

Air Cargo HAM

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Hamburg Facts

- Second-largest city in Germany and Europe‘s largest non-capital city (5 million people in the metropolitan area)
- Fastest-growing incoming destination in Europe over the last 10 years (> 100%) and no. 11 in Europe with approx. 13 million overnight stays
- Europe‘s largest urban development project „HafenCity“ with many new tourist attractions, museums, restaurants etc. and Hamburg‘s new landmark, the Elbe Philharmonic Hall
- Hamburg has the best economic outlook of all German cities according to a study by FERI Institute
- Hamburg has Germany‘s highest gross domestic product per capita
- 3rd-largest aviation center in the world
- Port of Hamburg is Europe‘s third-largest container port

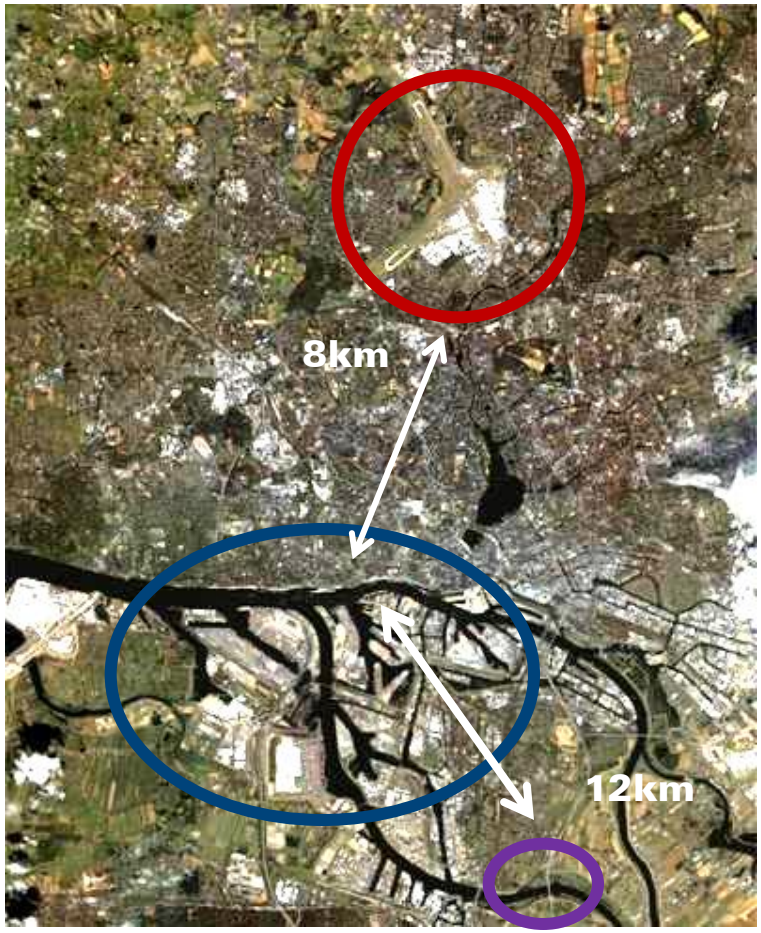






Hamburg: Germany´s Metropolis for Trade, Logistics and Aviation

- More than 158,000 companies
- 4,000 foreign companies
- Very strong import and export industry
- Many European distribution centers
- Sea and air cargo
- Road and rail traffic
- 3rd largest aviation center in the world
- (after Seattle and Toulouse)



