



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 2020-2021

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Zoom Teleconference

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Introduction

MAFFA has been established since June 1996 as then was named the Macau Air Freight Forwarding (Logistics) Association. 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 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 had been steadily increased and reckoned to be one of the world fastest growing airports. Tonnage had 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 forwarder, 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 two Committees, the Board of Executives Directors and Supervisory Board. With seven Committee members in the Executive Board and three Committee members in the Supervisory Board.

Macau Traffic Highlights

In 2020, the outbreak of COVID-19 hit hard on global aviation, Macau International Airport recorded the largest traffic slumps ever since its opening in 1995, declines started at rocket pace since February onwards and 99% of its monthly passengers were lost during April to August, which significant impact the cargo space from passengers' flight. New territory entry policy were imposed in Macau by the end of August, the Airport started resumed some of its traffic during the last quarter, In total, the Airport recorded 1,173,230 passengers and 16,962 aircraft movement, and 33,347 tons of cargo. When compared to 2019, all dropped in a double-digits basis – 88% (Passengers), 78%(Movements) and 21% (Cargo).

In 2020, 49% of the passengers were from the PRC (579,262 passengers) whereas 16% from Taiwan, China (181,961 passengers). The remaining 35% were from Republic of Korea, Thailand, Vietnam, Philippines, Japan, Malaysia, Cambodia, Singapore and etc. As of December 2020, most of the regular flights were operated for the PRC and Taiwan, China, transfer service were ceased and flights to/from cities other than these two territories, were mainly operated in charter basis.

The ten major cities in 2020 were Shanghai, Taipei, Seoul, Bangkok, Hangzhou, Beijing, Manila, Nanjing, Kuala Lumpur and Kaohsiung all slumped dramatically.

Registered cargo throughput of 2020 was 33,347 tonnes, among which Japan (13, 546 tonnes) as the largest cargo market, accounted 41% of the total freights and increased by 27%. Then followed by Taiwan, China (5,882 tonnes), accounted 18% and decreased by 57%. Starting from September onwards, throughputs to India grew and reported 2,560 tonnes annually, accounted 8% of the total. The Philippines (2,316 tonnes) and PRC (1,470 tonnes) altogether accounted 11% of the total freights and both posted notable slumps: the Philippines (-9%) and PRC (-73%).

The top five cargo cities in 2020 were Nagoya (n.a.), Taipei (-55%), Delhi (n.a.), Manila (20%) and Doha (-1%). Nagoya and Delhi were new cargo destinations, Manila showed positive trend whereas the other two marked notable retreat during the year.

In 2020, 46% of the total passengers were handled during two peak periods (12pm to 2pm) and (4pm to 8pm). Given air travel declined notably, freighters carried about 71% of the total throughputs in 2020. Airbus 321, Airbus 320 and Boeing 738 were the major aircraft in 2020.

Commercial Airfreight Traffic By Low Cost Carriers & Legacy Carriers:

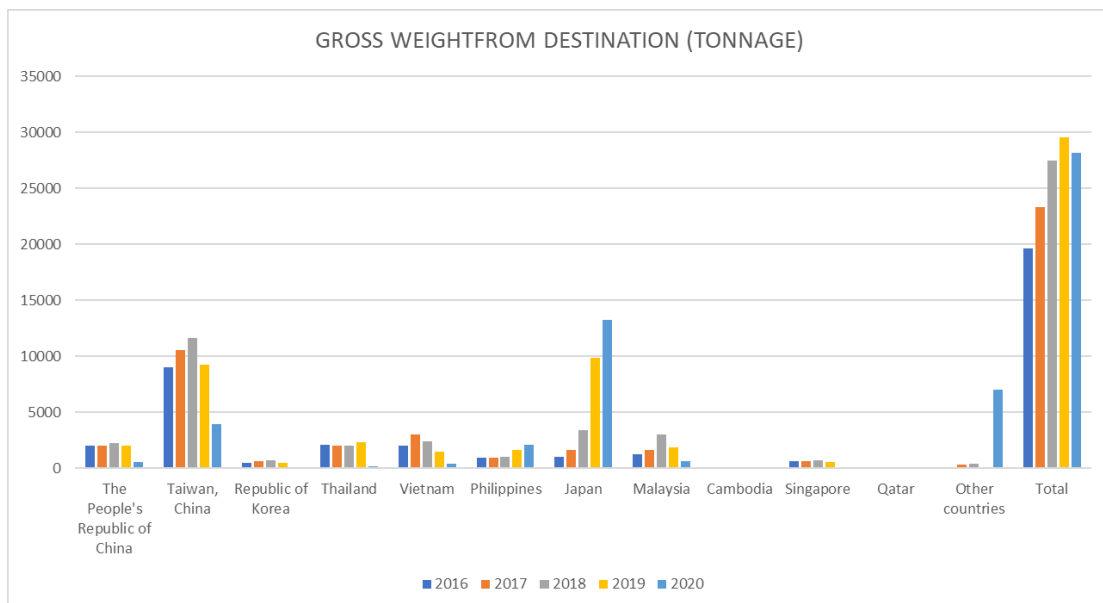
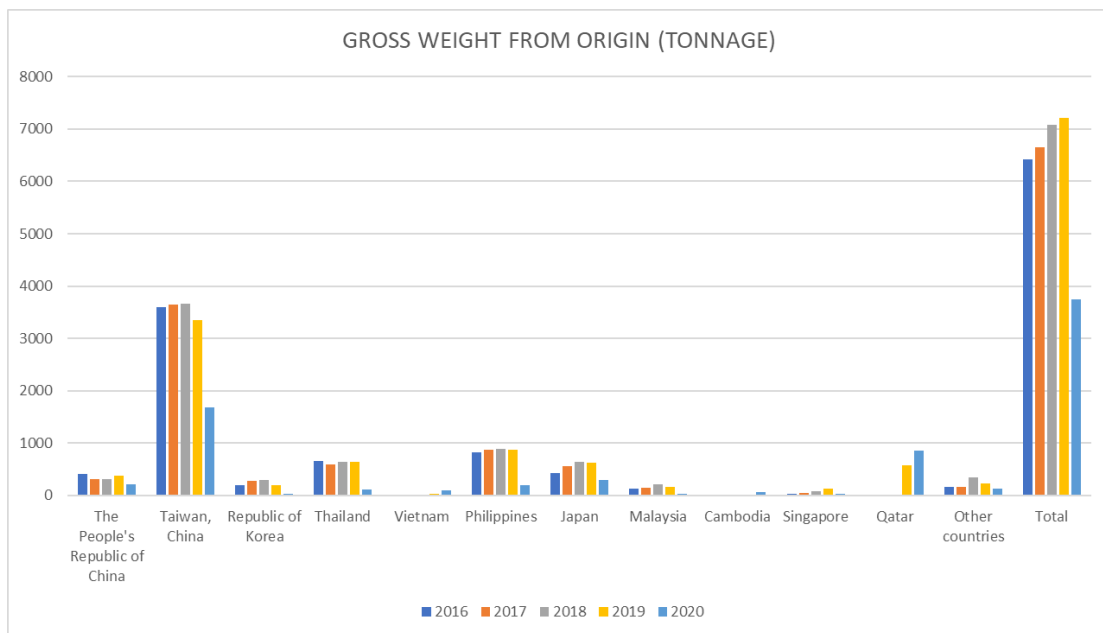
	2019	(%)	2020	(%)
Legacy	34,659,758	82.09%	32,739,603	98.18%
LCC	7,563,409	17.91%	607,074	1.82%
Total	42,223,167	100.00%	33,346,677	100.00%

Major Cities Cargo Uplift

	2020	2019	(%)	Market Share in 2020
Taipei	5,805,545	12,825,029	-54.73%	17.41%
Shanghai	365,473	1,331,311	-72.55%	1.10%
Osaka-Kansai	217,404	1,062,708	-79.54%	0.65%
Delhi	2,559,899	0		7.68%
Manila	2,314,265	1,923,162	20.34%	6.94%
Hangzhou	195,215	1,018,671	-80.84%	0.59%
K.Lumpur	651,311	1,934,401	-66.33%	1.95%
Seoul-incheon	93,779	979,448	-90.43%	0.28%
Bangkok	260,933	1,218,604	-78.59%	0.78%
Tokyo-Narita	346,463	6,340,054	-94.54%	1.04%
Nogoya	12,968,690	3,023,899	328.87%	38.89%
Almaty	1,442,486	0		4.33%
Islamabad	1,070,757	0		3.21%
Other Cities	5,054,457	10,565,880	-52.16%	15.16%
Total:	33,346,677	42,223,167	-21.02%	
Freighter:	23,839,196	10,471,791	127.65%	71.49%
Belly:	9,507,481	31,751,376	-70.06%	28.51%

