



Aviation Industry Conferences



Roger Thijs

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Belgium

5th Annual Cargo Aircraft & Operations Conference

31st January 2007-1st February 2007
Crowne Plaza Rome St. Peter's Hotel
& Spa, Rome, Italy

Co-chaired by
Gennaro di Capua, CEO,
Alenia Aeronavali, Italy
&
Massimo Panagia, Chief Executive
Officer & Managing Director,
Cargoitalia, Italy

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Aviation Industry Group

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Conference Agenda

Day I – Wednesday 31st January 2007

- 08.15 Coffee & Registration in the "Foro Constantino" Foyer on the Lower Ground Floor of the hotel
- 09.15 Chairmen's Opening Remarks by
Gennaro di Capua, CEO, Alenia Aeronavali, Italy &
Massimo Panagia, Chief Executive Officer & Managing Director,
Cargoitalia, Italy
- 09.30 **The World's Freighter Fleet**
Chris Seymour, Head of Market Analysis, Ascend – A Division of Airclaims, UK
Which aircraft make up the world's small and large freighter fleets? Where are these aircraft located geographically? Which aircraft will be retired from and added to this fleet over the next 10 years? What proportion of this fleet will be leased? What proportion will be P-to-F conversions? How will the average age of the fleet change over the next 10 years?
- 10.00 **The World's Airfreight & Airmail Business**
Tom Hoang, Regional Director Marketing – Cargo, Boeing Commercial
Airplanes Group, WA, USA
How does the world's airfreight and airmail business break down in continental and intercontinental terms? Which markets are showing the most growth? Where will these markets be in the future? What proportion of freight and airmail is currently being carried in the holds of passenger aircraft? How are aircraft operators serving the freight and airmail markets in terms of aircraft and route structures?
- 10.30 Questions & Discussion
- 10.40 Break for Refreshments in the Conference Room Foyer
- 11.20 **Selecting Cargo Aircraft Types for Different Route Structures**
Didier Lenormand, Freight Marketing Director, Airbus, France
How should airlines decide upon the aircraft types that they need in their fleets? What are the typical parameters under consideration in terms of payload, range, operating economics, finance costs and profitability? To what extent is fleet commonality of importance? To what extent is it desirable to have different aircraft for short-range and long-range operations?
- 11.50 **The Status of the A320 Passenger to Freighter Conversion**
Juergen G. Habermann, Vice President Sales & Customer Support, Member of
the Board, EADS Elbe Flugzeugwerke, Germany
An update of the project status of the JV between EADS and Russia for the development certification kit production and conversion of A320 family aircraft.
- 12.20 Questions & Discussion
- 12.30 Lunch in the Osteria Romana on the Ground Floor hosted by



14.00 **Freighter Aircraft Values**

Steve Jarvis, Managing Director, AVITAS – Europe, UK

What values do the current range of freighter aircraft command? To what extent have these values changed over recent years and for what reasons? How will these values change in the next 5 to 10 years? Are certain freighters becoming less attractive to the market and how is this affecting their values? To what extent will the introduction of new freighters such as the B747-8F and the A320 P-to-F affect the values of other aircraft?

14.30 **A Regional Aircraft Lessors View of Freight Markets**

Rob Morris, Director, Market Analysis & Support, BAE Systems Regional Aircraft, UK

The structure of regional freighter markets (historic and present), route networks, fleet demographics and demand drivers. Views on future demand, and current and future freighter programmes

15.00 Questions & Discussion

15.15 Break for Refreshments in the Conference Room Foyer

15.45 **An Integrator's Views of its Aircraft & Operations**

By Harald Vogels, Manager International Feeder Aircraft Operations EMEA, Federal Express Corporation, Belgium

An integrator reviews the aircraft in its fleet and its route network. It discusses the primary concerns in terms of world economics, route selection, aircraft selection and profitability. It discusses market trends and how to best satisfy them.

16.15 **Acquiring Freighter Aircraft**

Patrick Harris, President, Mercury Aviation Partners, FL, USA

What are lead times to delivery of new, purpose-built freighters as compared with the acquisition of an aircraft for P-to-F conversion? What is the likelihood of being able to obtain a freighter from a leasing company? Is it advisable to use an agent when seeking suitable used freighters or aircraft for P-to-F conversion? Is it advisable to have finance in place before seeking aircraft? When considering the creation of a fleet of freighters what criteria should be considered and specified as desirable?

