



Air Cargo and Logistics

Challenges and Opportunities

**Asia Pacific Gateway and Corridor Workforce Productivity and
Innovation Roundtable
June 21, 2011**

AGENDA

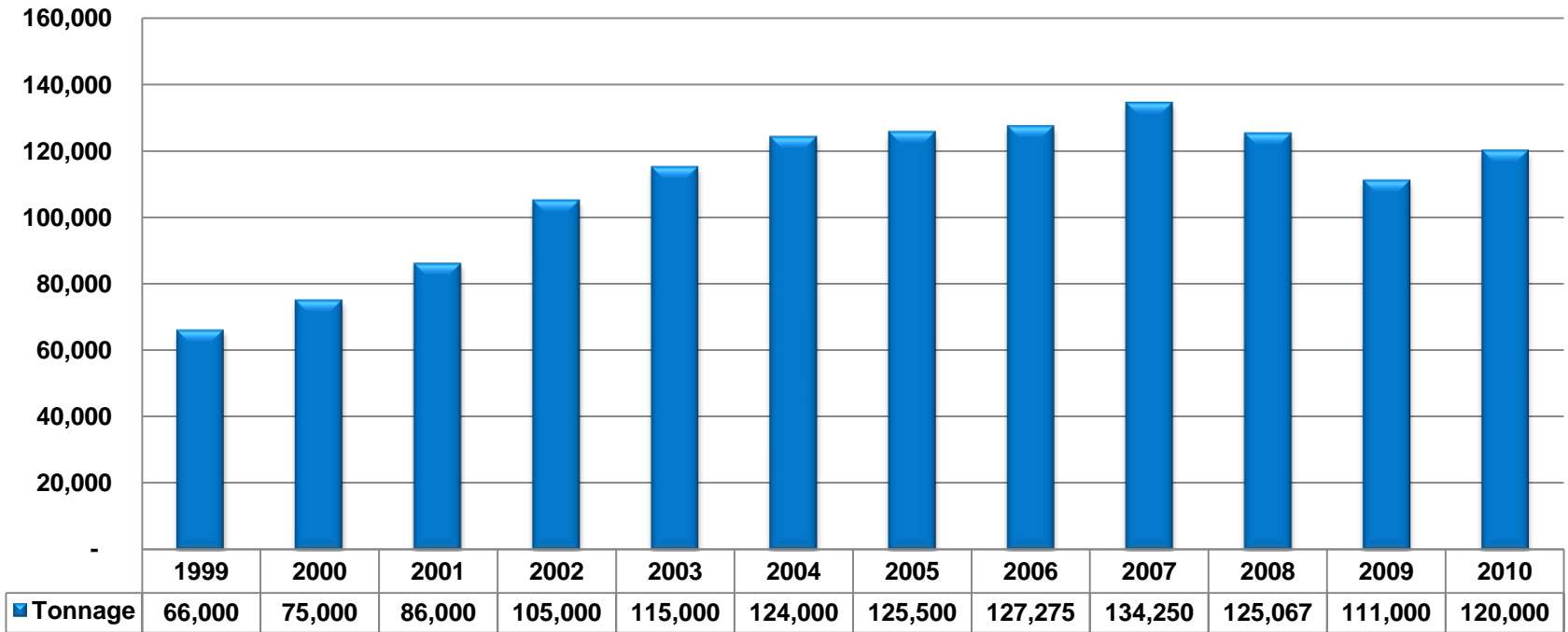
- **YYC Cargo Overview**
- Industry Challenges, Opportunities and Key Trends
- YYC Airport Development Program

Facts & Figures

- YYC is one of Canada's busiest airports with 12.6 million passengers in 2010
- YYC is one of only three airports in Canada to offer passengers non-stop service to both Asia and Europe
- A hub for over 120,000 metric tons of air cargo handled annually
- Cargo can be shipped from Calgary to anywhere in the world within 48 hours
- Western Canada's Logistics and Distribution Hub
- Expanded to over 1.8 million square feet of warehouse space in last 10 years
- Generates approximately \$6 billion to the City of Calgary's GDP (about 10 per cent of the economy) and creates or maintains approximately 40,000 jobs

