

Air Cargo 2026: **What shippers, airports, and airlines are really prioritising**



Executive summary

The air cargo industry is entering a decisive phase where digital orchestration, reliability, and sustainability are no longer independent priorities—they are deeply interconnected. Insights from Kale Logistics Solutions' 2026 industry polls, conducted across global air cargo stakeholders, reveal a clear mandate: **Technology platforms must act as the backbone of future-ready air cargo ecosystems.**

Respondents overwhelmingly identified technology and automation as the most influential force shaping air cargo's future, while reliability emerged as the single most important criterion when choosing a cargo provider. Sustainability, once viewed largely through a compliance lens, is now recognised as a strategic responsibility and brand differentiator—enabled increasingly through digital optimisation rather than standalone initiatives.

E-commerce continues to accelerate demand for faster, more transparent, and more predictable air cargo operations, placing pressure on legacy systems and fragmented workflows. At the same time, gaps in regulatory awareness and digital readiness expose operational and compliance risks across airports, terminals, and cargo communities.

The research reinforces Kale's long-held belief: the future of air cargo will be built on integrated digital platforms that connect stakeholders, standardise data, enable compliance, and deliver end-to-end visibility. Organisations that adopt this platform-led approach will be best positioned to scale sustainably, operate reliably, and respond rapidly to market and regulatory change.

Overall Research Summary

Kale's 2025-26 industry research, conducted via polls across social media, email campaigns, and professional networks, captures perspectives from air cargo stakeholders on technology, sustainability, e-commerce, reliability, and regulatory compliance. Key findings include:

- **Technology & Automation:** 48% of respondents see digital transformation as the top driver for air cargo growth, with GPS, RFID, and mobile platforms improving visibility, efficiency, and predictive capabilities.
- **Reliability:** 57% of shippers prioritise consistent service over cost and speed, emphasizing trust and operational continuity.
- **E-commerce Impact:** 83% of respondents report a significantly positive effect, highlighting air cargo's role in supporting rapid online fulfilment.
- **Sustainability:** 60% view it as corporate responsibility, with greener aircraft, carbon offsets, and fleet optimization as key levers; willingness to pay premiums remains split.
- **Digital Readiness:** 58% identify leadership vision and commitment as critical to successful transformation.
- **Reports indicate that 22% of airports are unaware of new EU regulations, highlighting gaps in awareness and preparedness.**

The research indicates a clear trend: air cargo's future depends on the integration of technology, operational reliability, and sustainable practices, with leadership and strategic vision guiding successful adoption.



Technology as the Engine of Transformation

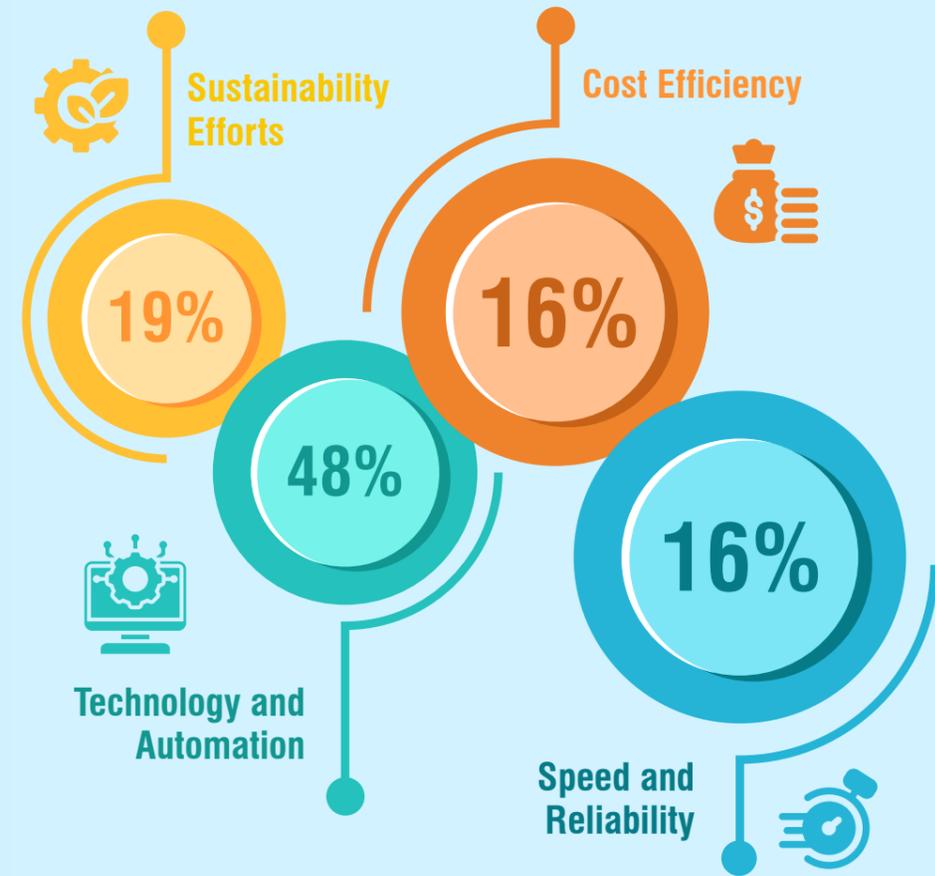
Our 2025-26 poll reveals a decisive shift: 48% of industry leaders identify technology and automation as the primary driver shaping the future of air cargo. This significantly outpaces other priorities.

