AVIATION CO_2 REDUCTIONS

STOCKTAKING SEMINAR

TECHNOLOGY · OPERATIONS · SUSTAINABLE AVIATION FUELS

Setting the scene: challenges, trends and energy requirements for aviation

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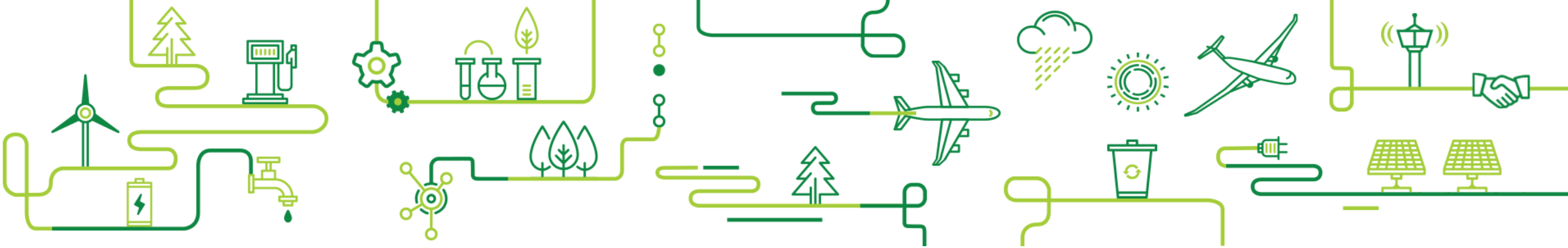
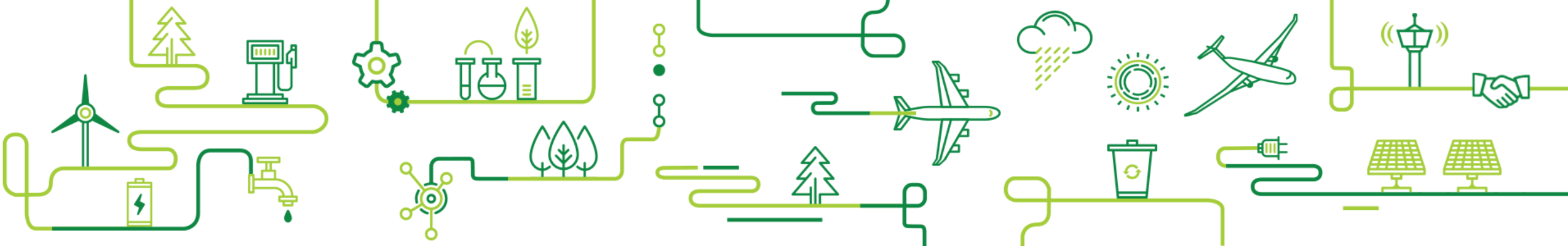


Outline

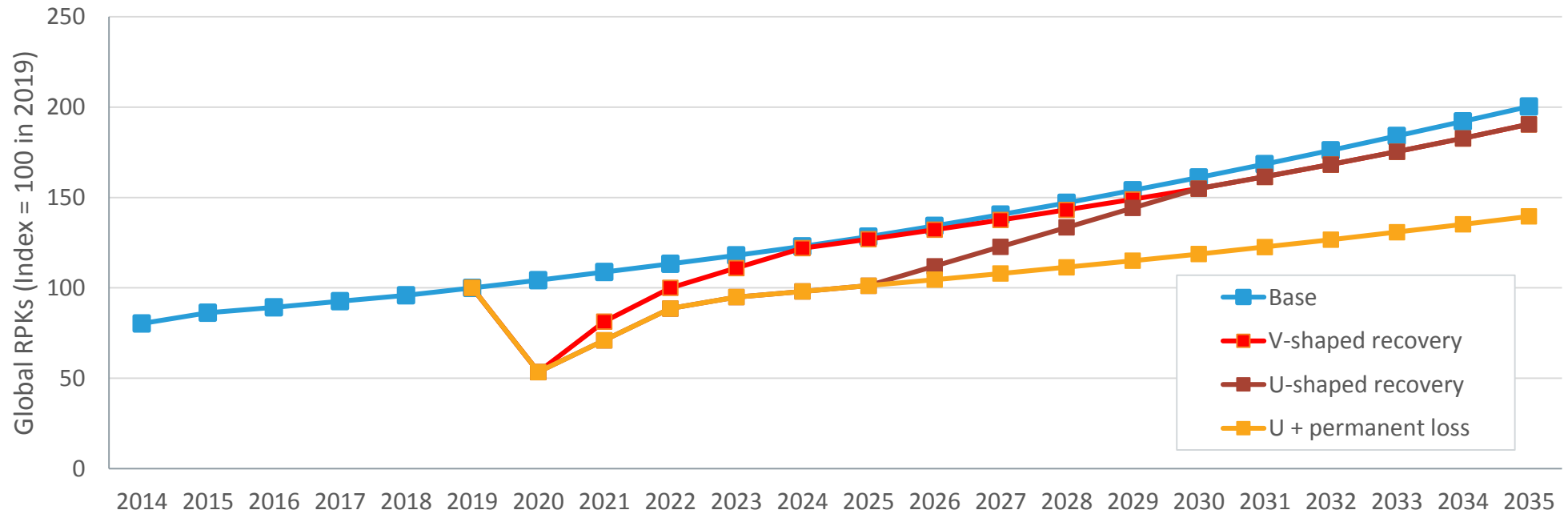
- Previous Work on COVID-19 Scenarios
- Additional COVID-19 impacts
- Conclusions

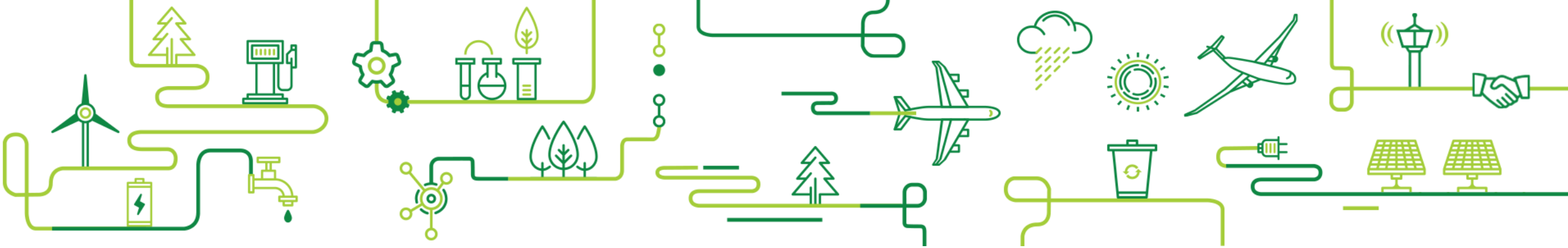


Previous Work by CAEP on COVID-19 Scenario Impacts

- ICAO has considered impact of COVID-19 on air travel demand and fuel consumption
- CAEP developed 3 scenarios out to 2035:
  - V-shaped – traffic recovery by 2022
  - U-shaped – traffic recovery by 2025
  - U-shaped with permanent loss – traffic recovery by 2025

Global Passenger Traffic COVID-19 Scenarios





Conclusions

- Much uncertainty surrounding COVID-19 impacts
  - Future level of demand for aviation
  - Impacts of future fleet mix
  - Impacts on future network
- Within uncertainties lies opportunities for new technologies, new operational concepts, new fuel sources that can radically change the future growth in aviation emissions whatever the level of future demand

Thank You

ICAO