16.45 Questions & Discussion

17.00 Close of Day One followed by Drinks Reception in the Osteria Romana on the

Ground Floor, hosted by



AleniaAeronavali
A Finmeccanica Company

Day 2 – Thursday 1st February 2007

08.15 Coffee & Registration in the “Foro Constantino” Foyer on the Lower Ground Floor of the hotel

09.00 Chairmen's Remarks

09.10 **The Market for Narrowbody Freighter Conversions**

Iso Nezaj, General Manager, Commercial Jet, Inc., FL, USA

Which narrowbody P-to-F conversions are currently available and which conversion specialists are active in their accomplishment? Which new P-to-F conversions are in the pipeline? What is the potential market for such conversions and where is that demand located? What are the typical costs of aircraft acquisition and subsequent conversion? What variations can be expected as a result of airline specifications?

09.40 **The Market for Turboprop Freighter Conversions**
Ruben Werjefelt, President, Aerosyncro AB, Sweden

Which turboprop P-to-F conversions are currently available and which conversion specialists are active in their accomplishment? Which new P-to-F conversions are in the pipeline? What is the potential market for such conversions and where are these markets located? What are the typical costs of aircraft acquisition and subsequent conversion? What variations can be expected as a result of airline specifications?

10.10 **The Market for Widebody Freighter Conversions**
George Peppes, Freighter Conversion Product Marketing Manager, The Boeing Company, WA, USA

Which widebody P-to-F conversions are currently available and which conversion specialists are active in their accomplishment? Which new P-to-F conversions are in the pipeline? What is the potential market for such conversions and where is that demand located? What are the typical costs of aircraft acquisition and subsequent conversion? What variations can be expected as a result of airline specifications?

10.40 Questions & Discussion

11.00 Break for Refreshments in the Conference Room Foyer

11.30 **Start-up Freight Carriers & the Challenges They Face**
Fredrik Groth, Director General, Swiftair, Spain

What difficulties should start-up freighter carriers be aware of in terms of starting their airlines, acquiring their aircraft and operating their fleets? What barriers to entry exist for start-up freight carriers? What are the staffing requirements and how easy is it to obtain the staff required? What certification requirements exist and how difficult is it to obtain routes? What are the primary causes for the failure of start-up freighter operators?

12.00 **Alternative Models for the Air Cargo Business**
Alessandro Ciancimino, Partner, Sabre Consulting Services, Italy

Where the low-cost model is achieving significant success in shorthaul passenger markets, to what extent has it been possible to apply similar concepts to freighter operation? Are other business concepts practicable for the air freight and air mail businesses in terms of reducing costs and improving revenues?

12.30 Questions & Discussion

12.40 Lunch in the Osteria Romana on the Ground Floor of the hotel hosted by

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14.00 **Selecting the Equipment Required for a Freighter**
Lucien Schummer, VP Alliances & Strategy, Cargolux Airlines International, Luxembourg

What equipment on a freighter aircraft can be specified by a freight carrier? How should freight carriers select such equipment for new aircraft? Who within a freight airline should be made responsible for such equipment selection? To what extent is it desirable to ensure the commonality of such equipment on used aircraft?

14.30 **Dangerous Goods – What Can Happen When Things Go Wrong – An Insurance & Legal Viewpoint**
Philip Bass, Partner, Beaumont & Son - Aviation at Clyde & Co, UK

The exposures faced by cargo carriers, ground handlers, shippers, cargo agents and regulators. Practical experience gained from court proceedings worldwide. The recent decision of the Chinese Supreme Court in a subrogation action brought as a result of a chemical spillage onboard an A330 aircraft in which a finding by the Beijing High Court is pending.

15.00 Short Break

15.10 **Informal Round Table Discussion Groups** – Please indicate on the morning of 1st February which group you would like to join.

Round Table Discussion Group 1: Operational Experience with Cargo Loading / Offloading

- The efficiency of loading and offloading operations can have a significant effect on aircraft safety and availability. What are the primary concerns and to what extent can they be managed at the aircraft and in the cargo terminal?
- What steps can be taken to improve such efficiencies, recognising that different airports will have different facilities and capabilities?

Round Table Discussion Group 2: Factory Built Freighters Versus P to F Conversions

- How do costs compare when looking at the acquisition of new freighters as opposed to the acquisition of P-to-F converted aircraft?
- What are the obvious upsides and downsides for operators of new freighters as opposed to P-to-F converted aircraft, particularly for those who operate a mixed fleet?
- Is it easier for suppliers to support dedicated freighters as opposed to conversions?

15.45 Close of Conference