Hamburg Seaport
Hamburg Airport
Hamburg Railport

Overview of Hamburg Airport



Air Cargo Catchment Area / Development of HAM

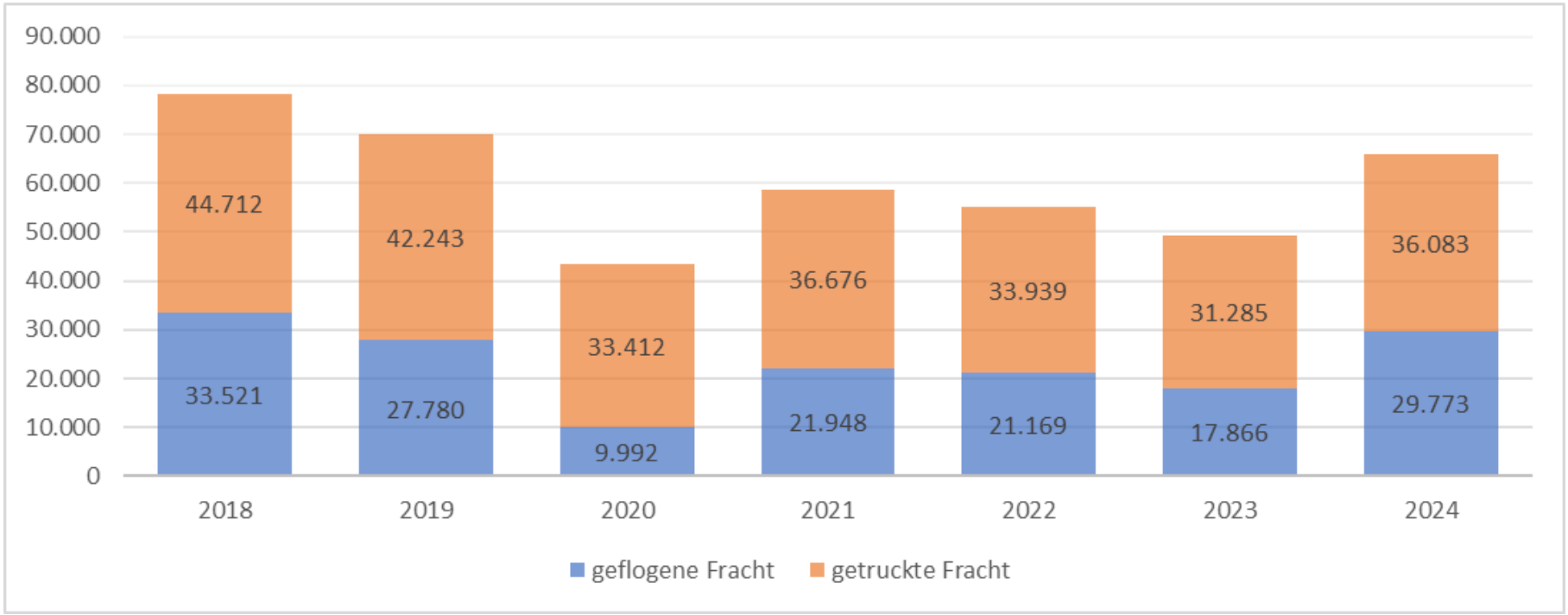


- HAM catchment area (2010): 270,000t
- Other airports (2010): 125,000t
- HAM Region (2010): 145,000t
- HAM Airport (2019): 70,022t
  (2024): 65,856t

Air Cargo Development HAM

total* 2019
70,022t

total* 2024
65,856t



*excluding transit

Air Cargo Goods in Hamburg

The logistics companies and forwarders around Hamburg Airport specialize on the following sectors:

- Aircraft spare parts (import and export)
- Ship spare parts (import and export)
- Medical technology (export)
- Pharmaceutical products (export)
- Chemistry industry (import and export)
- Textile industry and mailorder (import)





Important Customers of Air Cargo Services at Hamburg Airport

Export

HELM

AIRBUS

PHILIPS
sense and simplicity

Honeywell

JUNGHEINRICH

HAUNI
KÖRBER SOLUTIONS

Dräger

Lufthansa Technik
More mobility for the world

Import

H&M

TOM TAILOR

CASIO

Panasonic
ideas for life

MILES
FASHION GROUP

SHARP

OLYMPUS

OTTO

Tchibo

Structure of Air Cargo am Hamburg Airport

- Small average weight per shipment (< 190kg)
- High amount of shipments, especially express shipments (express air cargo)
- Small amount of so called „consolidated ULDs“ (containers which are already prepared by forwarders for the transport by aircraft or by truck/road feeder service) and which are only handled by cargo handling agents on airport)

