雙遺產都江堰、青城山和臥龍自然保護區大熊猫繁殖基地等；而其中最具代表性的就是四姑娘山，從成都出發，乘車向西北行經都江堰、臥龍到達日隆，全程約230公里，約六小時車程。

四姑娘山以雄峻挺拔聞名，山體陡峭，由四座連綿不斷的山峰組成，它們從北到南，在三到五公里範圍內一字排開，終年積雪，與四川其他名山風格迥異。這裡的山麓森林茂密，綠草如茵，清澈的溪流潺潺不絕，特別是秋天的紅葉與潔白的山峰互為呼應，秀美如歐洲的田園風光，被人形容為「東方的阿爾卑斯」。

### 重慶大足石刻

位於中國西南部第四個直轄市重慶市的大足

區境內，是唐末、宋初時期的宗教摩崖石刻，以佛教題材為主，也是集中國佛教、道教和儒家三教造像藝術精華和表現世俗生活題材的著名古代石刻藝術。這個遺蹟距重慶市中心約兩小時的車程。

大足石刻始鑿於初唐（公元七世紀中葉唐永徽年間），歷經晚唐、五代、北宋，興盛於南宋（公元12世紀），延續至明、清（公元15-19世紀）。大足石刻點多面廣，石刻造像共計100多處，五萬餘尊，其中以北山、寶頂山、南山、石篆山和石門山最集中，又以北山與寶頂山的摩崖造像最著名。

大足石刻是中國晚期石窟造像藝術的典範，不但內容豐富多變，規模宏大，而且工藝精湛，保存完整，可與甘肅的敦煌莫高窟、山西的雲岡石窟、河南的龍門石窟齊名。 CC

By Leo Williams

# Cool customers

## 全程冷凍

A new cold-chain solution has been developed for shipments that need more precise temperature control  
新近研發的冷凍鏈解決方案有助運送需要更準確控制溫度的貨物

**C**ATHAY PACIFIC CARGO values customer feedback, and in response to customer requests for effective temperature control in the  $-20^{\circ}\text{C}$  to  $-10^{\circ}\text{C}$  range, the airline began development of a brand new solution.

Working with Envirotainer, a pharmaceutical cold-chain specialist, Cathay Pacific initiated development of an active container that could maintain consistent temperatures within the required range for the duration of shipping – ideal for products that require sub-zero temperatures, but not deep-freezing.

Several tests followed to perfect the dry-ice technology employed, a process that had to provide mitigation for possible equipment failure during shipment.

Envirotainer currently offers temperature management of  $-20^{\circ}\text{C}$  or below for deep-frozen cargo, but with the dry-ice management system, very specific temperature ranges can be maintained, says Jack Lo, Cargo Product and Marketing Manager at Cathay Pacific.

Jack adds that managing a

precise temperature inside an active Envirotainer t2 container is a delicate exercise, and has resulted in the design of a new dry-ice management programme, different for that used for deep-frozen cargo.

“To maintain the product temperature at about  $-15^{\circ}\text{C}$ , it was necessary to place dry ice within the cargo volume of the container, as placing dry ice directly on top of the product leads to overcooling of the tops of boxes. As a preventive measure, a thick layer of Styrofoam was placed in between the product load and the dry ice,” he says.

The potential for such precise temperature management is considerable. “There are different frozen pharma products that require this product temperature,” Jack says.

Jack adds that through the PHARMA **LIFT** product Cathay Pacific Cargo continues to develop groundbreaking technologies and services for the pharmaceutical market, which also include wireless-sensor devices that capture temperature data in-flight and transmit it back to the ground in close to real time (see story on page 20).



泰貨運重視顧客的意見，當客戶要求運送貨物時的溫度控制在攝氏零下20度至零下10度之間，便馬上付諸行動。

國泰貨運邀請了專門提供藥品冷凍鏈服務的集裝箱製造商Envirotainer合作，研發一款主動式溫度控制集裝箱，即能夠在運送過程中將溫度穩定維持在要求的範圍內，適合那些需要在零下溫度貯存、但無需深層冷凍的貨品。

這種乾冰科技經過反覆測試，力臻完善；並同時考慮到，設備在運送途中可能會有所損壞，因此也作出減低風險的措施。

國泰貨運產品及市場經理羅錦彪指出，Envirotainer目前更為需要深層冷凍的貨品提供攝氏零下20度或以下的貯存溫度，但採用乾冰溫度控制系統，則可以提供特定的溫度控制範圍。

羅錦彪指出，要在主動式溫度控制集裝箱





Envirotainer can now maintain temperatures in the range of  $-20^{\circ}\text{C}$  to  $-10^{\circ}\text{C}$ , a requirement for various pharmaceutical products

Envirotainer集裝箱現在可以將溫度保持在攝氏零下20度至零下10度之間，以符合個別醫藥產品的要求

Envirotainer t2內控制準確的溫度，是一個複雜而精密的過程，這促使公司設計一套新的乾冰管理程序，有別於運送其他深層冷凍貨物的程序。

「要將貨物溫度保持在大約攝氏零下15度，就需要將乾冰放置於集裝箱的載貨空間

之中。若然將乾冰直接放在貨品之上，上層的貨物箱就會過冷。」他說，「為了預防這種情況出現，我們會在貨物及乾冰之間，鋪墊一層厚厚的發泡膠。」

市場上對精確控制溫度的貨運需求潛力很大。羅錦彪解釋說：「像不少需要冷凍貯存

的醫藥產品，都需要保持在特定的溫度中。」

他又補充，透過PHARMA **Link** 產品，國泰貨運不斷在科技及服務上尋求突破，以配合醫藥市場的需要，包括以無線感應器收集機上溫度數據，以接近實時的速度傳送至地面。(請參閱第20頁相關文章) **CC**

Managing a **precise temperature** inside an active container **is a delicate exercise**

在一個主動式溫度控制集裝箱內控制**準確的溫度**  
是一個**複雜而精密**的過程

By Karen Pittar

It appears as if horses may fly courtesy of Cathay Pacific Cargo and a good deal of tender loving care

馬匹在空運的過程中，會得到國泰貨運的周全關照

**D**ENSELY URBAN Hong Kong is one of the world's great horse-racing cities and the sheer lack of space means most horses have to be flown into the city.

