

Connectivity, liberalisation and fair competition

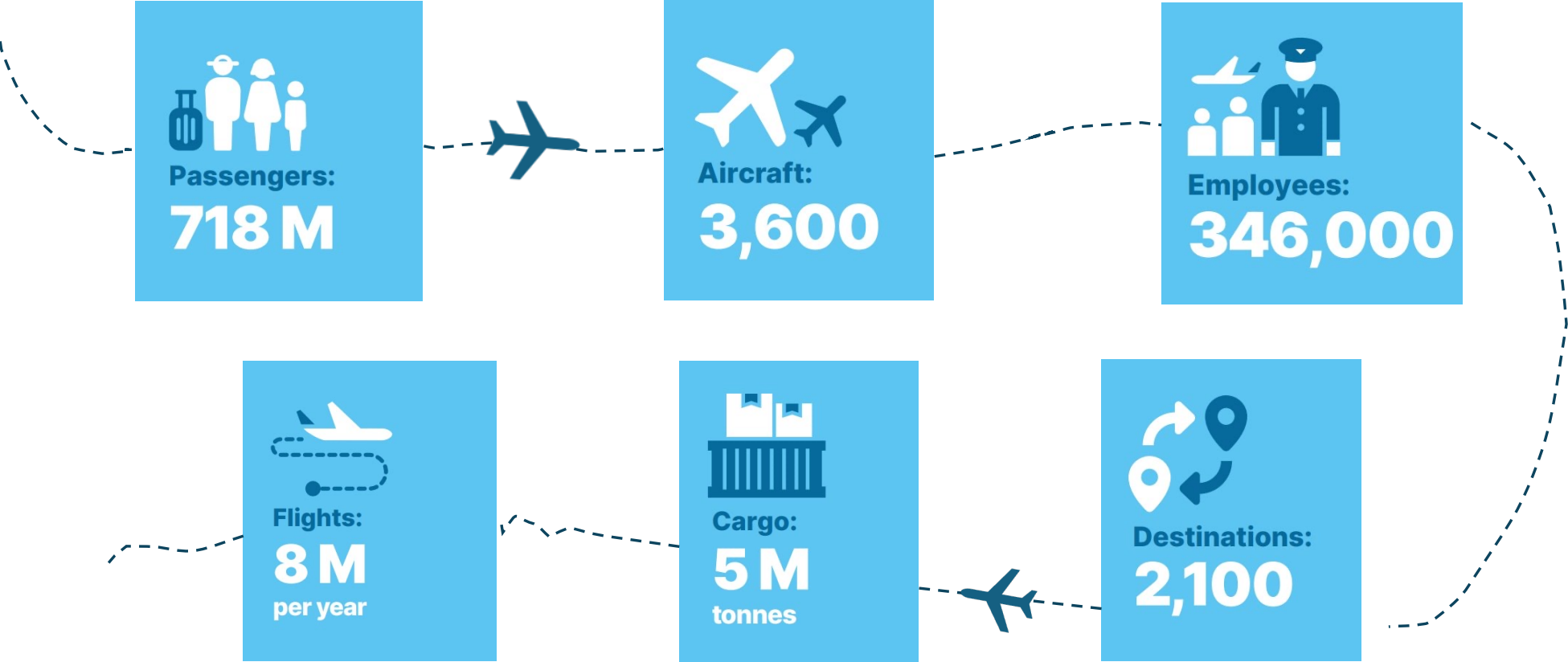
European Civil Aviation Conference

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A4E Managing Director

Strasbourg, 9 July 2024



Who We Are – 2023 Figures



Perceptions of Flying

Top benefits of flying



It enables Europeans to easily visit other parts of the world **(35%)**



Ensuring families are able to continue to see each other **(32%)**



