

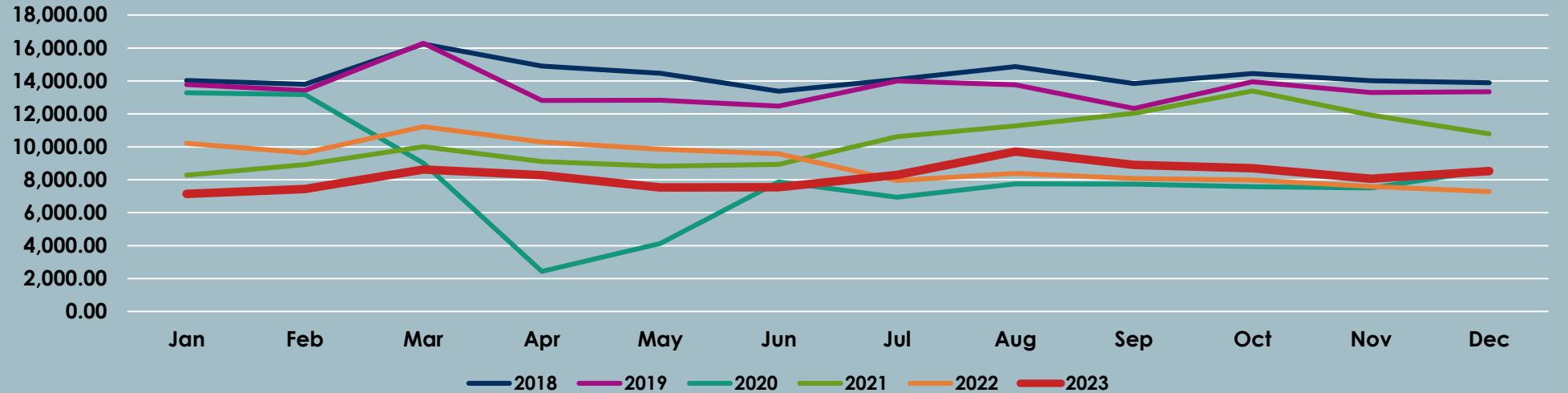
Sri Lanka Logistics & Freight Forwarders Association

2023 Statistics

Source :

- Sri Lankan Airline
- SLPA

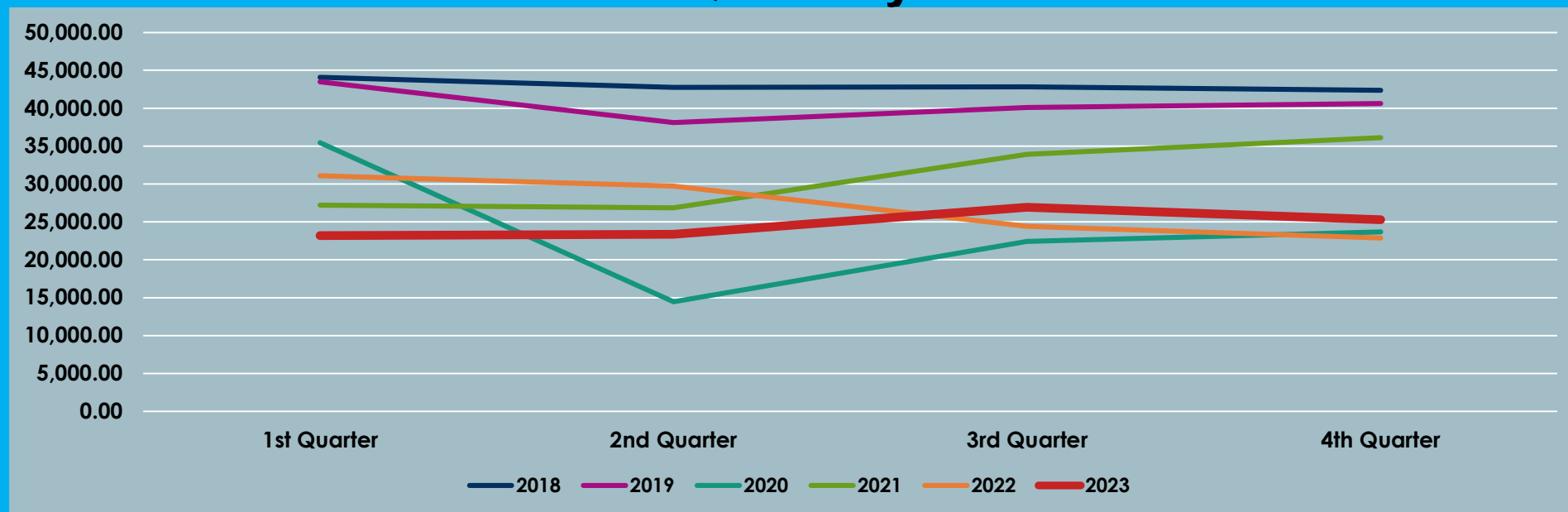
TOTAL AIR EXPORTS (IN TONS) MONTH ON MONTH



