



THE MARRAKECH CODE

Strategy for the Next Decade



NAP

THE PAST DECADE



Years of NAP

400⁺

Partners Worldwide

150

Countries

SIX

Specialized Networks

- Entering the Next Decade of Growth
- Built on Quality, Trust & Specialization
- From a small idea to the largest specialized air cargo logistics ecosystem globally.

The next chapter begins here.

THE NEW DECADE



It is a strategy for
what comes next.

8

Pillars

ONE

Direction

NAP remains a boutique ecosystem focused on quality, specialization, and long-term member value.

Semi-Exclusivity & Sustainable Growth

BOUTIQUE MEMBERSHIP



Quality over quantity

Semi-exclusive ecosystem
with most markets closed

Selective expansion for
strategic gaps

and/or additional airline
cargo sales advantages

Strategic network clean-up of
non-quality and non-
performing members

Growth

- Data, analytics, technology
- New products
- Strategic partnerships
- Member value creation

Focus

- Protecting network integrity and high standards
- Prioritizing active, specialized, and committed partners
- Creating more value per member, not more members

NAP combines SME cargo volumes into collective global buying power supported by advanced market intelligence and airline partnerships.

SME Buying Power & Data Intelligence

GLOBAL AIRLINE PARTNERSHIPS

25⁺

airline partners & growing



Global BSAs & collective buying power



Volume incentives & strategic agreements

Combined member volume

+1M

tons annually

TOP 10

global scale benchmark

Market intelligence

rotate



Better commercial leverage

Better access & pricing

Data-driven negotiations

Exclusive airline advantages for members



The Power of Many:

SME Air Cargo Agents & Consolidators



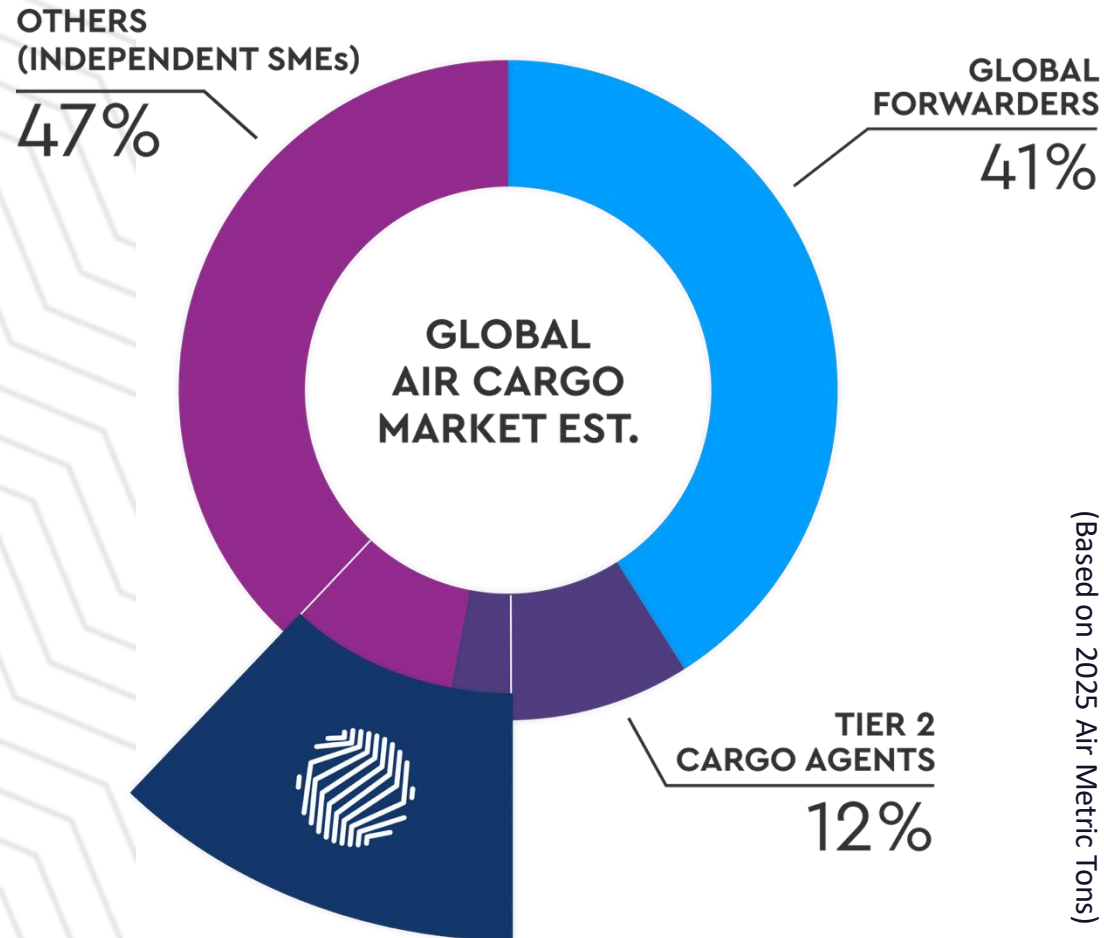
➤ SME Forwarders & Consolidators and tier 2 cargo agents represent over 59% of global air freight volumes, creating a major opportunity for airlines to diversify their customer portfolios through new global key accounts.