This finding aligns with broader market momentum. Secondary research indicates the global logistics automation market is valued at approximately \$88 billion in 2025, growing at a CAGR of 12.8%. Furthermore, with global e-commerce sales surpassing \$6.3 trillion, over 41% of logistics firms are now actively investing in automation software to handle the surge in volume and complexity. Digital solutions are the engine of this transformation. From AI-powered predictive analytics to autonomous systems, these tools are revolutionizing supply chains. Technologies like GPS tracking, mobile apps, and RFID provide real-time visibility and route optimization, enabling proactive exception management. Crucially, these efficiency gains indirectly bolster sustainability by minimizing fuel waste and emissions.

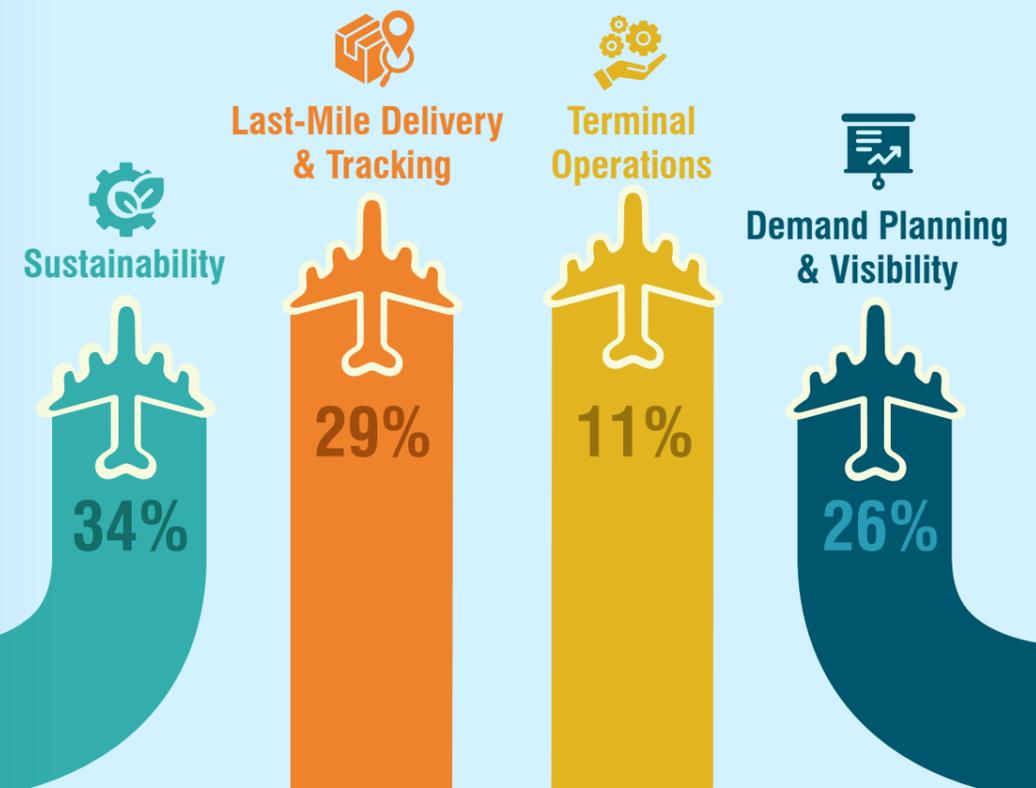
Key Takeaway: Technology isn't just a tool—it is the foundation enabling other strategic priorities in air cargo.