	2018	2019	2020	2021	2022	2023
Jan	14,028.34	13,785.71	13,279.38	8,286.47	10,207.39	7,143.05
Feb	13,801.10	13,417.90	13,174.61	8,925.35	9,634.57	7,444.76
Mar	16,244.86	16,292.42	9,016.18	10,010.79	11,235.13	8,617.84
Apr	14,901.63	12,808.03	2,440.22	9,101.77	10,285.85	8,277.48
May	14,472.57	12,822.10	4,135.50	8,820.02	9,851.76	7,526.58
Jun	13,375.31	12,478.47	7,876.50	8,929.19	9,576.66	7,552.83
Jul	14,094.70	13,997.98	6,944.16	10,624.76	7,945.45	8,301.19
Aug	14,868.58	13,766.30	7,744.63	11,272.76	8,390.29	9,717.79
Sep	13,845.34	12,332.20	7,733.17	12,028.00	8,075.45	8,906.63
Oct	14,457.10	13,958.57	7,581.66	13,388.62	7,980.28	8,703.21
Nov	14,011.27	13,304.60	7,494.98	11,925.73	7,593.82	8,066.42
Dec	13,894.25	13,343.25	8,597.94	10,795.49	7,291.88	8,528.15
TOTAL	171,995.03	162,307.53	96,018.92	124,108.95	108,068.53	98,785.92

- Compared to 2022, 2023 Oct / Nov / Dec has shown minor increased in monthly numbers.
- Overall, when looking at the performance of the entire year, it is a very minor increase from 2020 compared to previous years. The reasons for this downturn were the huge downturn in the garment sector and import restrictions.

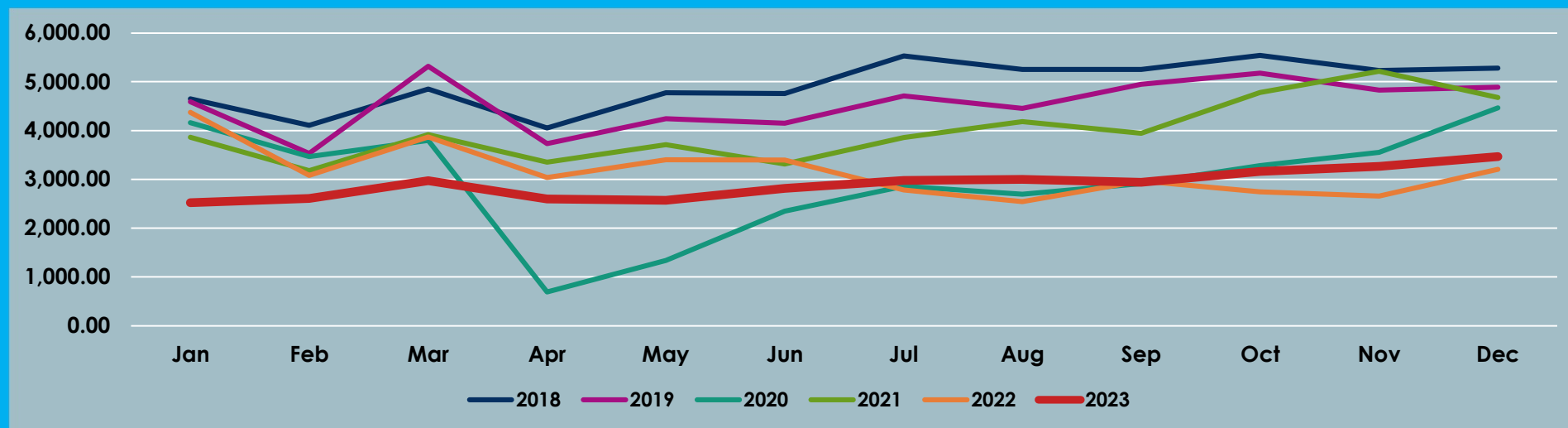
Total Air Exports (In Tons) Quarterly



	2018	2019	2020	2021	2022	2023
1st Quarter	44,074.30	43,496.02	35,470.17	27,222.61	31,077.09	23,205.65
2nd Quarter	42,749.50	38,108.60	14,452.22	26,850.98	29,714.27	23,356.89
3rd Quarter	42,808.61	40,096.48	22,421.96	33,925.52	24,411.19	26,925.61
4th Quarter	42,362.61	40,606.42	23,675.47	36,109.84	22,865.98	25,297.77
TOTAL	171,995.02	162,307.52	96,019.82	124,108.95	108,068.53	98,785.92

- Looking at the last 5 years, Q4 of 2023 will see growth only higher than 2022 and 2020. Compared to other years, the data for Q4 2023 is very low.
- The reasons for this very slow growth curve are many garment factories leaving Sri Lanka and going to other countries, and the very rapid changes in the price of infrastructure. With this, the price of the product is not at a certain level because the manufacturers have not been able to set a certain price. Due to this, the demand for Sri Lankan products has decreased.