The Horse Handling Centre at Cathay Pacific Cargo Terminal (CPCT) has been specifically designed to ease the handling of these valuable, thoroughbred, long-distance travellers.

Cathay Pacific Cargo Product and Marketing Manager Jack Lo says the design provides seamless cross-docking between stall and stables.

When a horse is exported from Hong Kong, it arrives at the cargo terminal in a horsebox, which is then parked next to the platform. A groom leads the horse from the box across the platform and into an "Airstable", a compartment specially designed for horses, which has food and water. The animal is loaded directly onto the plane in this unit, making the transfer as easy and stress-free as possible.

Cathay Pacific Cargo Terminal also has an air-conditioned large-animal handling facility that permits animals to be held in a controlled-temperature environment. In the transit area, horses are kept in Airstables on dollies so they can be easily uploaded.

LIVE ANIMAL **LIFT** provides live animals an extra level of care and comfort throughout the journey.

Global bloodstock transporters Instoneair, based in the UK, are believed to have been the first to carry a racehorse by plane, in the 1920s.



# The final furlong

## 天馬行空

"Among other things, we design and build horse containers, which we call 'Airstables'," explains Mike Bugle, Instoneair, General Manager. "We own the Airstables on Cathay Pacific flights and are the airline's general sales agent for carrying horses, except in Japan and Australia. We centralise all bookings in the UK and ensure Airstables are put in place in a timely manner, so as to support all bookings worldwide."

Bugle has worked with Cathay Pacific for more than 25 years and is responsible for shipping about 200 horses a year into Hong Kong. "These animals are brought in by local owners to be trained or to race," he says. "Some horses, of course, come only for an invitation or international race and then head off home or

do the circuit, say onto Singapore. Horses are consolidated in Australia, the USA and the UK where they are put through pre-export quarantines. These have to coincide with the availability of post-arrival quarantine spaces at Sha Tin; this is strictly controlled to prevent the import of any disease which could decimate Hong Kong racing."

Moving livestock creates a whole host of challenges, however Bugle says Cathay Pacific's cutting-edge cargo facilities, along with local agent expertise, helps to reduce any potential issues. "You need good and safe equipment, namely the Airstable and an agent who will provide professional and experienced grooms."

From Australia, many horses are moved by IRT. Managing Director





**Inflight comfort is a very high priority when transporting race horses by air**

**讓馬匹在航程中舒適自在，是空運賽馬的優先考慮**

Chris Burke says the company has worked with Cathay Pacific for more than 30 years to move horses around the globe.

"We work closely with the staff at Cathay Pacific to try to develop freighter schedules which meet the International movement demands for horses. Each month we ship about 400 horses with probably 10 percent travelling via Hong Kong."

About 150 horses a year are sent to Hong Kong using Cathay Pacific, the majority transiting in Hong Kong, en route to Europe, Dubai or the United States. Burke says that when transporting horses by air it is necessary to book the shortest route with the fewest stops and use a world-class airline with reliable equipment.

**香**港是人口稠密的大都會，卻同時是全球最愛賽馬的城市之一；由於缺乏土地培育馬匹，大部分馬匹都是空運到港。

國泰航空貨運站（CPCT）設有馬匹處理中心，並為方便處理這些遠道而來的珍貴純種馬作出特別設計。

國泰貨運產品及市務經理羅錦彪指出，中心的設計在馬棚與馬房之間的運送過程，提供高效快捷的馬匹流轉服務。

當一匹馬由香港運出時，馬匹會置身於馬箱內送抵貨運站，並停泊於平台旁，由馬伕領著馬匹走出馬箱，越過平台走進為馬匹特設的空中馬廐「Airstable」，內置飼料及食水。然後，馬匹便會從這個集裝箱直接運上機，運送過程便利，盡量令馬匹免受驚嚇。

另外，國泰航空貨運站亦設有配備空調系統的大型動物處理中心，將動物安置在舒適的恆溫環境中；此舉在香港的炎夏尤為重要。在轉運區內，載運馬匹的「Airstable」被置於運輸車上，方便裝運上機。

國泰貨運的LIVE ANIMAL **LIFT** 服務確保空中及陸地的運送過程便利、安全，盡量減低對馬匹造成不安。

英國的全球純種馬運輸公司Instoneair，早於1920年代初期便以飛機運送馬匹，相信是首間空運馬匹的公司。

Instoneair總經理貝明康說：「除了其他安排之外，我們設計和製造了名為『Airstable』的馬匹集裝箱。國泰航機上的『Airstable』由我們擁有。我們也是國泰運

送馬匹的營業總代理（日本及澳洲除外）。在英國，我們集中處理所有貨運訂單，確保『Airstable』在適當的時候配置得當，以支援全球系統的所有訂單。」

貝明康已與國泰合作超過25年，每年運送約200匹馬進入香港，他說：「這些馬匹是由本地馬主引入，在香港訓練或比賽。當然也有些馬匹只是參加邀請賽或國際賽，比賽後便回國或巡迴比賽，例如再到新加坡。」

「馬匹首先集中在澳洲、美國及英國等地，進行出口前檢疫，配合抵港後在沙田接受隔離檢疫。整個過程嚴格控制，以防止任何傳染病入口而導致大量香港的馬匹死亡。」運送牲畜需要克服許多難題，但貝明康認為國泰擁有先進的貨運設施及專業的本地代理，有助解決任何潛在困難，他說：「你必須擁有良好和安全的設備，即是『Airstable』，而貨運代理亦能提供富經驗的專業馬伕。」

至於來自澳洲的馬匹，許多都是由IRT公司運送。該公司的董事總經理Chris Burke表示，已與國泰緊密合作逾30年，運送馬匹到全球不同地方。

「我們與國泰員工緊密合作，規劃貨機班次，以配合世界各地對運送馬匹的需求。我們每月運送約400匹馬，約有一成途經香港。」

每年約有150頭馬匹由國泰航空運抵香港，大部分在香港中轉，再運往歐洲、迪拜及美國。Burke表示，空運馬匹必須安排最短航程及減少中途停站，並選用設備可靠的世界級航空公司。CC

# High fashion

## 高級時裝

Asia's booming garment manufacturing industry is a key driver for freight volumes

亞洲區內急速發展的成衣製造業，是促進貨運量的主要推動力

By Karen Pittar

**F**OR DECADES, a new coat, a pair of trousers or even a simple T-shirt would undoubtedly come with a "made in China" label sewn inside. But the fashion manufacturing industry is changing and today you are more likely to find Bangladesh, Myanmar, India or Cambodia stitched to your latest fashion purchase.

