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Agenda Item 1: Overview of developments in the field of air transport
1.2: Air transport in ICAO's long term strategic plan: Accelerating aviation towards 2050

AVIATION'S CONTRIBUTION TOWARDS THE UNITED NATIONS 2030 AGENDA FOR SUSTAINABLE DEVELOPMENT

(Presented by Air Transport Action Group (ATAG), Airports Council International (ACI World), International Business Aviation Council (IBAC), Aviation Services Association (ASA World), International Federation of Air Line Pilots' Associations (IFALPA), Civil Air Navigation Services Organisation (CANSO), International Coordinating Council for Aerospace Industries Associations (ICCAIA))

EXECUTIVE SUMMARY

Air transport is a significant contributor to global economic growth and social development. It creates employment, facilitates trade, enables tourism and supports sustainable development all around the world. Safe, reliable and cost-effective air transport supports the Sustainable Development Goals (SDGs) and should be seen as a development imperative by governments. The report *Aviation: Benefits Beyond Borders* explores the role aviation plays for global society and how air transport supports the United Nations sustainable development framework.

1. INTRODUCTION

1.1 The Air Transport Action Group (ATAG)[1] works with Oxford Economics and industry partners to undertake a macroeconomic assessment of aviation's global economic impact – known as *Aviation: Benefits Beyond Borders* – combined with a holistic overview of the social and environmental aspects of air transport. An updated edition will be launched during the International Civil Aviation Organization (ICAO) Seventh Worldwide Air Transport Conference (ATConf/7).

1.2 Its findings demonstrate that aviation is:

a) **A major global employer:** International civil aviation supports 99 million jobs (direct, indirect, induced and tourism catalytic) worldwide. Over 12.5 million of those jobs are generated directly

[1] The Air Transport Action Group (ATAG) is a not-for-profit association that brings together actors and experts from all parts of the air transport value chain. Its members include around 45 industry organisations worldwide.

by the industry itself, including at airports, airlines, air navigation service providers, business aviation, and manufacturers of aircraft and their components. Of the 12.5 million jobs directly supported:

i. the airport sector accounts for 7.3 million jobs (59% of the total). This includes on-site employment (for example retail, restaurants and government agencies), accounting for 6.6 million jobs or 53 per cent of the total, and 749,000 positions with airport operators.

ii. 3.3 million people are directly employed by airlines (26% of the total).

iii. the civil aerospace sector employs 1.7 million people (13% of the total). This includes engineers, manufacturing technicians, logistics, and maintenance among others.

iv. 240,000 jobs are generated by air navigation service providers (2%).

b) **Enabling economic growth:** Air transport supports $5 trillion (direct, indirect, induced and tourism catalytic) in global economic activity or 4.2 per cent of global gross domestic product (GDP).

c) **Unique connectivity:** The global aviation system comprises over 69,000 routes connecting around 4,100 commercial airports through 1,113 airlines, carrying over 5 billion passengers on 39 million flights a year. The industry's fleet of 30,264 aircraft are guided safely through the skies by 162 air navigation service providers.

d) **Big trade values, small volumes:** Some 29.5 per cent of world trade by value is transported by air, with 71.5 million tonnes of freight in 2025 (0.8% of trade by volume).

e) **Aviation will create millions of new jobs over the next two decades:** Demand for air transport is forecast to grow by 3.8 per cent annually over the next two decades which will support an additional 7.2 million direct jobs by 2045. Meeting this demand will require millions of additional professionals across the aviation value chain.

2. VITAL SUPPORT FOR TOURISM

2.1 Air transport is also an enabler of tourism, with 58 per cent of all international tourists travelling to their destinations by air in 2025. Without the connectivity provided by flight, many countries that rely on a steady inflow of tourists (particularly developing countries in regions remote from their source tourism markets) would not be able to enjoy their present levels of economic growth.

