

# FISH & FLOWERS

## Opportunities for Growth and Replenishment



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Commercial and Contract Manager

# WHO WE ARE



## WHO WE ARE



Headquarter in Dresden, Germany



Founded in 1955



More than 2,200 employees (2023)

# WHO WE ARE



**ST Engineering**

**AIRBUS**



A company of ST Engineering and Airbus /

# WHO WE ARE



# THE QUESTION

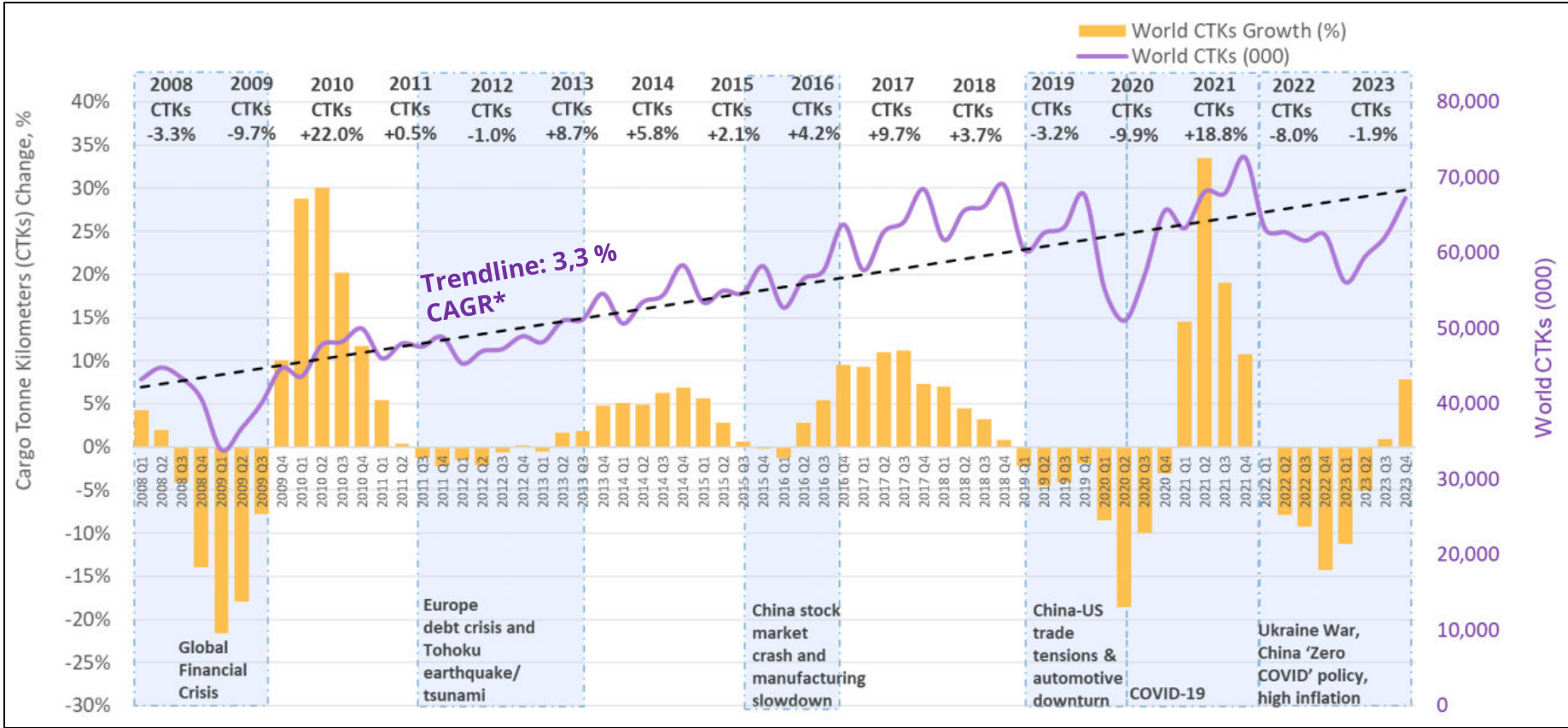


# ANALYSIS

## Forecast until 2032

### Global Air Cargo

- (Historic) Air Cargo growth rate: 3.3%\*, since 2000
- Growth trendline expected to continue
  - 2023 – 2027 slightly lower (3.2%\*)
  - 2028 – 2032 slightly higher (3.4%\*)
- Q1 2024: 15% more CTKs than Q1 2023

