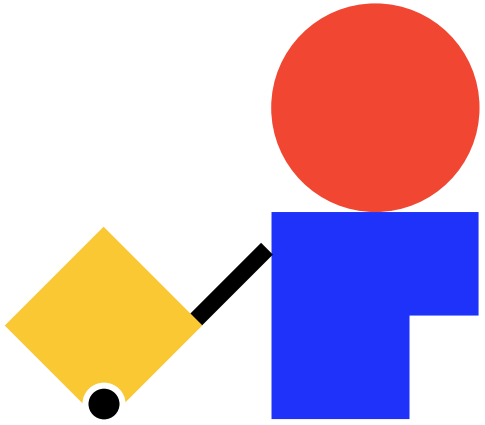


COVID Impact and Forecast

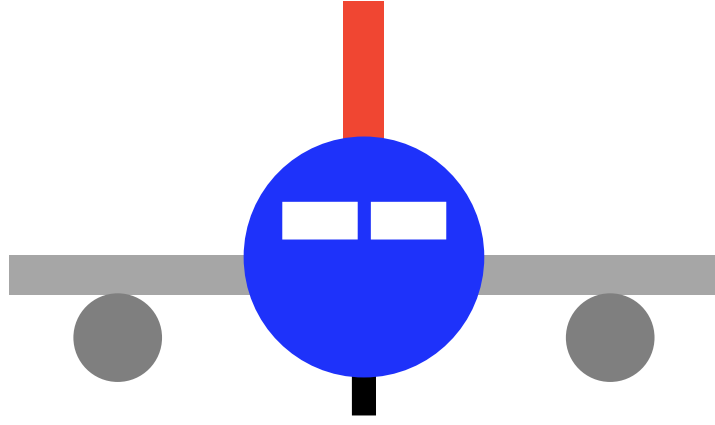
Navigating safely and sustainably out of Covid



Every day in 2019...



12.4
million
passengers

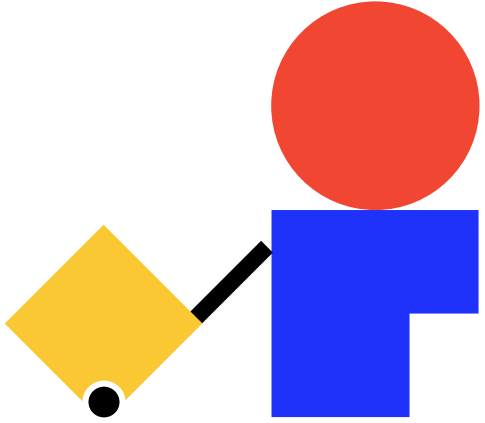


106,600
flights

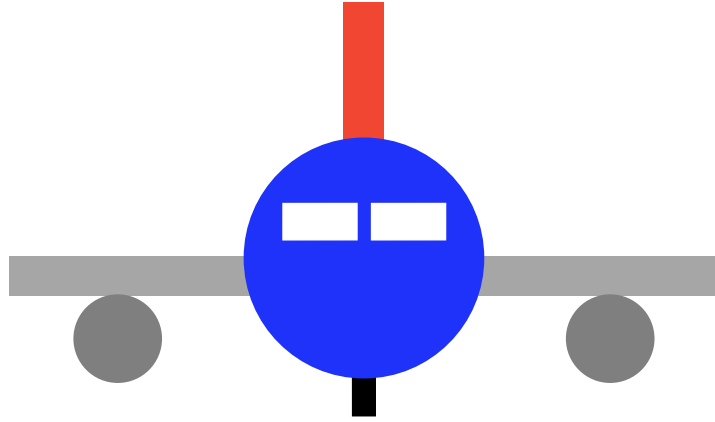


\$17.8
billion worth of
goods carried

Every day in 2020...



4.9
million
passengers

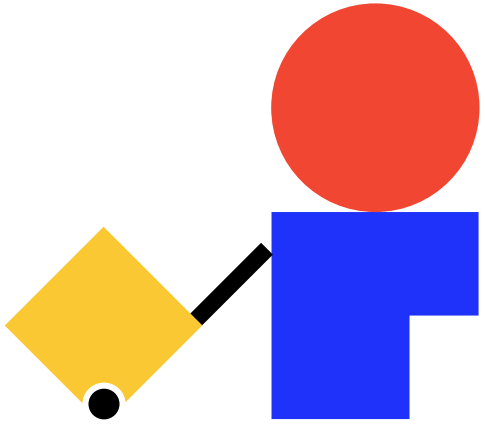


46,200
flights

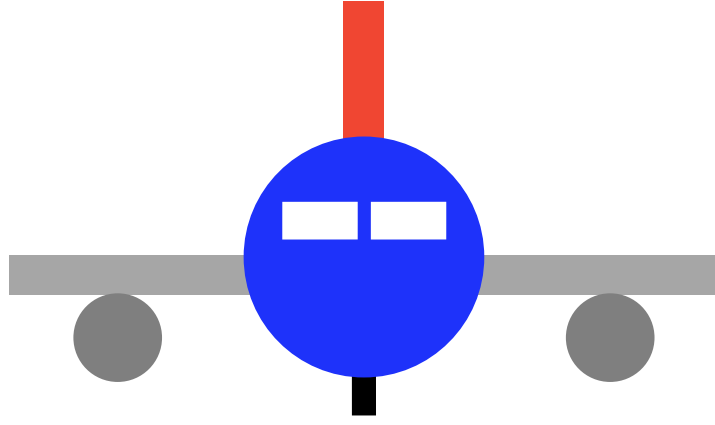


\$16.3
billion worth of
goods carried

Every day in 2021...



