



Sustainability in Air Cargo

Insight Report 2025

March 2025

Results of the 5th annual air cargo industry sustainability survey

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**Brussels Airport's cargo zone
leading the way**

Thanks to our digital processes,
the electrification of ground equipment,
and the implementation of net zero carbon logistics buildings,
we are leading the way in freight transport.

In the heart of Europe, we handle freight quickly, efficiently and sustainably.

TIACA's message

Dear Reader,

It gives us great pleasure to present the fifth version of the TIACA annual Insights report which is a comprehensive cross industry analysis of how the community is responding to the many critical aspects that comprise sustainable transformation.

Sustainability is a broad concept, covering actions directed at doing good for the planet, people, and business. And at TIACA we add through partnerships and innovation.

This year's report is compiled from 274 responses from the entire industry covering airlines, airports, freight forwarders, ground handlers, shippers, equipment manufacturers, IT providers, and other organizations. The report analyzes data by industry sector as well as organizational size with a good mix of small, medium and large businesses. We also analyze the responses from a regional perspective.

Pressures to be sustainable continues to increase from all stakeholders, including customers, employees, business partners, regulators, local communities, and financial institutions.

We see significant increases in organizations' focus on energy efficiency and carbon footprint reductions. Fleet renewals feature in airline and ground handler strategies, as well as more efficient buildings and optimization strategies leveraging innovation and digitalization.

The number of organizations who are allocating funds to sustainable initiatives has increased as have the number of companies with specific sustainability strategies and who produce annual sustainability reports.

Although there is one trend which appears quite regularly throughout the study which is the differential between large and small organizations. However, with regulations and customer demands for greater action increasing across the board, smaller organizations will continue to face additional challenges in demonstrating tangible moves forward.

TIACA has specific programs, such as the BlueSky sustainability assessment program designed to support all organizations in understanding where they stand against industry best practices in many areas of sustainability.

In conclusion, we are very encouraged by how the entire industry is embracing the need for sustainable transformation as the next generation of air cargo leaders, men, and women, want to work for an industry that is modern, agile, and sustainable.

Let's continue our work to make sure everyone wants to join in! TIACA is here to support all air cargo partners wishing to progress through their sustainability journey.



Glyn Hughes
Director General, TIACA

While TIACA continues to support and enable the industry with its sustainability program, I am calling all air cargo businesses to join in and:

- 1. Set up concrete targets** to accelerate their sustainability transformation
- 2. Measure progress made** by collecting data and facts regularly
- 3. Communicate** on achievements with transparency
- 4. Get recognized for the progress made** by embarking on BlueSky, TIACA's sustainability assessment and validation program

Executive summary

Conducted for the 5th time from November 2024 to January 2025, the annual Air Cargo Industry Sustainability Survey reveals interesting trends affecting the sector and its approach to sustainability:

Definition

1. 95% associate sustainability with environment, and more specifically carbon footprint and climate change.

Business case

2. This 5th survey reveals that companies continue to see a clear link between their ESG performance and their reputation (84%) and attractiveness (66%) but less so for their bottom-line (42%).
3. Globally, the sustainability pressure (61%) has decreased by 6 points compared to last year mainly driven by a drop of 13 points from local communities (54%), 11 points from regulators (50%), and 9 points from customers (71%).
4. Not surprisingly, the sustainability pressure is higher for large businesses (71%, which is 10 points above the industry average) and way lower for small companies (44% only).
5. Year on year, sustainability remains very important for employees and customers and gains more attraction with the shareholders.

Industry maturity

7. C-suite prioritize sustainability: 96% of the respondents confirm it is supported by their CEO, 88% by their CFO and 94% highlight sustainability is equally or more important than last year.
8. While 71% have a sustainability strategy, this number hides notable differences between large (84%) and small companies (60%).
9. 53% of respondents have a sustainability team and 42% have a dedicated budget.
10. Survey shows companies are embedding sustainability in traditional corporate functions: 58% include ESG in their risk management process, 64% in their procurement process and 64% in their partners' engagement approach.
11. There is still a long way to go to make sustainability really part of the companies' culture: 62% of companies feel that sustainability is embedded in their company's DNA (drop of 12 points compared to last year).
12. 69% of large firms already produce a sustainability report.

Industry priorities

13. The air cargo industry accelerates efforts in digitalization, innovation, business partner support and employee experience.
14. Industry focuses on optimizing its energy consumption (72%) to decarbonize and reduce costs.
15. The focus on SAF & offsets seems to decrease: 32% companies declare they are actively involved in the deployment of SAF or other fossil-free energy, and 35% use carbon offsets.
16. Single-use plastics remains a top priority of the air cargo industry: 91% focus on eliminating SUP and foam (action or awareness stage)
17. The industry continue investing in its people through training programs (83%) and employee experience (81%). 74% declare they take action to advance their diversity and inclusion credentials.
18. The air cargo industry continues to invest in innovation & digitalization: 84% take concrete actions to accelerate digitalization (5 points more than last year) and 83% invest in innovation (plus 6 points).

About this report

Methodology

This report is based on the 5th edition of the annual Air Cargo Industry Sustainability Survey, conducted from November 2024 to January 2025.

Initially designed by Change Horizon as part of the overall TIACA's Sustainability program, the annual survey aims to:

- Collect valuable insights on current focus and status of sustainability metrics within the industry
- Monitor the annual progress of sustainability work in air cargo industry
- Identify next priorities and gaps to address, that will feed TIACA's strategy to better support the industry in its sustainable transformation efforts

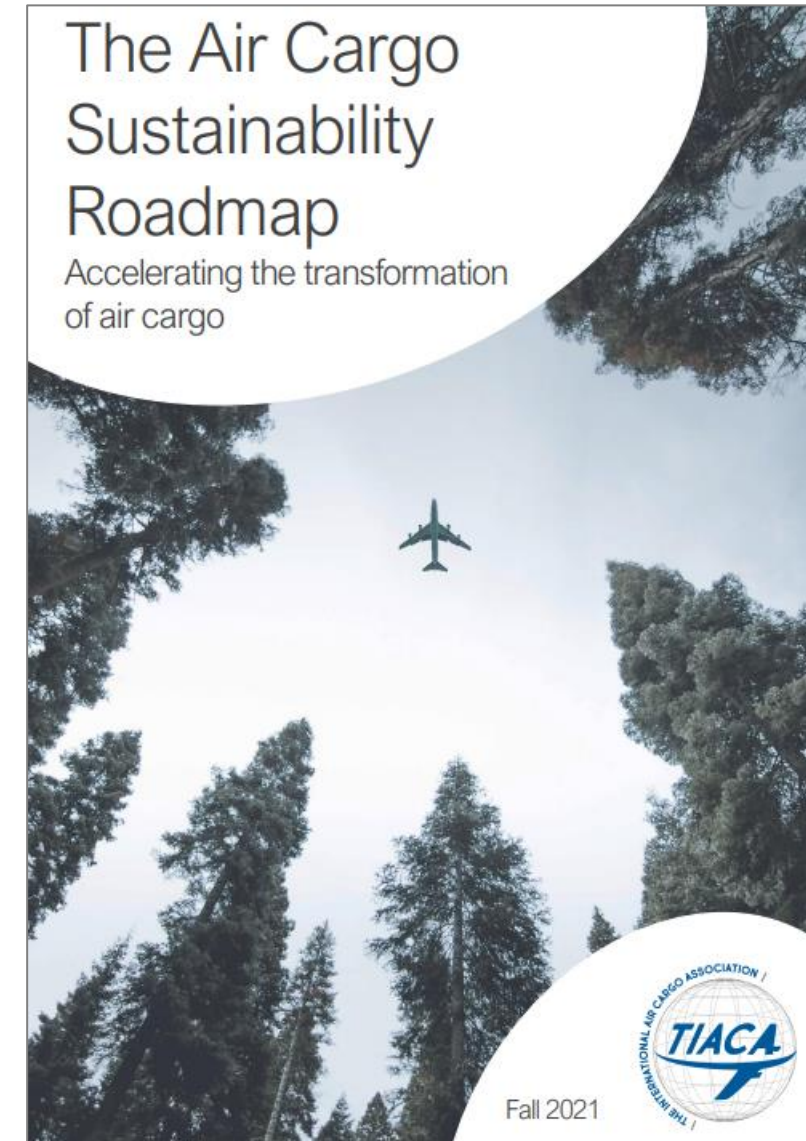
How to read this report

The majority of the results are considering all 274 respondents. We displayed results by company size, region and/or company type where relevant.

Where it made more sense, we looked only at responses from certain type of stakeholders grouped as follow:

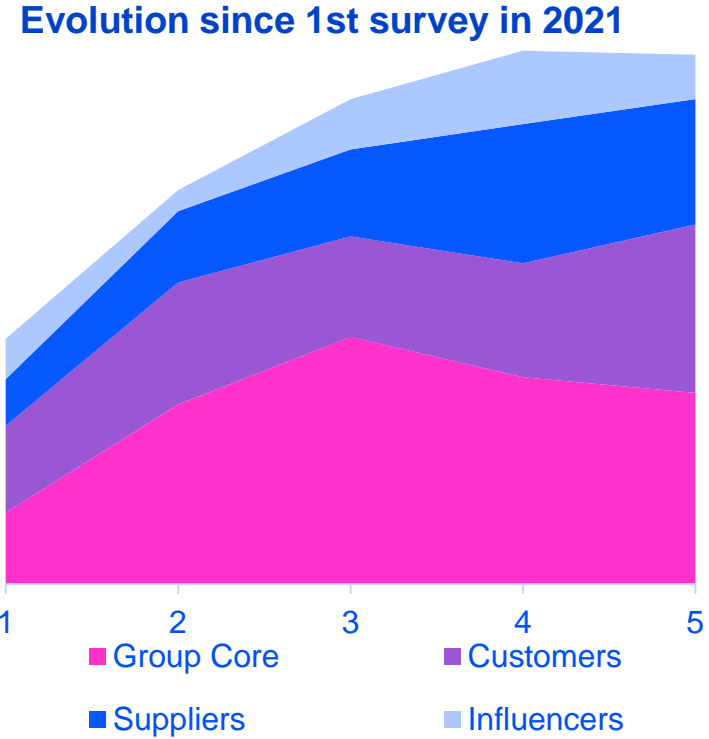
- Group Core: airlines, airports and ground handlers
- Customers: freight forwarders and shippers
- Suppliers: Aircraft, OEM & ULD manufacturers, GSE and packaging providers; GSAs and GSSAs; IT and data providers
- Influencers: academia, consulting, media, trade associations and networks

Comparison of data is done against previous four years where data is comparable and when it was relevant.

