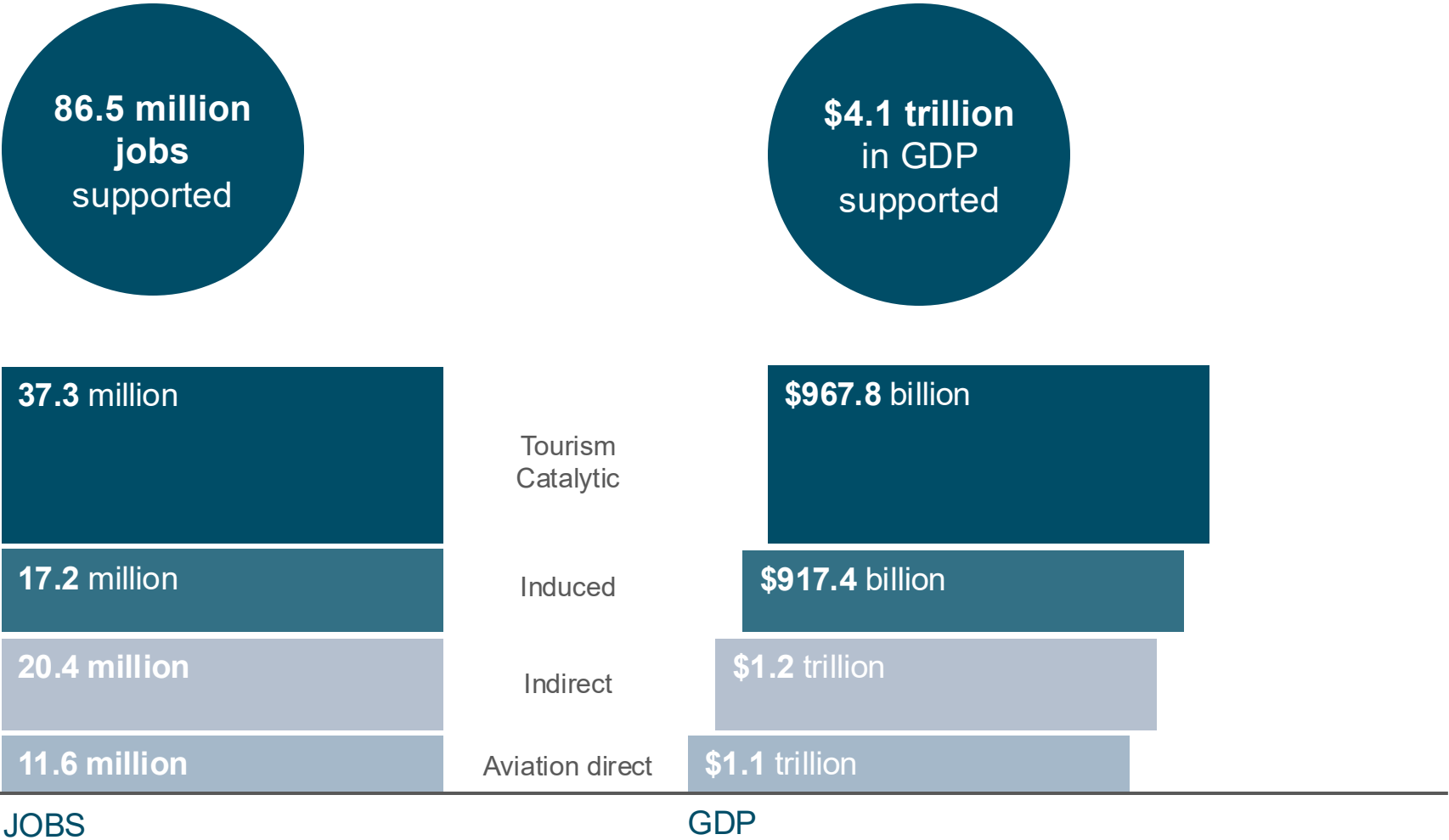




Haldane Dodd | Executive Director, ATAG

3 July, 2025

Global support for employment and economic activity



Global support for employment and economic activity

North America

8.4m jobs
\$1.2trn in GDP (4.7%)

Europe

15 m jobs
\$1.2 trn in GDP (4.6%)

Middle East

4m jobs
\$290bn in GDP (4.3%)