The Future of Air Cargo: What's Most Important to You?



Which area of logistics is going to see the most transformation due to technology adoption in 2026?





Reliability Remains Non-Negotiable

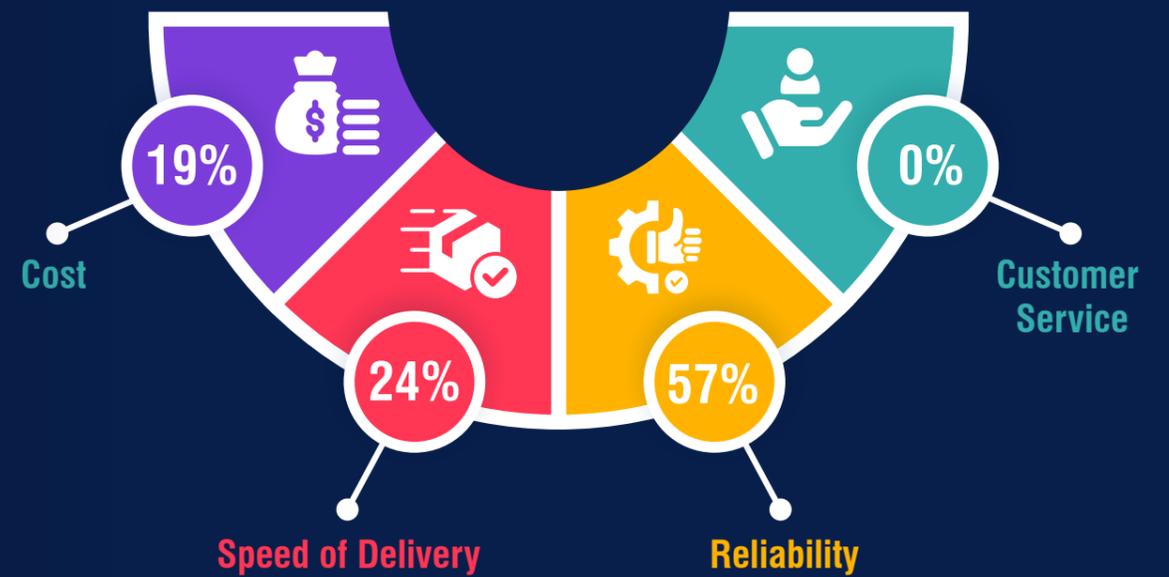
Our 2025-26 poll establishes a clear hierarchy in air cargo selection: Industry leaders prioritize reliability, decisively outpacing speed and cost. Notably, customer service scored 0% as a primary driver, indicating it has evolved from a differentiator into a non-negotiable baseline expectation.

This shift reflects a market hardened by recent volatility. Secondary research reinforces this sentiment: with global supply chain disruptions costing high-value sectors like automotive and technology an estimated \$13–16 billion annually, the financial penalty for failure is severe. Furthermore, with industry-wide "Delivery As Promised" (DAP) quality averaging just 63.7% in mid-2025, the gap between promise and performance remains a critical pain point.

In this environment, "fast" is irrelevant if it isn't "certain." Shippers are moving away from purely transactional, price-driven decisions toward carriers that offer proven resilience. Technologies like real-time control towers and predictive AI are no longer just operational tools—they are the mechanisms that guarantee this reliability, transforming unpredictable supply chains into transparent, dependable networks.

Key Takeaway: Reliability drives trust and long-term partnerships; technology is the infrastructure that sustains it.

What do you consider the most important factor when choosing an air cargo provider?



E-Commerce: A Catalyst for Growth

Our 2025-26 poll confirms a decisive trend: 83% of respondents view e-commerce as having a significantly positive impact on air cargo, with the remaining 17% acknowledging at least some benefits. Not a single respondent views this shift negatively.

This overwhelmingly positive sentiment mirrors broader market realities. Secondary research reveals the global e-commerce air cargo market reached approximately \$52.8 billion in 2024, with cross-border e-commerce volumes projected to grow at a CAGR of 14% through 2026. As traditional general freight remains flat, e-commerce has effectively become the industry's primary growth engine, accounting for the vast majority of new air cargo demand.