6.2
million
passengers

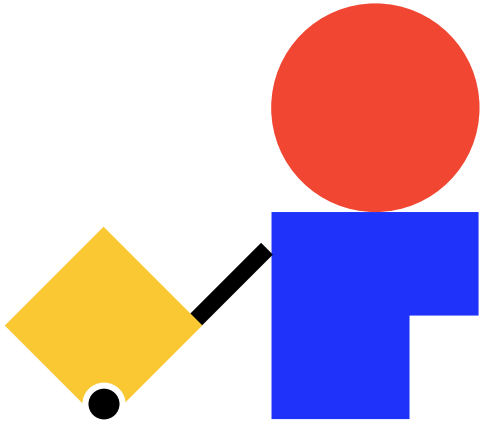


53,000
flights



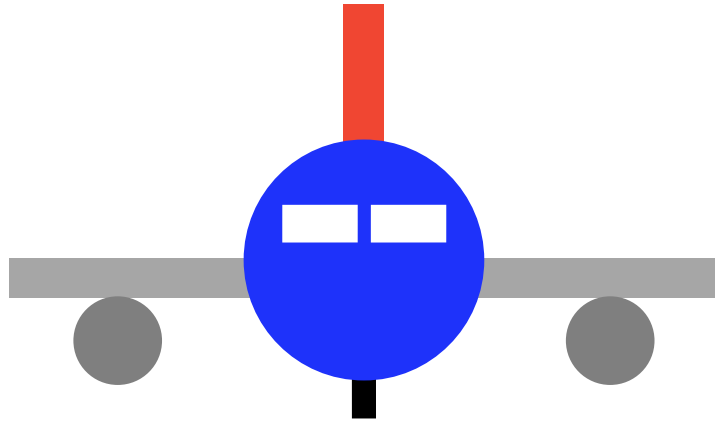
\$20.5
billion worth of
goods carried

Every day in 2022...