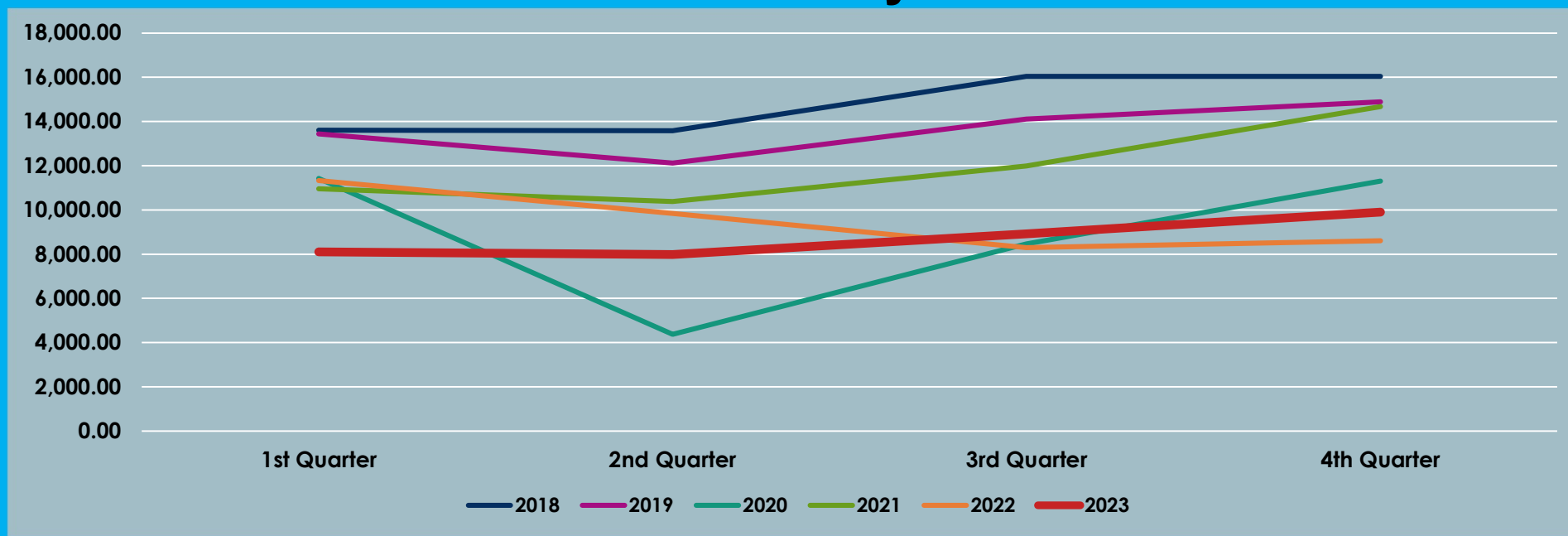
Total Air Imports (In Tons) Month on Month



	2018	2019	2020	2021	2022	2023
Jan	4,649.34	4,590.66	4,163.02	3,865.25	4,373.74	2,522.41
Feb	4,104.60	3,530.99	3,467.65	3,177.57	3,081.75	2,608.16
Mar	4,852.32	5,320.53	3,797.24	3,914.50	3,870.15	2,971.05
Apr	4,055.56	3,733.33	693.71	3,353.93	3,036.41	2,596.85
May	4,774.01	4,242.23	1,337.94	3,711.17	3,401.47	2,570.28
Jun	4,757.45	4,150.59	2,348.74	3,312.30	3,397.17	2,816.53
Jul	5,526.74	4,706.83	2,855.98	3,859.50	2,781.64	2,976.63
Aug	5,252.79	4,454.15	2,698.05	4,182.14	2,543.83	2,998.65
Sep	5,251.96	4,948.86	2,911.15	3,943.50	2,964.78	2,937.76
Oct	5,539.59	5,178.20	3,280.80	4,778.13	2,743.05	3,162.02
Nov	5,228.63	4,827.20	3,553.66	5,215.43	2,656.84	3,266.76
Dec	5,278.39	4,886.43	4,466.68	4,678.77	3,203.43	3,469.85
TOTAL	59,271.38	54,569.99	35,574.62	47,992.19	38,054.26	34,896.95

- The imports in the months of Oct, Nov, Dec in 2023 has seen a very minor increase in comparison with 2022, but in comparison with 2018, 2019, 2020, 2021, the imports in the months of Oct, Nov, Dec 2023 is very low. Which mean even in Covid period of 2020 did imports more than this year.
- The reason behind this decreasing would be import restriction that implanted by the LK government, the reduction of sea freight rates and the rapid price fluctuation of infrastructure.