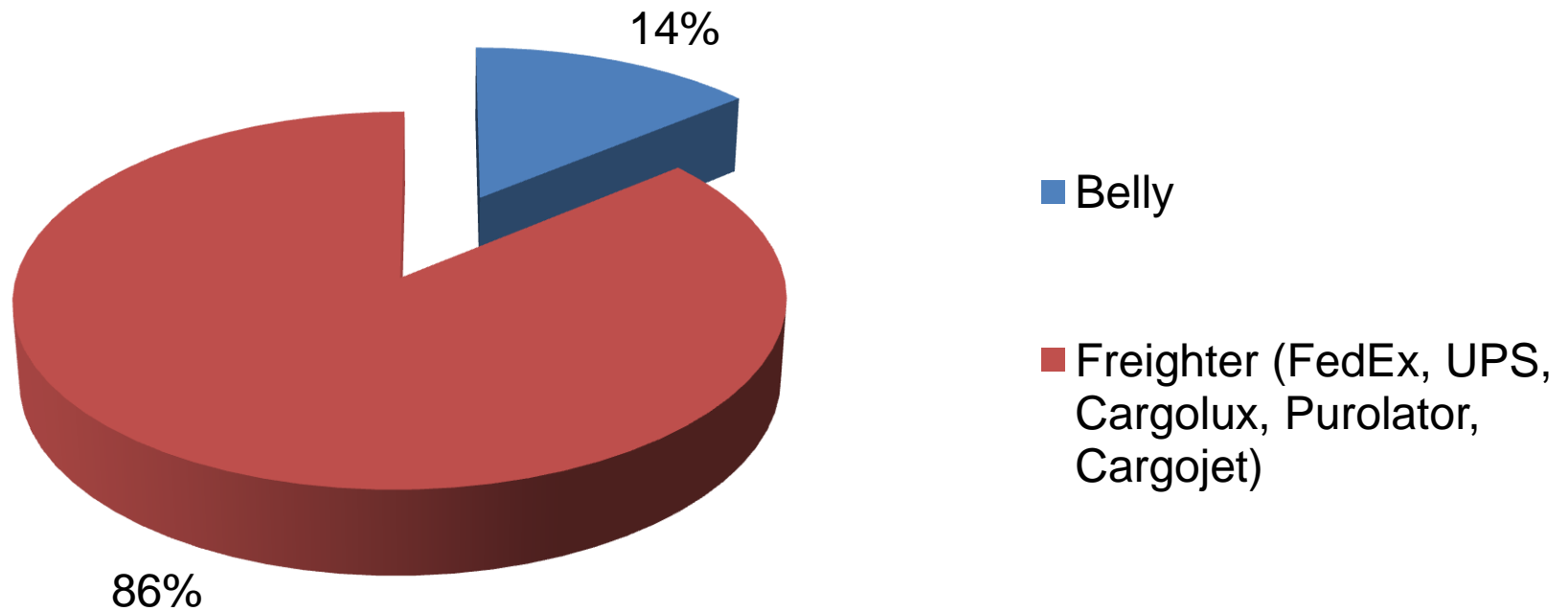
YYC Air Cargo Tonnage Growth

Total Tonnage Growth - Year on Year



Current Cargo Capacity Distribution

Volumes Carried by Sector



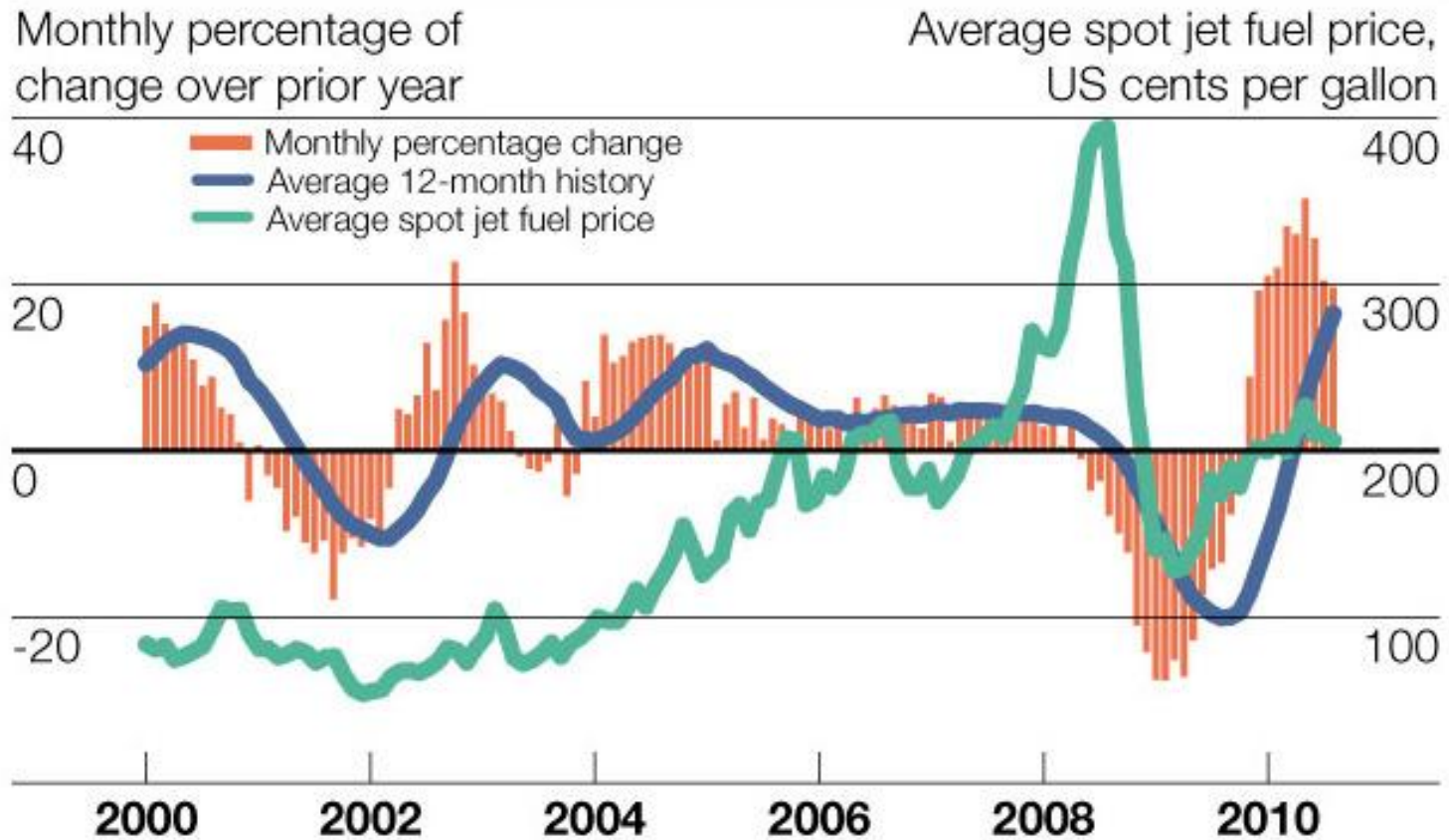
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“Demand for air cargo transport rebounded sharply in 2010 after a calamitous 18-month decline that began in May 2008. In spite of this downturn, world air cargo traffic will triple over the next 20 years, compared to 2009 levels, averaging 5.9% annual growth. The number of airplanes in the freighter fleet will increase by more than two-thirds over the same period.”

* Source: Boeing Air Cargo Forecast 2010-2011

WORLD AIR CARGO TRAFFIC REBOUNDED SHARPLY IN 2010



* Source: Boeing Air Cargo Forecast 2010-2011

Challenges and Opportunities

- **Streamlining the supply chain**
- **Cargo security**
- **Qualified supply chain professionals**
- **Business attraction**



Key Industry Trends

- **Greater automation**
 - Expediting processes
- **Standardization**
 - Cargo 2000
 - e-Freight/ e-AWB
- **Environment**
 - Alternative Fuels
 - Carbon emissions
 - Noise restrictions