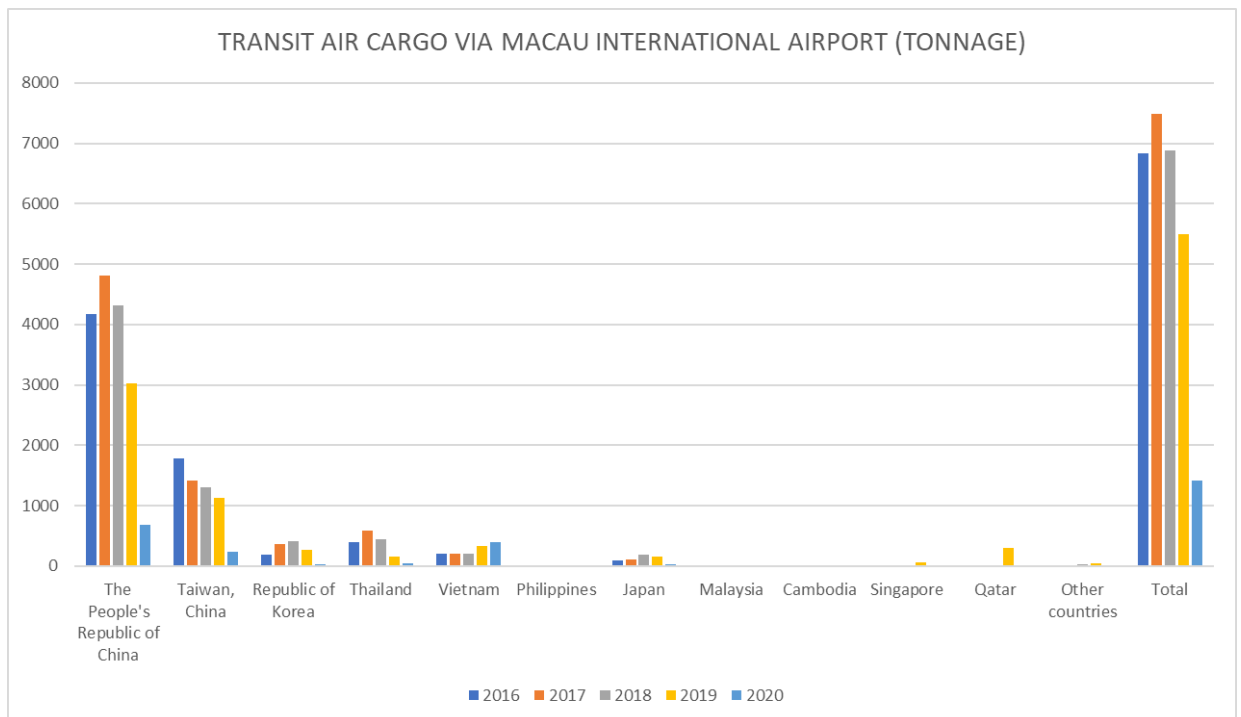
Gross Weight of Air Cargo Based on Tonnage

Form Origin	2016	2017	2018	2019	2020	From Destination	2016	2017	2018	2019	2020
The People's Republic of China	414	305	317	385	212	The People's Republic of China	2001	1999	2238	2017	577
Taiwan, China	3593	3648	3663	3348	1675	Taiwan, China	8995	10593	11634	9277	3979
Republic of Korea	191	279	289	189	35	Republic of Korea	498	655	688	517	34
Thailand	651	598	635	646	113	Thailand	2107	1995	2054	2305	215
Vietnam	10	22	18	35	90	Vietnam	1986	2987	2376	1493	377
Philippines	830	876	889	869	202	Philippines	954	930	1007	1664	2098
Japan	423	553	642	626	301	Japan	1057	1601	3434	9853	13223
Malaysia	125	152	209	167	39	Malaysia	1230	1642	3018	1839	615
Cambodia	0	0	0	0	65	Cambodia	0	0	0	9	6
Singapore	34	50	74	138	26	Singapore	673	623	703	523	52
Qatar	0	0	0	579	865	Qatar	0	0	0	0	0
Other countries	156	160	346	237	129	Other countries	121	332	369	51	7015
Total	6427	6643	7082	7219	3752	Total	19622	23357	27521	29548	28191