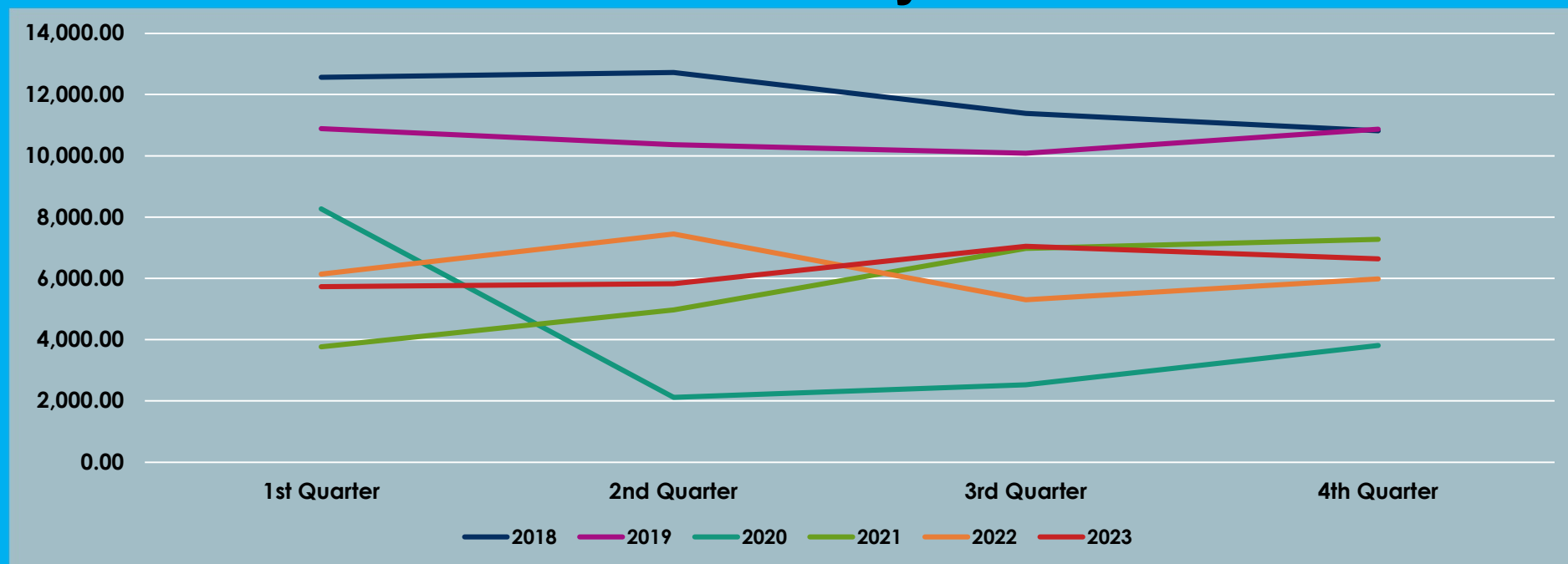
Total Air Imports (In Tons) Quarterly



	2018	2019	2020	2021	2022	2023
1st Quarter	13,606.26	13,442.18	11,427.91	10,957.32	11,325.64	8,101.62
2nd Quarter	13,587.01	12,126.14	4,380.39	10,377.40	9,835.05	7,983.66
3rd Quarter	16,031.50	14,109.84	8,465.18	11,985.14	8,290.25	8,913.04
4th Quarter	16,046.61	14,891.83	11,301.14	14,672.33	8,603.32	9,898.63
TOTAL	59,271.39	54,569.99	35,574.62	47,992.19	38,054.26	34,896.95

- A clear increase can be seen in Q4 compared to other Quarters of 2023.
- The main reason for this could be the removal of import restrictions.
- But in comparison with other years, although the year 2023 shows an increase compared to the year 2022, it is very low compared to the years 2018, 2019, 2020, 2021.

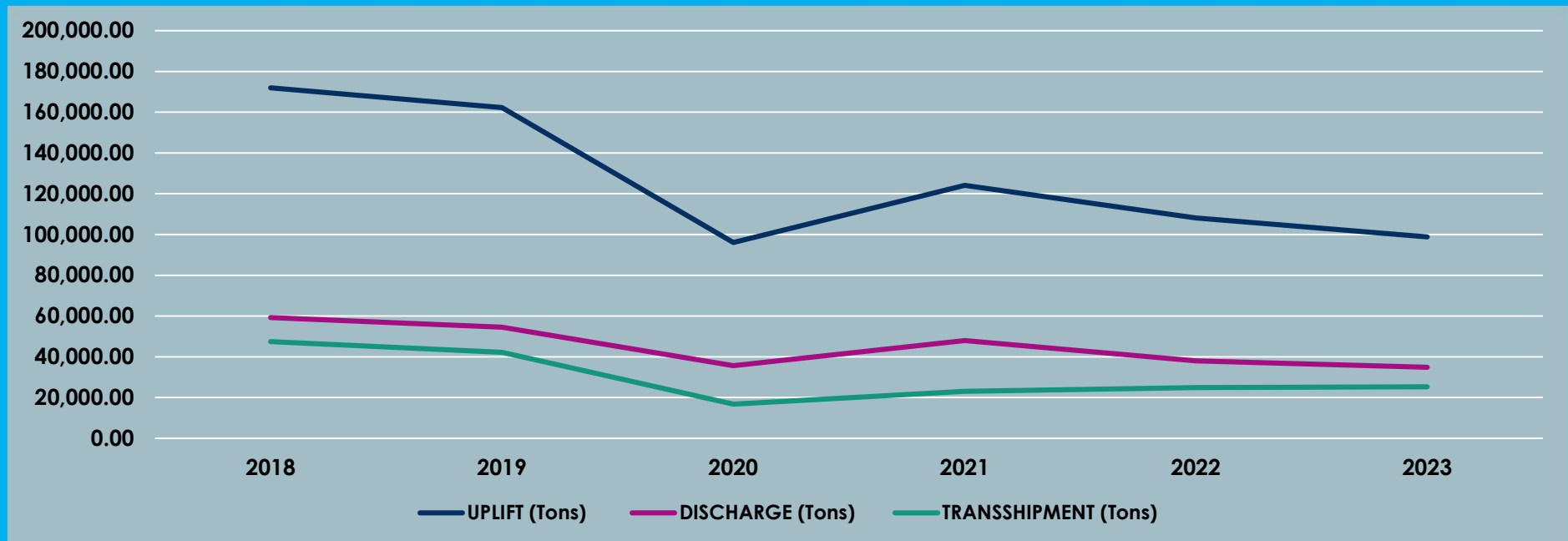
Total Air Transshipments (In Tons) Quarterly



	2018	2019	2020	2021	2022	2023
1st Quarter	12,560.46	10,890.86	8,268.93	3,765.81	6,138.50	5,727.79
2nd Quarter	12,720.85	10,366.65	2,116.53	4,971.27	7,451.95	5,826.13
3rd Quarter	11,380.16	10,084.46	2,523.25	6,979.10	5,300.03	7,052.71
4th Quarter	10,815.24	10,869.28	3,809.29	7,279.39	5,981.29	6,637.10
TOTAL	47,476.71	42,211.25	16,718.00	22,995.57	24,871.77	25,243.73

- Compared to the 2020, 2022 years, Q4 of 2023 can see a huge increase.
- But in comparison with the years 2018 2019 2021, it is a big setback. Due to the reasons for this, the continuous technical faults in UL flights greatly affected the decrease in demand.