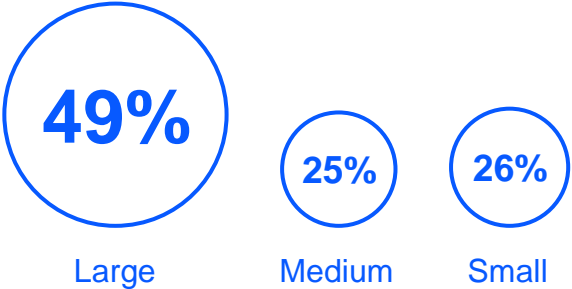


The voice of the air cargo industry

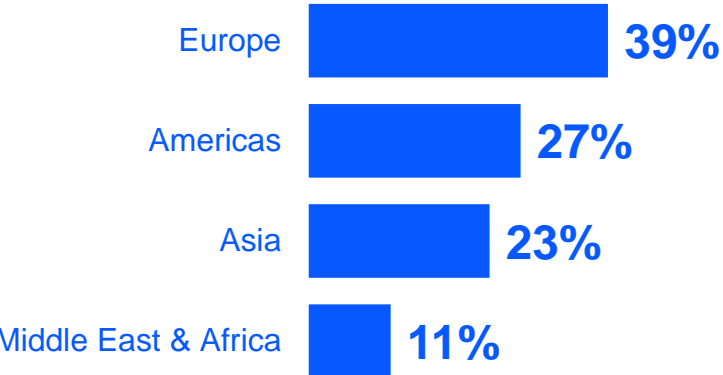
274
Respondents



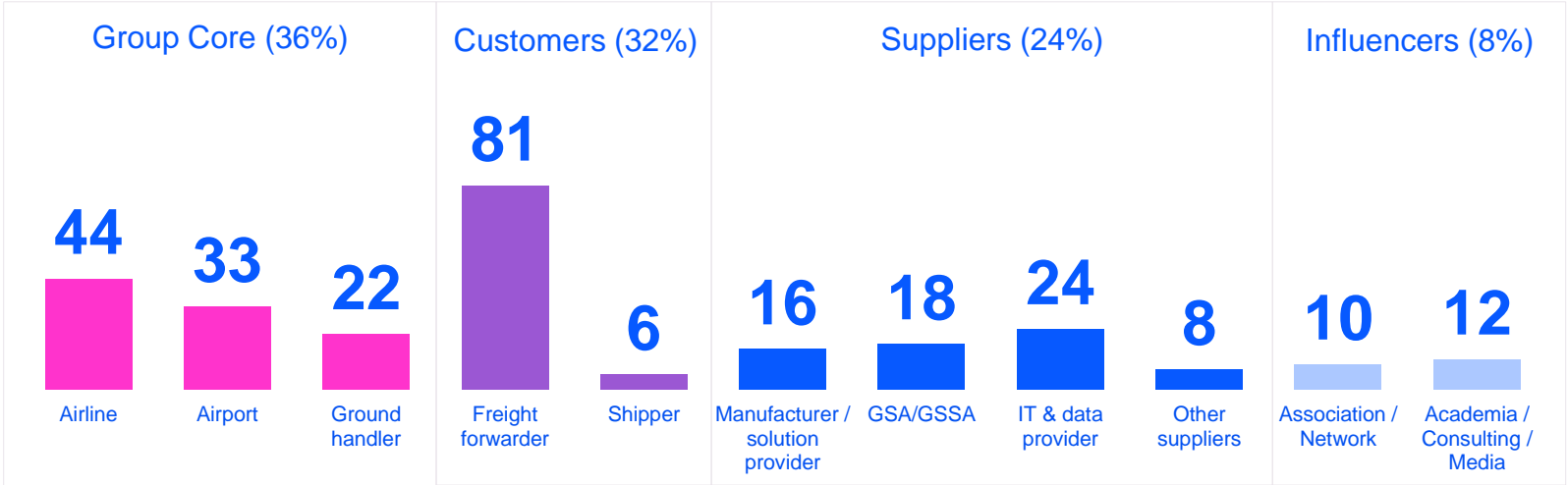
Respondents by company size



Respondents by region



Respondents by company type



A low-angle, upward-looking photograph of a city skyline. The image features several skyscrapers of varying architectural styles, including older brick buildings and modern glass-fronted structures. A commercial airplane is seen flying in the clear blue sky in the upper center. The overall composition is dynamic, with lines converging towards the top of the frame.

Defining sustainability

Hong Kong Air Cargo Terminals Limited

People and Planet before Profit

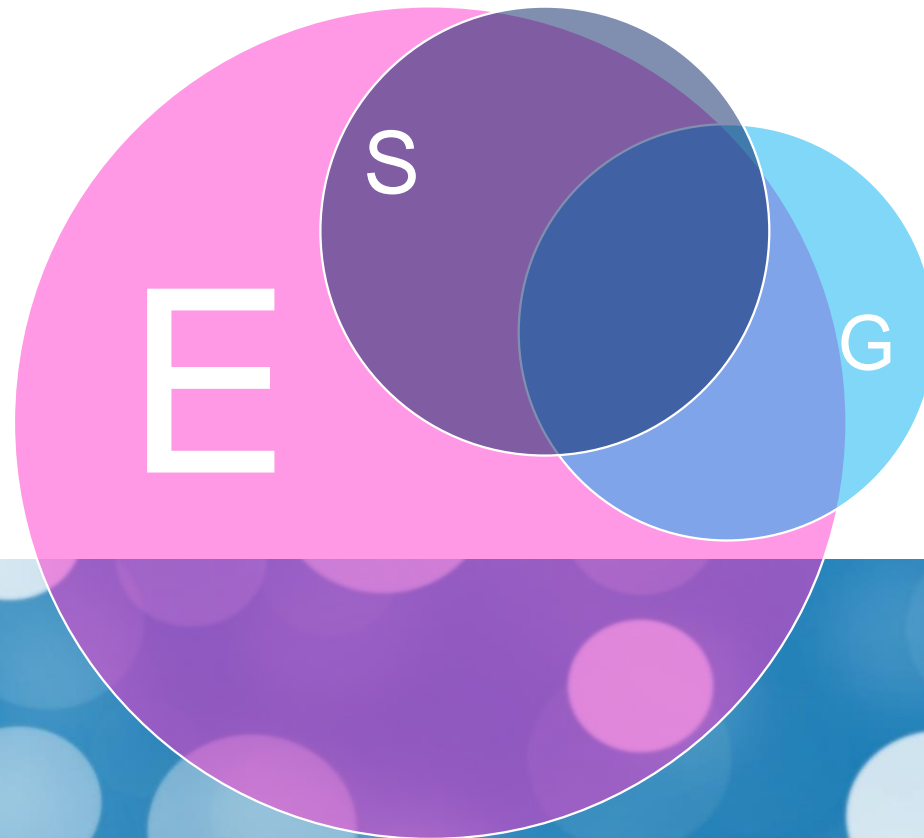


Carbon footprint & climate change keep being the main sustainability focus

Across the air cargo industry, the concept of sustainability varies considerably

95%

Of the companies having detailed their definition of sustainability confirm they are focusing on environmental matters, mostly linked to carbon footprint and climate change



17%

Integrate at least 3 dimensions to their sustainability definition

- ESG: Environment, Social & Governance
- 3Ps: People, Planet & Profits
- TIACA's 3+2: doing good for the planet, the people and the business, enabled by innovation and partnerships
- 17 SDGs (Sustainable Development Goals defined by the United Nations)

The 30 ESG priorities of the air cargo industry

Priorities are ranked based on companies confirming they are focusing on these areas, either by raising awareness on the subject or taking action to improve or reduce their impact:



Answers to the question: "Please indicate what you do to decarbonize, eliminate waste and protect biodiversity; to improve lives and well-being and support communities in need and to attract, develop and retain your talents, improve efficiencies & profitability, and build & nurture partnership" (1 possible answer from "Action stage", "Awareness stage", "Not a focus" or "Not applicable to us")

- Environment
- Social
- Governance



The sustainability pressure
on the air cargo industry

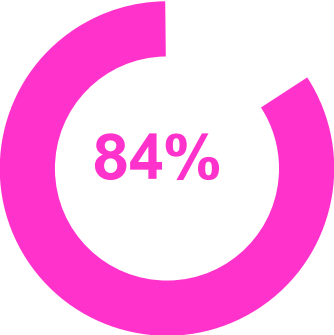
The business case of sustainability

Reputation

Consistent with the past 5 years, the air cargo industry sees ESG performance mostly impacting its reputation (84%).

This figure jumps to 90% for Large businesses.

From 79% in 2021 to 84% in 2025, the five-year average show that more than 8 out of 10 companies in the air cargo industry consider that making tangible progress in sustainability matters would impact positively their reputation.



Attractiveness

Attractiveness remains the second most important benefit of a good ESG performance, with two thirds of the 2025 respondents selecting it a key motivation.

This is particularly important for Large businesses (70%) and European headquartered companies (74%) but less of a concern in the Middle East 1 Africa region (48% only, i.e. 18 points below the global average).



Bottom-line

Most companies in the air cargo industry continue to question the direct link between their ESG performance and their profits (58%).