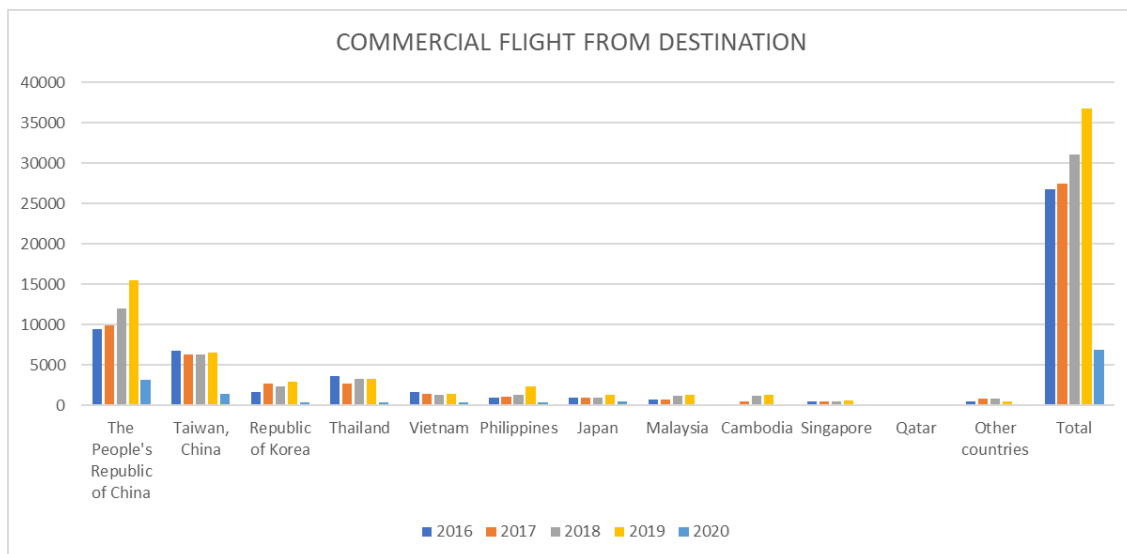
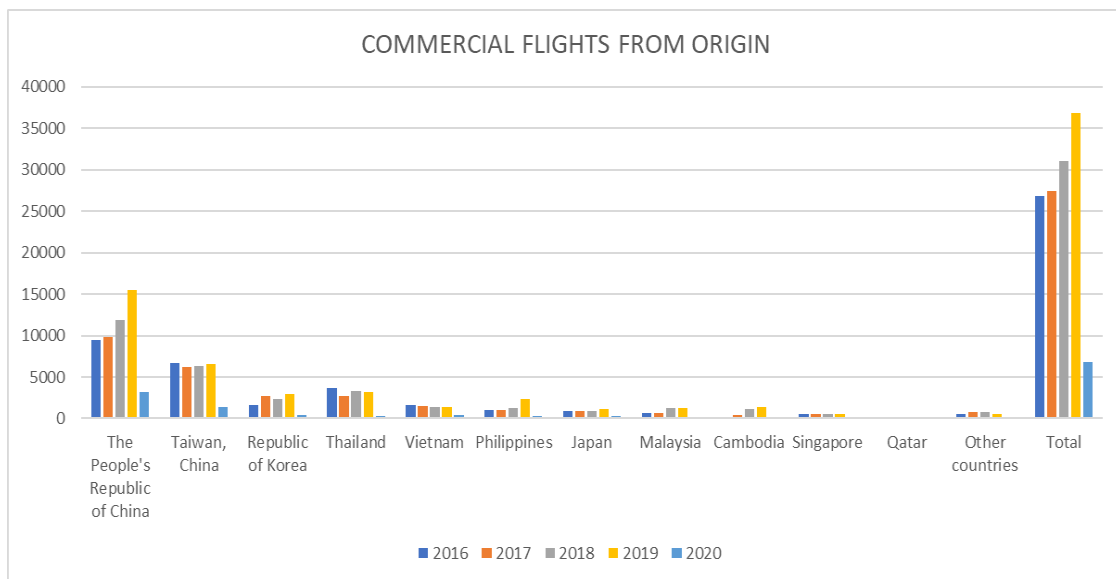
Transit Air Cargo Via Macau International Airport