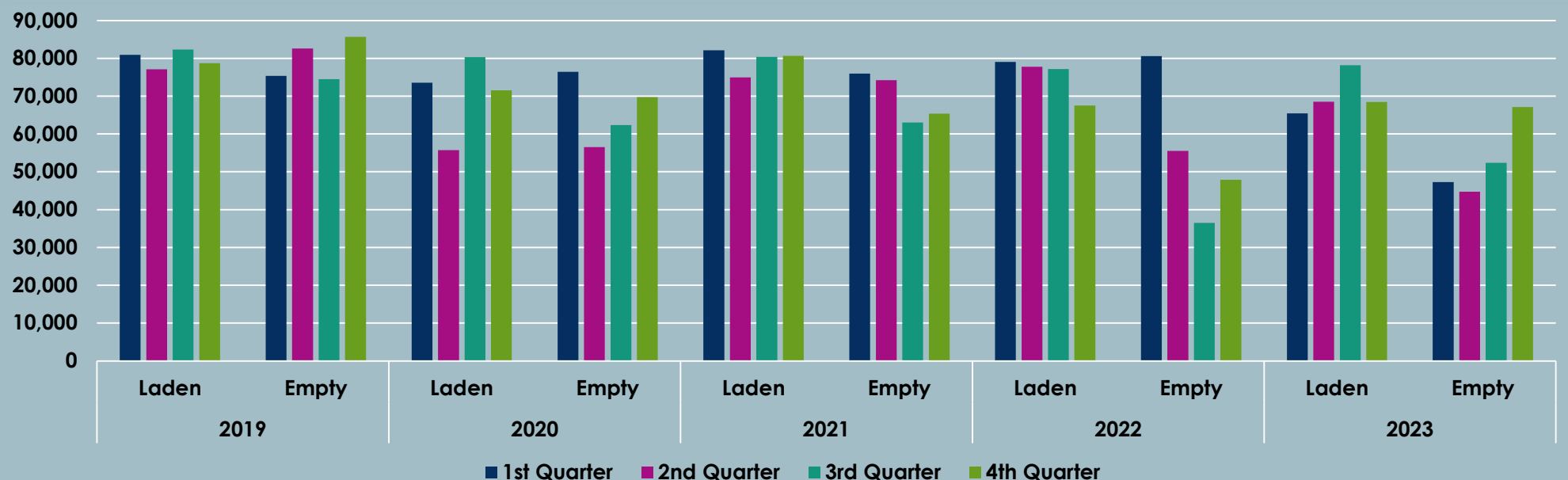
Air Freight Throughput (Exports, Imports & Transshipments) in Ton's Yearly



	UPLIFT (Tons)	DISCHARGE (Tons)	TRANSSHIPMENT (Tons)	TTL (Tons)
2018	171,995.03	59,271.38	47,476.71	278,743.12
2019	162,307.53	54,569.99	42,211.25	259,088.77
2020	96,019.82	35,574.52	16,717.21	148,311.55
2021	124,108.95	47,992.19	22,995.58	195,096.72
2022	108,068.53	38,054.26	24,871.77	170,994.56
2023	98,785.92	34,896.95	25,243.73	158,926.60

- Data shown for the years from 2018 to 2023.
- In addition to the facts mentioned in the above slide, the fall in the rates of the ocean freight industry, rapid price fluctuation of infrastructure has also had a strong impact on the collapse of the air freight industry.