The insatiable appetite for affordable, on-trend clothing is pushing the industry to find cheaper and more expedient production alternatives within the Asian region. The impact of this vigorous demand is felt across a range of industries worldwide, including the air-freight business: in 2013 fashion and its raw materials were air-cargo winners, growing by a significant 11 percent.

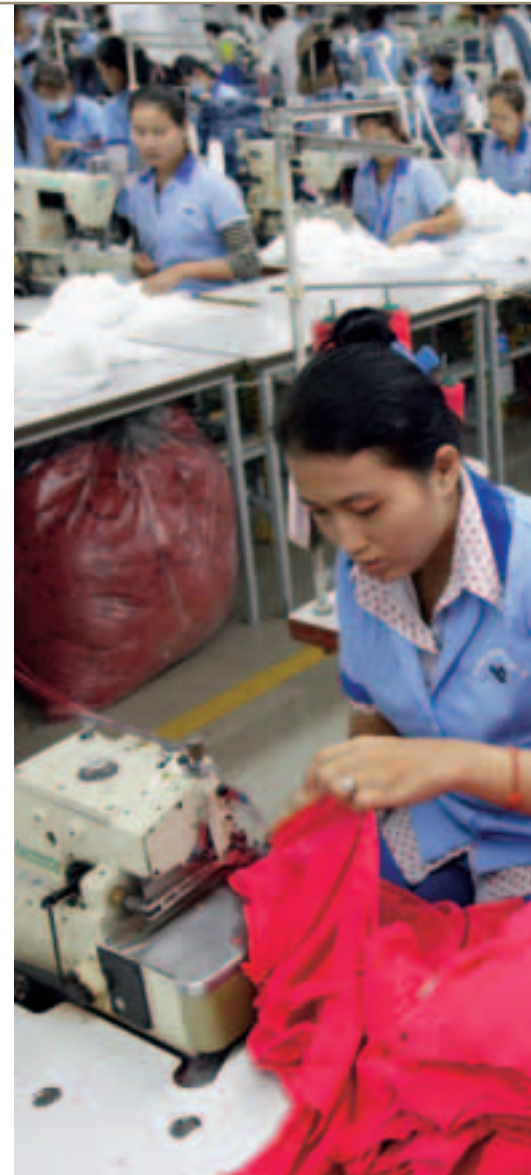
"As the standard of living steadily increases in China, the younger generation doesn't want to work in textile manufacturing; it tends to be basic work and lower paid," says Linda Doubleday, a veteran of the high-street fashion industry for the past 20 years and now Quality Assurance Director at Sweden's global sourcing firm, ICA. "But demand for fast-fashion all over the world continues and the lowest production costs are still obtained in the Far East. This is only made more attractive by various duty subsidies when Western countries import from areas within Asia." Trade aid is given to most developing Asian countries: Bangladesh, Cambodia and Myanmar

all receive extensive trade preferences granted by the European Union under the United Nations' Everything But Arms (EBA) initiative.

Jing Li, a Beijing-based economist at The Economist Intelligence Unit says the local fashion-manufacturing industry is dividing between low-end and high-end fashion, with the former moving to cheaper locations in Asia and the latter remaining in China. "China continues to experience rapid wage inflation along with appreciation in exchange rates," she says. "Brands offering lower-value products will continue to move their factories to countries like Myanmar. The key difference is the value added as a result of modern technology. Low-end manufacturing involves intensive manual labour, relying on traditional skills, with little aid from high-tech machinery. In comparison, high-end manufacturing requires more capital and is much more technology-driven."

### Growing trend

Li says countries such as Cambodia and Myanmar are rapidly gaining traction as Asia's new manufacturing hubs. "For many Asian countries, garment manufacturing has already become one of the most important industries driving economic growth. For example, in recent years in Cambodia garment exports have contributed about 80 percent of the country's total exports and 15-20 percent of its GDP. Revenues from garment exports are an important source of foreign exchange



and also provide a stable source of employment for local people."

Businesses in Hong Kong and Mainland China are also funding new, state-of-the-art facilities located around the Asia region. "It is a growing trend for Chinese manufacturers to invest in emerging hubs, not only to benefit from cheaper labour, but also to avoid some of the trade barriers which specifically target Chinese exports," says Li.

In March, Hong Kong textile manufacturers signed a deal to help set up a 200-hectare industrial park in Yangon, Myanmar. Due to open in late 2015, the plant will employ about 30,000 local workers.





**Demand for affordable fashion brands (above) has helped drive garment manufacturing from Mainland China to other Asian countries such as Cambodia (left), where garments now make up about 80 percent of the country's total exports**

對中端知名時裝品牌（上圖）的需求，促使成衣製造商將廠房由中國內地遷往亞洲其他地區，例如柬埔寨（左圖）現時的成衣出口就佔其全國總出口量約八成

**數**十年來，在市面上新推出的大樓、長褲，甚至簡單如T恤，內裡無不縫有「中國製造」的標籤。不過，成衣製造業正在不斷轉變，如今，你在最新購買的時裝上看到生產於孟加拉、緬甸、印度或柬埔寨等名字的可能性更高。

大眾無止境追求價格實惠的時尚服裝，推動業內人士遍尋亞洲區內更相宜和便利的替代生產基地。這般切的需求衝擊著全球各個產業，包括空運業務：2013年，時裝及其生產原料位居空運之冠，顯著上升11%。

投身街頭時裝業20年、經驗豐富的瑞典全球採購公司ICA品質保證總監Linda Doubleday表示：「隨著中國生活水平穩步上升，年輕一代嫌棄紡織製造業技術性低，而且工資較低，因此不願意從事這個行業。然而，快速時裝的國際需求高踞不下，遠東的生產成本仍是全球

