



澳門空運暨物流業協會

Associação de Despachantes de carga Aérea (logística) de Macau  
Macau Air Freight Forwarding (Logistics) Association



# MAFFA COUNTRY REPORT

## 2018 - 2019

FAPAA 46th Executive Council Meeting

25<sup>TH</sup> TO 27<sup>TH</sup> July 2019

Dhaka, Bangladesh



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## INTRODUCTION

MAFFA was founded on 12<sup>th</sup> April 1996 with members from the Airfreight Forwarders in Macau. The Association which is self-reliance, a Non-profit association has been acknowledged by the public when the operation of Macau International Airport came into operation in December 1995. Even since the development, Macau being part of China which we enjoy a self-antimony with the one country two system governance, Macau enjoyed a vast opportunity, with traffic on both passengers and as well as airfreight movements. Since 1997, with the collaboration of our members, the growth of cargo handled in the Macau International Airport has been steadily increased and reckoned to be one of the world fastest growing airports. Tonnage has been encouraging during those days where Macau Airport also broke the record on handling 220,000 metric tons in 2004 during the pandemic of SARS where most of the cargoes were diverted from Hong Kong Airport. However, with Mainland China opening-up, cargo movement have been moving directly into mainland China by-passing Macau. Hence, cargo volume decline year on year, which most airfreight forwarders are facing a uphill task to keep up with the trend of evolving demographic movement, such affecting cargo movement in general.

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## MISSION

To enhance the relationship in the industry among fellow forwarders, uplift the level of professionalism and safeguard the interest of our fellow members.

To connect with worldwide freight association, exchange of industry practice experience, promoting with development of our freight industry with logistics and to enhance the economical growth of Macau.

To bridge the communications between the Government with our industry, coordinate the relationship and interest of all parties' concern.

## MAFFA MEMBERS

Any company engaging in freight forwarding business and logistics activities are welcome to become a member of the association, provided that the company observes the rules and regulations of the association.

The Association has 2 Committees, viz the Board of Executives Directors and Supervisory Board. With 7 Committee members in the Executive Board and 3 Committee Members in the Supervisory Board.



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On 23<sup>rd</sup> October 2018, the HZMB officially inaugurated by central government, on 24<sup>th</sup> October 2018, the bridge was opened to the public. The HZMB links three major cities Hong Kong, Zhuhai and Macau, which are geographically close but separated by water. With the bridge in place, travelling time between Macau, Zhuhai and Hong Kong cuts down from about four hours to 30 minutes on the road. The entire project has changed a new era in transportation and demographic of the Greater Bay Area designated in Guangdong region.



Air Cargo movement via Macau has seen increasing and with the promotion by subsidiary company Civil Aviation of Macau (CAM) and members of MAFFA. In last quarter of 2018, Qatar Airways' Freighter service and some scheduled chartered flights have since stopover Macau airport. Tonnage for the first quarter of Y2019 has been steadily moving uptrend and expected to have payload increasing steadily within these coming years.

Low Cost Carriers and Legacy carriers are increasing their flights to Macau and the numbers are growing. Giving the open sky policy by year 2020, many carriers are turning towards Macau as one of the airports in the region which cannot be ignored. Many inquiries especially major freight carriers are exploring the possibilities of landing here other than nearby airports namely HKG, SZX and CAN respectively. With lesser flights as compared with those airports as mentioned airports, Macau is undeniable the favorable choice for major players due to the autonomy city outside China.





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Please see below tables.

## Commercial Airfreight Traffic By Low Cost Carriers & Legacy Carriers:

	2018	(%)	2017	(%)
Legacy	34,671,455	83.53%	31,716,744	84.58%
LCC	6,834,235	16.47%	5,782,269	15.42%
<b>TOTAL</b>	<b>41,505,690</b>	<b>100.00%</b>	<b>37,499,013</b>	<b>100.00%</b>