This surge is fundamentally altering operational DNA. The shift from consolidated bulk pallets to millions of individuals, time-sensitive parcels demand unprecedented agility. To cope, providers are rapidly adopting flexible networks, rapid last-mile solutions, and integrated tracking systems that offer "parcel-level" visibility. Those leveraging automation to handle this high-frequency, low-weight volume are capturing the lion's share of the market.

Key Takeaway: E-commerce is not just influencing air cargo—it is the **accelerant** for its operational transformation and future profitability.

How do you think e-commerce is impacting the air cargo industry?

0%

No impact

0%

Some negative impact

83%

Significantly positive impact

17%

Some positive impact



Sustainability: Strategic Priority and Business Differentiator

Sustainability is transitioning from a regulatory checkbox to a strategic imperative. Our 2025-26 poll indicates a maturity in market mindset. Leaders now view sustainability as a Corporate Responsibility; this significantly outweighs those viewing it merely as Compliance or Cost Reduction.

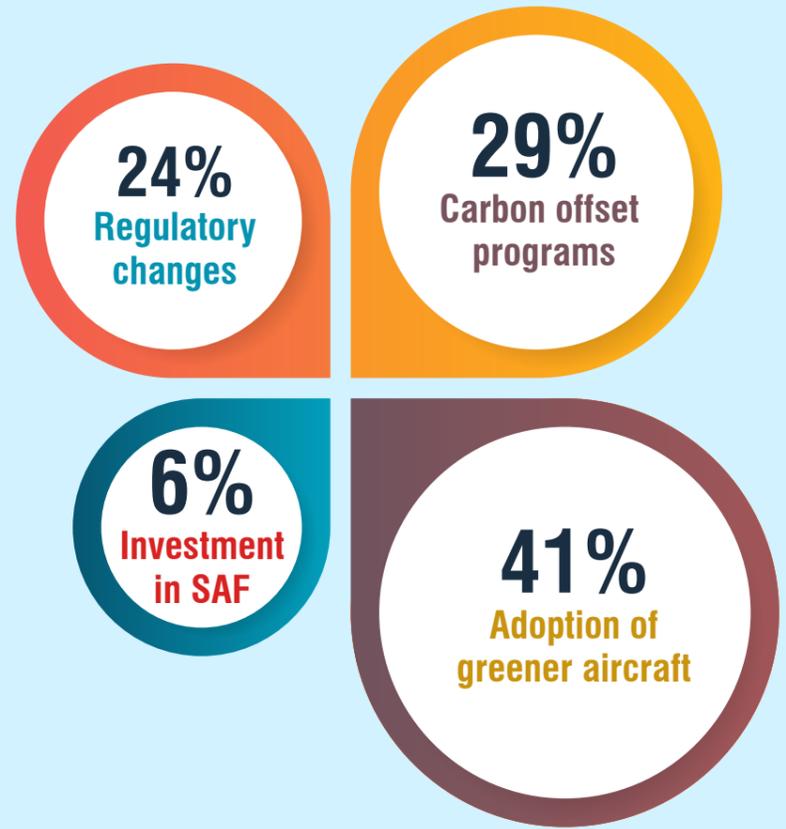
This shift is crucial because the economic reality remains challenging. Secondary research highlights that while mandates like the EU's ReFuelEU are active, Sustainable Aviation Fuel (SAF) production hovered around just 0.6–0.8% of total jet fuel consumption in 2025. Widespread adoption is throttled by a severe "green premium," with SAF trading at 3 to 5 times the cost of conventional fossil jet fuel. Consequently, while SAF remains the long-term goal, the industry's immediate focus has pivoted to fleet modernization and digital optimization. These levers offer tangible, immediate carbon reductions without the supply constraints of alternative fuels.

This underscores a market split between sustainability-focused clients and price-sensitive segments. Clear communication of measurable environmental benefits—emissions reduction, certifications, and reporting—can increase willingness to pay.