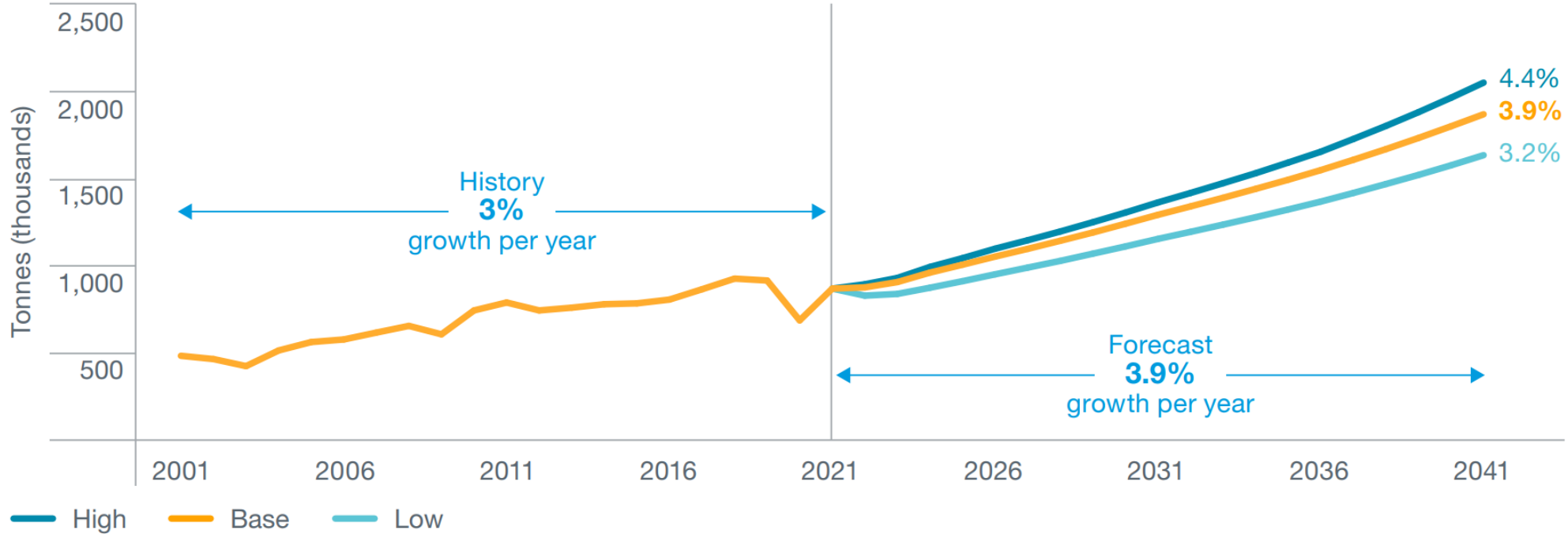


Global air cargo by Cargo Tonne Kilometers (CTK), Source: IATA CargoIS 2024.

# ANALYSIS

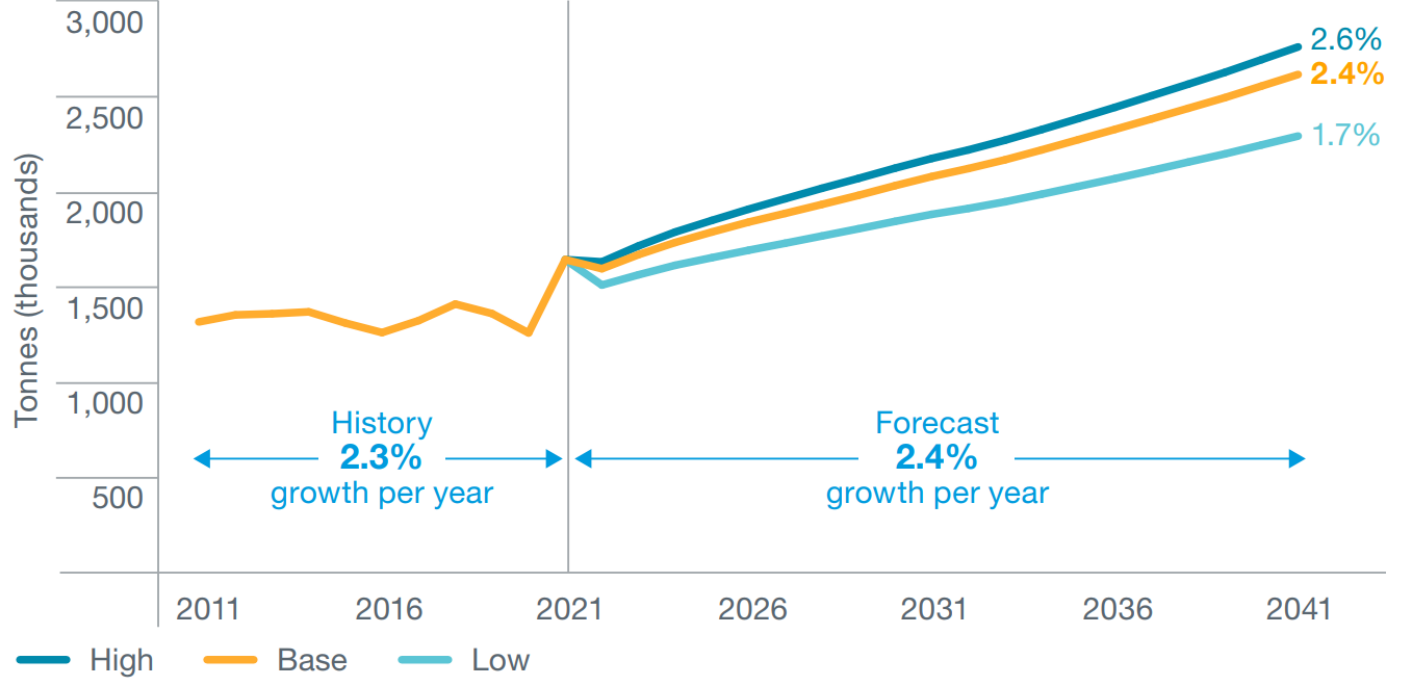
**Latin America–Europe Air Cargo Traffic Will Grow 3.9% per Year**