## Major Cities Cargo Uplift

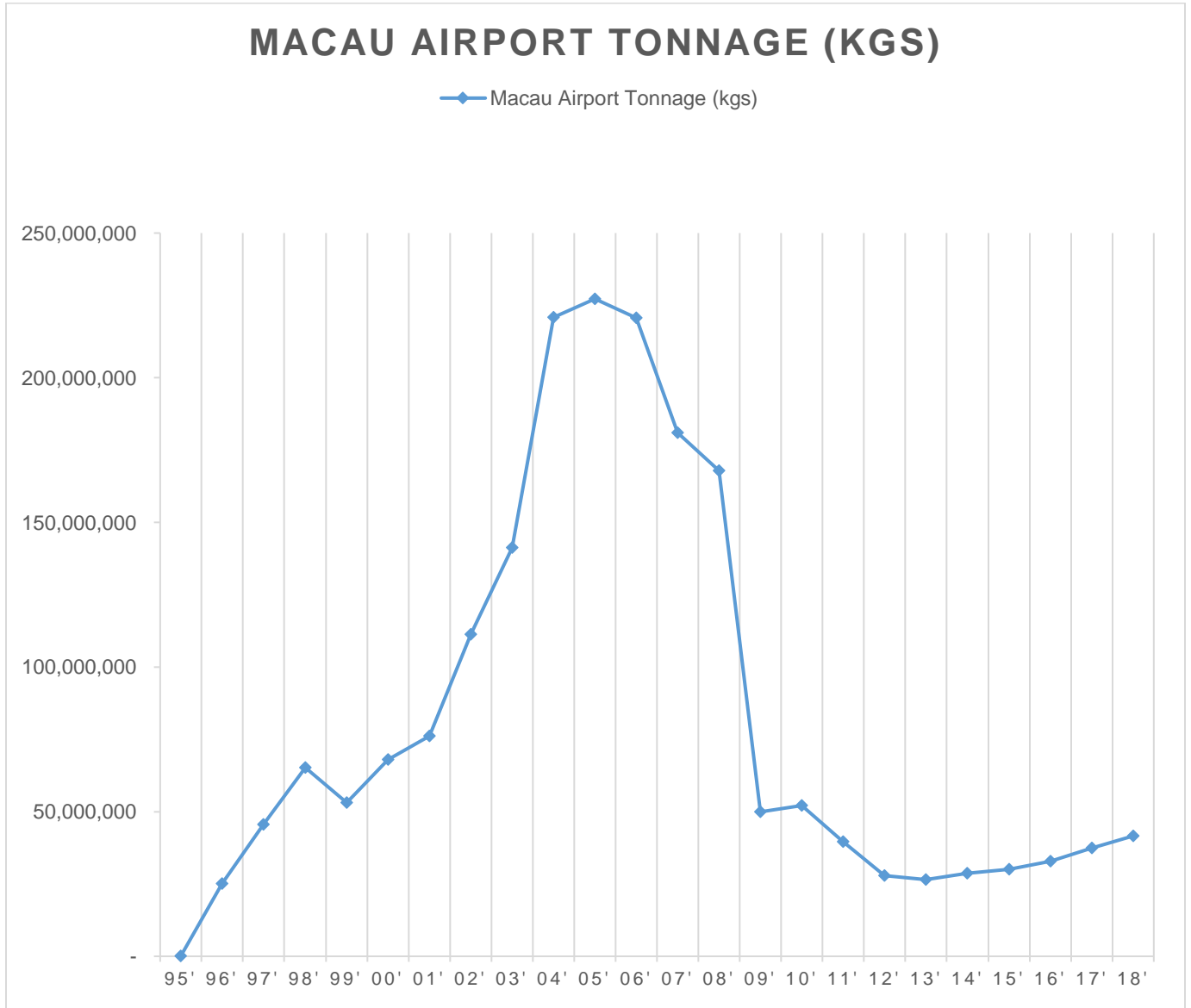
	2018	2017	(%)	Market Share in 2018
Taipei	15,589,582	14,738,753	5.77%	37.56%
Shanghai	1,795,910	2,135,928	-15.92%	4.33%
Osaka-kansai	1,252,489	1,217,104	2.91%	3.02%
Singapore	778,456	673,505	15.58%	1.88%
Kaohsiung	1,015,234	912,559	11.25%	2.45%
Hangzhou	1,376,134	1,156,243	19.02%	3.32%
K. Lumpur	3,091,404	1,740,319	77.63%	7.45%
Seoul-Incheon	1,389,649	1,297,496	7.10%	3.35%
Bangkok	2,060,689	2,442,492	-15.63%	4.96%
Tokyo-Narita	2,745,466	857,503	220.17%	6.61%
Other Cities	10,410,677	10,327,111	0.81%	25.08%
<b>Total:</b>	<b>41,505,690</b>	<b>37,499,013</b>	<b>10.68%</b>	
<b>Freighter:</b>	<b>4,772,547</b>	<b>756,322</b>	<b>531.02%</b>	<b>11.50%</b>
<b>Belly:</b>	<b>36,733,143</b>	<b>36,742,691</b>	<b>-0.03%</b>	<b>88.50%</b>