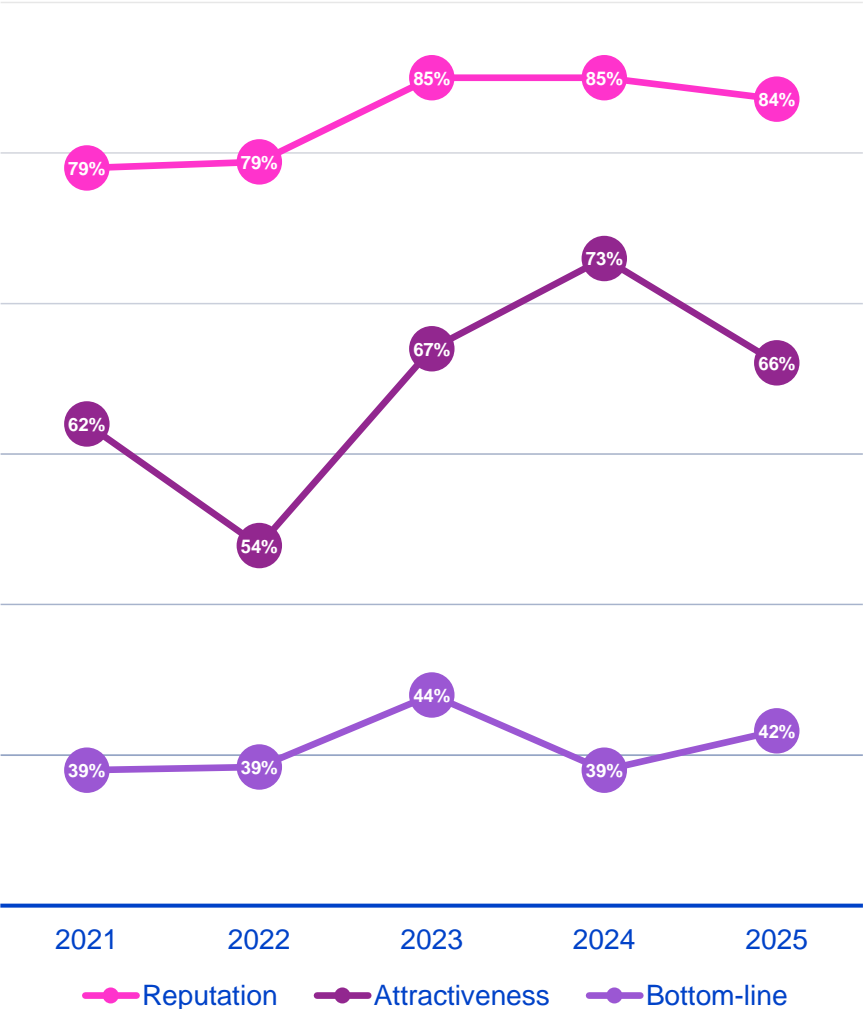
Other benefits

In their comments, survey participants mentioned regularly the positive impact on their:

- License to operate
- Competitiveness
- Ability to reduce environmental and financial risks



The corporate business case of ESG, evolution from 2021 to 2025



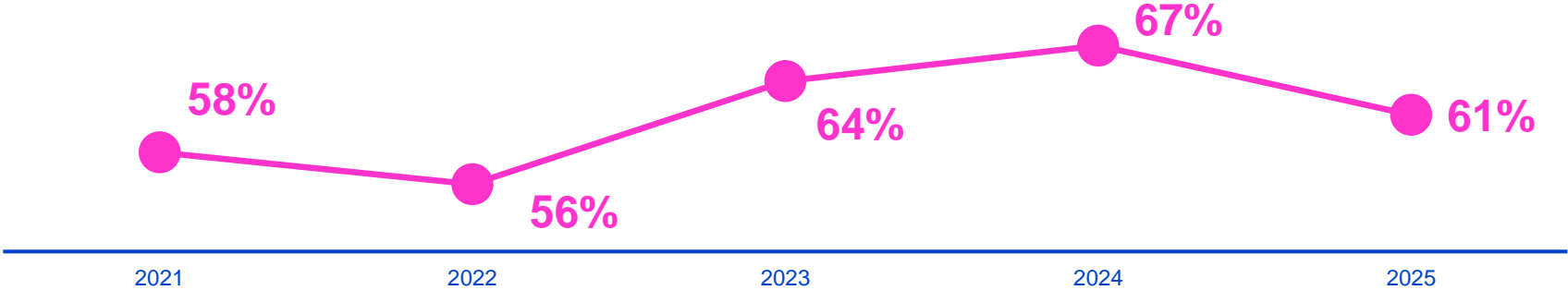
Note: Answers to the multiple-choice question: "Do you believe making tangible progress in sustainability matters will or would impact positively your company's (please select all that apply)".

Companies feels the sustainability pressure has decreased the past 12 months

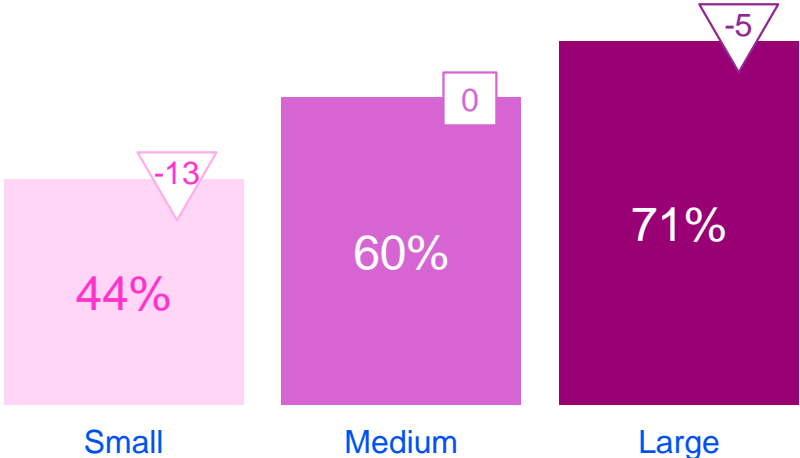
61%  -6

Globally, the sustainability pressure has decreased compared to last year, but sustainability remains more important than in 2021.

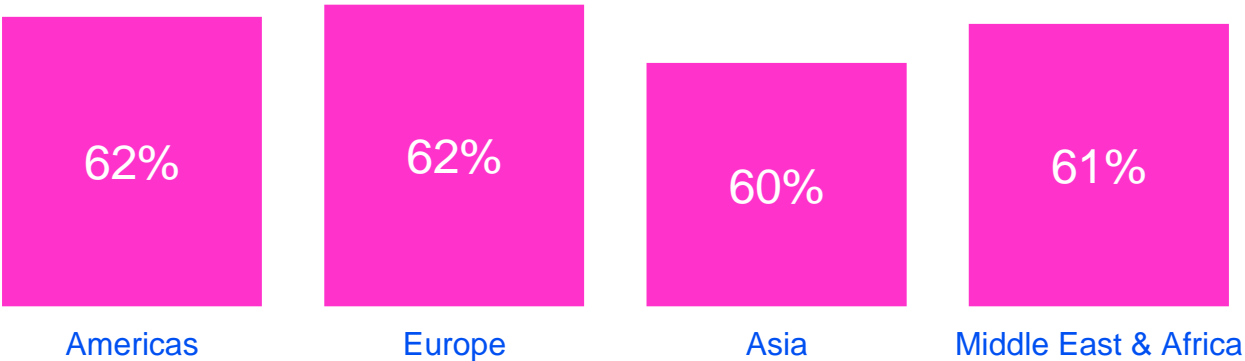
The sustainability pressure on the air cargo industry, evolution from 2021 to 2025



The sustainability pressure varies significantly by company size

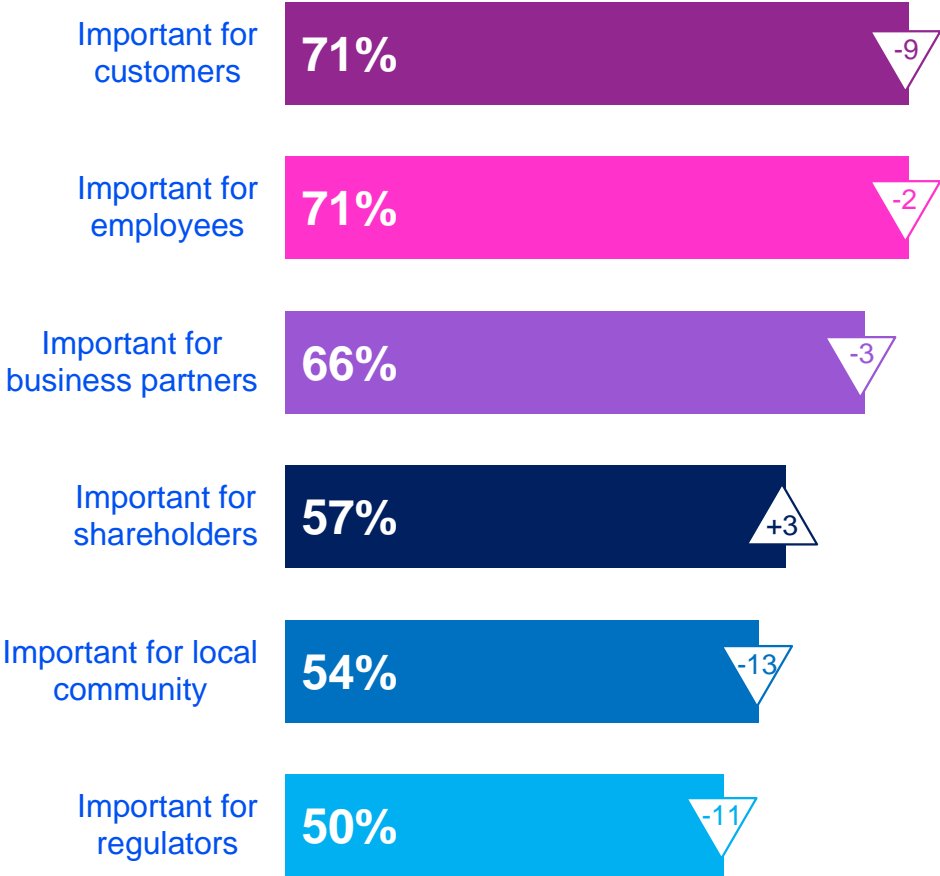


The sustainability pressure on the air cargo industry, in 2025 by region



Sustainability remains very important for employees and customers

Why is sustainability important to your organization?



The importance of sustainability by stakeholder, evolution from 2021 to 2025



Note: Answers to the multiple-choice question: "Why does or should sustainability matter to your company? (tick all that apply)"



Leading the movement of movement

At United Cargo, we're not just in the business of moving cargo; we're here to keep the world moving forward.