Reason: limited offer of intercontinental flights from HAM



HACC



Visualization of HACC

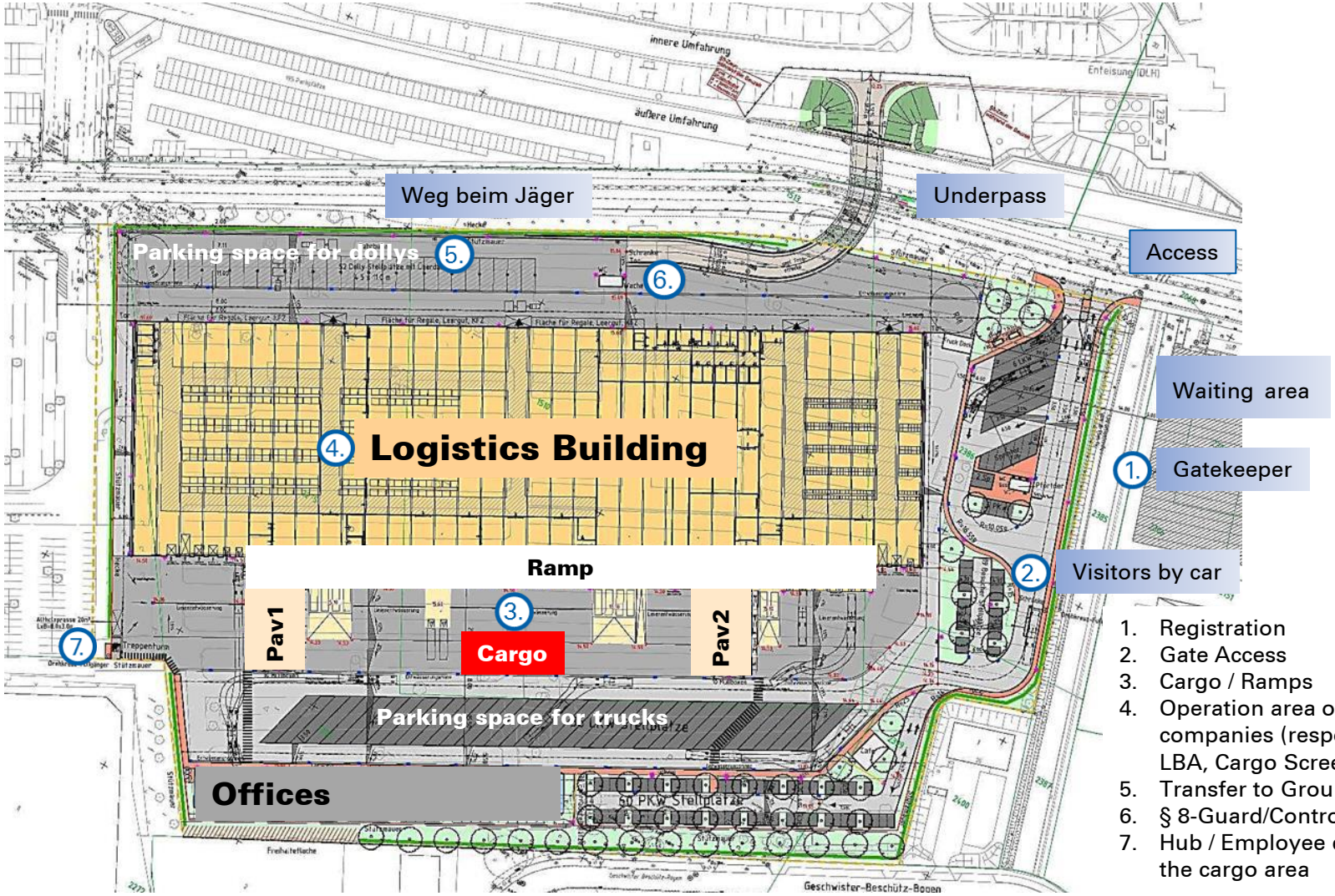


Hamburg Airport Cargo Center (HACC)