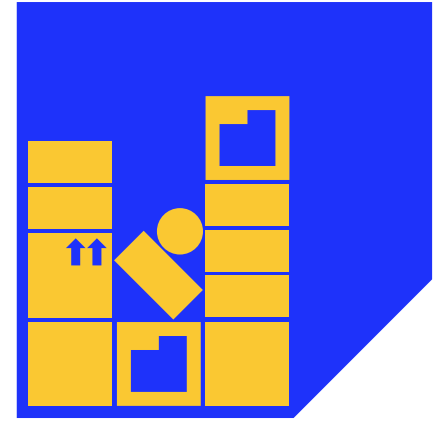
9.4

million
passengers



70,600

flights

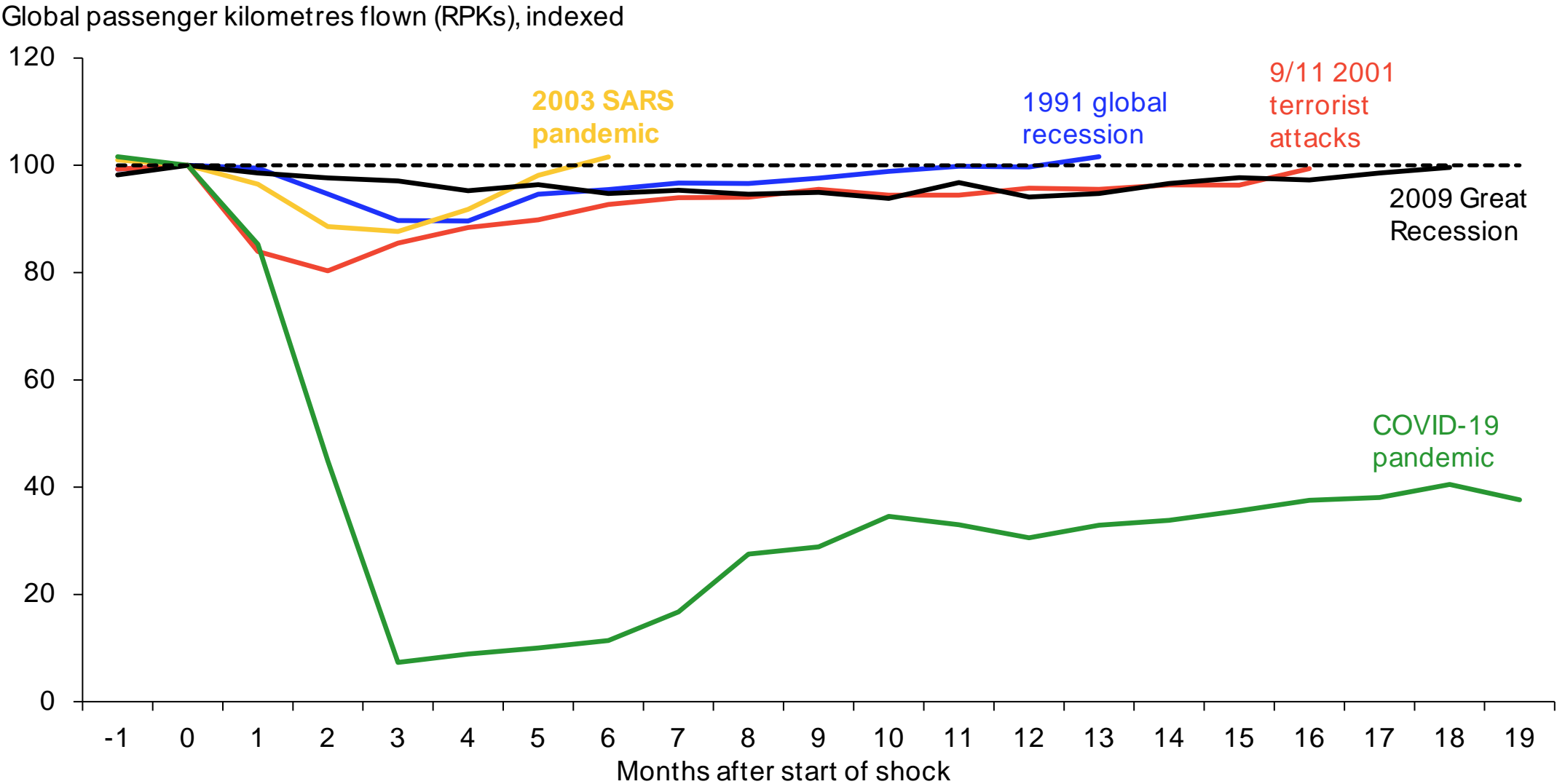


\$21.9

billion worth of
goods carried

COVID-19 is the biggest and longest shock to hit aviation

Previous shocks cut 5-20% from RPKs and recovered after 6-18 months

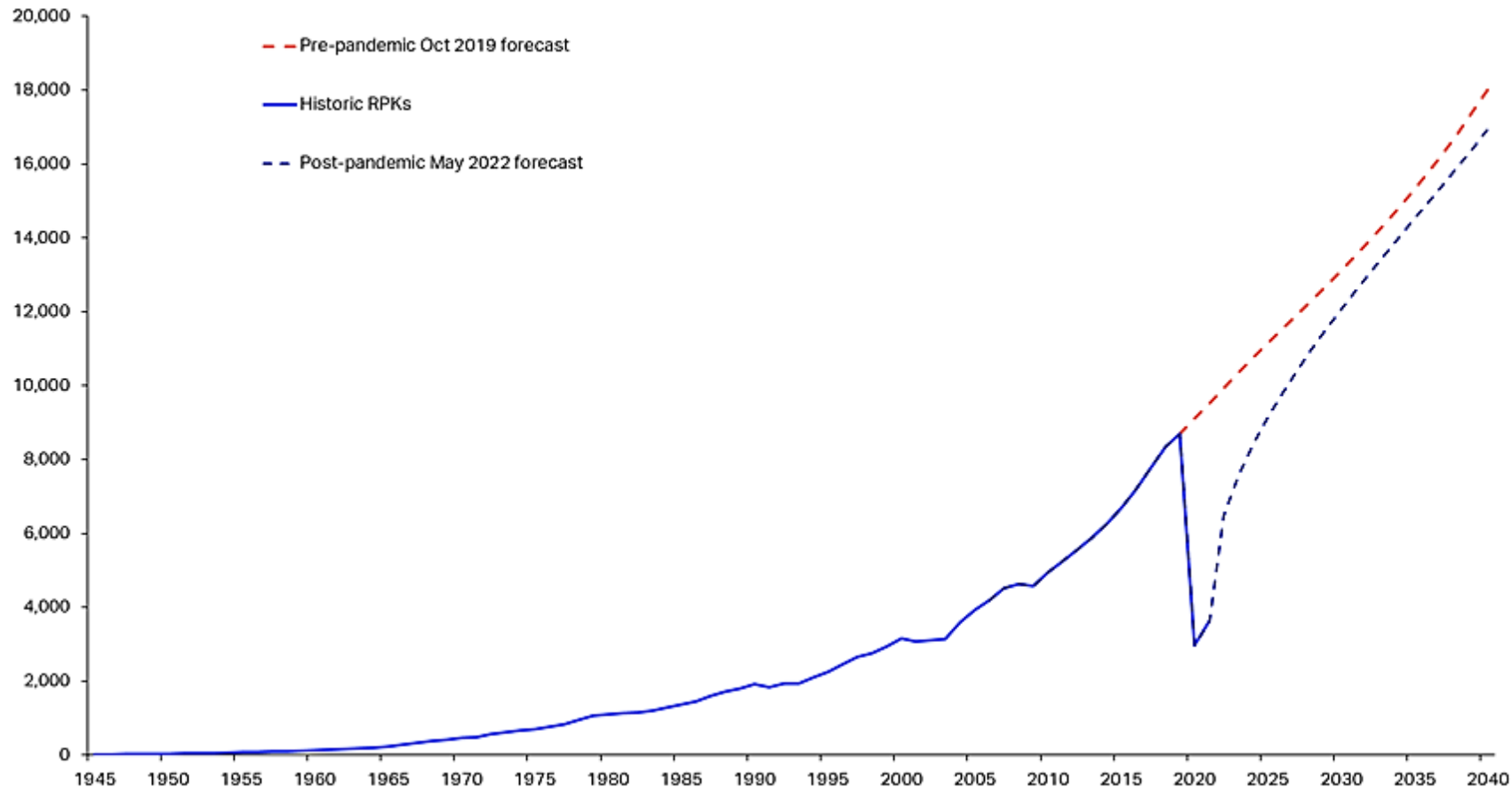


Source: IATA Economics using data from IATA Monthly Statistics. Data is adjusted for seasonality.

The greatest shock to aviation in its history

Global RPKs, with pre-pandemic (red) and current forecasts (blue), billion

Global RPKs (billions)



- “Lost” travel between 2020 and 2022 is equivalent to 1.8 x 2019 RPKs.
- In 2040, if our current forecast is realized, traffic would still be 6% below our pre-pandemic forecast.

Source: IATA Annual airline traffic statistics, IATA Economics/Tourism Economics.