From Destination	2016	2017	2018	2019	2020
The People's Republic of China	4170	4806	4309	3028	681
Taiwan, China	1783	1411	1309	1126	228
Republic of Korea	195	364	412	273	25
Thailand	387	592	444	157	44
Vietnam	202	199	198	334	392
Philippines	5	5	0	9	15
Japan	93	115	184	163	22
Malaysia	0	0	0	2	1
Cambodia	0	0	0	0	0
Singapore	3	0	0	58	0
Qatar	0	0	0	299	1
Other countries	4	2	21	39	0
Total	6842	7494	6877	5488	1409



Commercial Flight Movements in Macau International Airport

Form Origin	2016	2017	2018	2019	2020	From Destination	2016	2017	2018	2019	2020
The People's Republic of China	9468	9872	11935	15487	3143	The People's Republic of China	9470	9872	11945	15496	3143
Taiwan, China	6728	6241	6282	6535	1371	Taiwan, China	6728	6240	6287	6531	1370
Republic of Korea	1670	2744	2318	2919	360	Republic of Korea	1671	2741	2317	2919	360
Thailand	3620	2718	3282	3231	348	Thailand	3626	2721	3287	3230	346
Vietnam	1614	1464	1335	1382	396	Vietnam	1614	1464	1334	1374	304
Philippines	959	1060	1313	2347	340	Philippines	960	1058	1319	2358	344
Japan	906	900	910	1130	259	Japan	903	901	925	1254	457
Malaysia	700	705	1226	1263	168	Malaysia	705	723	1216	1262	170
Cambodia	109	422	1124	1330	125	Cambodia	108	420	1127	1328	132
Singapore	517	497	507	586	83	Singapore	513	499	506	550	78
Qatar	0	0	0	86	98	Qatar	0	0	0	0	0
Other countries	518	792	776	500	145	Other countries	510	788	769	496	136
Total	26809	27415	31008	36796	6836	Total	26808	27427	31032	36798	6840



2020 & 2021 Highlights and Prospectives

- Guangzhou & Macau Customs successfully launched “Cross Border One Electronic Seal” in Q3 2020, that would facilitate the living supplies & commodities importing from China, and foresee somewhat benefit to the export cargo in the year of 2021, MAFFA representative expressed several opinions to Macau Customs on how to improve the operations & process flow.
- MAFFA progressive supported it’s member to negotiate with Macau International Airport entity in order to seek for better shipment acceptance process flow for both passenger air cargo & freighter operations.
- MAFFA committee suggested that it’s necessary to make use of “Hanqin,Guangzhou & Macau Cooperation Zone” & “Nanhai Free Trade Port” to strengthen and support Macau’s logistics service, it has potential to develop Macau as logistic hub for promoting Macau as “World Centre for Tourism and Lesiure” as well as “Eastern Las Vega”.
- New Macau Customs Clearance System had been launched to Macau International Airport in Dec 2020, MAFFA helped members to feedback the operations issue to Customs and seek for improvements.
- Updates & progress on HK-Zhuhai-Macau Bridge:
The Bridge will be targeted to operate it’s cargo transportation between HK & Macau in 2024 because it still take time to build up the transit station at Macau side with transit and clearance function, and need time to restructure Macau entrance of the Bridge, in the meantime MAFFA suggested 1) build up the public warehouse in case to handle the on-hold cargo which there’s no sufficient shipping documentation, and on-hold dangerous cargo as well for further arrangement, 2) sufficient parking space to transit the cargo smoothly , 3) Facilitate shipment clearance process between HK & Macau.
- MAFFA will continue to act as important role to feedback constructive opinion from members to Macau Government as well as China entity, in order to align and connect the development of Greater Bay Area (HK, Macau, Guangzhou, Zhuhai, Dongguan, Huizhou, Zhongshan, Foshan, Zhaoqing and Jiangmen) to Portuguese-Speaking Countries (PSCs) as mentioned in our previous annual report.



Thank You !

End of Report

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