- Air Cargo Center with direct access to the apron
- Commissioning: 2016
- Geographical position: southern airport area
- approx. 20,000 m² hall space
- approx. 6,000 m² office space
- 48 tenants (forwarders, handlers, authorities)
- Capacity approx. 150,000 tons p.a.
- 36 parking spaces for trucks
- 40 loading and unloading positions (ramps)

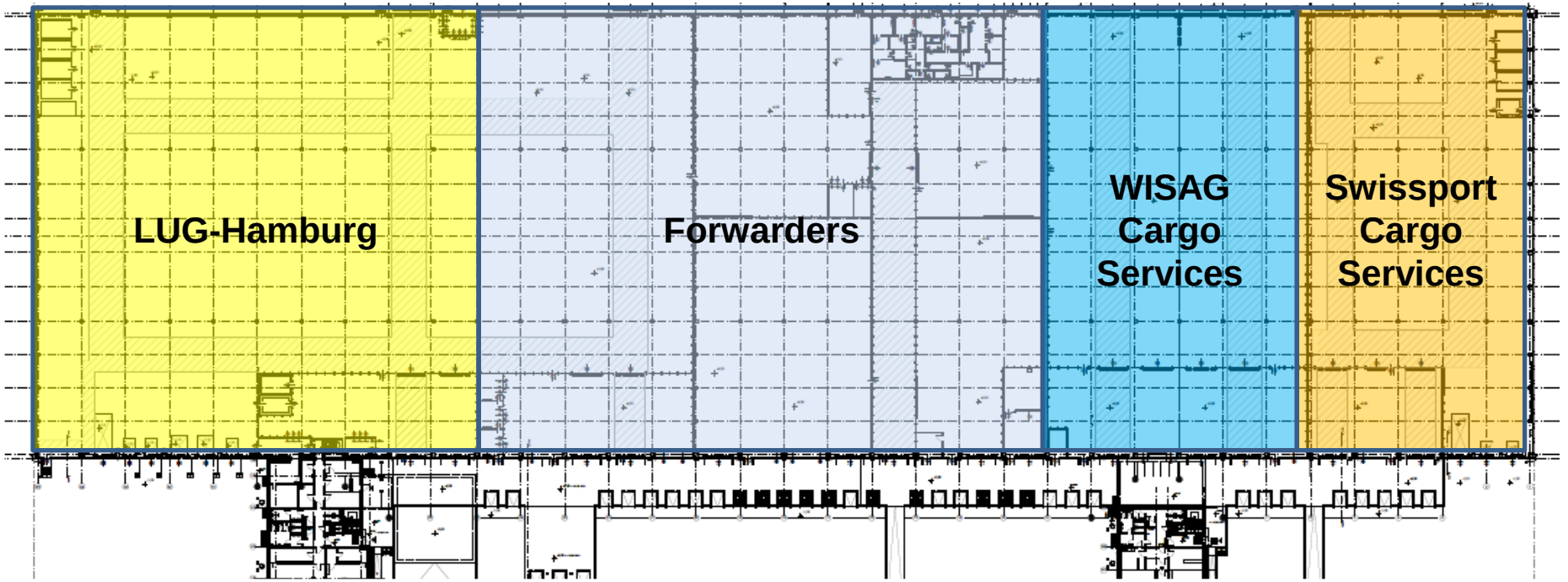


Functional Concept – New Cargo Center



1. Registration
2. Gate Access
3. Cargo / Ramps
4. Operation area of handling companies (responsibility of LBA, Cargo Screening)
5. Transfer to Groundhandling
6. § 8-Guard/Control
7. Hub / Employee entrance to the cargo area

Warehouse: Layout Air Cargo Handling



New Air Cargo Facility and Underserved Market

- Large demand for time-critical air cargo
- Large demand for air cargo capacities from and to Asia (over 500 Chinese companies)
- Europe's 2nd largest city (after London) for international courier/express business demand
- 3rd largest ocean port in Europe with excellent air/ocean (Hinterland) distribution facilities
- With EK and QR only two provider in the daily air cargo market for large belly freight shipments:

  42% market share of the air cargo market at HAM airport
- No full freighter operator at HAM at the moment

Source: Hamburg Airport & Aviainform

Thank you very much for your attention!



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