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IATA E-FREIGHT
SIMPLE > ELECTRONIC > PAPER FREE



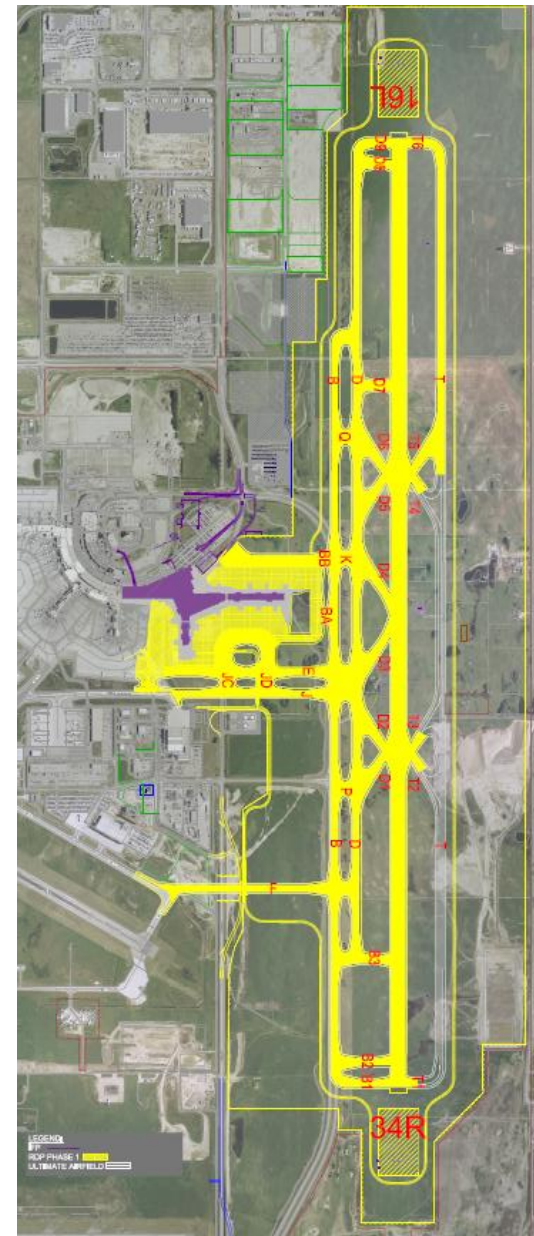
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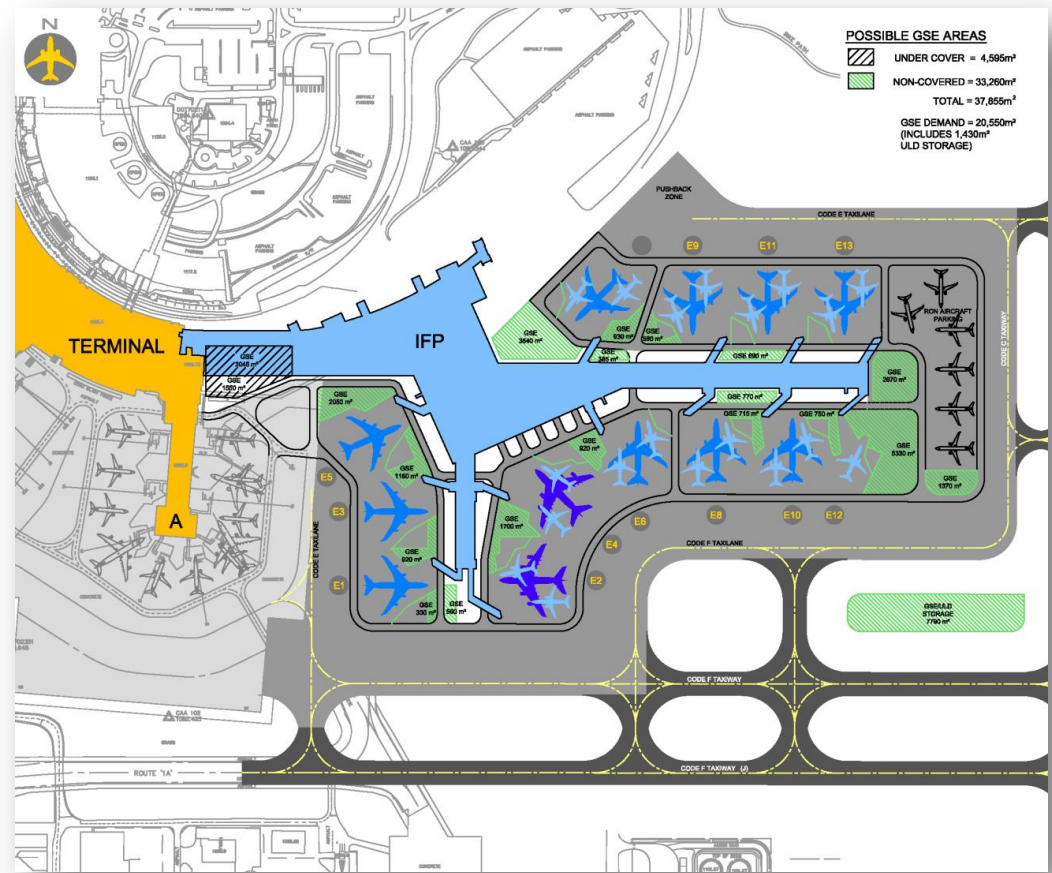