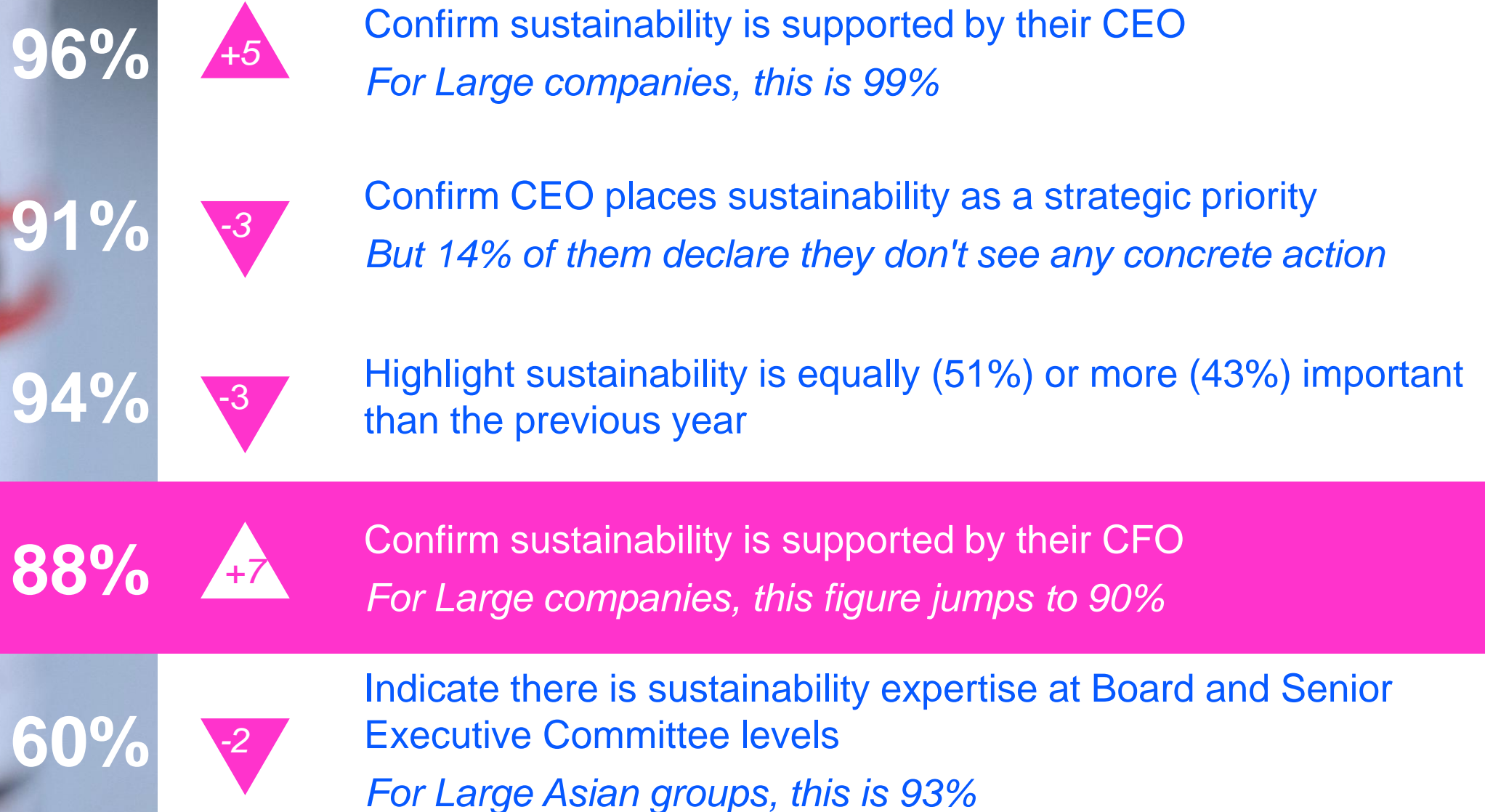
Our deep expertise, guided by leaders who have invested their careers in cargo, keeps us proactively responding ahead of the curve. As true partners, our dedicated support team meets every customer where they are to take their cargo where it needs to be.





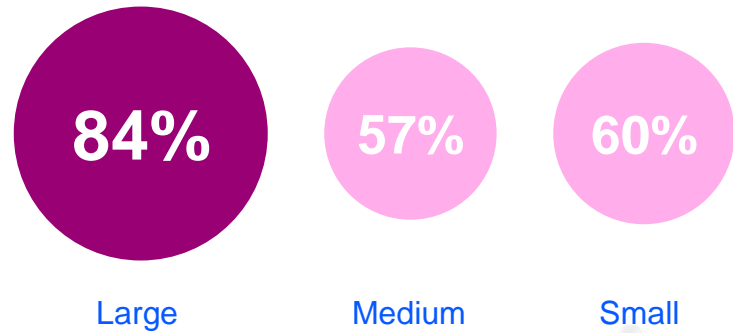
The sustainability
maturity of the air
cargo industry

Sustainability is now also a CFO priority

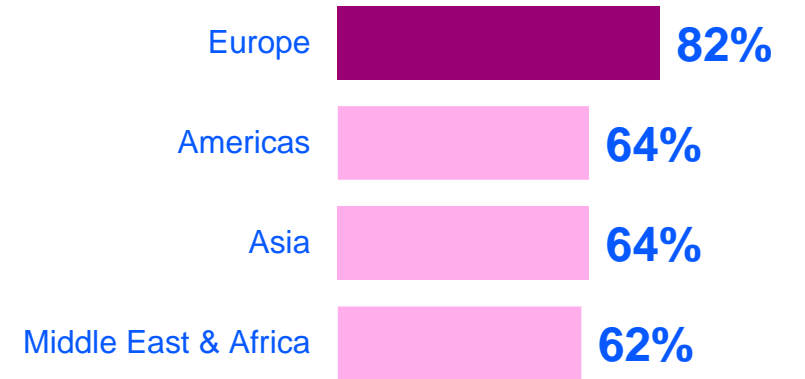


71% have a sustainability strategy

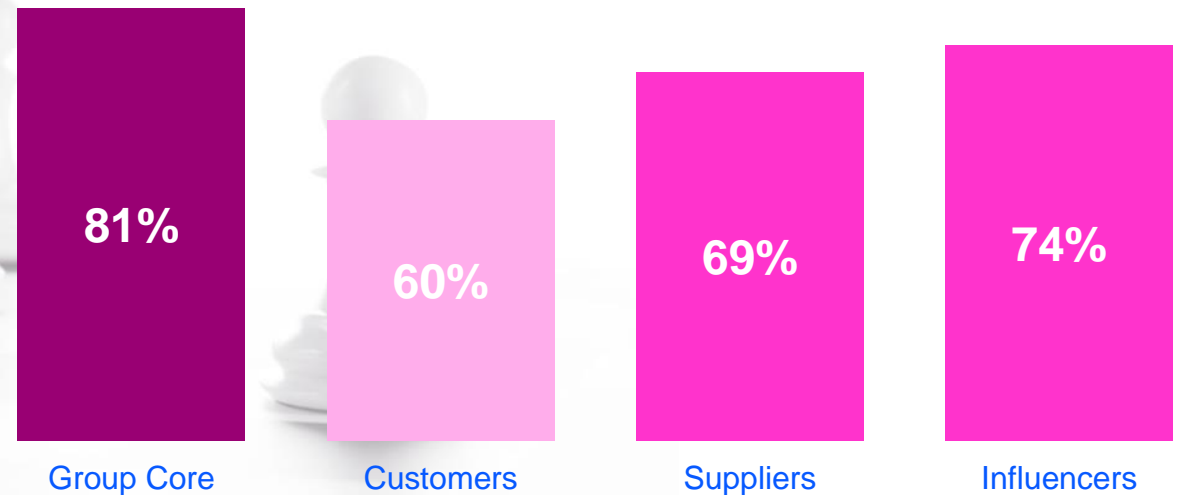
Companies with a sustainability strategy, by company size



Companies with a sustainability strategy, by region



Companies with a sustainability strategy, by company type

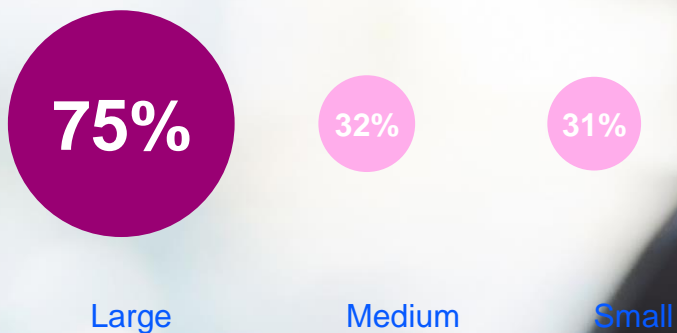


Having a sustainability team becomes the norm

53%

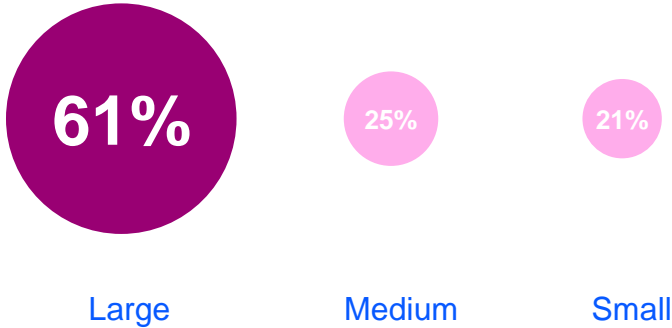
Have a dedicated team in charge of sustainability agenda (at least one fully dedicated person)

Companies with a sustainability team, by company size



42% have a dedicated sustainability budget

Companies with a sustainability budget, by company size



No budget needed. Cause being more efficient reduces co2 but also cost. People have to rethink on low hanging fruits – EUROPEAN MEDIUM COMPANY

43%

Of companies with a dedicated sustainability budget have increased it compared to last year, potentially consolidating their leading advantage