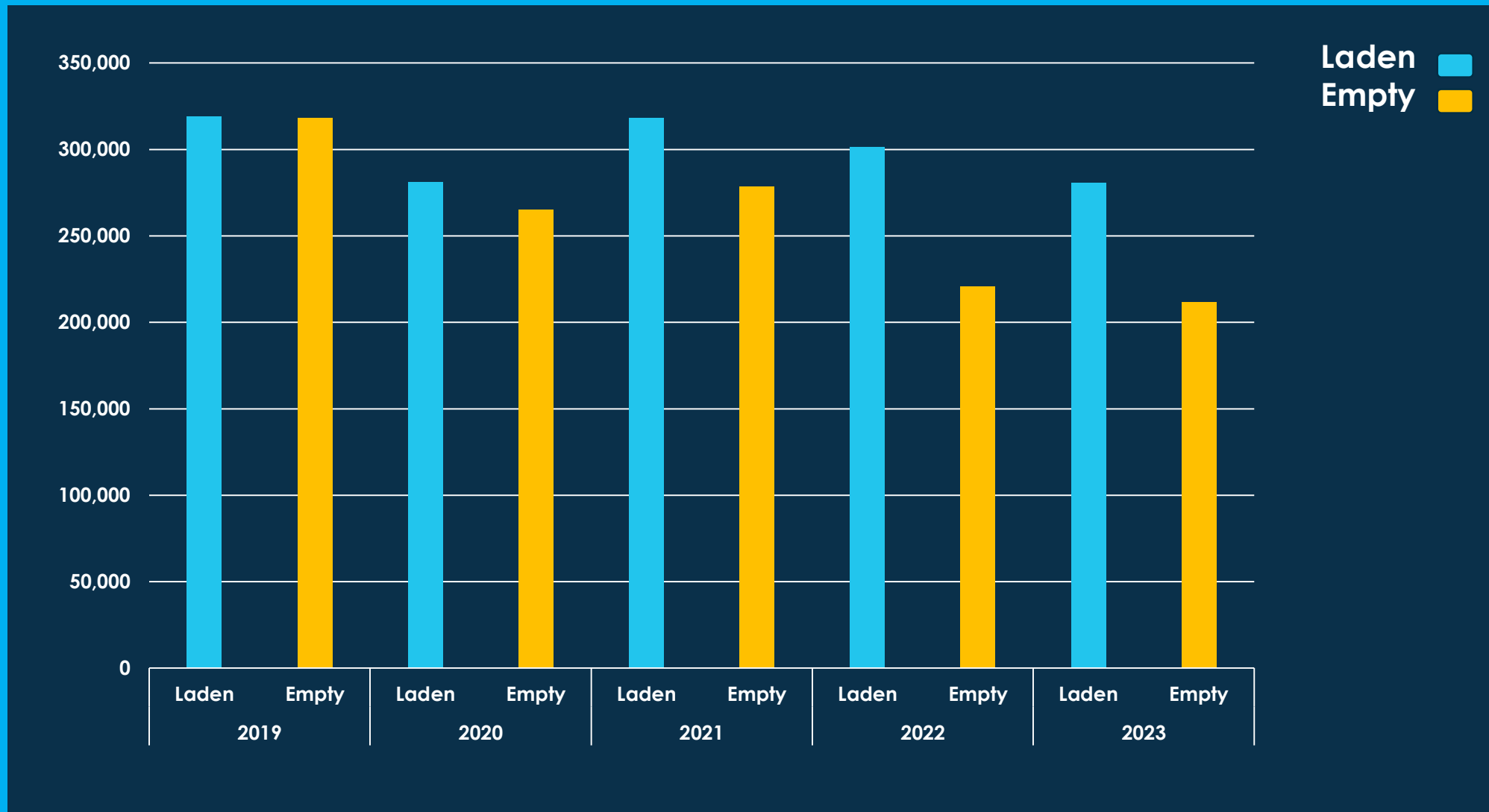
Total Ocean Exports in TEUs Quarterly



	2019		2020		2021		2022		2023	
	Laden	Empty	Laden	Empty	Laden	Empty	Laden	Empty	Laden	Empty
1st Quarter	80,896	75,381	73,563	76,440	82,132	75,953	79,059	80,554	65,424	47,247
2nd Quarter	77,125	82,566	55,711	56,508	74,942	74,195	77,751	55,535	68,502	44,704
3rd Quarter	82,320	74,483	80,291	62,341	80,409	63,011	77,143	36,462	78,140	52,376
4th Quarter	78,697	85,654	71,512	69,722	80,623	65,355	67,494	47,892	68,423	67,138
Total	319,038	318,084	281,077	265,011	318,106	278,514	301,447	220,443	280,489	211,465

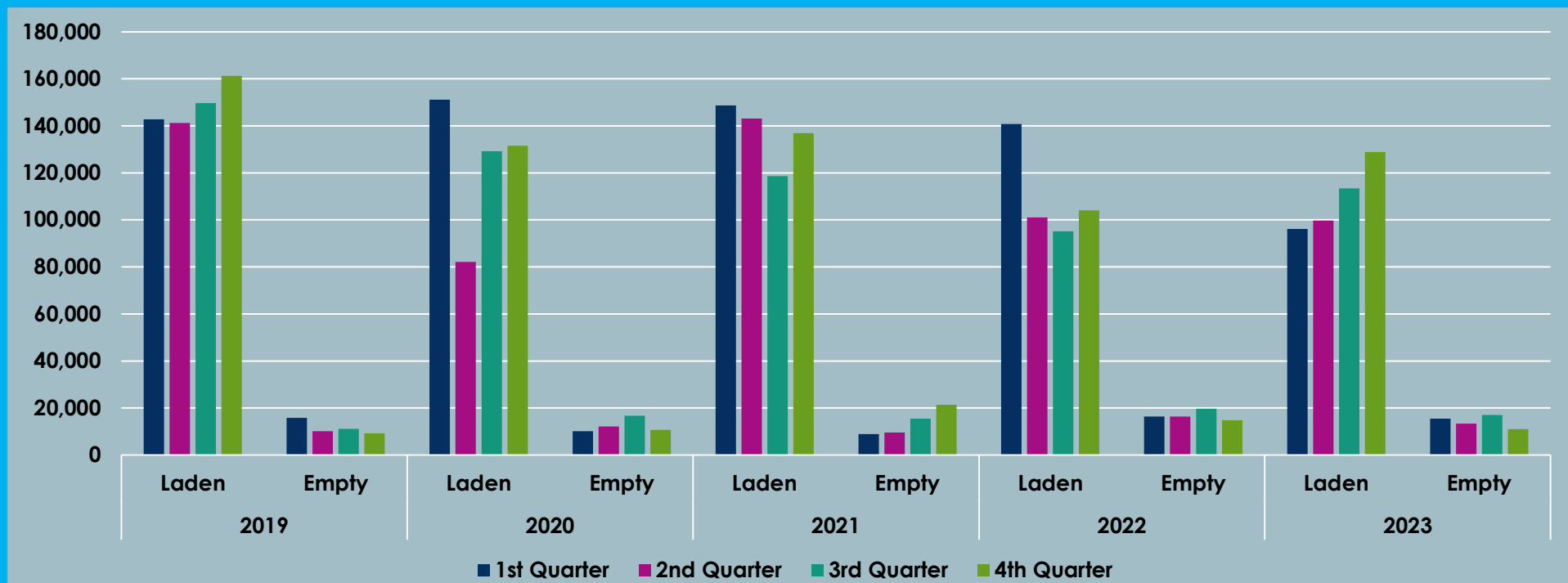
- Laden containers of Q4 in 2023 has shows minor increased compared to last year while Empty containers of Q4 has shows major increased. But compared to 2019 to 2021 it has shows minor decrease.
- This apparent collapse of the ocean freight industry has been heavily influenced by the massive collapse in the apparel sector.

Total Ocean Exports in TEUs Yearly



- Above data shown from years from 2019 to 2023.