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History of the Macau Tonnage since 1995 till 2018.



Statistics has shown that 2018 tonnage with volume increased steadily.

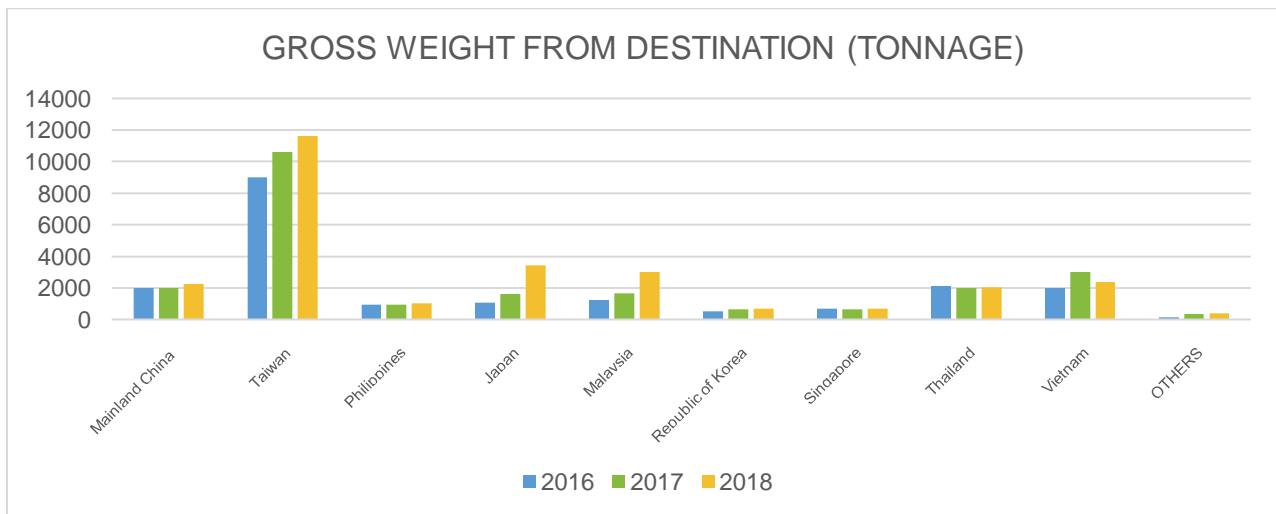
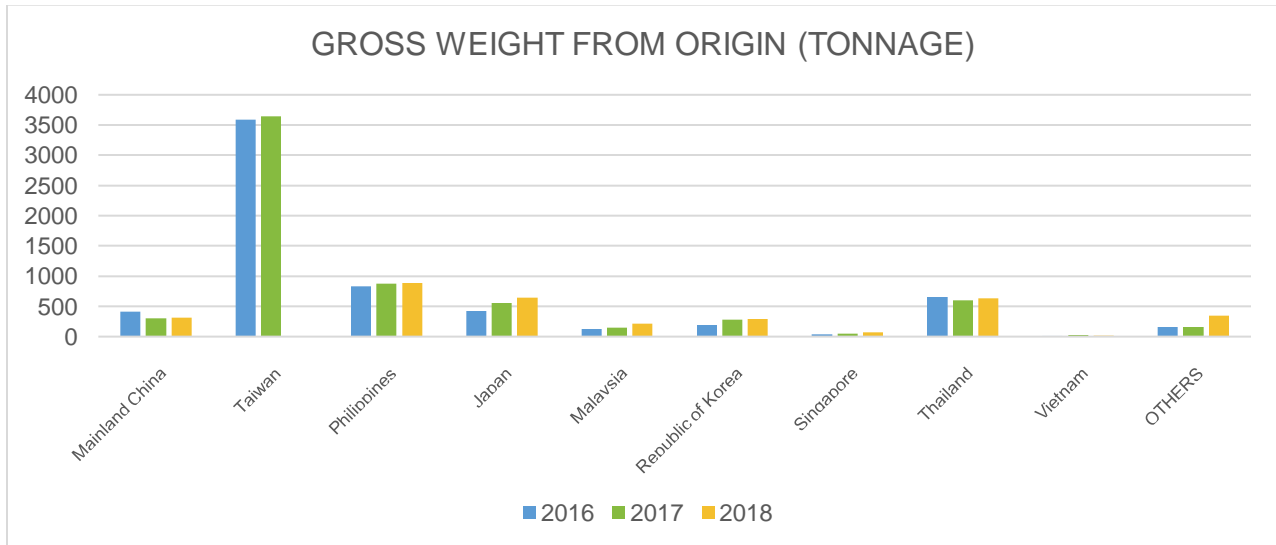