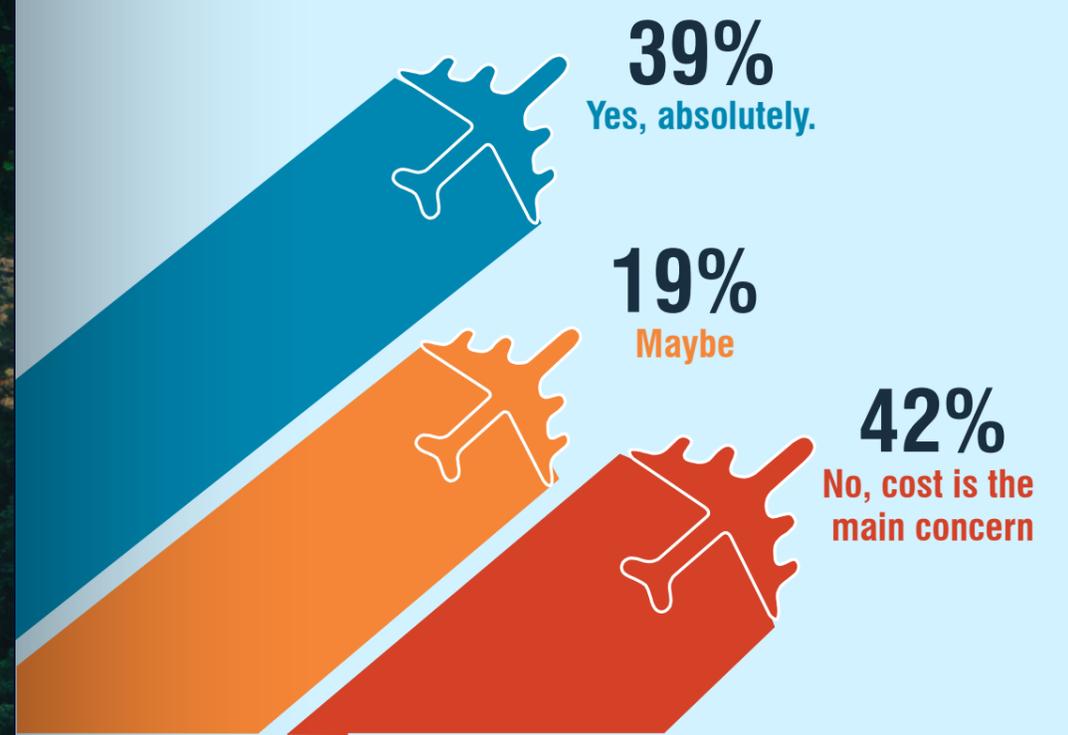
Key Takeaway: Sustainability strengthens brand value and stakeholder trust, forcing companies to innovate even as cost pressures persist. But investments towards sustainability must demonstrate tangible value to overcome cost sensitivity.