➤ Whilst Airlines have Global Key Account Programs for Global Forwarders, pursuing a Global Partnership Program with a group of local and independent SME forwarders and consolidators will be of value for airlines and a win-win collaboration.

59% GLOBAL
AIRFREIGHT
VOLUME

The power of many global air cargo market est.

NAP, Independent SMEs and Tier 2 cargo agents represent 59% of the global cargo market.



Top 10 Global Air Freight Forwarders
(Based on 2025 Air Metric Tons)

KUEHNE+NAGEL 	Switzerland 2,030,280
DSV	Denmark 2,013,127
DHL	Germany 1,767,000
NEX NIPPON EXPRESS	Japan 933,201
Expeditors	United States 928,000
SINOTRANS	China 912,000
KLN	Hong Kong 840,508
AWOT A world, One team	China 785,000
CEVA LOGISTICS	France 680,000
ups	United States 790,000

Benchmarked against the world's leading air freight forwarders

Based on 2025 air cargo volume benchmarks from Armstrong & Associates, combined NAP member volumes place the network at global top-tier air freight scale.

RANKED
#5
GLOBALLY

Top Global Air Freight Forwarders
(Based on 2025 Air Metric Tons)

+930K

tons of combined air cargo
volumes annually

+1.2M

air cargo shipments
processed worldwide

KUEHNE+NAGEL

Switzerland
2,030,280

DSV

Denmark
2,013,127

DHL

Germany
1,767,000

NEX
NIPPON
EXPRESS

Japan
933,201

neutral
AIR PARTNER

Hong Kong

Expeditors

United States
928,000

SINOTRANS

China
912,000

KLN

Hong Kong
840,508

ups

United States
790,000

AWET
A world, One team

China
785,000

Source: IATA Cargo IS, Armstrong & Associates, combined member data, industry reports, market estimates. NAP figures represent aggregated annual member volumes and are shown as a benchmark comparison. NAP is not listed as an official A&A-ranked forwarder.