最低，加上西方諸國在亞洲本土進口可獲得各樣補貼，令吸引力大增。」

大部分亞洲發展中國家都獲得貿易援助：根據聯合國《除武器外所有商品》的相關條款和措施，孟加拉、柬埔寨及緬甸均得到歐盟提供慷慨的貿易優惠待遇。

### 增長趨勢

經濟學人智庫駐北京經濟學家李婧表示，中國低端及高端時裝製造業各走極端，前者轉移至成本較低的亞洲其他地區，後者則留守內地。她補充說：「隨著中國薪資持續高漲，加上匯率升值，生產廉價商品的品牌繼續將廠房遷移至緬甸等國家。主要差異在於現代科技帶來的增值成果。廉價製造牽涉大量勞動力，依靠傳統技術，甚少使用先進機械。相比之下，高端時裝生產需要較雄厚資本，較依賴科技推動。」

李婧認為，柬埔寨及緬甸等國家的發展動力急速增強，正在迅速竄升為亞洲製造業的新樞紐。

她說：「成衣製造已成為多個亞洲國家最重要的工業之一，推動經濟增長。舉例說，近年柬埔寨成衣出口佔國家總出口約80%，並佔國內生產總值15-20%。成衣出口收益是重要的外匯來源，亦能平穩地為給國民提供就業機會。」

大量香港及中國內地的公司亦在亞洲區投資嶄新而先進的廠房設施。李婧表示：「愈來愈多中國製造商注資新興樞紐，這些大本營不但勞工成本較低，同時可避開部分針對中國出口的貿易關卡。」

今年3月，香港紡織業製造商與緬甸當局簽署協議，在仰光設立200公頃的工業園，預計2015年底落成，屆時，那裡的工廠將會招聘約30,000名當地工人。CC



# Keeping **tabs** 萬無一失

More tracking devices have been approved  
國泰認可更多無線感測器

**C**ATHAY PACIFIC Cargo has approved more wireless sensor devices for use onboard aircraft with its PHARMA **UFT** and SECURE **UFT** services. These low-emission devices capture shipment data for the entire journey – even during the flight – and transmit the information once the aircraft is on the ground.

## What do wireless sensors do?

- Track information about temperature, humidity, vibration, light and location.
- Provide proactive pre-alerts to trigger action to mitigate any problems that may arise.

**國**泰貨運批准更多適合於國泰航機運送的 PHARMA **UFT** 和 SECURE **UFT** 貨物時使用的無線感測器，這些低輻射排放設備可全程（包括飛行期間）記錄貨物的環境資料，並於飛機著陸後即時傳送相關數據。

## 無線感測器有何功能？

- 追蹤貨物的溫度、濕度、震動情況、亮度及位置等資料數據。
- 可主動發出預警，以便工作人員及時採取措施，減低貨物發生問題的機會。**CC**

## Wireless sensors approved for Cathay Pacific Cargo flights 獲認可在國泰貨運航機使用的無線感測器

PHARMA <b>UFT</b>	<ul style="list-style-type: none"> <li>• OnAsset's SENTRY 400 FlightSafe</li> <li>• OnAsset's SENTRY 500 FlightSafe</li> <li>• SenseAware</li> <li>• CartaSense U-Sensor Model No. 100115</li> </ul>
SECURE <b>UFT</b>	<ul style="list-style-type: none"> <li>• iControl's iTAG</li> <li>• Moog Crossbow's ILC2000</li> </ul>

# 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](http://envirotainer.com)

**Envirotainer**<sup>®</sup>  
The Active Cold Chain



# Clear vision

## 行業前瞻

Despite tough conditions, air cargo has maintained its market share in the trans-Pacific market

儘管市況不利，  
在跨太平洋市場，  
航空貨運仍維持  
其市場佔有率

This year's World Cargo Symposium offered valuable insight into the challenges facing the airfreight industry – and how to deal with them  
今年的全球貨運座談會深入探討空運業面對的挑戰，以及應對的方法

**B**IG-PICTURE TRENDS in air cargo were the main focus of the eighth World Cargo Symposium, organised by the International Air Transport Association (IATA) and held in Los Angeles from 11 to 13 March. Among the topics delegates discussed were:

- The weak air-cargo demand since mid-2011 and the minimal growth in air cargo
- The trend towards shipping by sea
- The gap between demand and supply growth
- The increasing proportion of air cargo carried in passenger bellies rather than by freighters
- The use of technology, including

the use of “big data” and tracking of shipments

- Supply-chain management and in particular the cold chain, perishables and dangerous goods

There were some bright spots in the air-cargo industry, according to Russell Tom, Regional Director, Air Cargo Marketing, for Boeing, who pointed out that air cargo had maintained its market share in the key trans-Pacific cargo market and the total passenger aircraft lower-hold cargo capacity was insufficient to satisfy trans-Pacific market demand.

Another cause for optimism was the garment sector, which displayed an increase in 2013 (see story page 18).

According to Tom, strong air-cargo

# 國

際航空運輸協會 (IATA) 於3月11至13日在洛杉磯舉辦的第八屆全球貨運座談會上，集中討論了航空貨運業的發展大趨勢。與會代表討論的議題包括：

- 自2011年中以來航空貨運的需求疲弱及空運量只輕微增長
- 海路運輸的上升趨勢
- 供求增長存在的差距
- 相對於使用貨機，以客機機腹貨艙載貨的比例上升
- 應用高科技，包括使用「大數據」及追蹤運送貨物
- 供應鏈管理，尤其是冷凍鏈、鮮貨及危險品

波音公司空運事務推廣區域總監Russell Tom表示，航空貨運業仍然有令人鼓舞的亮點。在主要的跨太平洋貨運市場，空運仍維持其市場佔有率，而客機機腹貨艙的整體運力，並不能滿足跨太平洋市場的需求。另一

growth from inland China was expected to continue, a result of the "Go West" policies of the nation's government. He presented data that showed manufacturing labour costs in inland China remained the third-cheapest in Asia, Vietnam being the cheapest, followed by India.

Tom also noted that China to United States air-cargo tonnage has returned to pre-recession (2007) levels, while maritime shipping has not. He said air cargo had maintained its modal share with maritime shipping in major air-trade lanes; because of their unique advantages, freighters were expected to continue to hold their share of the cargo carried, despite lower-hold capacity increase on passenger aircraft.