In your opinion, which factor will most influence the sustainability of the air cargo industry in the near future?



Are customers prepared to pay a premium for sustainable air cargo services?



Digital Readiness: Vision First

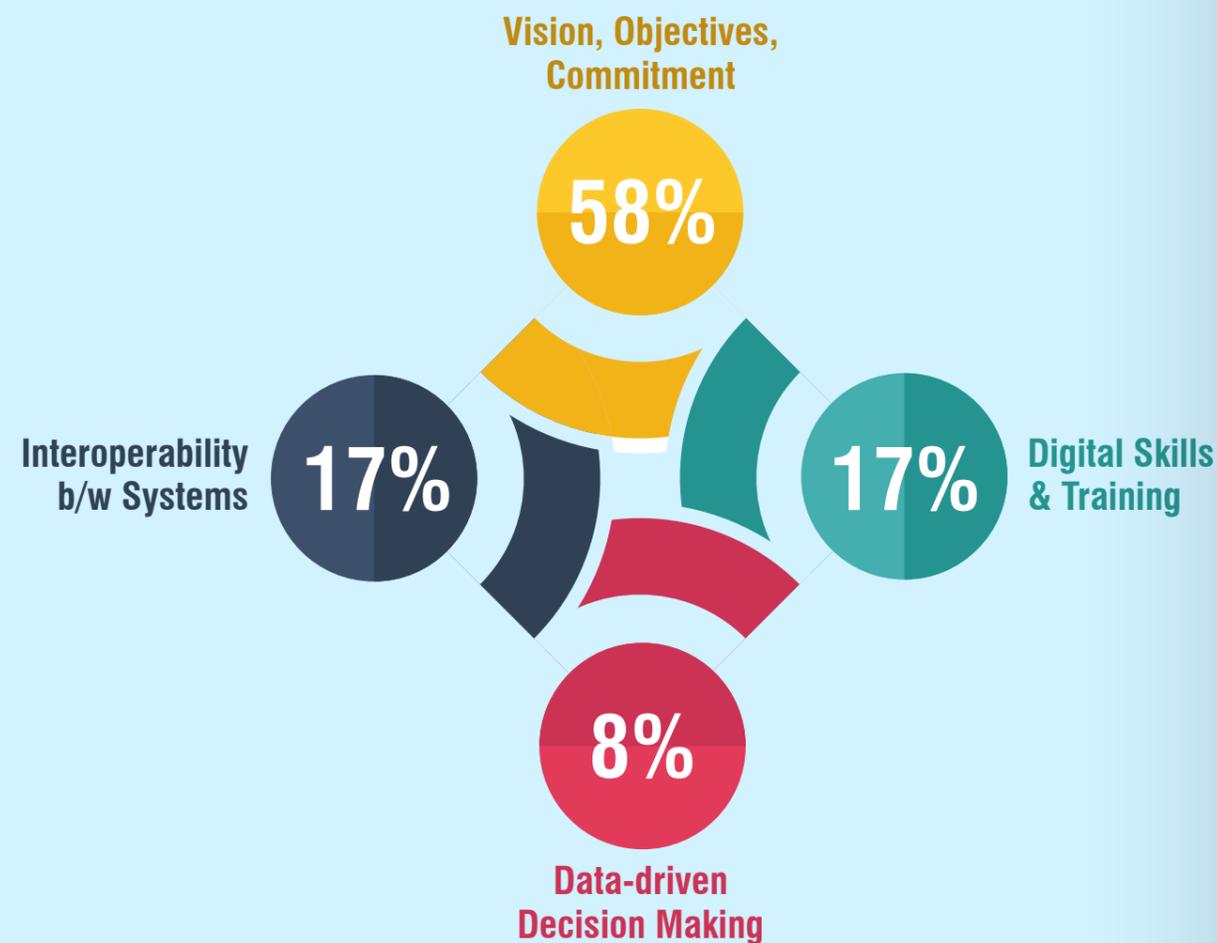
Achieving digital maturity is fundamentally a cultural challenge, not just a technical one.