Airport congestion hampers post-Covid air traffic recovery

Airport chaos: European travel runs into pandemic cutbacks

By KELVIN CHAN and MIKE CORDER June 24, 2022

European labour strife, staff shortages disrupt summer travel

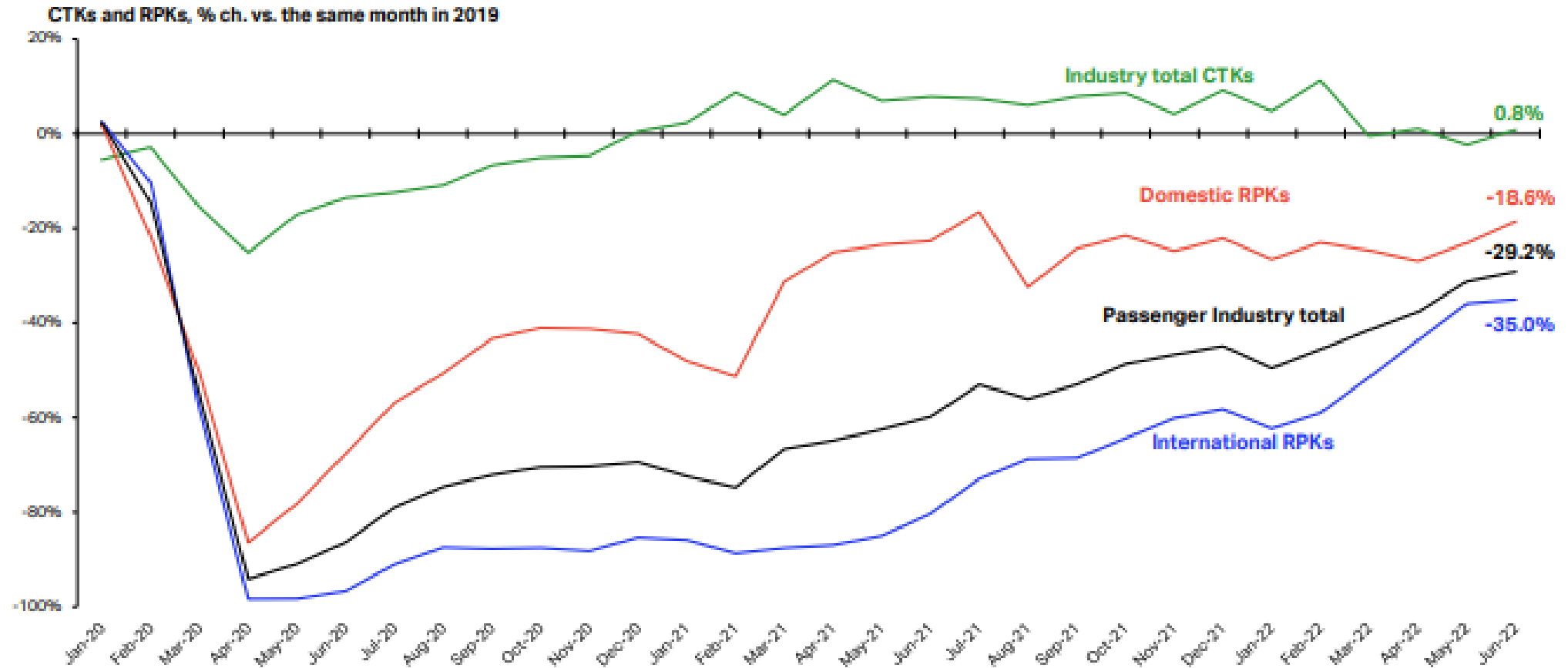
By Allison Lamper

Travel plans to or across Europe? Prepare for long lines

June 23, 2022 · 5:24 AM ET

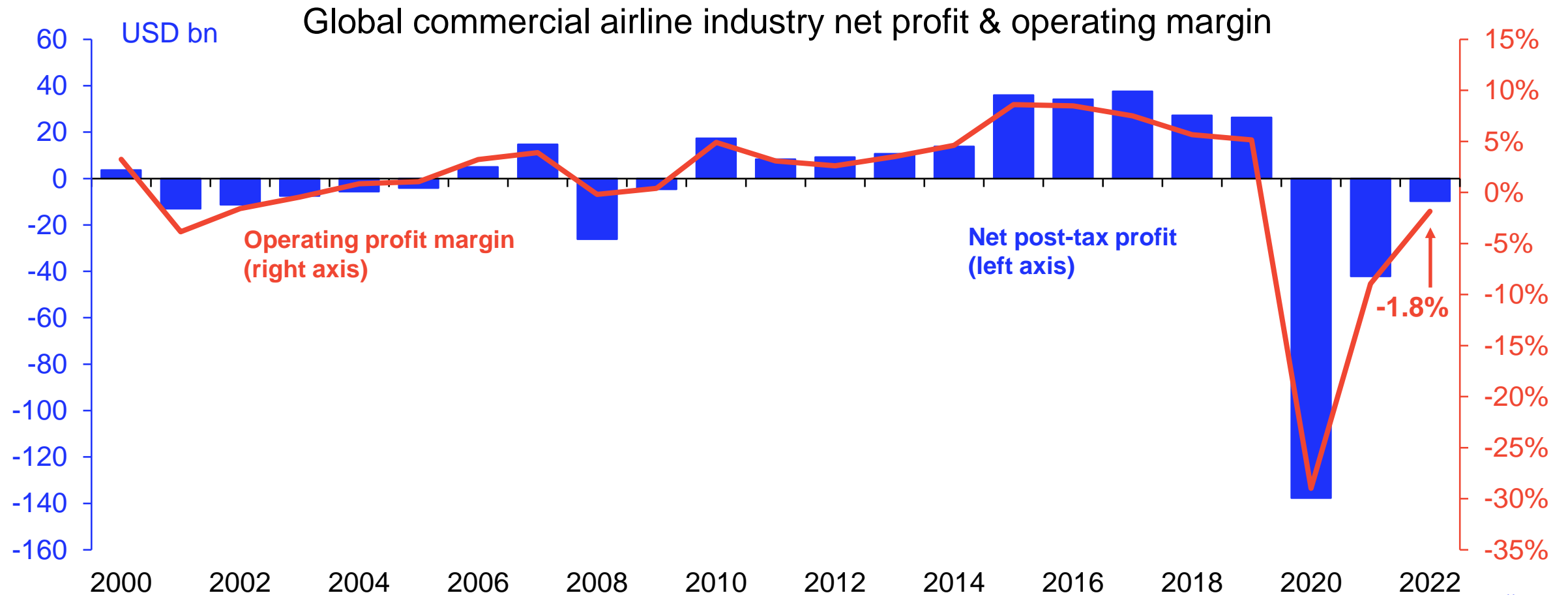
Germany to deploy temporary foreign workers to ease staff shortage at German airports, Bild am Sonntag reports