The long-term drivers of air cargo remain strong: the imperative for reliability and speed, continuing product innovation and global interdependence. Tom remains confident that annual world gross domestic product (GDP) growth and trade growth will continue to drive the 20-year world air-cargo growth rate.

Asia tech exports, a major air-cargo commodity, have slowed since 2010 due to the weak world economy, he added. A decrease in these exports resulted in Europe and US long-haul market traffic declines in 2012. And the current air-cargo slowdown has affected Asian airlines more so than carriers in other regions. While world air cargo grew by 1.2 percent in 2013, air cargo revenue-tonne kilometres (RTKs) flown by Asia-Pacific carriers dropped 2.8 percent in 2013 from 2012, while Middle East carriers rose 11.1 percent in the same period.

Gert-Jan Jansen, Executive Director, Head of Cargo Advisory Practice, Seabury, said that many major trade lanes had declined again in 2013 but the notable exceptions were growth in export volumes ex-Europe to Asia and Latin America to the US.

In terms of air-export growth, Jansen said that China won what the



Fashion has been a growth market in Asia, while the pharmaceutical industry (right) faces challenges due to European Union regulatory requirements

在亞洲，時裝市場持續增長；但由於歐盟的監管要求，醫藥行業（右）反而面臨挑戰

US lost in exports in 2013, and that other big losses have been seen in Thailand and Japan. Other countries with export growth included Germany, Chile, Spain and Lithuania, while he noted that the growth was scattered and not concentrated in certain regions.

In Asia, and India in particular, fashion has been a growth market, even though it has declined to some degree in some other countries. Highest year-on-year growth in the air export of fashion in 2013 was from eastern China, followed by India, Bangladesh, northern China and Vietnam. Southern China experienced the largest decrease in fashion exports.

### Pharmaceuticals

Changes to the European Union regulatory requirements on Good

Distribution Practice meant that the handling of pharmaceutical products by the air-cargo industry was a hot topic.

Maria D'Orazio, Head of Cold Chain Logistics, Novartis Vaccines, spoke about risk management for pharmaceutical shipments. She said that under the new directives pharmaceutical companies must ensure that quality is maintained throughout the transport chain, including the activities outsourced to their logistic-service providers.

Logistics activities were considered as an extension of the internal manufacturing processes and the same level of quality and compliance that was currently applied to the pharmaceutical environment would be required for transportation and distribution, which was usually outsourced to external logistic partners, she said.

"Even a shipment from a regional





warehouse to a country's primary distribution centre can be exposed to temperature fluctuations due to several hand-offs. The more complex the shipping route, the higher the risk," she said. "For intercontinental deliveries the hand-offs increase including transporters, airlines and customs."

D'Orazio recommended measures to mitigate some risks to cold-chain management and distribution, such as understanding all operational needs and bottlenecks from the origin to the destination before any sale takes place, and establishing proactive communication between country representatives, global customer service and global and logistic partners. While the risk-management involved was complex, she concluded that combining good science, a practical operational approach and strategic partnership yielded benefits.

樂觀因素是，製衣業在2013年出現的增長（請閱第18頁專文報道）。

Tom指出，受惠於中國政府的「西部大開發」政策，中國內陸的空運貨量預期會維持強勁增長。他列舉數據顯示，中國內陸的製造業勞工成本仍然居於亞洲第三低，僅隨成本最低的越南以及第二低的印度之後。

Tom又表示，由中國運往美國的空運貨量已重回金融海嘯前（2007年）的水平，但海運貨量則不然。他說，在主要空運航線，空運維持與海運的載運分配比例；儘管客機的底艙運力有所增加，貨機仍擁有獨特的優勢，將會繼續維持其載貨份額。

航空貨運的長遠利好因素，包括能提供必須的可靠性及速度、產品持續創新及全球相依共存。Tom對前景充滿信心，他認為全球每年國內生產總值（GDP）及貿易增長，將在未來20年不斷推進全球空運的增長速度。

他補充說，由於受到世界經濟疲弱影響，自2010年起，主要的空運貨品——亞洲科技產品出口增長放緩。這些產品的出口減少，也導致歐美的長途空運市場在2012年出現下滑。

現時的空運放緩對亞洲航空公司的影響，較其他地區的航空公司更大。2013年，全球航空貨運增長1.2%，但亞太地區航空公司的

收入噸千米（RTK）卻較2012年下降2.8%，中東航空公司在同期則上升11.1%。

顧問公司Seabury的行政總裁及Cargo Advisory Practice主管Gert-Jan Jansen表示，許多主要貿易航線在2013年再度出現衰退。不過，從歐洲輸往亞洲及拉丁美洲到美國的出口量卻是一個例外，反而有所增長。

Jansen表示，以空運出口增長而言，中國在2013年增加的出口量，正好是美國的出口損失，而泰國及日本也有巨大損失。其他錄得出口增長的國家包括德國、智利、西班牙及立陶宛。他指出，增長散佈於不同地方，並不集中於某些區域。

在亞洲，尤其是印度，時裝市場持續增長，儘管在其他國家也有某種程度的下降。與之前一年相比，2013年的時裝空運在中國的華東地區錄得最高增長，其次為印度、孟加拉、中國華北地區及越南，而華南地區則錄得時裝出口最大跌幅。

## 醫藥產品

歐盟優良運銷作業規範修訂條例，令航空貨運業處理醫藥產品成為備受關注的議題。

Novartis Vaccines的冷凍鏈物流主管Maria D'Orazio闡述運送醫藥產品的風險管理。她透露，在新作業規範下，醫藥公司必須確保產品在整條運送鏈的品質，包括外判予物流服務供應商的運送過程。

她說，物流活動被視為內部生產過程的延伸。因此，運送及分銷過程必須遵從現行應用於醫藥環境的相同品質管理及規範。她指出，運送及分銷通常外判予物流公司執行。

她表示：「即使由區域貨倉運送貨品至國家的主要分發中心，由於經過多個交接點，也可能受到溫度變化的影響。運送路線愈複雜，風險愈高。而在洲際貨運航線上，有更多交接點，包括大貨車、航空公司及海關等。」

D'Orazio建議可採取一些方法來緩解冷凍鏈管理及分發的風險，例如在任何銷售進行之前，先了解從原產地到目的地的所有運營需要及障礙，並在相關國家的代表、全球客戶服務，以及全球物流夥伴之間建立積極的溝通。雖然風險管理過程複雜，但總而言之，D'Orazio認為，結合高科技、務實的運營方法及策略聯盟能帶來效益。CC



## 2014 Cargo Business Update & Rugby Sevens 2014 貨運業務匯報會及七人欖球賽花絮

Cargo agents from around the world recently attended the 2014 Cargo Business Update to learn about the latest cargo development in Hong Kong. The agents enjoyed the next two days of the Hong Kong Sevens in the Cargo Box.