It is the easiest way to travel **(26%)**

Top barriers to flying

①

Cost **(41%)**

②

The overall length of time it takes **(22%)**

③

Concern for environment **(21%)**

Most important areas for improvement

①

Making aviation more sustainable **(18%)**

②

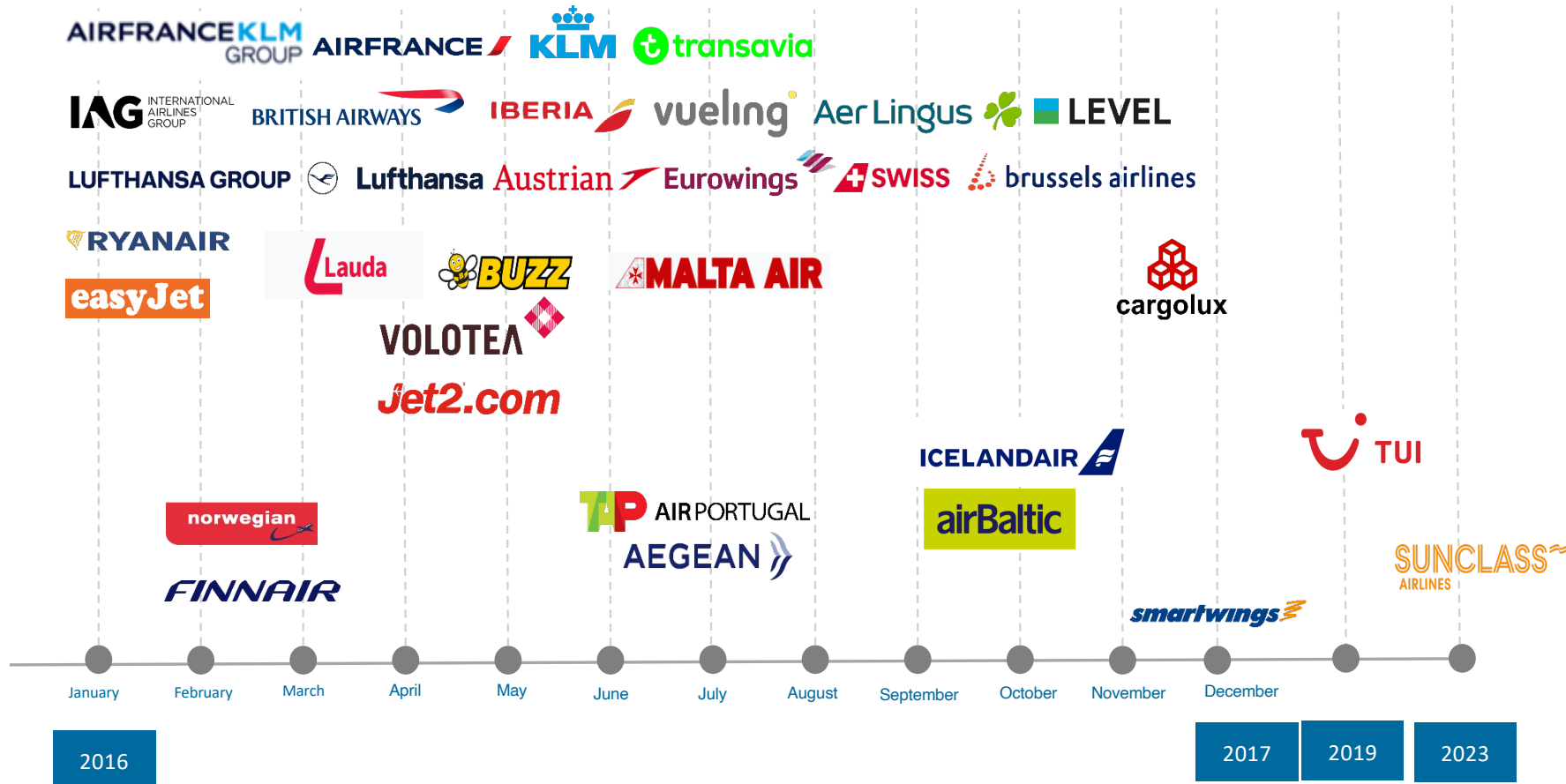
Making flights more affordable **(13%)**

③

Being more punctual with flight times **(9%)**

Online Poll of 5,280 adults in 5 countries conducted by Portland Communications, September 2023