The recovery in global air traffic continues



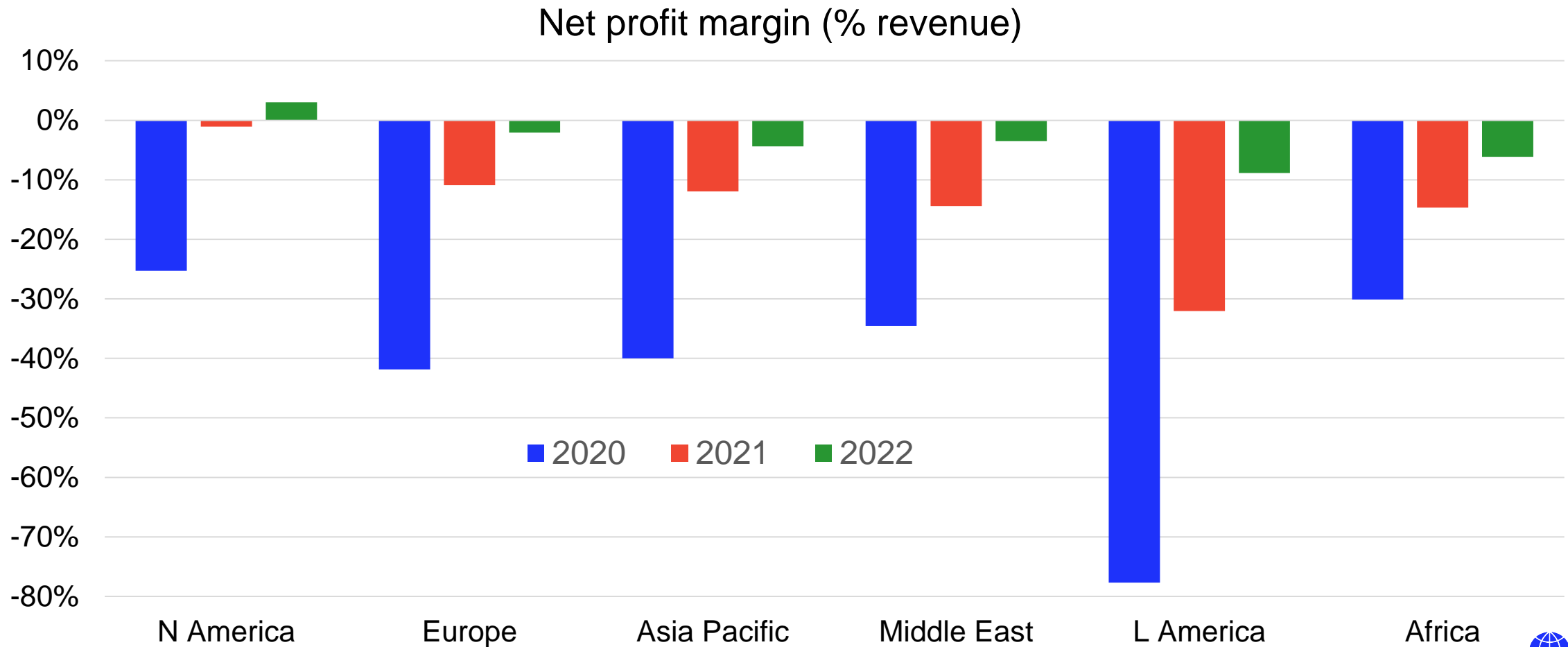
Financial performance improves to – USD 9.7bn

Highlighting the resilience of the industry



North America returns to profitability in 2022

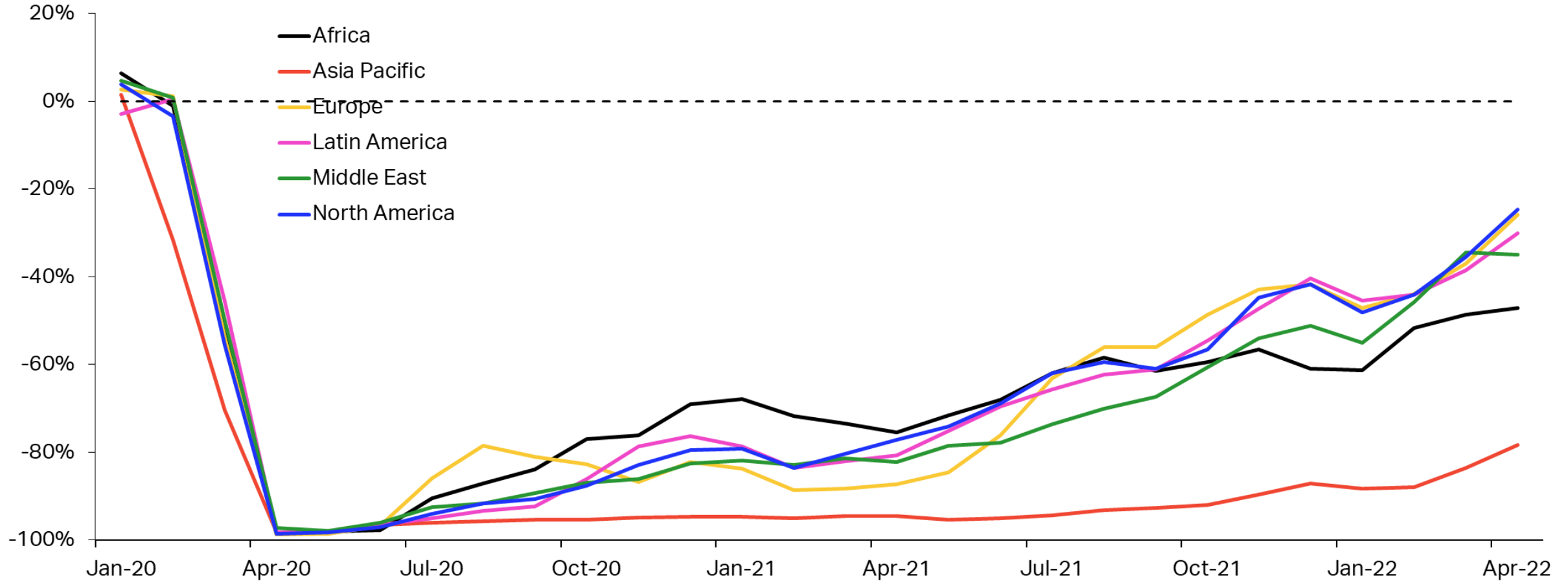
But financial performance is improving in all regions