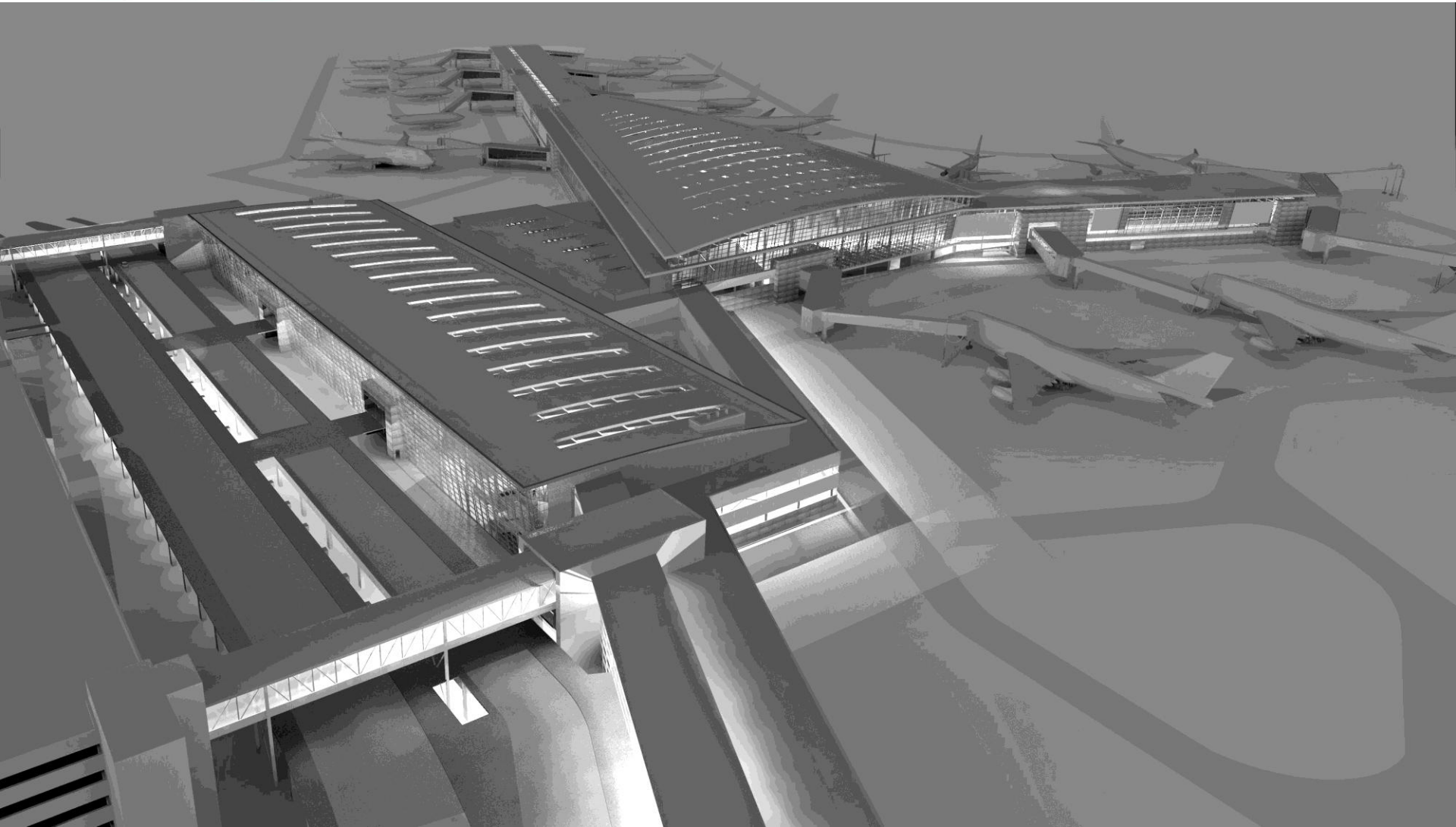
Airport Development Program

- Largest construction project in Calgary's history
- 1600 people will be employed on the Airport Development Program
- 10.5 million hours of employment
- Total estimated cost \$2.1B



- Expanding Alberta's premier international gateway to meet current and future capacity demands
- Primary International Transborder Concourse
- Total Estimated Cost \$1.4 Billion
- 183,000 square metres
- 22 gates
- In-service October 2015