Member Airline Groups

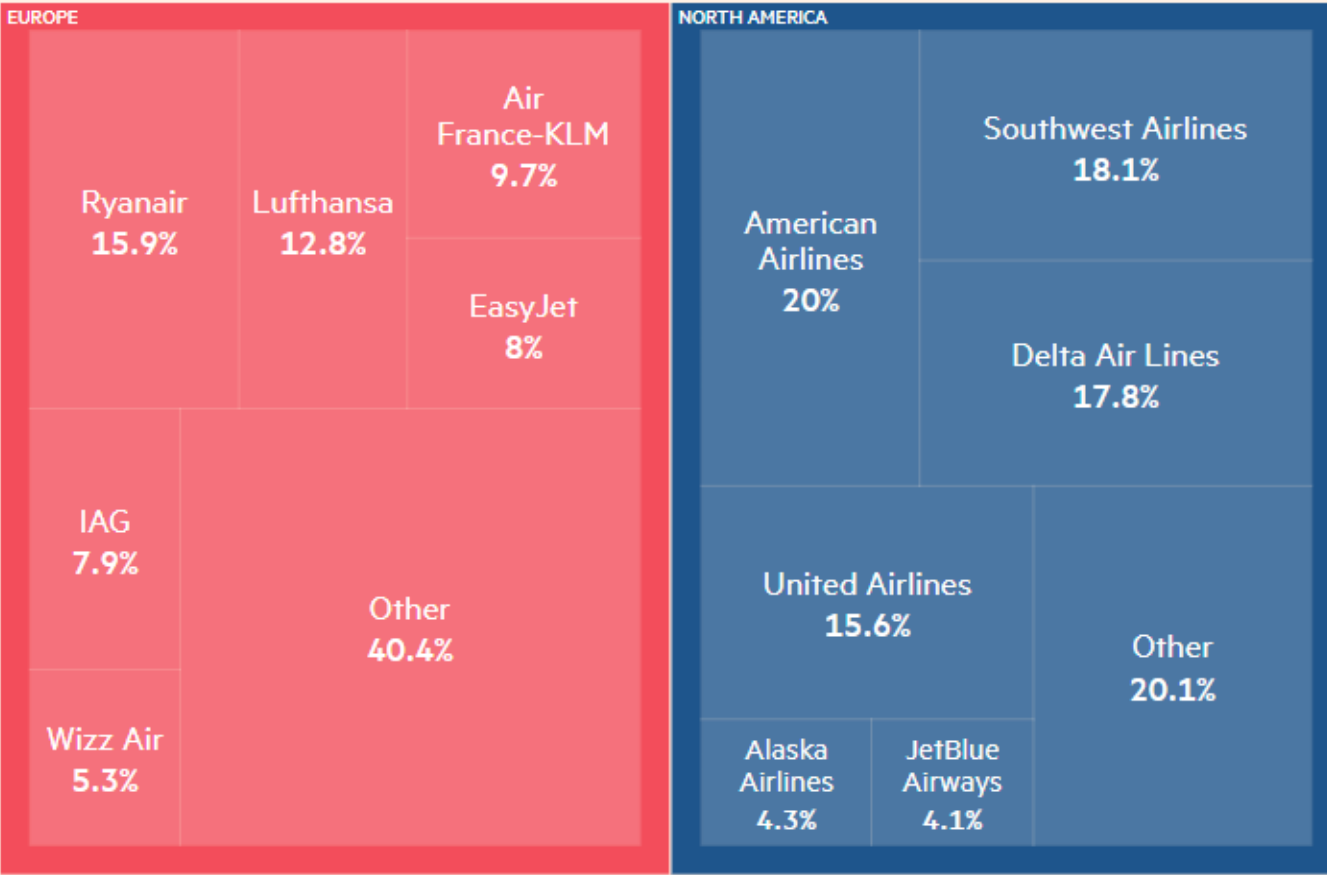


European Airlines Market



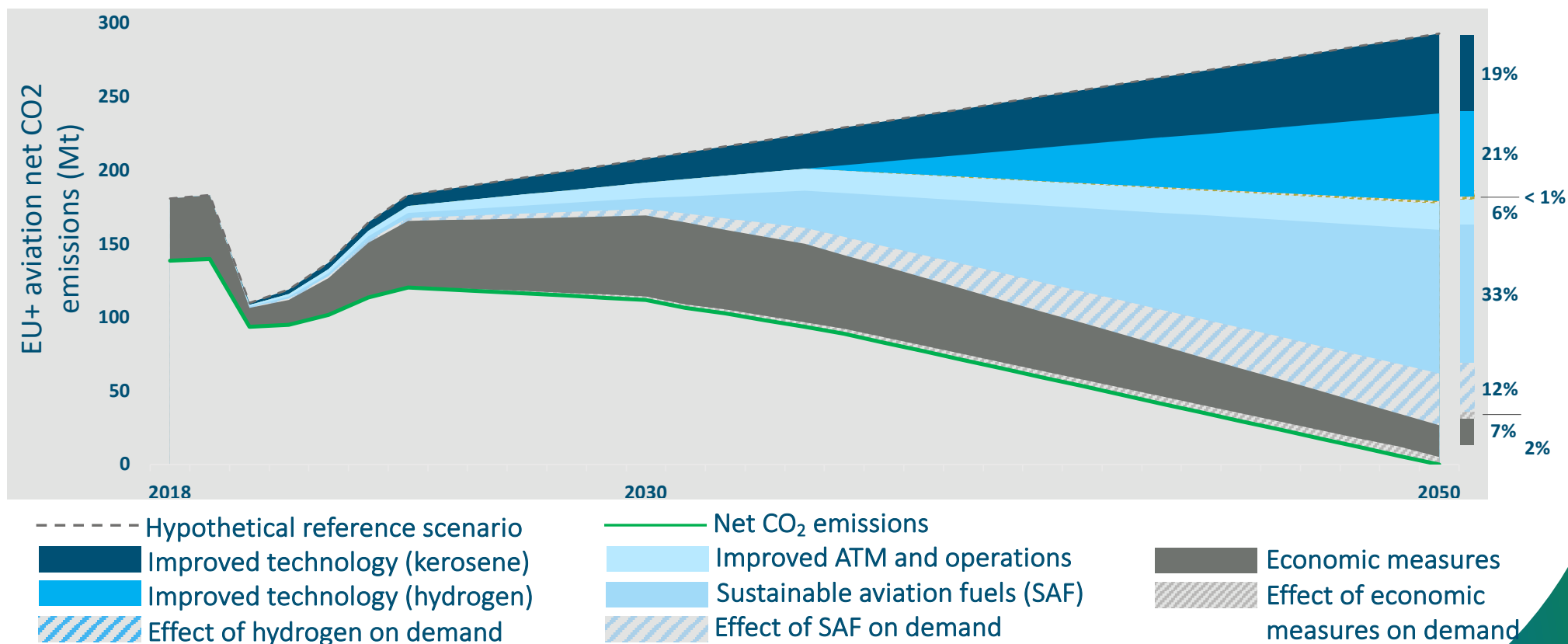
The **European** market remains more fragmented than the US