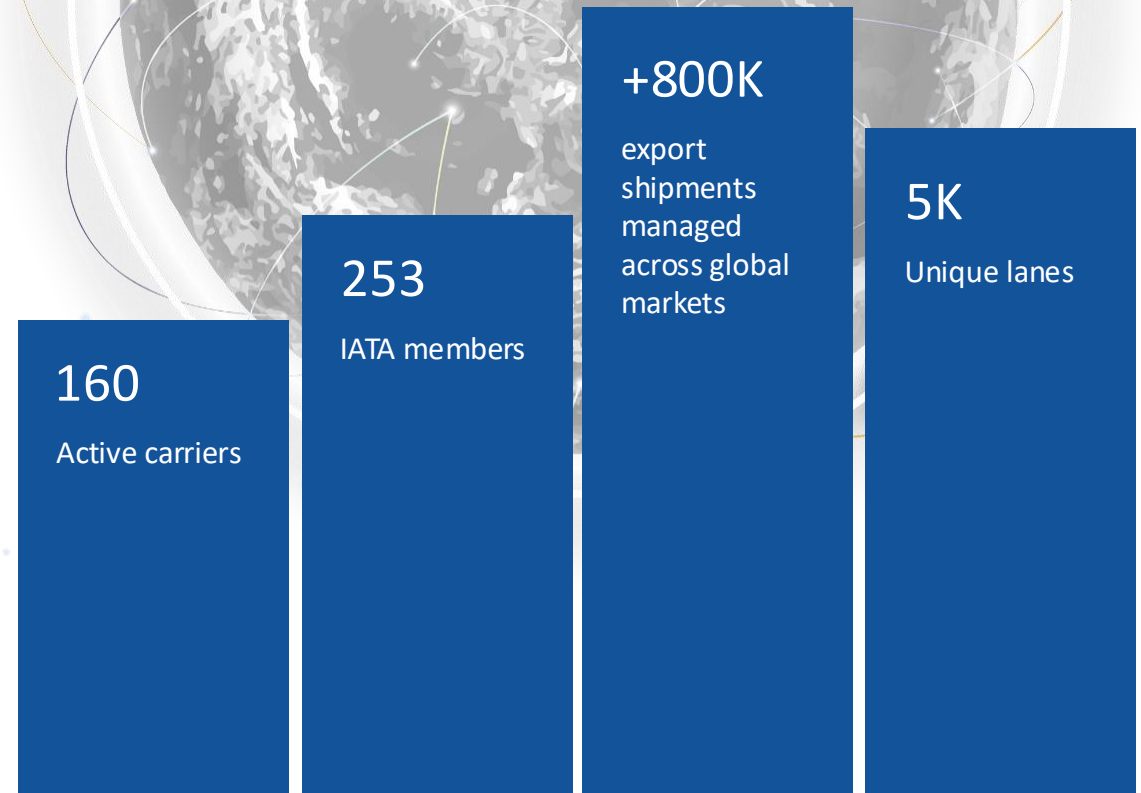
Turning SMEs Cargo Volumes into Strategic Airline Partnerships

NAP members represent one of the most powerful independent air cargo sales group in the world. Based on aggregated annual member volumes, the network handles



+600K

tons of combined **air export** volumes with **CASS Airlines**



Top 25 Cargo sales agents 2025



Top 25 NAP Airlines by Cargo Volumes (kg) 2025



54,719,805.00	38,212,893.60	37,697,975.50	29,888,323.30	29,699,424.00	27,791,251.50	22,297,401.50	17,944,824.00	16,435,834.10
15,712,078.00	14,892,215.50	14,330,871.80	13,363,872.00	13,361,062.50	12,330,080.60	11,683,457.30	11,451,603.00	10,961,490.00
10,717,129.50	9,729,111.50	9,507,922.80	9,217,006.50	8,299,580.30	7,975,802.50	7,528,658.00		