International travel gradually returning despite shocks

Asia Pacific lags the rest of the industry due to closed borders

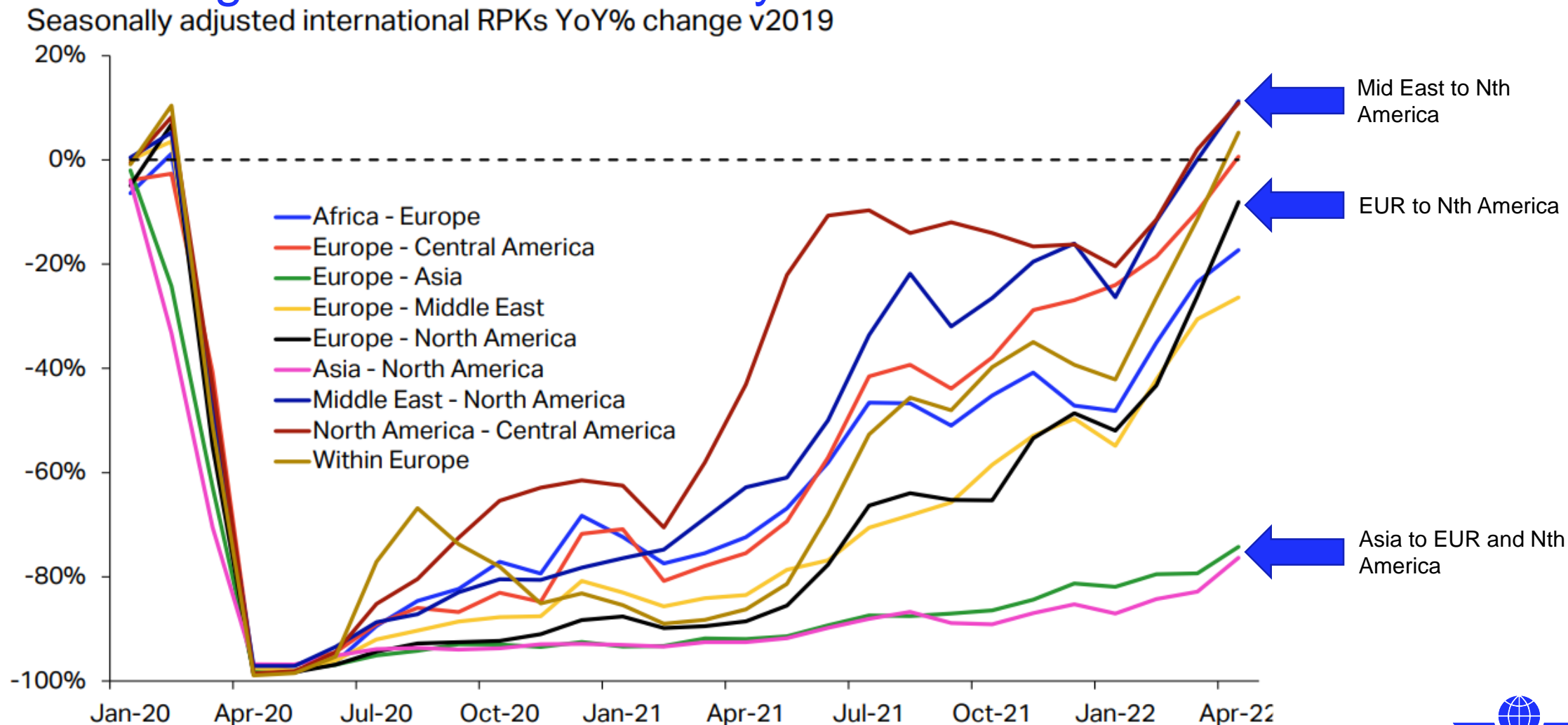
International RPKs YOY% change v2019



Source: IATA Monthly Statistics

International travel gradually returning despite shocks

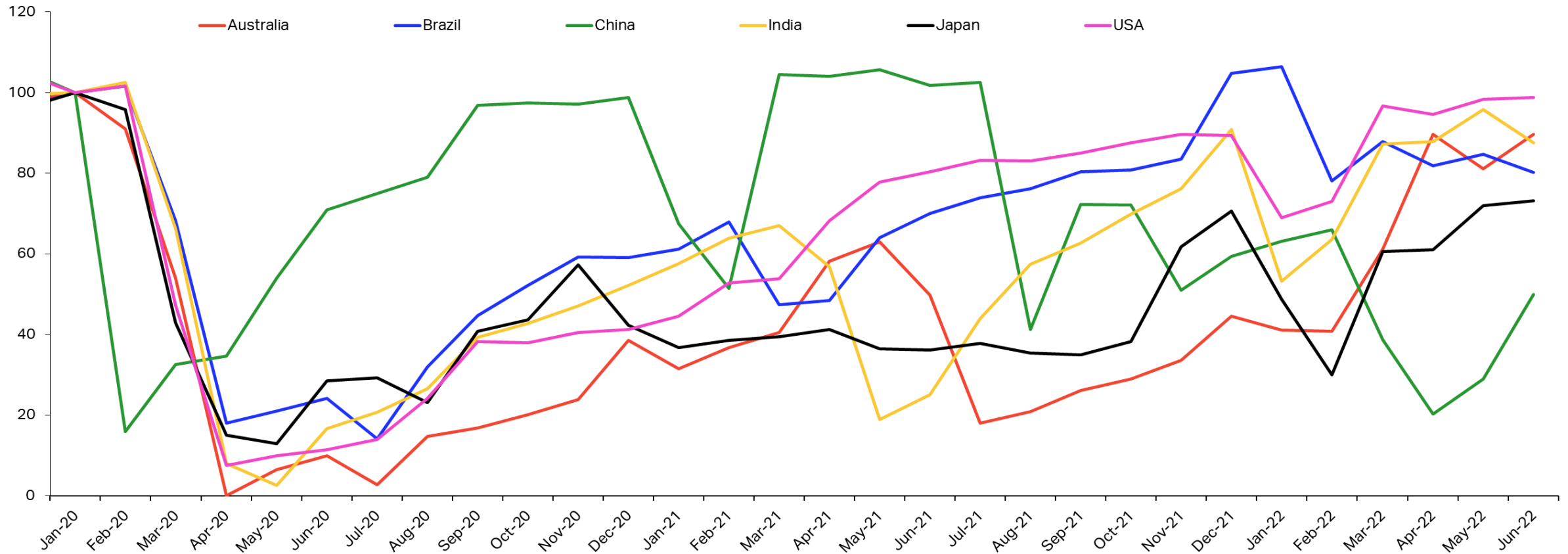
Asia Pacific lags the rest of the industry due to closed borders