Average Annual Growth, 2022–2041



**Latin America–North America Air Cargo Traffic Will Grow 2.4% per Year**

Average Annual Growth, 2022–2041



Air Cargo Forecast of Cargo Tonne Kilometers (CTK), Source: Boeing Commercial Market Forecast 2023.

## Latin America Air Cargo Growth Forecast until 2042

- Latin America – Europe: 3.9%\* p.a.
- Latin America – North America: 2.4%\* p.a.



# ANALYSIS – STANDARD BODY

- **99** aircraft are doing all the work

## Standard body freighter demand in Latin America until 2042:

- Replacement:  
90 aircraft (90%) are older than 25 years
- Growth:  
Approx. 70 more standard body aircraft needed for growth for European routes with 3.3% CAGR

Route characteristics	Aircraft Model	# Flights	Share	Avg. Age	# of Aircraft
regular*	737-400SF	13.694	39%	30	15
	737-800BCF	5.121	15%	18	7
	757-200PCF	2.845	8%	29	14
	737-300BDSF	2.614	7%	35	5
	MD-83SF	2.206	6%	33	10
	737-300SF	1.663	5%	32	3
	757-200PF	1.339	4%	28	20
	727-200(F) Advanced	1.294	4%	44	4
	737-400BDSF	1.224	3%	28	1
	737-800SF	394	1%	23	1
	MD-82SF	380	1%	35	4
	MD-88SF	303	1%	33	10
	DC-9-32F	219	1%	56	2
	DC-9-33F	109	0%	55	1
	737-200	100	0%	43	1
A321-200P2F	48	0%	24	1	
sporadically	- various -	1.710	5%	32	102
<b>total</b>	-	<b>35.263</b>	<b>100%</b>	-	<b>201</b>

\* A/C with at least 25 flights per year

Standardbody Freighter Fleet operating in Latin America 2023, Source: EFW evaluation based on IBA data.

# ANALYSIS – WIDEBODY

- **325** aircraft are doing all the work

## Widebody freighter demand in Latin America until 2042:

- Replacement:  
58 aircraft (18%) are older than 25 years
- Growth:  
Approx. 200 more widebody aircraft needed for growth in European routes with 3,3% CAGR

Route characteristics	Aircraft Model	# Flights	Share	Avg. Age	# of Aircraft
regular*	767-300F	10.574	23%	15	84
	767-300ERBDSF	7.279	16%	32	41
	767-300ERBCF	6.844	15%	19	21
	777F	5.329	11%	8	84
	A330-200F	4.732	10%	11	6
	747-8F	2.073	4%	10	32
	747-400F	2.039	4%	23	23
	767-200ERBDSF	1.416	3%	30	4
	747-400ERF	1.192	3%	19	13
	A300B4-600RF	900	2%	32	2
	A330-200P2F	676	1%	17	2
	A330-300P2F	388	1%	16	2
	747-400BCF	333	1%	32	8
	767-200BDSF	194	0%	41	1
	MD-10-30F	159	0%	36	1
A300B4-200F	37	0%	41	1	
sporadically	- various -	2.629	6%	20	241
<b>total</b>	-	<b>46.794</b>	<b>100%</b>	-	<b>566</b>

\* A/C with at least 25 flights per year

Widebody Freighter Fleet operating in Latin America 2023, Source: EFW evaluation based on IBA data.