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## Gross Weight of Air Cargo Based on Tonnage

From Origin	2016	2017	2018	From Destination	2016	2017	2018
Mainland China	414	305	317	Mainland China	2001	1999	2238
Taiwan	3593	3648	3 663	Taiwan	8995	10593	11634
Philippines	830	876	889	Philippines	954	930	1007
Japan	423	553	642	Japan	1057	1601	3434
Malaysia	125	152	209	Malaysia	1230	1642	3018
Republic of Korea	191	279	289	Republic of Korea	498	655	688
Singapore	34	50	74	Singapore	673	623	703
Thailand	651	598	635	Thailand	2107	1995	2054
Vietnam	10	22	18	Vietnam	1986	2987	2376
OTHERS	156	160	346	OTHERS	121	332	369



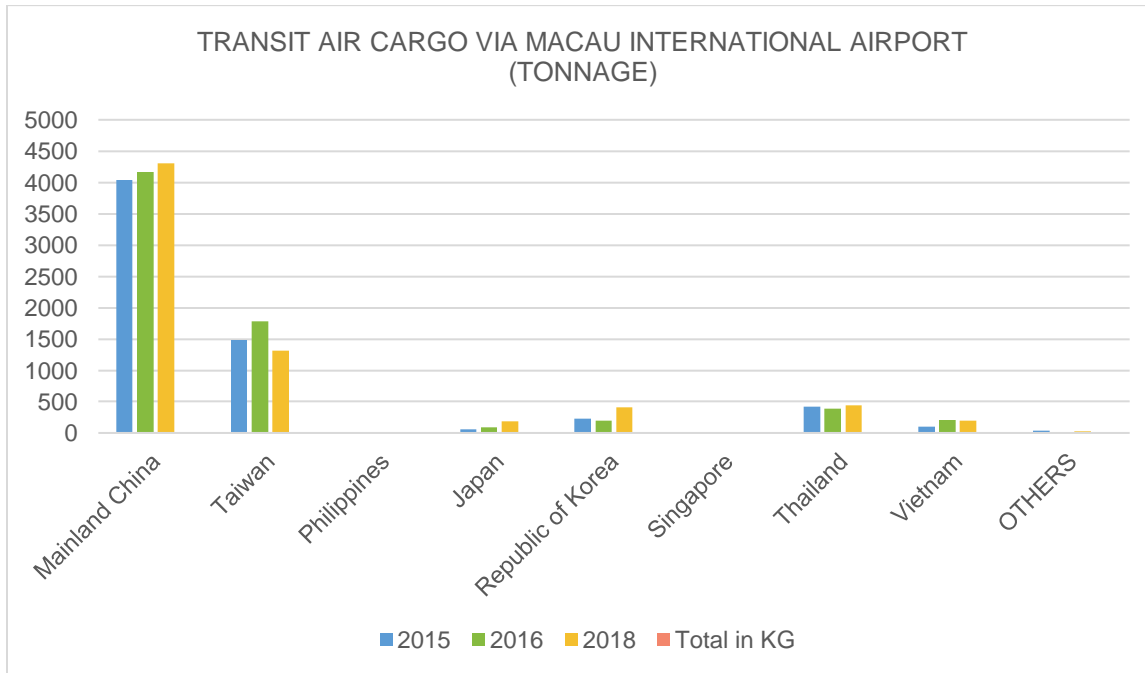


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## Transit Air Cargo Via Macau International Airport

FROM DESTINATION	2016	2017	2018
Mainland China	4170	4806	4309
Taiwan	1783	1411	1309
Philippines	5	5	
Japan	93	115	184
Republic of Korea	195	364	412
Singapore	3	0	
Thailand	387	592	444
Vietnam	202	199	198
OTHERS	4	2	21





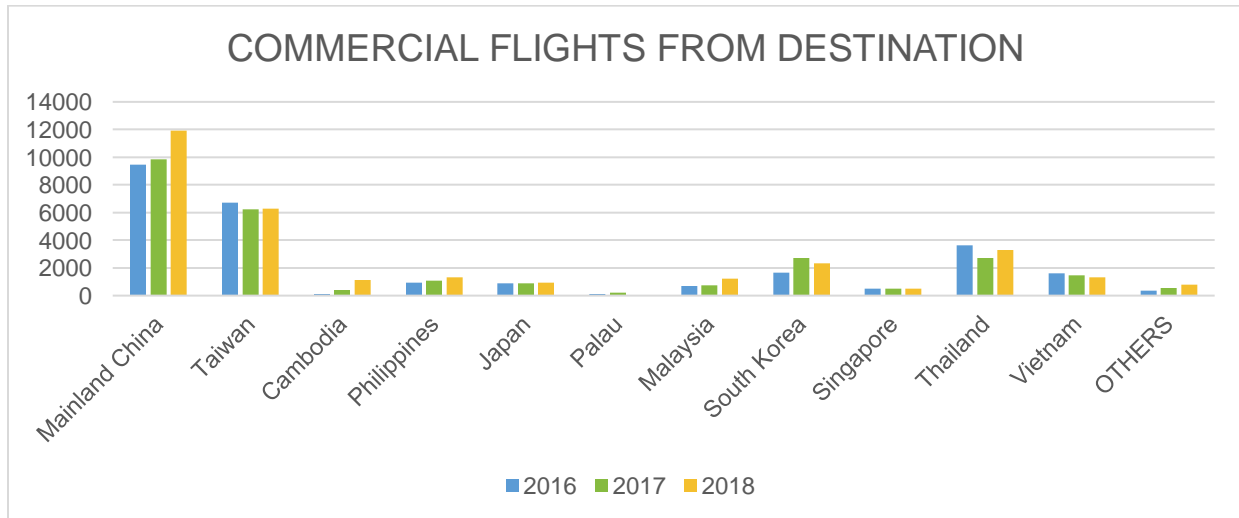
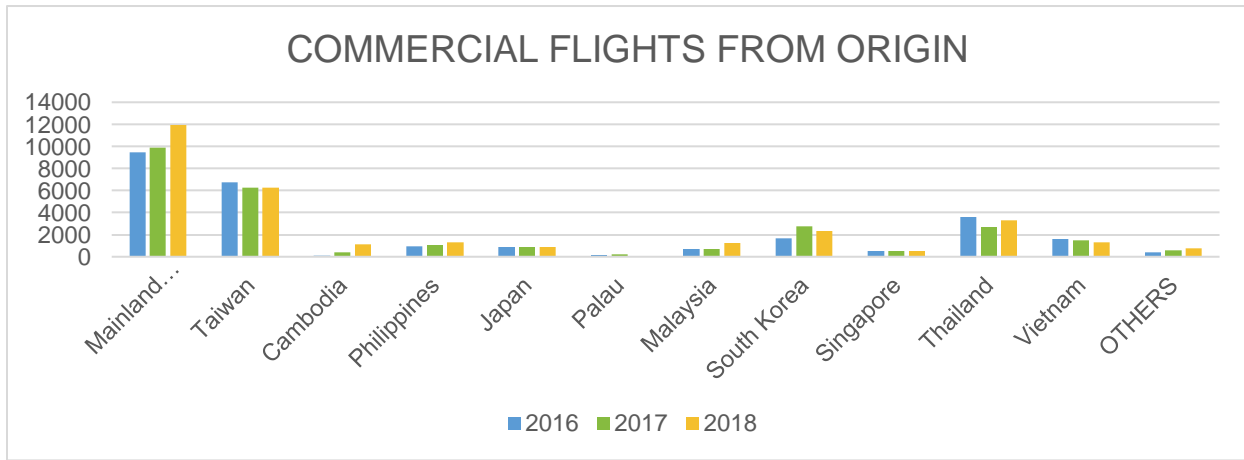