This finding is backed by significant secondary research. Industry studies consistently show that approximately 70% of digital transformations fall short of their objectives—not due to flawed technology, but due to a lack of clear strategy and resistance to change. Furthermore, logistics companies with a defined, top-down digital roadmap are reported to achieve revenue growth up to five times higher than those adopting ad-hoc, siloed solutions.

Skills and system integration are vital, but they are downstream dependencies. Without a cohesive "North Star" from the C-suite, technology investments risk becoming expensive, disjointed experiments. A clear vision ensures that tools—from AI to Port Community Systems—are not just purchased but effectively adopted across the organization.

Key Takeaway: Leadership and strategic clarity are the non-negotiable foundations that determine whether digital transformation generates ROI or merely overhead.

What's the most critical factor for digital readiness?





Compliance and Security: Avoiding Blind Spots

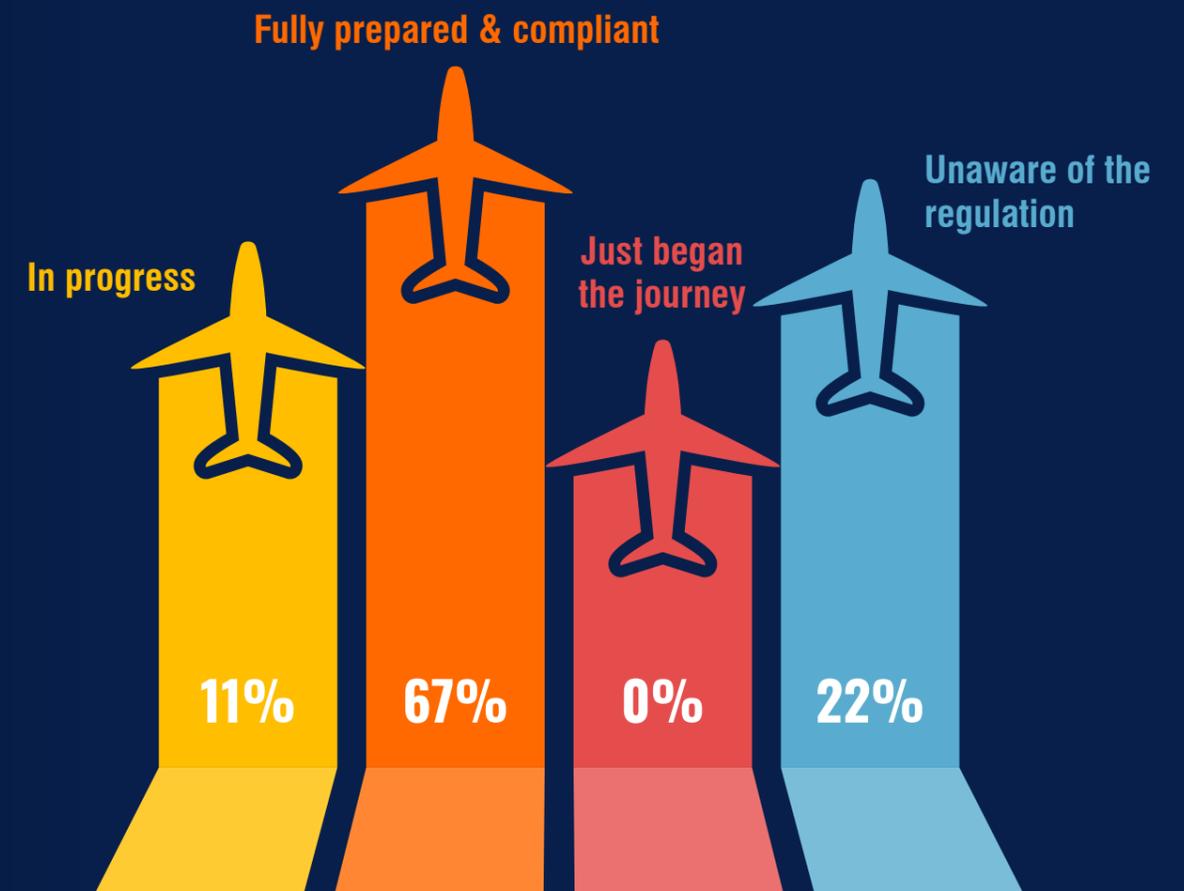
Despite the critical nature of regulatory updates, our 2025-26 poll uncovers a worrying gap: 22% of airports and logistics leaders remain unaware of recent security mandates, such as the EU's Implementing Regulation (EU) 2025/920. This regulation, effective September 2025, removed "security equivalence" status for several third-country airports, mandating stricter, full EU-standard screening for cargo originating from these regions.

This lack of awareness is a significant operational risk. Secondary research emphasizes that under the EU Import Control System 2 (ICS2) Release 3, non-compliance is no longer just a fine—it is a hard stop. Customs authorities are increasingly issuing "Do Not Load" (DNL) orders for shipments with missing or vague Pre-Loading Advance Cargo Information (PLACI). In late 2025 alone, incomplete data filings resulted in an estimated 15% increase in cargo dwell time at major European hubs as shipments were flagged for manual intervention.

For the 22% in the dark, the consequences are immediate: blocked shipments, compounded storage fees, and reputational damage.

Key Takeaway: Regulatory readiness is not passive; it requires active monitoring, automated compliance systems, and continuous training to prevent "blind spots" from becoming supply chain blockages.

How prepared is your Airport/Terminal for the new EU aviation security regulation?



Conclusion: The Road Ahead

The 2025 -26 Kale Logistics polls reveal a clear narrative: air cargo's future is digital, reliable, and sustainable. Technology and automation drive efficiency and visibility, reliability underpins trust, e-commerce accelerates demand, and sustainability is becoming a strategic differentiator.

For carriers and stakeholders, the focus should be on:

- Investing in digital tracking and automation
- Prioritising consistent, reliable service
- Balancing sustainability initiatives with customer value
- Ensuring leadership-driven digital readiness
- Staying ahead of regulatory changes

By aligning technology, operational excellence, and environmental stewardship, air cargo companies can build resilient, future-ready supply chains that meet market expectations in 2026 and beyond. Kale's role in this transformation is not simply to digitise processes, but to connect the entire air cargo value chain—airlines, airports, terminals, forwarders, customs, and regulators—on a single, trusted digital foundation.



About Kale Logistics Solutions

Kale Logistics Solutions is a global vertical SaaS company, providing a suite of software solutions for the logistics industry. It counts several Fortune 500 companies including large airports, and seaports as its customers. With in-depth domain knowledge and technical expertise, Kale has developed a suite of comprehensive digital enterprise solutions. Its flagship product is the Cargo Community Platform, which offer a single source of data to support operational flows, disseminating information to various stakeholders and facilitating the paperless exchange of trade-related data between stakeholders.

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