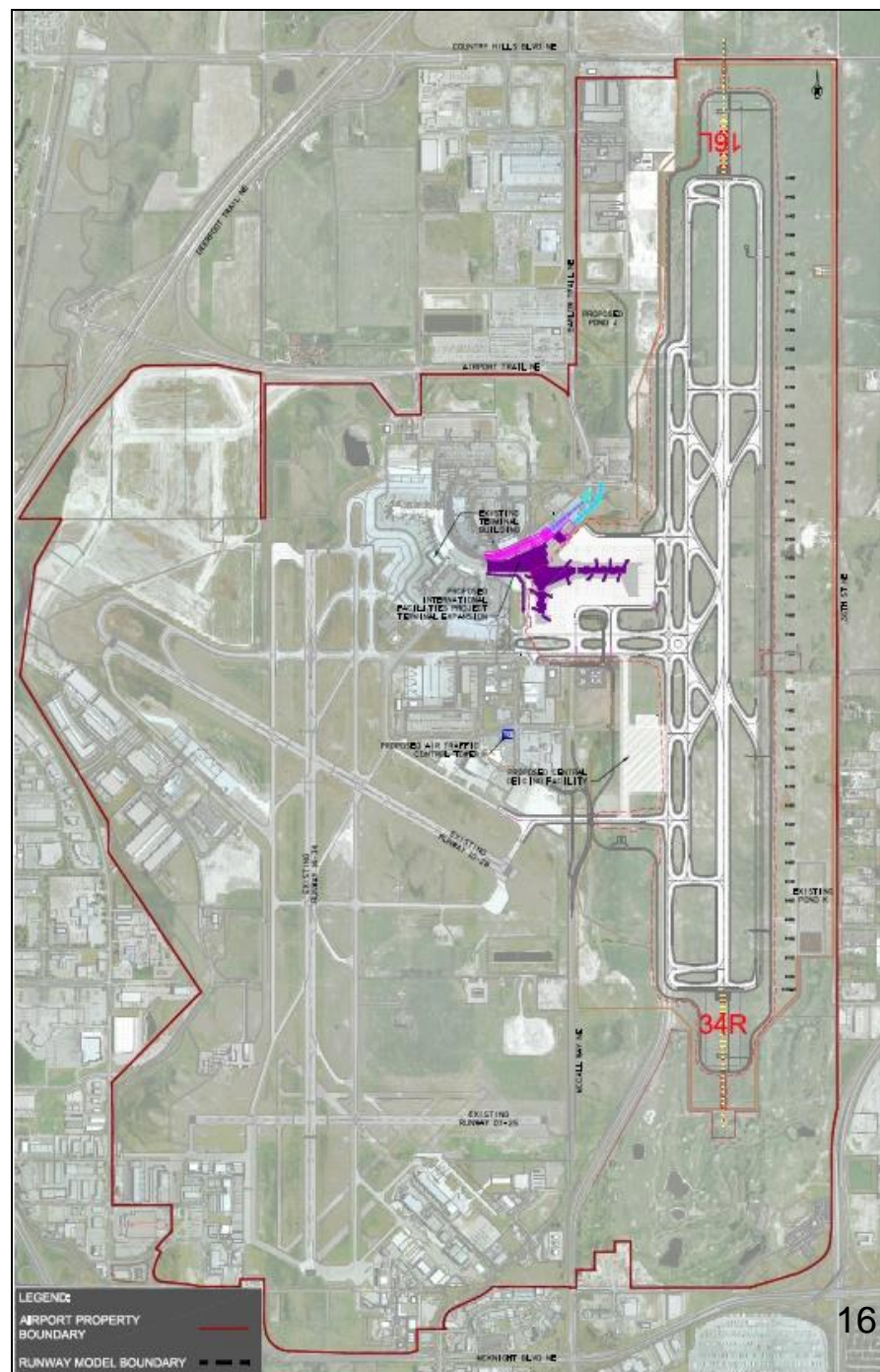




4th Runway

Program Scope:

- 4,267 m (14,000 ft)
- Parallel to existing runway (16R/34L)
- Code 'F' capable (A380)
- Noise contour and electronic zoning protection in place
- In-service May 2014
- \$620 Million



YYC Global Aviation Park

280 acres (113 hectares)

Opening mid-2012

Features:

- 50,000 m² (538,000 ft²) dedicated cargo apron
- Custom-build warehouse capability
- In-ground fueling
- Nose tethers
- 1,858 m² (20,000 ft²) livestock handling facility
- Major CBSA (Canada Border Services) operations
- On-site veterinarian



Thank You

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