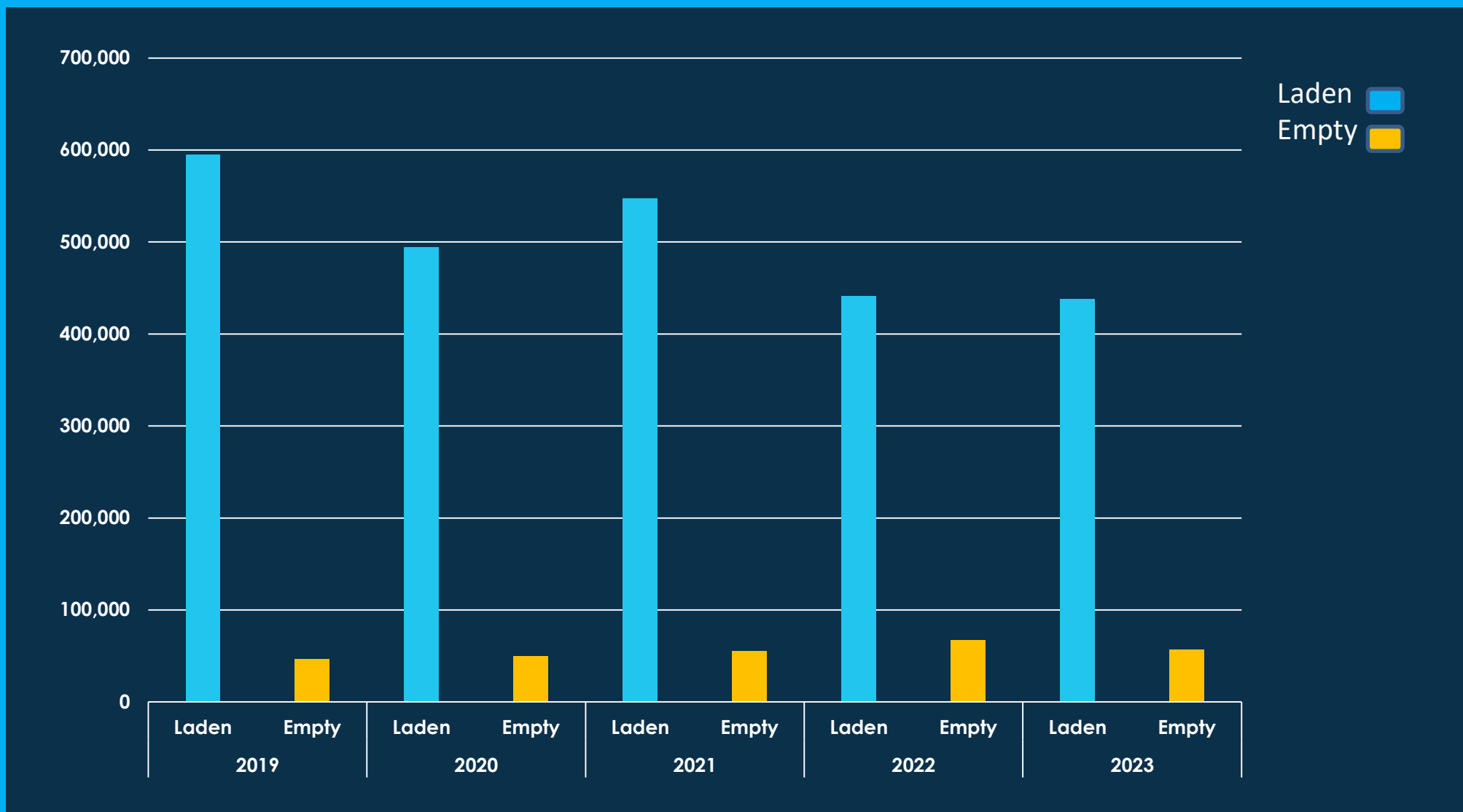
TOTAL OCEAN IMPORTS IN TEUs QUARTERLY



	2019		2020		2021		2022		2023	
	Laden	Empty	Laden	Empty	Laden	Empty	Laden	Empty	Laden	Empty
1st Quarter	142,723	15,754	151,144	10,166	148,665	8,860	140,748	16,397	96,196	15,520
2nd Quarter	141,240	10,172	82,171	12,092	143,074	9,532	101,084	16,388	99,749	13,350
3rd Quarter	149,670	11,112	129,201	16,668	118,570	15,428	95,095	19,651	113,375	17,034
4th Quarter	161,271	9,268	131,504	10,635	136,902	21,404	104,095	14,842	128,915	10,963
Total	594,904	46,306	494,020	49,561	547,211	55,224	441,042	67,278	438,235	56,867

- The above data shows that gradually increased of ocean import. This may be happened due to wave off the import restriction and sea-air transshipment happened in last quarter.
- We can see a decrease in empty containers, which reached a very high value in 2022, in all quarters of this year.