# AIRBUS 2042 FORECAST

## Standard Body



1,020 aircraft

## Widebody



890 aircraft

# EFW P2F COMPLETED CONVERSIONS

## Standard Body



EFW Converted : 41

## Widebody



EFW Converted : 37

# WE ARE FAMILY

## THE AIRBUS FREIGHTER CONVERSION



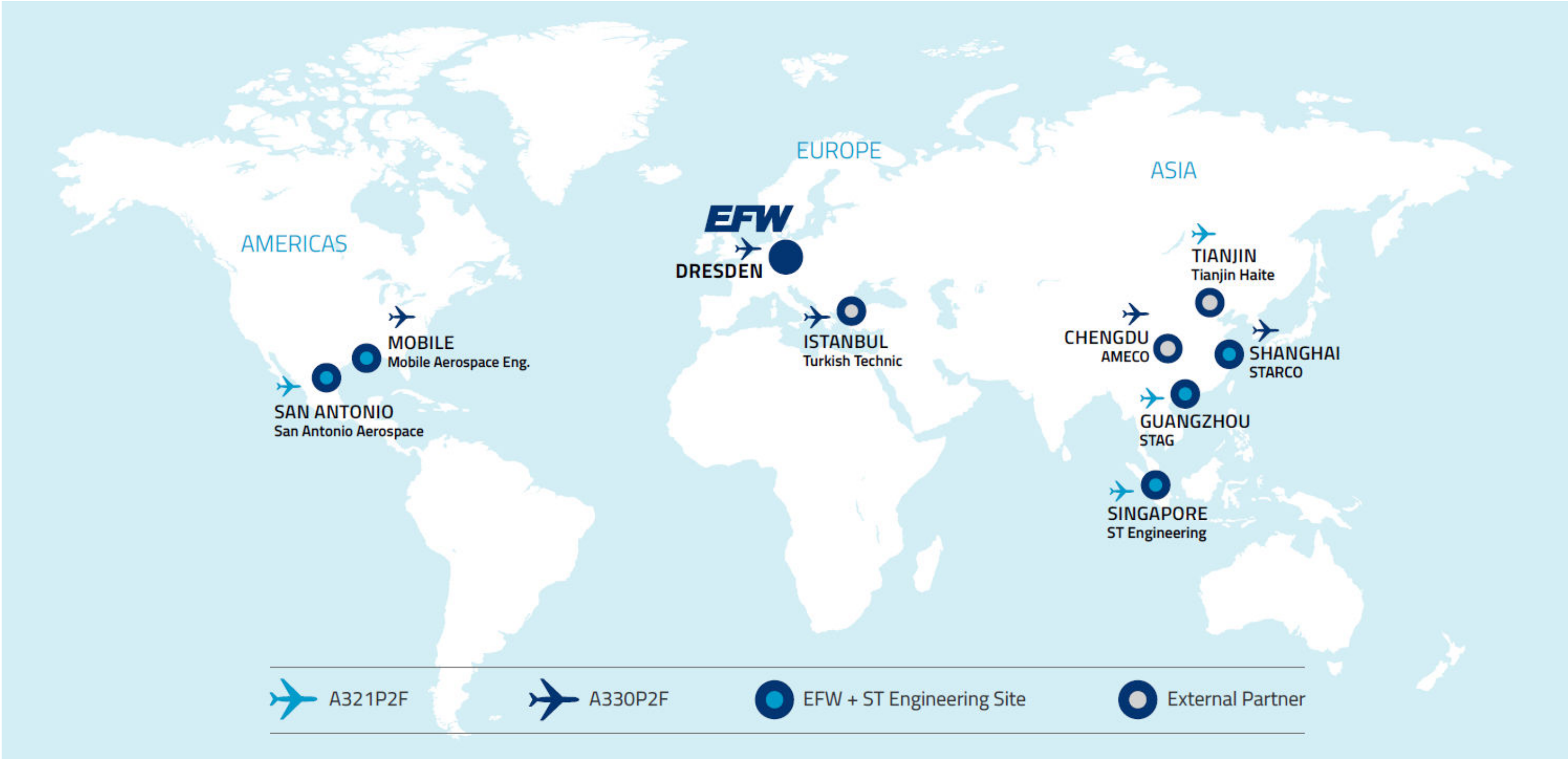
**A321P2F**

**A330-300P2F**

**A330-200P2F**

**A320P2F**

# OUR LOCATIONS



# THE LAST QUESTION



# How can we ensure that the Latin America keeps its cargo flying?

1. Buy new freighters?
2. Buy old freighters?
3. Convert passenger to freighter aircraft?
4. Not change anything and keep flying older freighters?



**THANK YOU VERY MUCH.**