來自世界各地的貨運代理早前齊聚香港，出席2014年貨運業務匯報會，了解香港貨運業的最新發展。隨後兩天，一眾代理於國泰貨運的包廂內欣賞香港國際七人欖球賽的精彩賽事。



Cargo agents joined Cathay Pacific Director Cargo James Woodrow (left with Thomas Mack, Senior Vice President and Head of Global Air Freight, Schenker) at the Cargo Business Update dinner

貨運代理齊聚香港，與國泰貨運董事韋靖（左圖，旁為德鐵信可的高級副總裁及全球空運主管Thomas Mack）一同出席貨運業務匯報會的晚宴





**Cathay Pacific Cargo team members and guests watched New Zealand beat England 26-7 in the final at the Hong Kong Stadium**

國泰貨運團隊成員與賓客在香港大球場見證紐西蘭隊於決賽以26：7大勝英格蘭隊





## CATHAY PACIFIC CARGO & DRAGONAIR CARGO 2013 TOP AGENTS AWARD DINNER



# Top time for the **top agents** 獎賞代理

Cathay Pacific Cargo raises a glass to its partners  
國泰貨運與合作夥伴舉杯慶祝

Cathay Pacific's Chief Operating Officer Rupert Hogg (centre) and Director Cargo James Woodrow (third from right) kicked-off the evening with toasts and speeches

國泰航空常務總裁何昊(中)及國泰貨運董事韋靖(右起第三人)祝酒及致辭，為晚宴揭開序幕

**M**ORE THAN 100 guests attended the Cathay Pacific Cargo Hong Kong annual Top Agents Award Dinner on 25 April at The Ritz-Carlton, Hong Kong.

The event began with speeches from Chief Operating Officer Rupert Hogg and Director Cargo James Woodrow, who thanked customers for their continued support in a challenging year.

The entertainment highlight was a performance by actress and TV show host Skye Chan. Guests also enjoyed the photo booth where they could be pictured against backdrops of Cathay Pacific Cargo's two new destinations, Doha and Mexico City.

**國泰貨運**香港營業部於4月25日假香港麗思卡爾頓酒店舉行一年一度的卓越代理頒獎晚宴，是晚逾百位賓客出席盛會。

晚宴由國泰航空常務總裁何昊及國泰貨運董事韋靖致辭，感謝各位客戶在這充滿挑戰的一年持續對國泰的大力支持。

當晚，大會請來著名藝人陳倩揚擔任表演嘉賓，並在場內設置了兩個充滿特色的拍照區，分別以國泰的新航點多哈和墨西哥城為背景，供賓客拍照留念。

**It's time to break out the summer wardrobe and let the hair down**

穿上夏裝及以型格髮式拍照留念







Guests celebrate Cathay Pacific Cargo's most distinguished agents at the Ritz-Carlton, Hong Kong, and snap photos in front of landmarks from the airline's newest destination, Doha (left), in the on-site photo booth

眾多嘉賓出席在香港麗思卡爾頓酒店舉行的晚宴，慶祝國泰貨運的卓越代理獲獎，並在以國泰新航點多哈（左圖）的地標為背景的拍照區拍照留念



## INDONESIAN AWARD LUNCHEON 頒獎午宴

Cathay Pacific Cargo Indonesia held a familiarisation tour to Hong Kong to reward the top agents for their support over the past year. The programme included a visit to the new Cathay Pacific Cargo Terminal followed by an award-presentation luncheon at

Catalina's at The Headland Hotel. James Woodrow, Director Cargo, and Madi Dewanto, Cargo Manager, Jakarta, presented the awards to the top agents and thanked them for their continued contributions.

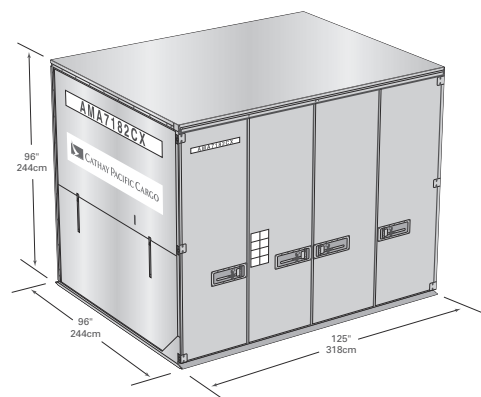
國泰印尼貨運部為當地表現出色的代理舉辦了一趟香港之旅，以回饋他們過去一年的支持。在行程中，他們除了參觀國泰航空貨運站之外，還出席了在逸泰居酒店 Catalina's 餐廳舉行的頒獎午宴。席間，國泰貨運董事章靖與雅加達貨運經理 Madi Dewanto 頒發獎項後，並向各位代理致以衷心謝意。

James Woodrow (centre back) presents awards to Indonesia's top agents  
章靖（後排中間）頒發獎項予印尼貨運代理



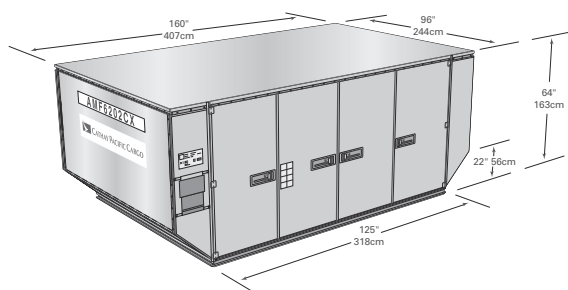
These are the Unit Load Devices (ULDs) that Cathay Pacific Cargo provides. Please visit [www.cathaypacificcargo.com](http://www.cathaypacificcargo.com) for detailed descriptions of each of the ULDs.