Asia-Pacific

42m jobs
\$890bn in GDP (2.5%)

Latin America

8.3m jobs
\$240bn in GDP (3.6%)

Africa

8.1m jobs
\$75bn in GDP (2.6%)

Tourism is a driver for jobs and economic prosperity

\$1.2 trillion

spent by international
tourists in 2023

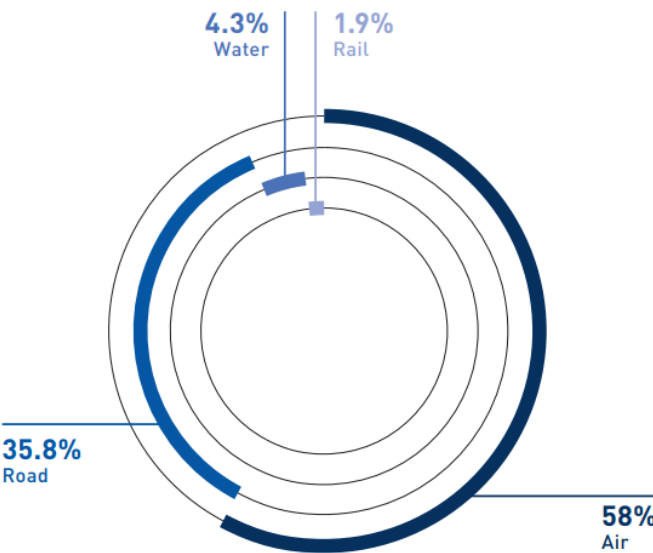
\$967.8 billion

in global GDP supported
by air transport-related
tourism

37.3 million

tourism jobs supported
by air transport

Travel modes of international tourists, 2023



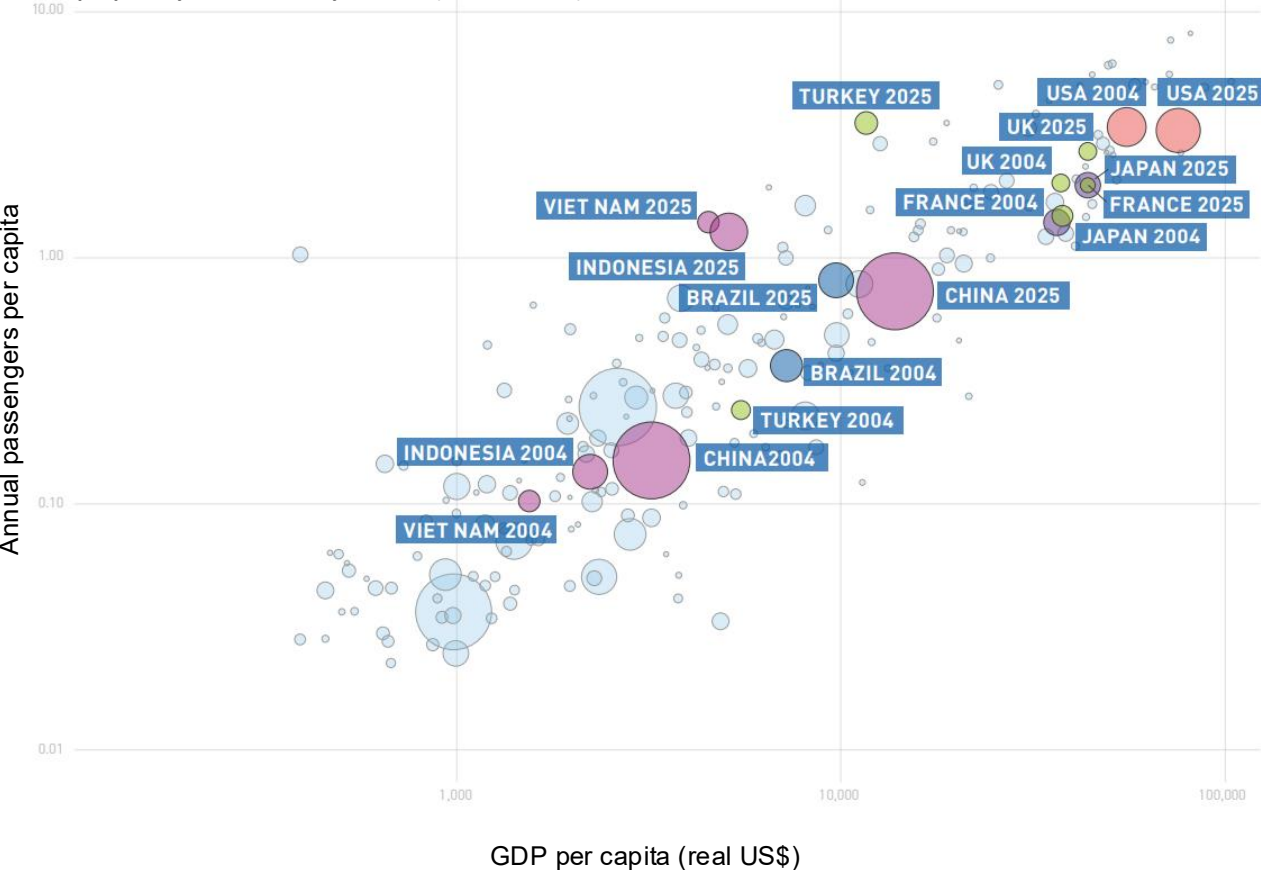
58%

of tourists