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## Commercial Flight Movements in Macau International Airport

From Origin	2016	2017	2018	From Destination	2016	2017	2018
Mainland China	9468	9872	11935	Mainland China	9470	9872	11945
Taiwan	6728	6241	6282	Taiwan	6728	6240	6287
Cambodia	109	422	1124	Cambodia	108	420	1127
Philippines	959	1060	1313	Philippines	960	1058	1319
Japan	906	900	910	Japan	903	901	925
Palau	132	231	--	Palau	133	232	--
Malaysia	700	705	1226	Malaysia	705	723	1216
South Korea	1670	2744	2318	South Korea	1671	2741	2317
Singapore	517	497	507	Singapore	513	499	506
Thailand	3620	2718	3282	Thailand	3626	2721	3287
Vietnam	1614	1464	1335	Vietnam	1614	1464	1334
OTHERS	386	561	776	OTHERS	377	556	769

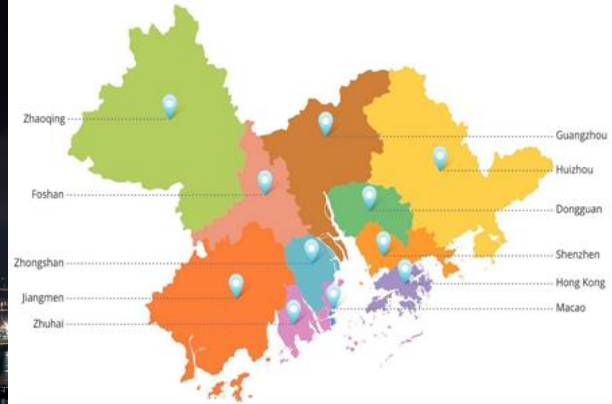




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## Greater Bay Area – Guangdong



By the year 2035, the region would have developed an economic system largely driven by innovation.

The blueprint involves linking 11 cities within a two-hour radius of Hong Kong. It comprises Hong Kong, Macau, Guangzhou, Shenzhen, Zhuhai, Dongguan, Huizhou, Zhongshan, Foshan, Zhaoqing and Jiangmen.

Guangzhou, Shenzhen, Hong Kong and Macau were identified as core engines for driving growth in nearby regions. The road map calls for Hong Kong to build on its status as an international financial, transportation and trade hub. The city would focus on offshore yuan, international asset management and risk management, as well as developing innovation and technology industries.

Guangzhou would strengthen its function as an international commerce and industry hub while Shenzhen would leverage its strength as home to China's innovation and technology giants and be turned into a special economic zone.

Macau would focus on being the "world centre for tourism and leisure" and act as a bridge to Portuguese-Speaking Countries (PSCs). The Plan designates Macau as a tourism hub and platform for trade with the PSCs. Macau serve as an entry point for the PSCs into the mainland market and should expedite the development of a food trading and distribution hub for PSCs. Cold Chain Logistics plays a crucial role for flesh catch and perishable to cater for the tourism sector as well as the exhibitions and conference sector. Local infrastructures are slowly developing to cater the needs for the entire city on pursuing the goal for becoming the world centre for tourism and leisure.



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