Efficiency is Our Nature

LOT Cargo – 30 years of trusted service

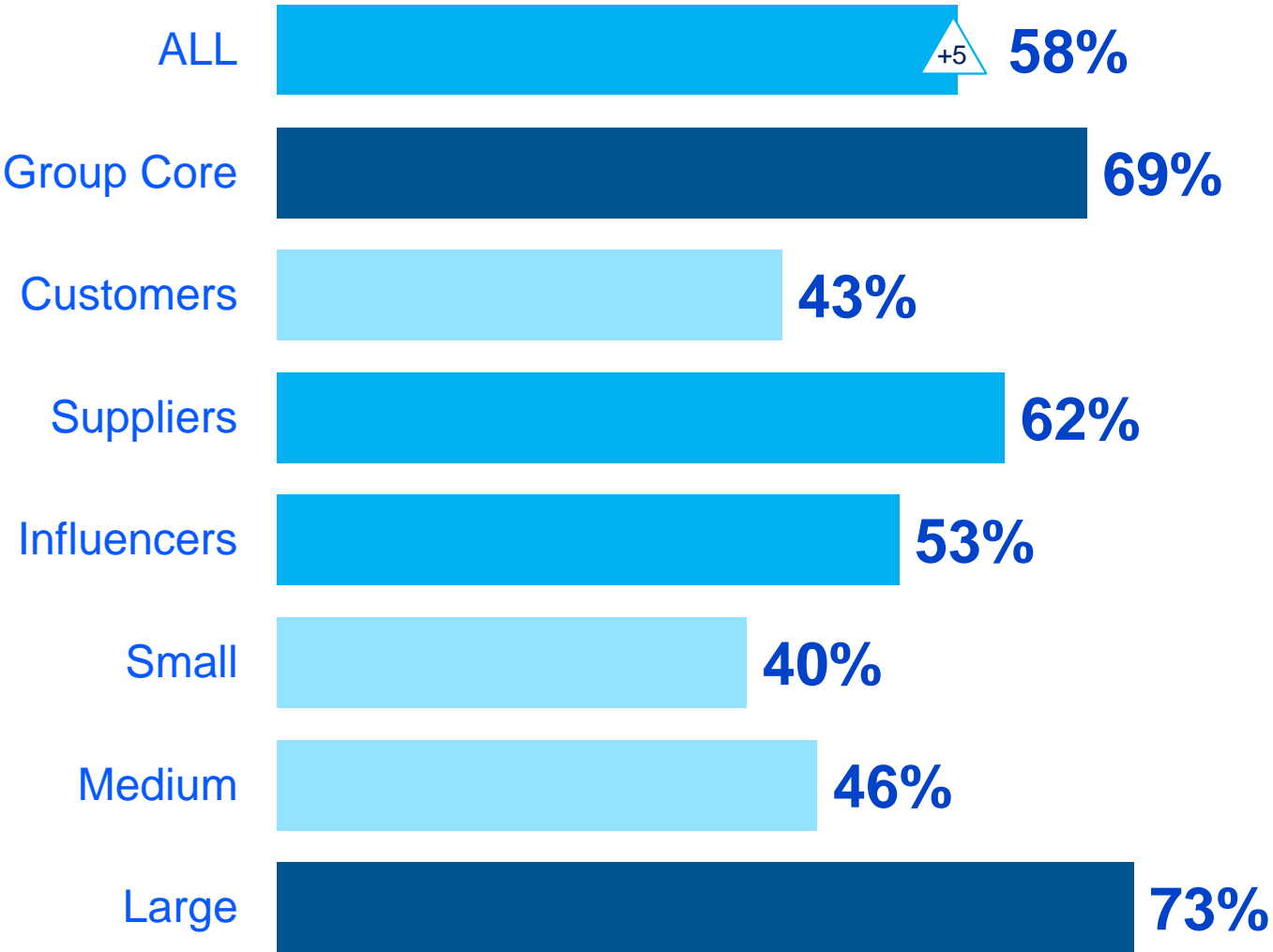
For 30 years, LOT Cargo has been delivering excellence in air freight, combining reliability, innovation, and efficiency. As we celebrate this milestone, we continue to optimize our operations focusing on efficiency, innovation, and long-term impact.

From single-engine taxiing after landing to optimized flight routes, we've refined our procedures to reduce emissions year after year. Direct routes, optimized cargo space, and faster deliveries – efficiency is at the core of what we do.

Smarter routes. Seamless operations. Reliable deliveries. Let's move forward, together!

Join us at **Air Cargo Europe 2025 in Munich** and meet the industry leaders shaping the future of air freight.

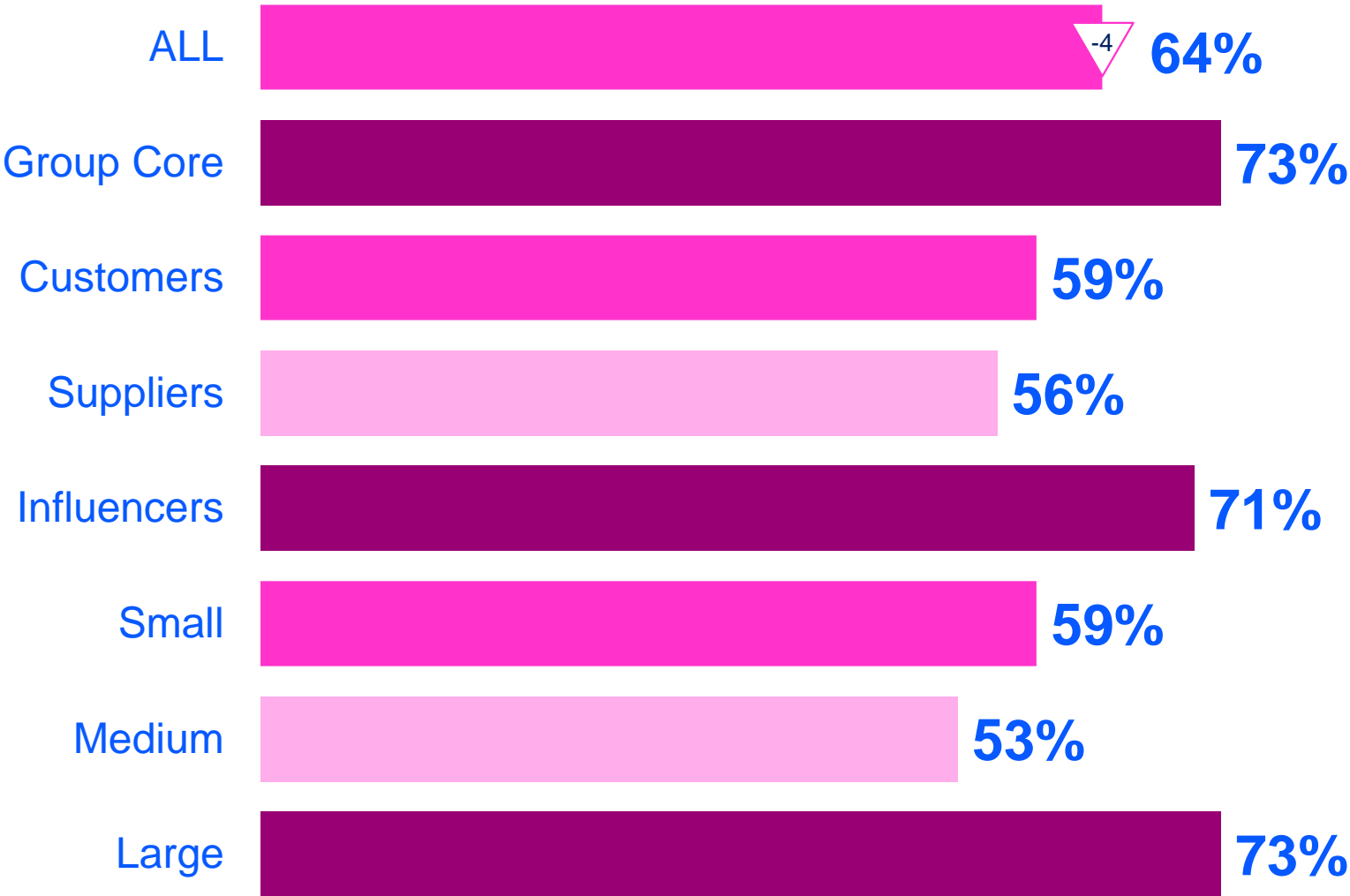
58% include ESG in their risk management process



“ ESG risks are reviewed quarterly as part of our enterprise risk management framework, with mitigation strategies developed and monitored by our risk management committee. LARGE ASIAN FORWARDER

“ ESG is embedded in our overall Enterprise Risk Management. We have a more detailed risk assessment and management process in place around a yearly double materiality assessment. –LARGE EUROPEAN GHA