Top Global Trade lanes driven by NAP members



1	China » United States Total Weight (KG): 46,121,019.20	10	China » Saudi Arabia Total Weight (KG): 7,769,000.00	19	India » Germany Total Weight (KG): 4,445,124.00
2	India » United States Total Weight (KG): 17,678,937.90	11	United Kingdom » United States Total Weight (KG): 7,680,662.80	20	India » Saudi Arabia Total Weight (KG): 4,389,753.00
3	South Korea » United States Total Weight (KG): 15,267,243.50	12	India » United Arab Emirates Total Weight (KG): 6,045,656.50	21	Germany » Saudi Arabia Total Weight (KG): 4,300,359.00
4	China » Germany Total Weight (KG): 12,596,097.00	13	China » Italy Total Weight (KG): 5,925,801.00	22	Hong Kong (SAR), China » Australia Total Weight (KG): 4,161,553.50
5	United States » United Kingdom Total Weight (KG): 11,294,009.90	14	South Korea » China Total Weight (KG): 5,648,245.00	23	United States » Brazil Total Weight (KG): 4,010,604.80
6	United States » Australia Total Weight (KG): 10,527,904.00	15	China » Netherlands Total Weight (KG): 5,637,624.50	24	Belgium » China Total Weight (KG): 3,934,602.10
7	China » United Kingdom Total Weight (KG): 9,357,740.50	16	China » Turkiye Total Weight (KG): 5,249,316.00	25	China » France Total Weight (KG): 3,715,982.50
8	South Korea » Vietnam Total Weight (KG): 9,178,997.00	17	India » Hong Kong (SAR), China Total Weight (KG): 5,194,317.50		
9	India » United States Total Weight (KG): 7,994,097.80	18	China » Spain Total Weight (KG): 4,944,712.00		

Airline value proposition

SME Forwarders & Consolidators represent over 47% of global air freight volumes – a great opportunity for airlines



Partner with us.

Global Network
Local Expertise

Trusted. Compliant.
Future-Ready.

Flexible Partnerships
Stronger Together

Unlock Opportunities
Drive Growth

Grow together.



Local Strength – Global Reach

- 400+ Air Cargo Partners
- Coverage across 150 countries
- Strong regional expertise with global reach



Flexibility

- Fast short- or long-term commitments with carriers
- BSA & CPA partnership opportunities
- Flexible capacity and trade-lane solutions



Higher-Yield & Special Cargo Expertise

- Access to higher-yield cargo verticals
- Specialized cargo products and solutions
- Niche cargo opportunities not widely available in the general market



Airline Growth & Diversification

- Diversify and extend airline key client portfolios
- Access to SME forwarders, consolidators, and niche cargo specialists
- Reduced dependency on limited large global accounts
- Expansion into new regional and emerging markets



Compliance & Knowhow

- Digital transformation readiness
- Strong operational air cargo expertise
- Adaptation to evolving global regulatory requirements
- Market-specific compliance and cargo handling knowhow

Partnership Options with Carriers



Preferred
carrier status

Global or regional BSA /
CPA agreements

GSSA/CSA
representation
through



Global Incentive
programs based on
targets

Global
account status

Charters, time critical, &
special cargoes Support

Marketing, PR & Communications
collaboration

QCargo : Quality Verification Platform

QUALITY



Global logistics quality verification platform



Partner screening, compliance, and sanctions screening



Faster and more reliable due diligence



Reinforcing NAP ecosystem integrity



Scalable trust across global logistics



Industry-wide compliance support



Supporting freight forwarders, TMSs, airlines, GSSAs, and solution providers



Core component of NAP, providing industry-wide quality validation

All NAP partners must be QCargo verified by 31 Dec 2026 to maintain membership eligibility.



Verification Code
5A00734

DD/MM/YYYY | Valid for

NAP is evolving beyond networking into an investment, collaboration, and strategic growth platform.

Executive Platform

NAP Privé & M&A

PRIVATE. FOCUSED. DECISIVE.

→ Private executive platform for air cargo and logistics leaders

→ Designed for entrepreneurs, investors, founders, and C-level decision-makers

→ High-level strategic networking and collaboration

→

Focused on

- o Investments
- o Strategic partnerships
- o M&A opportunities
- o Private deal-making and collaboration

Exclusive, invitation-only environment for industry leadership

Private

Strategic

High-level

Focused

Exclusive

Decisive



PRIVATE. FOCUSED. DECISIVE.

A private community for leading
freight & logistics entrepreneurs



D MARIS BAY

30 Sep – 03 Oct 2026
Marmaris, Turkey



Request an invite

Limited Seats Available.



PRIVATE. FOCUSED. DECISIVE.

This is not a conference.
It is a private environment where decisions are made



D MARIS BAY

30 Sep – 03 Oct 2026
Marmaris, Turkey



Request an invite

Limited Seats Available.