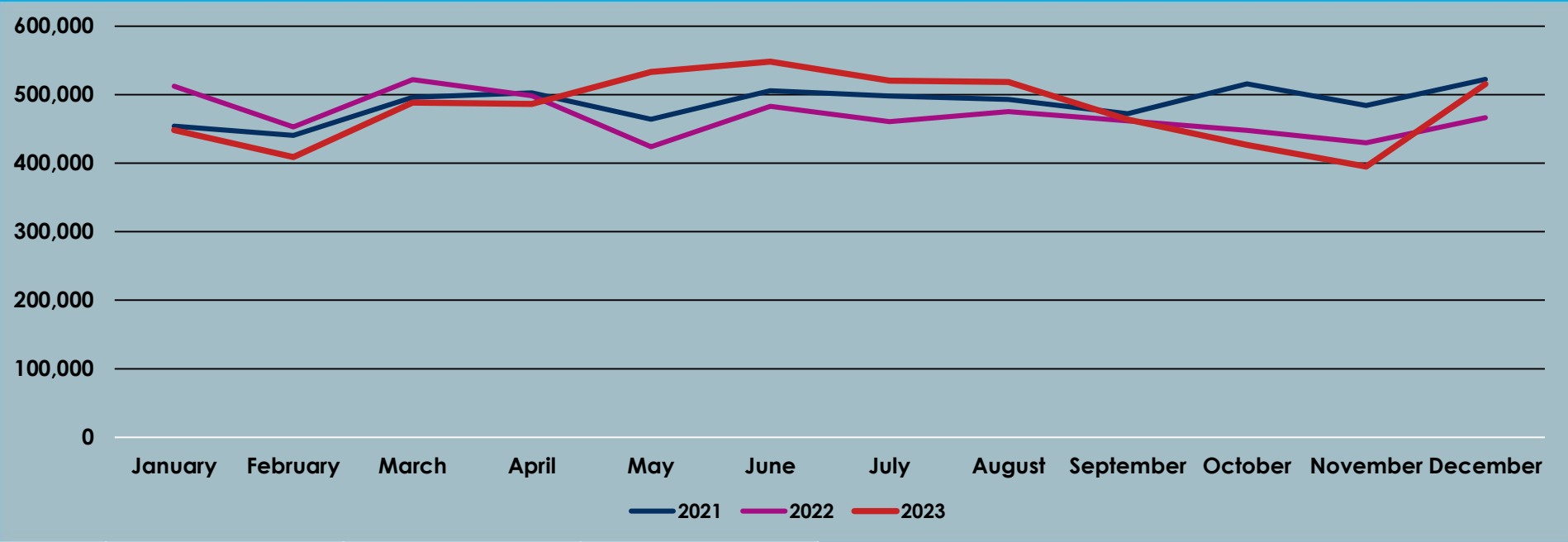
Total Ocean Imports in TEUs Yearly



- Data Shown above is related to years from 2019 to 2023.

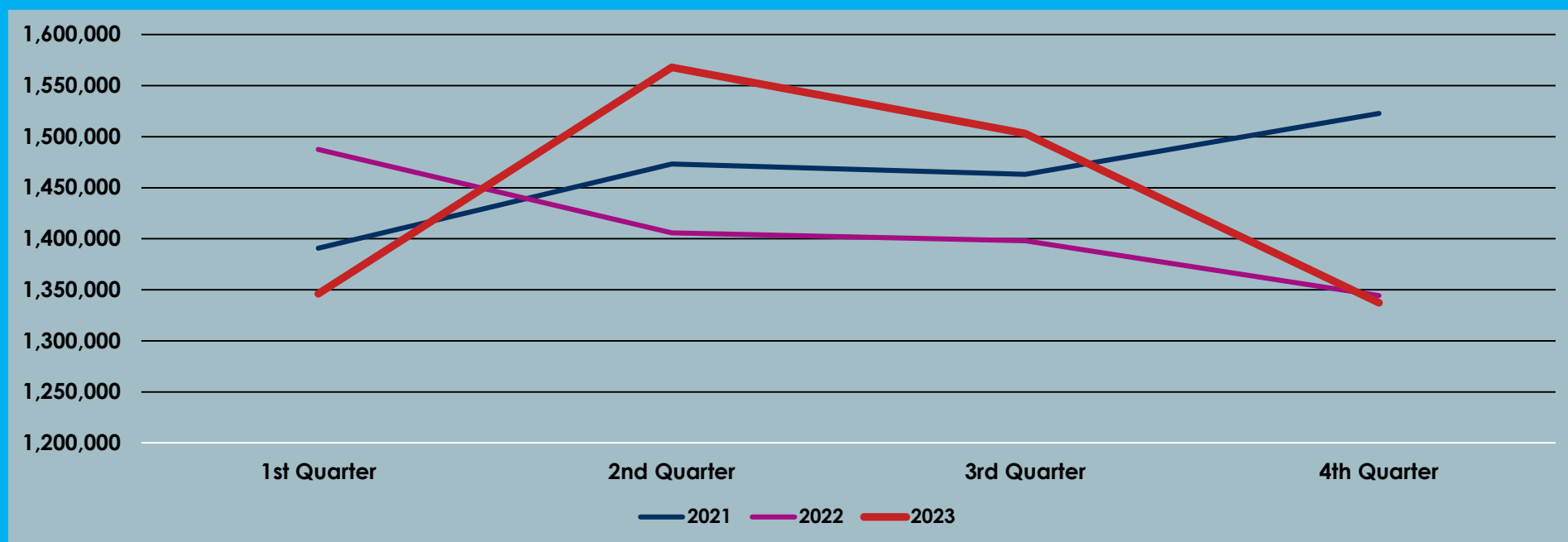
Total Ocean Transshipments in TEUs

Month On Month



Month	2021	2022	2023
January	453,994	512,401	448,276
February	440,772	452,865	409,175
March	496,132	522,178	488,554
April	502,929	498,482	486,400
May	464,269	424,310	533,158
June	505,966	483,070	548,292
July	498,070	460,736	520,579
August	492,955	475,420	518,672
September	472,193	461,975	463,860
October	515,959	447,911	426,825
November	484,270	429,649	395,046
December	522,538	466,688	515,404

Total Ocean Transshipments in TEUs Quarterly




	2021	2022	2023
1st Quarter	1,390,898	1,487,444	1,346,005
2nd Quarter	1,473,164	1,405,862	1,567,850
3rd Quarter	1,463,218	1,398,131	1,503,111
4th Quarter	1,522,767	1,344,248	1,337,275
Total	5,850,047	5,635,685	5,754,241

- 2023 Q4 shows the least amount of transshipment in between 2021 to 2023.
- The main reason for this collapse would be red sea issue which is happened in December month.

THANK

YOU

Several thin, white, parallel diagonal lines crossing the bottom right portion of the slide, adding a dynamic graphic element.