2.2 In 2025, aviation-related tourism supported an additional 46.2 million jobs and $1.29 trillion of global GDP. Globally (including those specifically aviation-related tourism jobs), a total of 366 million jobs are supported by travel and international tourism, which account for 9.8 per cent of world GDP, a total of $11.6 trillion.

3. AIR TRANSPORT SUPPORTING SUSTAINABLE DEVELOPMENT

3.1 The global aviation industry is aligned with the United Nations 2030 Agenda for Sustainable Development. Analysis shows that the global air transport industry plays at least some role in supporting most of the Sustainable Development Goals (SDGs). This includes:

SDG 1) End poverty	Aviation creates around 12.5 million direct jobs worldwide and indirectly supports a total of 99 million jobs.
SDG 2) Zero hunger	Aviation supports the delivery of vital humanitarian assistance to areas affected by conflict and disasters through the United Nations Humanitarian Air Service, the World Food Programme, other charities and commercial airlines providing their cargo and cabin space.
SDG 3) Good health and wellbeing	Air transport provides vital medical care through air ambulances to remote communities and the ability to transport vaccines, medicines, and laboratory reagents and specimens for analysis.
SDG 4) Quality education	Access to higher-quality education for many means travelling to another country. The opportunity to travel to established universities and technical schools for higher education is invaluable.
SDG 5) Gender equality	Aviation is working to achieve gender balance across the sector. While more data and more work are needed, statistics show that women globally make up 42.4% of airline staff[2], 32% of airport workers[3], 21.1% of air traffic controllers, 4.7% of pilots, and 3.1% of aircraft maintenance engineers and technicians[4].
SDG 7) Affordable and clean energy	Sustainable aviation fuel (SAF) plays a major role in civil aviation's decarbonisation. SAF can reduce lifecycle CO2 emissions by up to 80% compared to fossil fuels. Progress has been made with over 50 airlines representing 40% of global air passengers making long-term SAF commitments. Global SAF production output has approximately doubled each year since 2018, reaching 1.9 million tonnes in 2025. More than 45 countries covering over 40% of global jet fuel use are implementing or considering SAF policy options. Aviation is also supporting the energy transition through technological developments, energy-efficient infrastructure, operational improvements and modernised airport and airspace infrastructure.
SDG 8) Decent work and economic growth	Aviation contributes $5 trillion to global economic activity, 4.2% of the global total. Aviation jobs are, on average, three times more productive than jobs in the wider economy. The transition to SAF also presents significant employment opportunities, with the SAF sector potentially supporting 13.7 million jobs through new workers and the redeployment and upskilling of existing talent and the attraction of new workers.
SDG 9) Industry, innovation and infrastructure	Aviation is one of the most innovative industries in the world. The sector is continually developing new technology and creating significant urban infrastructure through the building of airports, as well as air traffic management. In 2024, around $65.8 billion was invested in airport infrastructure. Civil aerospace spends $15 billion per year on efficiency-related research and development.
SDG 10) Reduced inequalities	The connectivity provided by air transport reduces inequality between countries, as well as individuals, through creating trade links and providing access to goods and services for those in remote communities. The cost of air travel has been reduced by 91% since the 1950s. Half of the top 20 countries for passenger traffic are now developing or emerging economies and the greatest increase in propensity to travel over the next two decades will be in developing and emerging economies.
SDG 11) Sustainable cities and communities	Aviation-related infrastructure is a major part of urban and rural communities worldwide and contributes to the connectivity of populations through integrated transport links.
SDG 12) Responsible consumption and production	Airlines and airports around the world have recognised the importance of circular economy principles, including reducing, reusing and recycling waste. From analysing passenger consumption data and using compostable cups and dishes, to donating non-perishable food items and introducing recycling of bottles and cans, the industry is committed to minimising the quantity of waste sent to landfill and incinerators. Airlines and manufacturers work closely together to recycle aircraft at the end of their service.
SDG 13) Climate action	In October 2021, the commercial aviation industry – in support of the UNFCCC Paris Agreement – adopted a long-term climate goal of net-zero carbon emissions by 2050, adopted at the 41st ICAO Assembly.
SDG 15) Life on land	Aviation is working with partners in government and conservation organisations to combat the illegal wildlife trade. Data collected on seizures of wildlife products between 2009 and 2019 show that 2,000 seizures were registered with wildlife products and 5.5 million animals seized in 102 countries.