The Experience

NAP Privé is built around dialogue that shapes decisions and outcomes that shape businesses.

- ✓ Focused conversations.
- ✓ Aligned interests.
- ✓ Decisions that matter.



Strategic
alliances &
collaboration



Private
opportunity &
deal exchange



Selected start-
up investment
presentations



Market
expansion &
competitive
positioning



Business model
transformation
& innovation



Executive
strategic
dialogue



M&A & capital
strategy
conversations



Joint-venture
& partnership
structuring

The Circle

NAP Privé brings together senior decision-makers who shape capital, strategy, and growth across the industry.

INSIDE

- Founders and principal shareholders
- C-level executives with direct decision authority
- Board members and active investors

The Circle remains intentionally limited to preserve its integrity and level.



OUTSIDE

- Sales or marketing-only roles
- Advisors without equity or executive mandate
- Delegated or non-decision-making attendees



Request an invite

Limited Seats Available.



SUPPORTED BY



Official Launch
OPENAP 10

Where pharma Logistics Leaders Connect



Dedicated pharma logistics vertical



Specialized cold-chain solutions



Compliance-driven infrastructure



Pharma-focused training & standards



Global network of certified healthcare specialists



Long-term growth vertical

nap-pharma.com



COMING SOON

Defense & Government Logistics

NAP Defense targets highly specialized government and defense logistics opportunities through a carefully selected partner ecosystem.



Specialized government & defense logistics



Emergency response, complex project cargo, and mission-critical operations



Controlled-access vertical with strict partner selection



High-security operational capabilities and specialized execution



Proven defense logistics expertise with a strong operational track record



Experience in complex government, secure, and sensitive logistics projects

COMING SOON

NAP NextGen

Developing the future leaders of air cargo logistics



Annual meetings for
members under 35 years
old



Specialized trainings and
industry workshops



NAP NextGen talent
exchange programs
platform



Cross-company learning
and international
exposure

Focus



Education



Mentorship



Leadership
development



Future industry talent

NAP is strengthening its position through strategic
partnerships across the global air cargo industry.

Partnering with the Cargo Communities

STRATEGIC PARTNERSHIPS



Airports



Associations



PHARMA.AERO
WE CONNECT PHARMA



OCEAN 
The seafreight specialists.



Ground handlers



Technology firms

Strategic partnership with



ACE

aircargoevent.net



Technology is the backbone of the next phase of NAP growth, integrating digital tools, connectivity, and automation into one ecosystem.

DIGITAL TRANSFORMATION

Strategic Objectives

- Automation
- E-booking
- Cargo connectivity
- Digital collaboration
- Operational efficiency



NAP HUB

- o Trade lane analytics
- o Partner tools
- o Data intelligence
- o Payment solutions



NAP App

- o Mobile access
- o Member profiles
- o Credit alerts
- o Promos
- o Directory
- o F2F scheduler



Digital Solutions

NAPRates

POWERED BY  WEBCARGO
by Freighters

NAPConnect

POWERED BY  espresso

NAPay

POWERED BY  CargoWALLET

NAPClaims

POWERED BY  CARGO/CLAIMS

NAPNetting

POWERED BY  nettvia



DIGITAL TRANSFORMATION

Strategic Goal

- Enterprise-level tools for SMEs
- Real-time market intelligence
- Unified digital ecosystem
- Smarter cargo decisions

The connected NAP member to have access to the best tools in the industry- in one place.

NAP is expanding access to premium air cargo logistics technology, data, and market intelligence traditionally reserved for large global players.

Data Intelligence & Connected Partners

THE NEXT DECADE STARTS NOW

400+

Partners



150

Countries



Going deeper, not
wider

Creating more value
per member

The Vision

Core Pillars



Quality



Specialization



Trust



Technology

Building stronger
industry infrastructure

Driving the future of
specialized air cargo
logistics

SIX

Networks



Thank You

The next decade of NAP focuses on specialization, stronger infrastructure, smarter technology, and deeper member value creation.

neutralairpartner.com