以下是國泰貨運提供的各式集裝箱。有關服務詳情，請瀏覽[www.cathaypacificcargo.com](http://www.cathaypacificcargo.com)，並參考各款集裝箱的詳情。



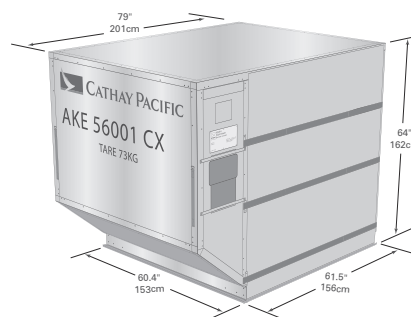
**TYPE: AMA CONTAINER**

ATA Code	: M1
Internal Volume	: 621 cu. ft. 17.58 mc
Tare Weight	: 477kg
Maximum Gross Weight	: 6,804 kg
Loadable Aircraft Type	: 747F



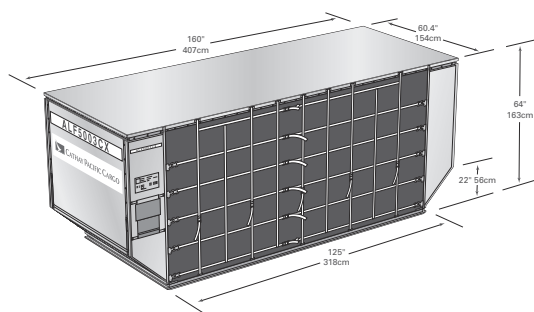
**TYPE: AMF CONTAINER**

ATA Code	: LD36
Internal Volume	: 516 cu. ft. 14.6 mc
Tare Weight	: 315 kg
Maximum Gross Weight	: 5,035 kg
Loadable Aircraft Type	: 747, 747F, 777, Airbus



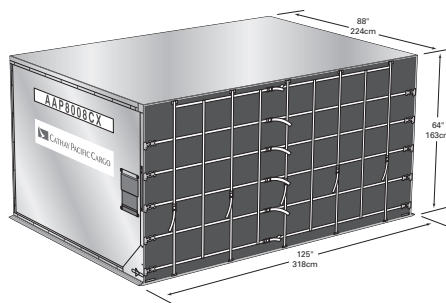
**TYPE: AKE CONTAINER**

ATA Code	: LD3
Internal Volume	: 152 cu. ft. 4.3 mc
Tare Weight (Light weight/Aluminium)	: 73 kg/100 kg
Maximum Gross Weight	: 1,588 kg
Loadable Aircraft Type	: 747, 747F, 777, Airbus



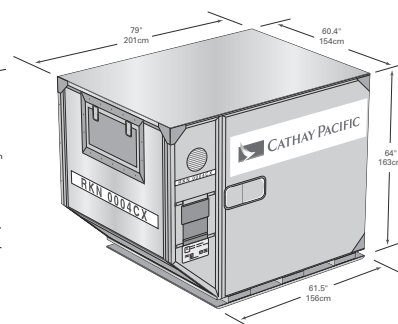
**TYPE: CONTAINER - ALF**

ATA Code	: LD6
Internal Volume	: 310 cu. ft. 8.78 mc
Tare Weight	: 157 kg
Weight Limitation Inc.	
ULD Tare Weight	: 3,175 kg
Loadable Aircraft Type	: 747, 747F, 777, Airbus



**TYPE: AAP CONTAINER**

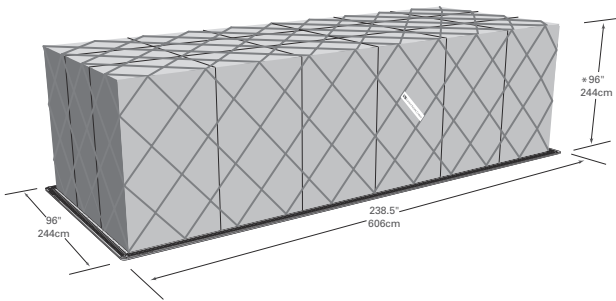
ATA Code	: LD9
Internal Volume	: 371 cu. ft. 10.51 mc
Tare Weight	: 220 kg
Weight Limitation Inc.	
ULD Tare Weight	: 4,626 kg
Loadable Aircraft Type	: 747, 747F, 777, Airbus



**TYPE: COOLTAINER - RKN**

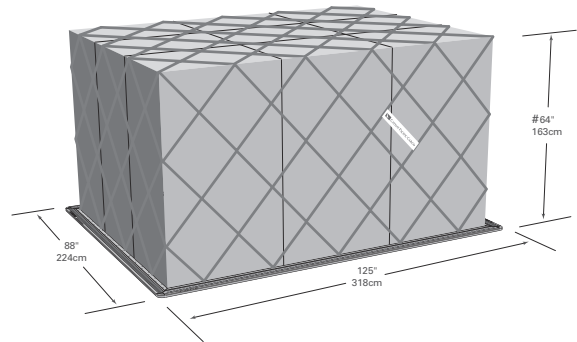
ATA Code	: LD3
Internal Volume	: 125.41 cu. ft. 3.55 mc
Tare Weight	: 230 kg
Weight Limitation Inc.	
ULD Tare Weight	: 1,588 kg
Loadable Aircraft Type	: 747, 747F, 777, Airbus





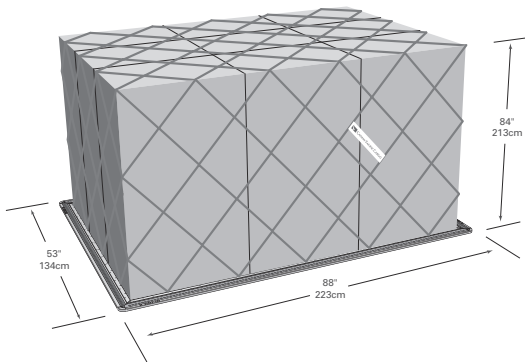
#### TYPE: PGA PALLET

Size – Base	: 96" x 238.5"	* Q6 Contour
– Height	: 96", **118"	** Q7 Contour
Tare Weight	: 565 kg	
Maximum Gross Weight	: 13,608 kg	
Loadable Aircraft Type	: 747F	