64% include sustainability considerations in their procurement process

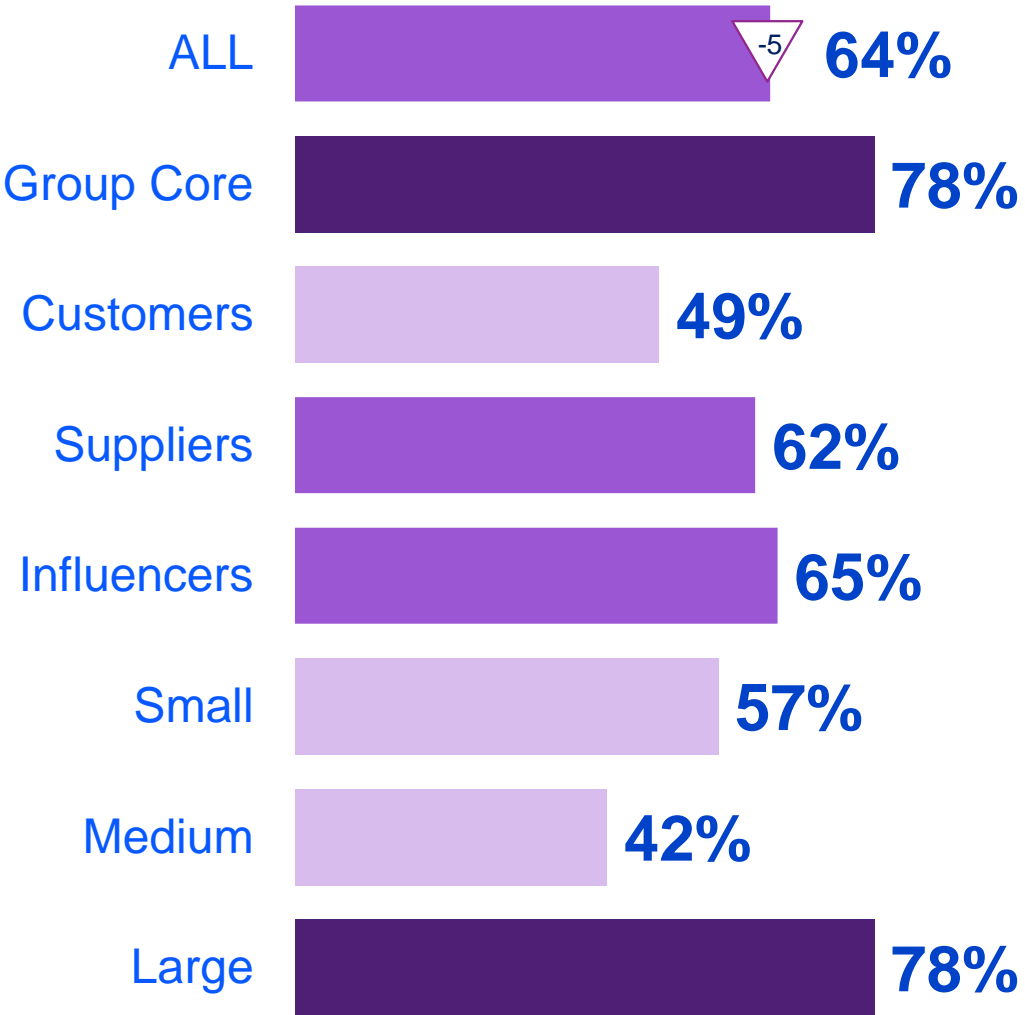


“ Sustainability is part of our Purchasing Policy. – MEDIUM-SIZE EUROPEAN AIRLINE ”

“ We scrutinize our suppliers for their sustainability practices during the bidding process – LARGE ASIAN AIRLINE ”

“ We still working to implement sustainable procurement in this year – LARGE MIDDLE EAST AIRLINE ”

64% engage with industry partners to advance their sustainability goals



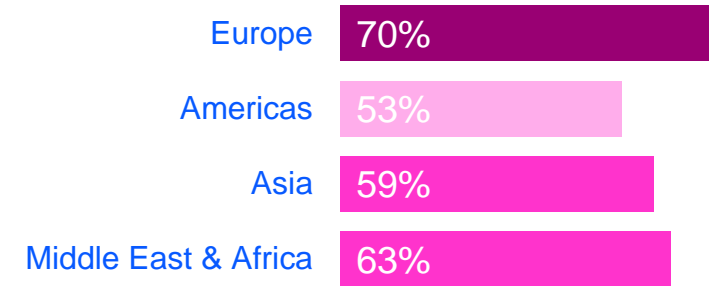
Still a long way to go to make sustainability really part of the companies' culture

62%



Of respondents feel sustainability is embedded in their company's DNA. This is 70% for Large companies.

Companies with a sustainability culture, by region



CARGO SERVICE CENTER

Smaller footprint,
Bigger impact



At CSC, sustainability is more than a goal-it's a responsibility we uphold at every step. Our commitment to 14 relevant Sustainable Development Goals (SDGs) drives real action, turning vision into measurable impact.



In past 3 years has become part of our DNA –
LARGE NORTH AMERICAN FORWARDER



Sustainability can be considered embedded in our company's DNA. We integrate it into our core values, decision-making processes, day to day operations..... – LARGE LATIN AMERICAN FORWARDER

69% of large firms produce a sustainability report

46%

Of surveyed companies produce a sustainability report, but this number hides huge differences by company size: 69% of Large companies but only 23% of small and medium size ones

71%

Have a sustainability strategy



81%

Measure ESG performance & progress



65%

Share ESG performance & progress externally



83%

Produce a sustainability report

Of companies with a sustainability strategy defined measure performance & progress against their sustainability targets

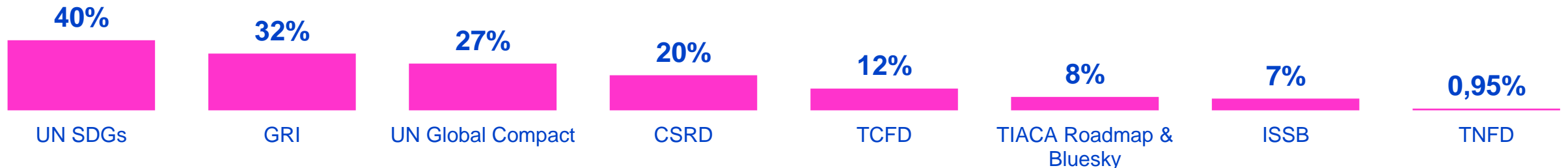
Of them* share their sustainability performance and progress externally

* Of companies with a sustainability strategy defined and who measure performance and progress against their sustainability targets

Of them** produce a sustainability report

** Of companies with a sustainability strategy defined and who measure performance and progress against their sustainability targets and share them externally

Most popular sustainability frameworks referenced in sustainability reports produced by the air cargo industry





The sustainability priorities
of the air cargo industry

Industry priorities: the 8 key objectives for a sustainable air cargo

The 5th TIACA Air Cargo Sustainability Survey continues to align with the 30 actionable priorities which are addressing the 8 key objectives for sustainable air cargo transformation. Each of the 30 actionable priorities are defined in full detail in the TIACA Air Cargo Sustainability Roadmap.

As the corporate world is adopting the Environment, Social & Governance, we are now proposing a mapping of the 8 TIACA objectives with the ESG framework.

TIACA framework		ESG framework	
Environment	Decarbonize	Carbon footprint	E
	Eliminate waste	Waste & water	
	Protect biodiversity	Animal welfare	
Social	Improve lives and well-being	Noise & air quality	S
	Support local economies and communities	Local community (<i>job creation, access to healthcare & essential goods</i>)	
		Business ethics (<i>fight against illegal trade</i>)	G
Improve efficiencies and profitability	Efficiencies & resilience		
Culture & leadership	Build and nurture partnerships	Partnerships	
	Attract, retain and develop employees	Workforce	S

The 30 ESG priorities of the air cargo industry

Priorities are ranked based on companies confirming they are focusing on these areas, either by raising awareness on the subject or taking action to improve or reduce their impact:



Answers to the question: "Please indicate what you do to decarbonize, eliminate waste and protect biodiversity; to improve lives and well-being and support communities in need and to attract, develop and retain your talents, improve efficiencies & profitability, and build & nurture partnership" (1 possible answer from "Action stage", "Awareness stage", "Not a focus" or "Not applicable to us")

- Environment
- Social
- Governance

The air cargo industry accelerates efforts in digitalization, innovation, business partner support and employee experience

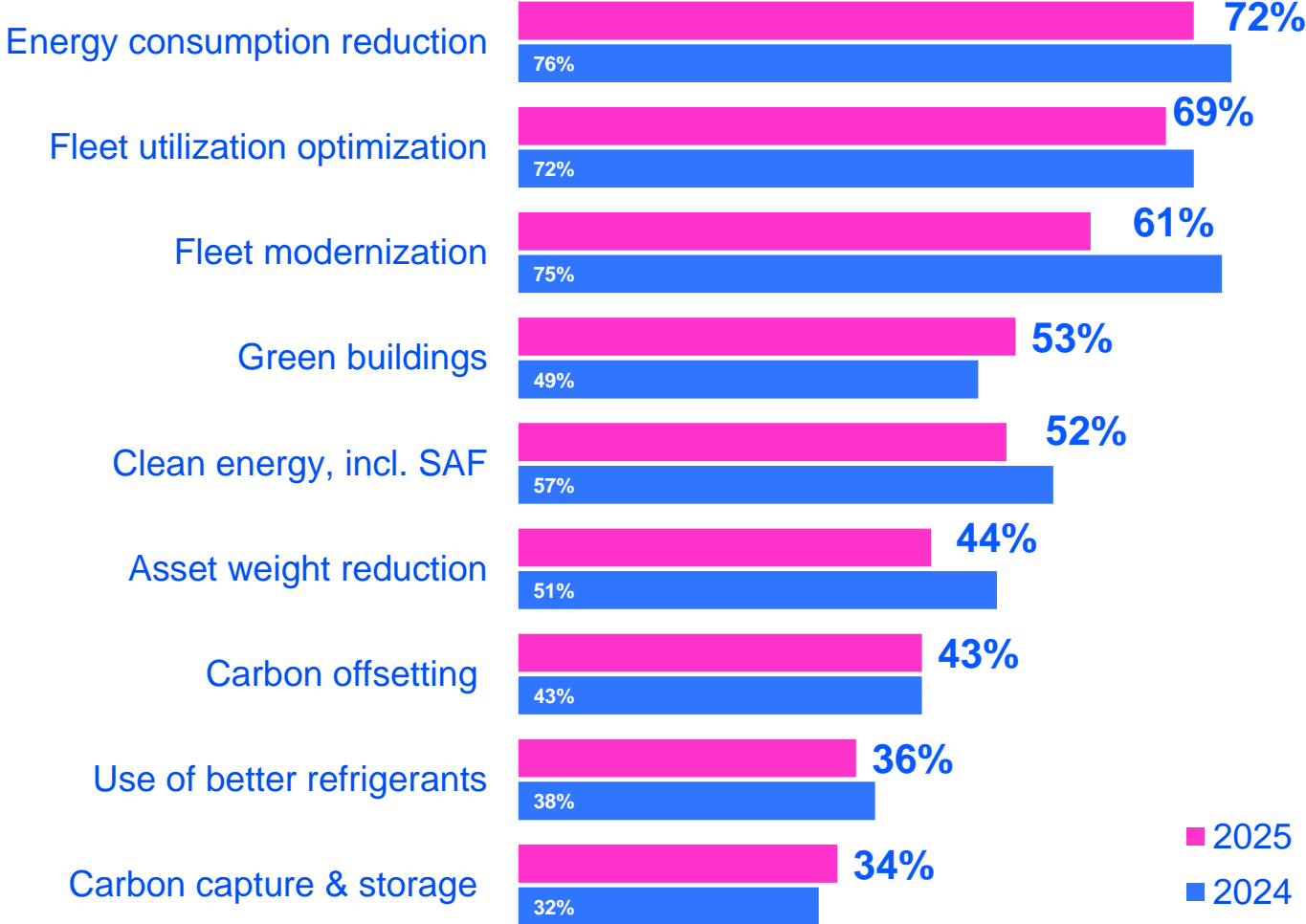
2025 rank	Priority	Action % 2025	Action % 2024	YoY progress
1	G Continuous improvement & operational excellence	84%	82%	△ +2
2	G Digitalization	84%	79%	▲ +5
3	S Training & education	83%	79%	△ +4
4	G Business partners support	83%	76%	▲ +7
5	G Innovation	83%	77%	▲ +6
6	S Employee experience	81%	76%	▲ +5
7	S Diversity & inclusion	74%	70%	△ +4
8	E Energy consumption	72%	76%	▽ -4
9	G Industry collaboration	69%	72%	▽ -3
10	E Vehicle utilization optimization	69%	72%	▽ -3
11	S Promotion of air cargo as a career choice	68%	69%	▽ -1
12	G Fight against illegal trade	67%	65%	△ +2
13	E Single-use plastic & foam	65%	59%	▲ +6
14	S Local economies support & job creation	64%	69%	▼ -5
15	G Sustainable sourcing	61%	59%	△ +2