Recovery in all major markets, China lagging behind

As borders reopen and restrictions eased, recovery is seen in all regions

Domestic RPKs, year-on-year % change vs 2019



Source: IATA Statistics



Our Work in the Region

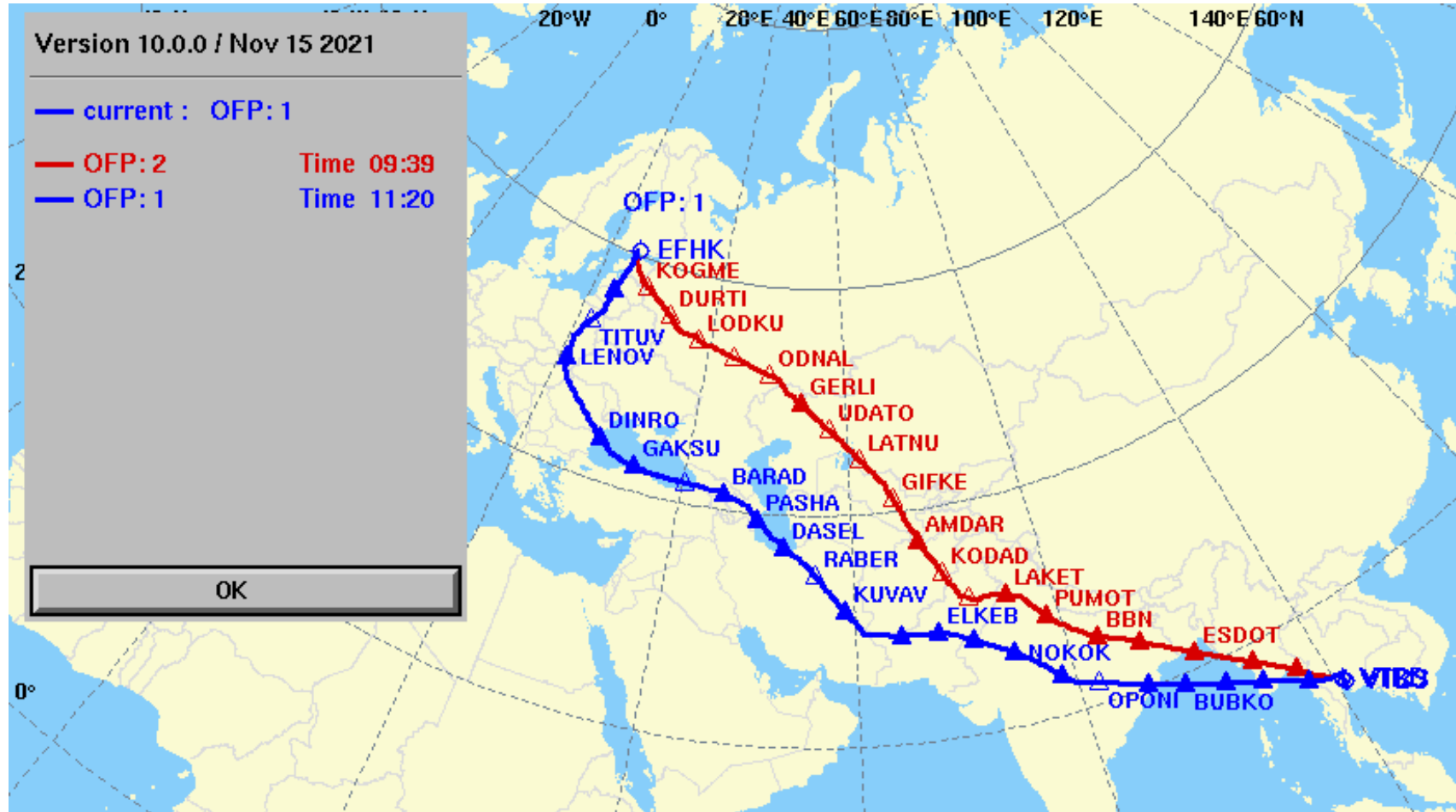
Navigating safely and
sustainably out of Covid



Airspace Restrictions and Contingency Ops



Flight Planning Challenges



Via Russia and
Afghanistan

Via the Caucasus
and Iran

Effect:

- Time +1:40h
- Fuel +10700kg
- Distance +821nm
- Available payload
-5221kg

Environment and Sustainability

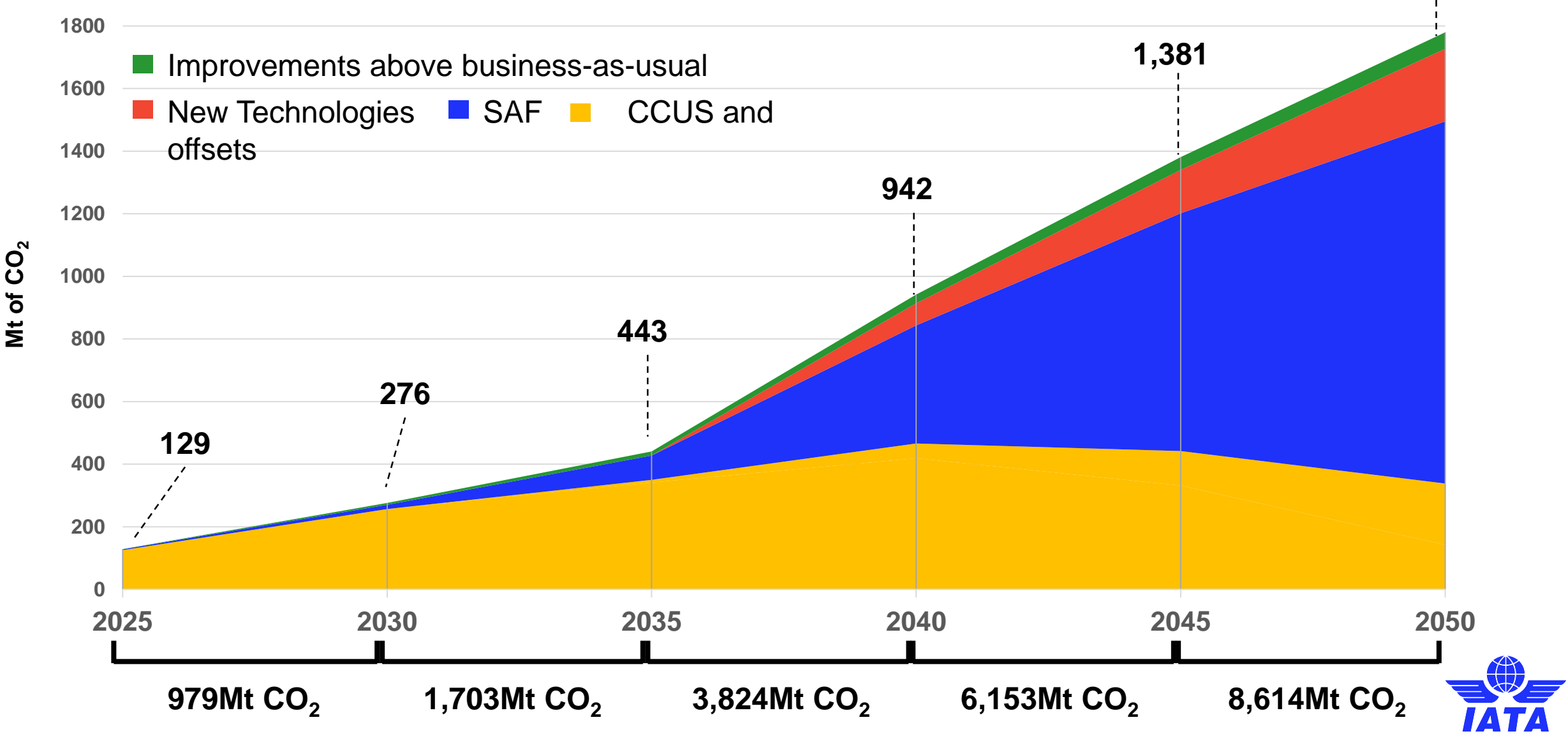
Net zero-carbon emissions by
2050



IATA Board Targets on Environment and Sustainability

Objective Description	Measure
Increase the readiness of member airlines for the transition to Sustainable Aviation Fuel (SAF) as the main option to achieve net zero-carbon emissions by 2050	Develop a SAF Readiness Index and complete assessment for all IATA members.
Ensure outcome of ICAO Assembly supports the industry's climate strategy	<p>Influence ICAO states to adopt a long-term aspirational goal aligned with the industry's net zero commitment.</p> <p>Continued support for CORSIA as a global market-based measure with an agreement to use 2019 emissions only as baseline.</p>

Expected CO₂ journey to Net Zero 2050

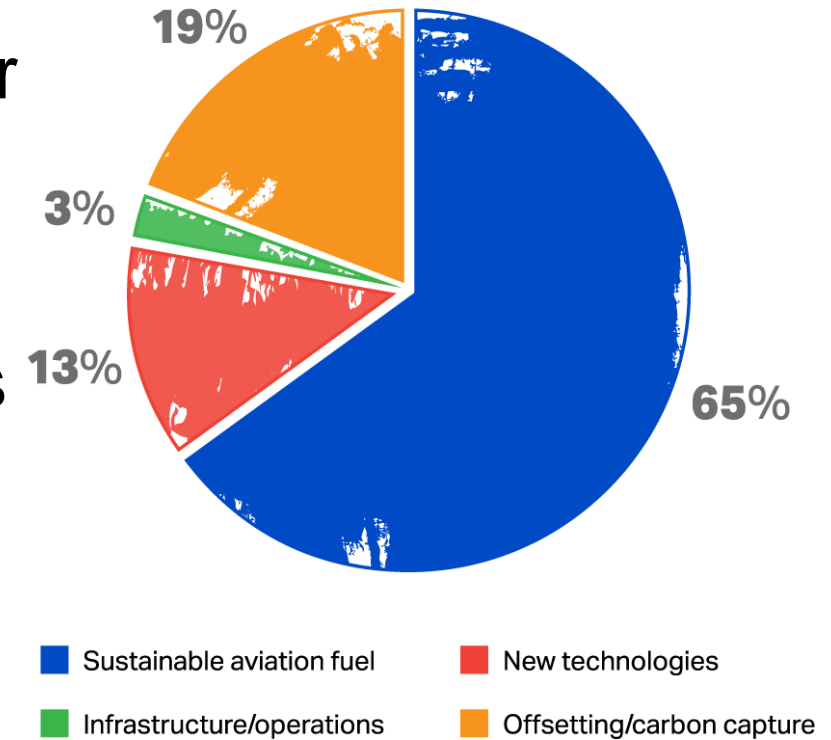


Source: IATA Environment and Sustainability modelling

Operations/infrastructure improvements

- Operational efficiencies have resulted in a **55%** improvement in fuel burn per passenger km since 1990
- 3% contribution but this is **over and above** expected continuous improvements over this period, typically 1.5-2% per year.
- Can be implemented to deliver **immediate** emissions reductions

Contribution to achieving Net Zero Carbon in 2050



Thank you

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www.iata.org