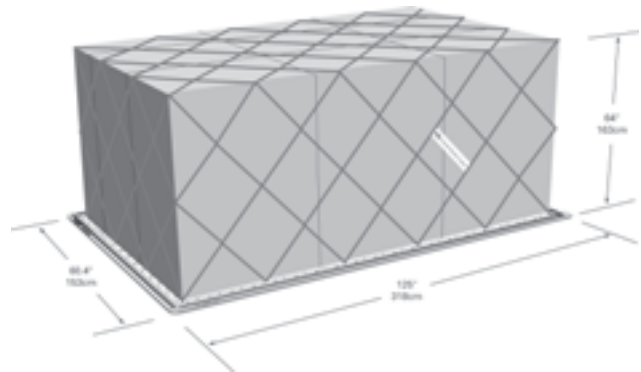
#### TYPE: PAG PALLET

Size – Base	: 88" x 125"	# Passenger Flight
– Height	: 64", 96", **118"	* Q6 Contour
Tare Weight	: 114 kg	** Q7 Contour
Maximum Gross Weight	: 4,626 kg (LD), 6,033 kg (MD)	
Loadable Aircraft Type	: 747, 747F, 777, Airbus	



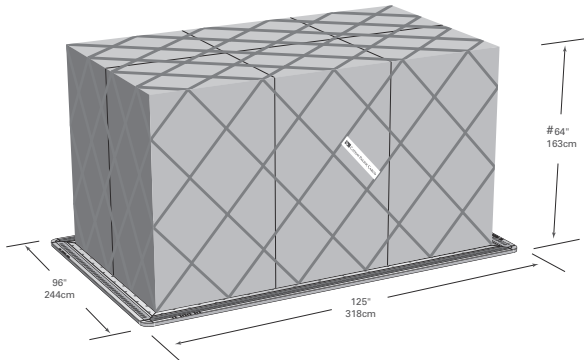
#### TYPE: PEB PALLET

Size – Base	: 53" x 88"
– Height	: 84"
Tare Weight	: 55 kg
Maximum Gross Weight	: 1,800 kg
Loadable Aircraft Type	: 747F



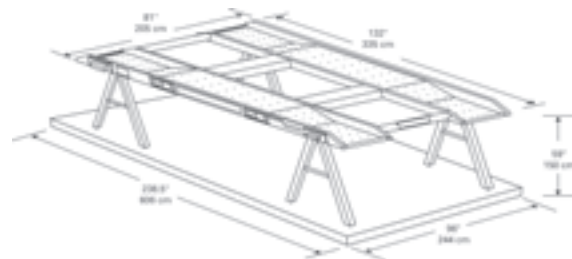
#### TYPE: PLA PALLET

Size – Base	: 60.4" x 125"
– Height	: 64"
Tare Weight	: 103 kg
Maximum Gross Weight	: 3,175 kg
Loadable Aircraft Type	: 747, 747F, 777, Airbus



#### TYPE: PMC PALLET

Size – Base	: 96" x 125"	# Passenger Flight
– Height	: 64", 96", **118"	* Q6 Contour
Tare Weight	: 120 kg	** Q7 Contour
Maximum Gross Weight	: 5,035 kg (LD), 6,804 kg (MD)	
Loadable Aircraft Type	: 747, 747F, 777, Airbus	



#### TYPE: VZA, VRA – CAR RACK

Size	: Fitted on PRA/PGA pallet
Max Width of the upper car	: 79.5"
Max Width of the lower car	: 85.6"
Max Height of the upper car	: 56"
Max Height of the lower car	: 57"
Tare Weight	: 344 kg
Maximum Weight of each car	: 2,268 kg
Maximum Gross Weight	: 11,340 kg
Loadable Aircraft Type	: 747F
Standard CX car strap must be used to secure the vehicle on the rack and pallet	



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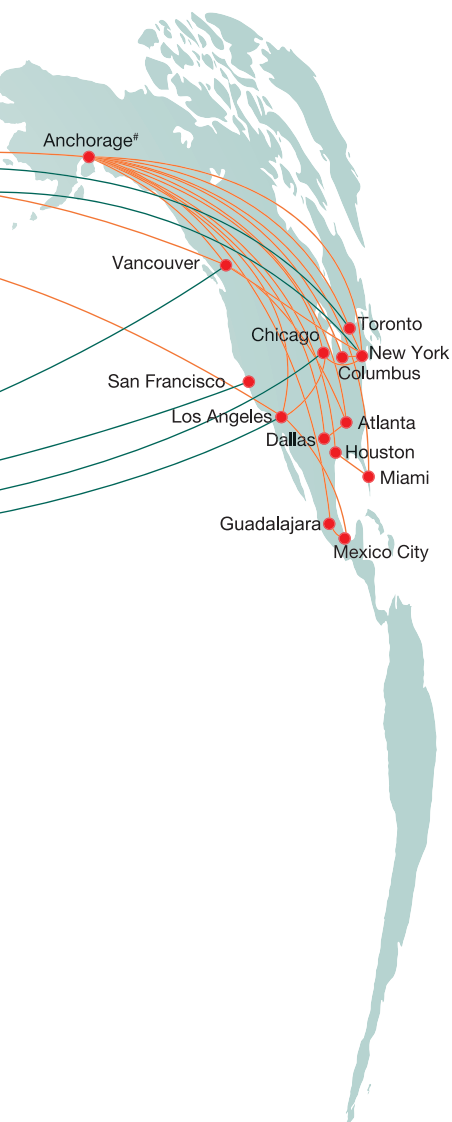


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## DRAGONAIR NETWORK



— Cathay Pacific Passenger Service  
 — Cathay Pacific Freight Service  
 — Dragonair Service

# Technical stop only

\* No cargo uplift service

Information correct at time of printing. Please check the latest availability of service on [www.cathaypacificcargo.com](http://www.cathaypacificcargo.com) or [www.dragonaircargo.com](http://www.dragonaircargo.com)



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