2025 rank	Priority	Action % 2025	Action % 2024	YoY progress
16	E Fleet modernization	61%	75%	▼ -14
17	S Local communities support <i>(with access to healthcare & essential goods)</i>	60%	58%	△ +2
18	E Fight against wildlife trafficking	60%	59%	△ +1
19	E Water management	58%	62%	▽ -4
20	E Local air quality	57%	58%	▽ -1
21	E Noise	55%	66%	▼ -9
22	E Green building	53%	49%	△ +4
23	E Clean energy, including SAF	52%	57%	▼ -5
24	E Perishable waste	51%	57%	▼ -6
25	E Recycling & circular economy	46%	45%	△ +1
26	E Live animals' transportation practices	45%	46%	▽ -1
27	E Light weight vehicles & ancillary equipment	44%	51%	▼ -7
28	E Carbon offsetting	43%	43%	0
29	E Better refrigerants	36%	38%	▽ -2
30	E Carbon capture technologies	34%	32%	△ +2

Note: Priorities are ranked based on companies confirming they are taking action to improve or reduce their impact in these areas. YoY progress represent the difference in points between Action % 2025 and Action % 2024.

Optimizing energy and asset utilization are the first decarbonization levers

How companies reduce (or plan to reduce) their carbon footprint

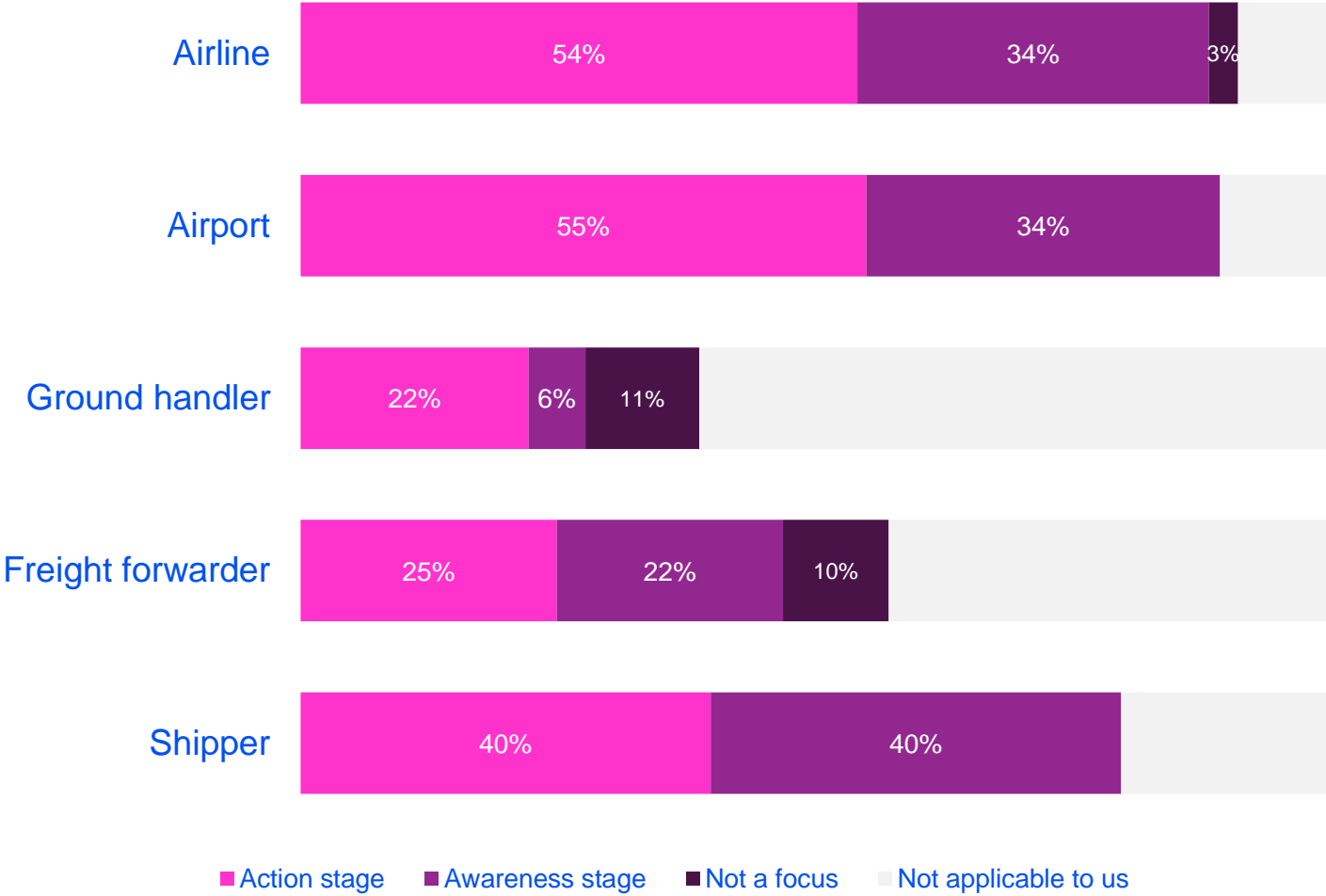


These figures reflect what respondents declared they are actively improving/reducing



The focus on SAF & offsets seems to decrease

Invest in and deploy Sustainable Aviation Fuels (SAF) or other fossil-free energy

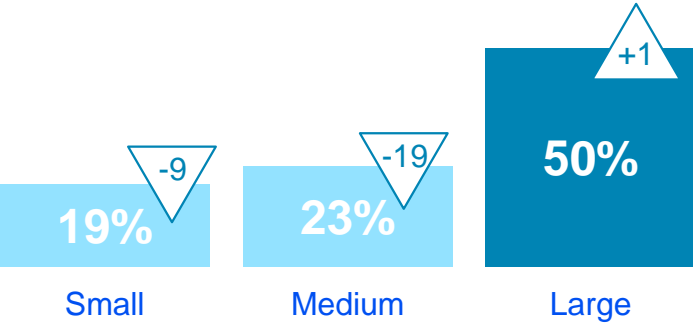


32% ▼ -3

Of participating companies declare they are actively involved in the deployment of SAF or other fossil-free energy

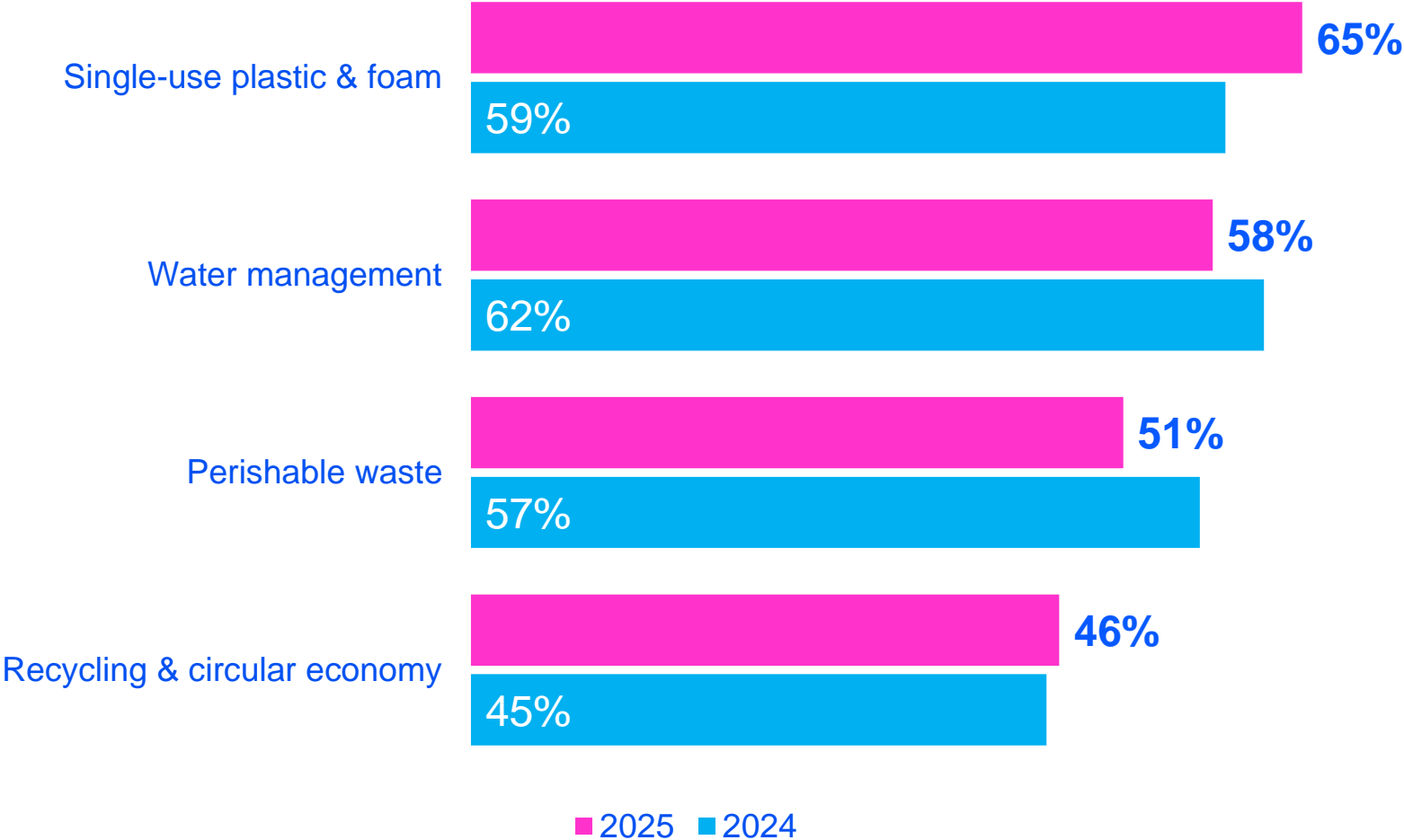
35% ▼ -8

Of surveyed companies already use effective offsetting mechanisms, but this number hides huge differences by company size:



Single-use plastics remains a top priority of the air cargo industry

How companies actively improve their waste & water management



91% ▲ +1

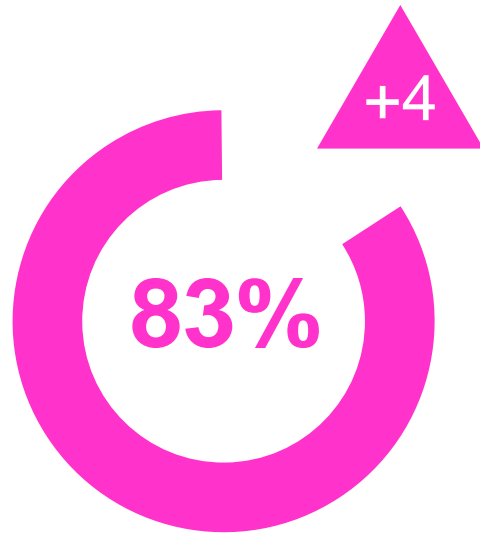
Of surveyed companies focus on eliminating single-use plastic and foam (action or awareness stage)

“
We target zero waste to landfill by 2030 – LARGE EUROPEAN AIRPORT

“
Exploring biodegradable or recyclable packaging options for goods – ASIAN FORWARDER

These figures reflect what respondents declared they are actively improving/reducing

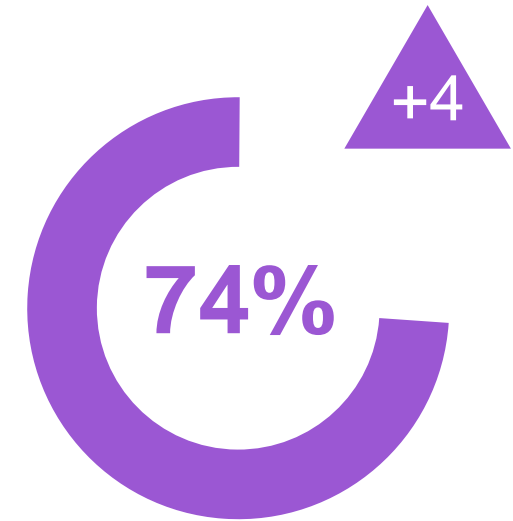
People matters: air cargo continues to invest in staff development and retention



Invest in training and education



Improve employee experience



Advance diversity & inclusion

“ We have active Diversity & Inclusion targets and have a Diversity & Inclusion committee. We are constantly working on ways to enhance our employees' working environments and provide regular training to all employees. – LARGE EUROPEAN GSA ”

“ We implemented employee resource groups for instance for women or for persons with disabilities. We also implemented a female leadership mentorship program to groom female leaders in our organisation. – LARGE EUROPEAN GHA ”

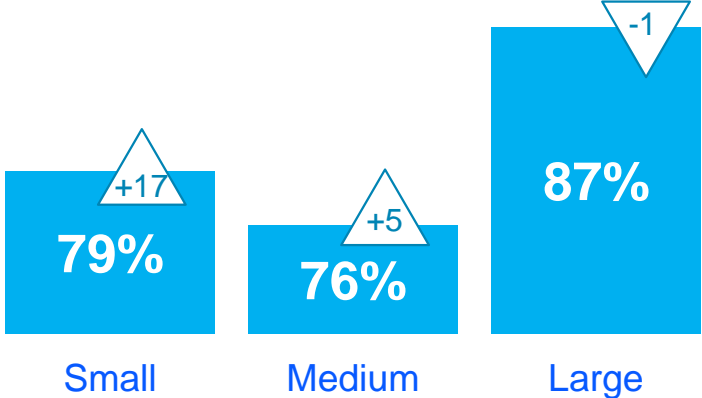
The air cargo industry continues to invest in innovation & digitalization

84% ▲ +5

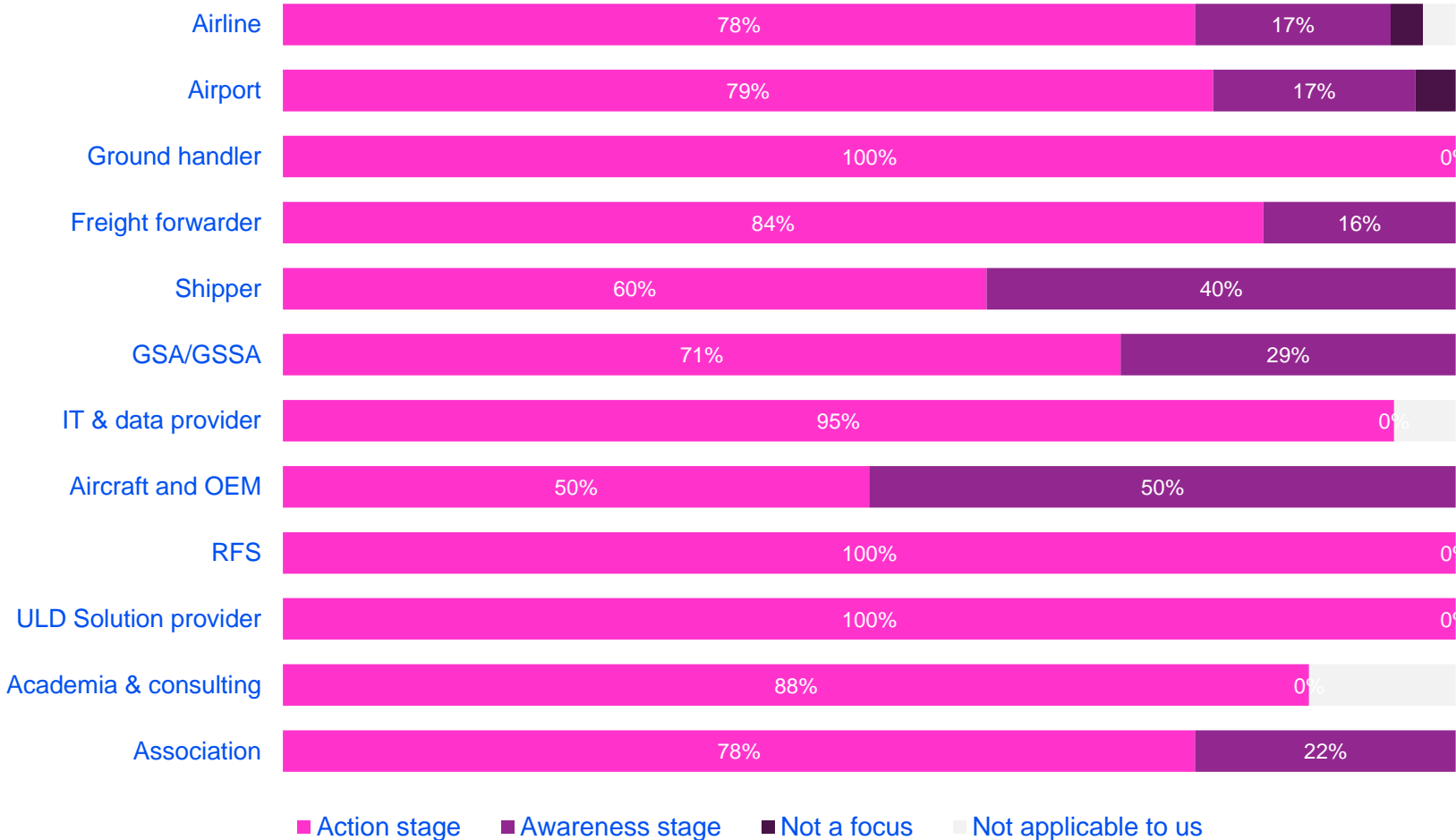
Of surveyed companies confirm they take concrete actions to accelerate digitalization

83% ▲ +6

Of surveyed companies confirm they actively promote and invest in innovation



Digitalization efforts by company type





Lifting air cargo to new heights

Join Industry Leaders Making Air Cargo more sustainable with the BlueSky Sustainability Verification Program.

Complete the BlueSky Desktop Verification to:

- Take advantage of the only sustainability rating system in the air cargo industry.
- Get public recognition and improve brand image and reputation.
- Showcase your company's performance against peers.

Learn more at tiaca.org

The BlueSky dashboard consists of

- ✓ Summary of the evaluation results
- ✓ Spider diagram highlighting performance in the 8 priority areas
- ✓ Detailed scoring breakdown in Environment, Society and Culture & Leadership areas

BlueSky Dashboard
Cargo Fly, Inc.

ISSUED	OVERALL SCORE	INDUSTRY SECTOR	VALID UNTIL
March 2022	230/320	Freight forwarding	March 2024

Cargo Fly logo

TIACA attests that Cargo Fly has provided substantial evidence demonstrating current sustainability performance in TIACA's 8 key sustainability priority areas for air cargo.

Cargo Fly earned an overall score of 230 in sustainability.