[2] Source: IATA, Gender in Aviation Report, 2024
[3] Source: ACI World, Airport Workforce Management Report, 2025
[4] Source: ICAO, ICAO Global Aviation Gender Summit advances action to strengthen women's empowerment in aviation

SDG 16) Peace, Justice & Strong Institutions	Through the International Civil Aviation Organization (ICAO) – the aviation industry's closest partner – air transport contributes to global standards and laws that ensure a safe, secure and sustainable sector.
SDG 17) Partnership for the goals	Partnerships between all sectors of the aviation industry enable the global air transport industry to operate. The industry also partners with the United Nations, mainly through ICAO, and governments to develop regulations and cooperate closely on climate action.

3.2 While aviation already plays a major role in supporting the SDGs through its daily operations, and is firmly committed to the 2050 goal of net zero carbon emissions, the industry acknowledges that it could further contribute to sustainable development by working more closely with governments, development agencies, inter-governmental institutions, and other sectors.

4. REGIONAL BENEFITS AND GROWTH PROSPECTS

4.1 The ATAG report *Aviation: Benefits Beyond Borders* presents regional and national analysis of air transport's economic and social benefits and forecasts the potential for growth in air transport which will more than double over the next 20 years.

a) **Africa:** Air transport supports 8 million jobs in Africa. This is equivalent to one in every 68 jobs across the continent or 1.5 per cent of all employment. Without the connectivity flight provides, many African countries that rely on a steady inflow of tourists would not be able to enjoy their present levels of economic growth.

b) **Asia-Pacific:** Air transport in Asia-Pacific supports 52 million jobs and $1.3 trillion in GDP. This is equivalent to 2.8 per cent of all employment and 3.3 per cent of all GDP in Asia-Pacific countries in 2025. Over the next two decades, the aviation sector's direct contribution to the Asia-Pacific's GDP is forecast to grow by an estimated 4.3 per cent annually.

c) **Europe:** Europe accounts for more than a quarter of global passenger traffic. Air transport supports 18 million jobs and $1.6 trillion in European economic activity.

d) **Latin America and the Caribbean:** In Latin America and the Caribbean, the aviation industry supports 2.8 per cent of all employment (8.3 million) and 3.1 per cent of the region's economic activity ($230 billion), which is forecast to grow by 4.5 per cent annually until 2045.

e) **Middle East:** Air transport today supports 3.4 million jobs and $300 billion in GDP in the Middle East. This is equivalent to one in every 26 jobs across the region or 3.9 per cent of all employment and 8 per cent of all regional GDP in 2025, which is forecast to grow by 5.8 per cent annually.

f) **North America:** In North America, air transport supports 9.2 million jobs and contributed $1.6 trillion to GDP. This is equivalent to one in every 20 jobs across the continent and 4.8 per cent of all GDP in the United States and Canada in 2025. The number of people directly employed in the sector is also forecast to grow by 4.7 per cent annually.

4.2 It is expected that air transport will support 138.6 million jobs and $10.2 trillion in global GDP in 2045. Analysis based on industry forecasts suggests that demand for air transport will increase by an average 3.8 per cent per annum over the next 20 years.

4.3 This growth estimate is based on factors including the improvement of near-term economic optimism, increased business investment supporting long-term supply and trade growth and maintaining or expanding air traffic rights. If these enabling factors are not met, this would result in 17.9 million fewer jobs and $2.6 trillion less global GDP by 2045.

4.4 This highlights the importance of governments ensuring open borders, balanced liberal trade policies and multilateralism for air transport development as a conduit for further connectivity, social advancement, trade and tourism worldwide.

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