Scheduled flights by total seats in 2023 (%)



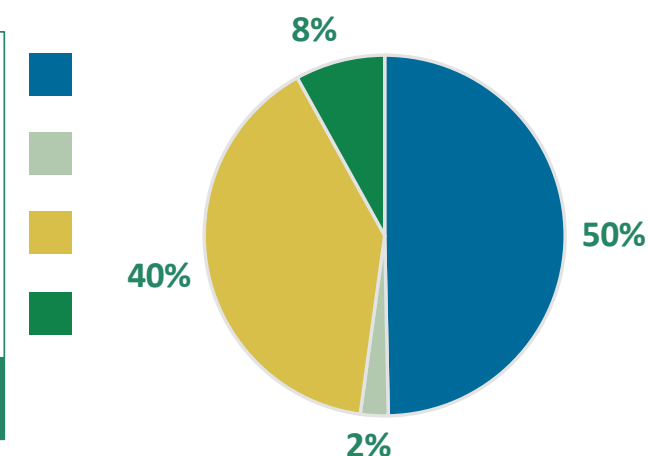
Source: [Financial Times](#), October 2023

Destination 2050: A decarbonisation roadmap for European aviation



Total expenditures add up to 1.888 B€ over 32 years, but include ‘business as usual’ expenditures

• Improvements in technology	938 B€
• Improvements in ATM and operations	47 B€
• Alternative fuels	751 B€
• Carbon pricing / negative emissions	152 B€
TOTAL	1.888 B€



These expenditures cover more than decarbonisation alone, but span

- › ‘Business as usual’ (BAU): expenditures that “would occur anyway”
- › “Premium”: expenditures directly related to Destination 2050 approx. **820 B€**

ETD and fuel taxes: carbon leakage & loss of competitiveness

DIVERSION RATE TO NON-EU



40% ES

19.4% IT

50% PT

ADDITIONAL COSTS FOR PASSENGERS

+5.9% ES

+ 6.2% IT

+ 5.9% PT



FINANCIAL LOSSES

TAX REVENUES

ES: + € 1.23 bn

IT: + €826.6 ml

PT: +264.3 ml



TOURISM EXPENDITURE

ES: - € 6.1 bn

IT: - €5.4 bn

PT: - €1.5 bn



JOB LOSSES

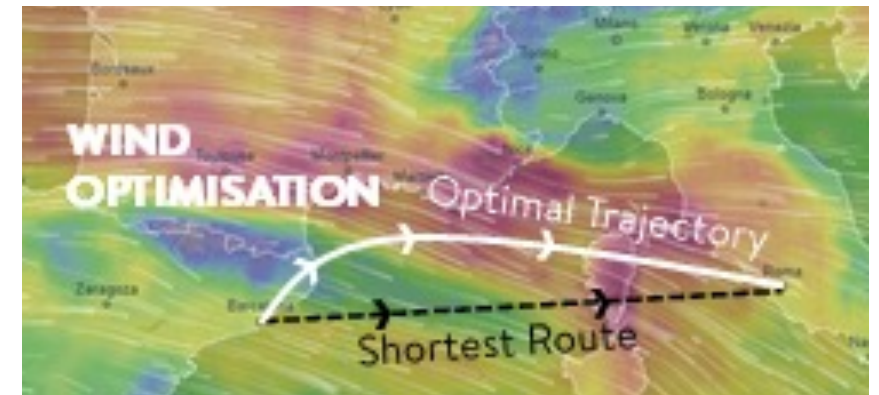
ES: - 52,588

IT: - 39,200

PT: - 18,752



Airspace Reform



Source: Flightradar24, 08 July 2024

Flying For Our Future



Our Commitment



Keeping Europe connected by an industry you can depend on



Modern & more sustainable



Available to all

Our Call to Action



Deliver meaningful airspace reform



Supercharge sustainability & strengthen competitiveness



Create a true single aviation market

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Thank you!