travel by air

Growth in travel propensity to focus on emerging markets

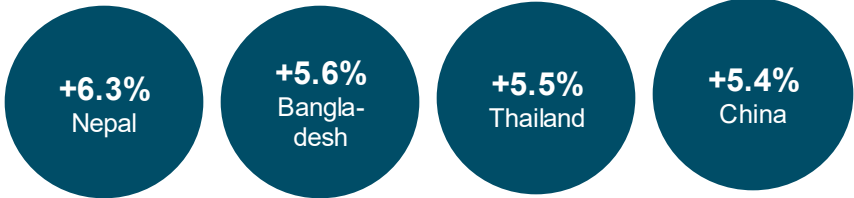


Global propensity to travel in key markets (2004 vs. 2025)



Propensity to travel

The greatest increase in propensity to travel between 2023 and 2043 will be in developing and emerging economies:



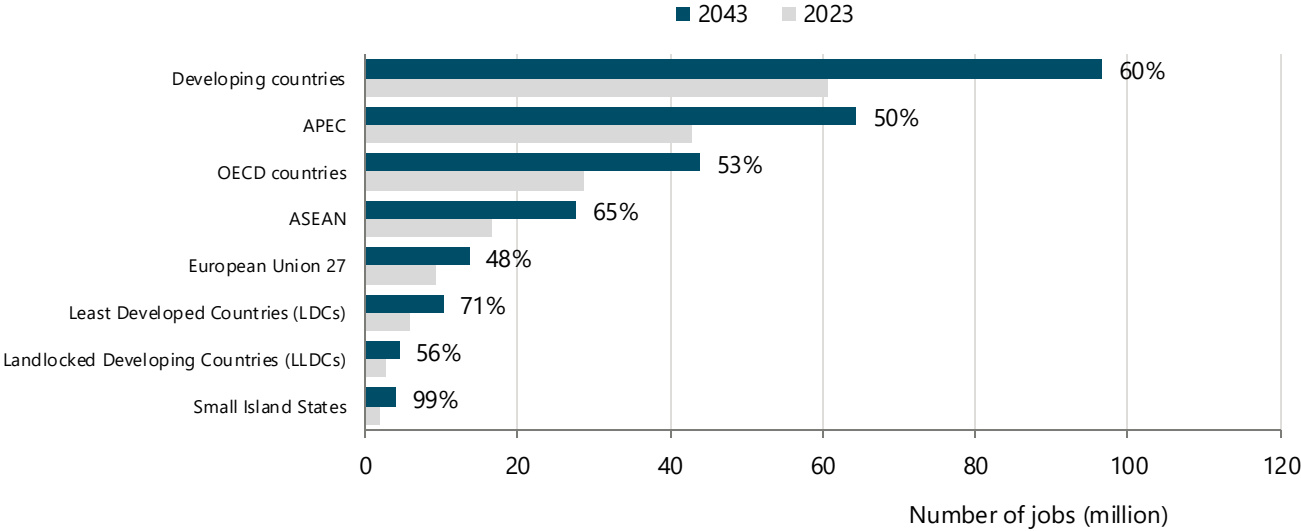
South-south routes

Traffic on south-south routes is increasing at a much higher rate than the global average.

An increasing impact of aviation in developing countries

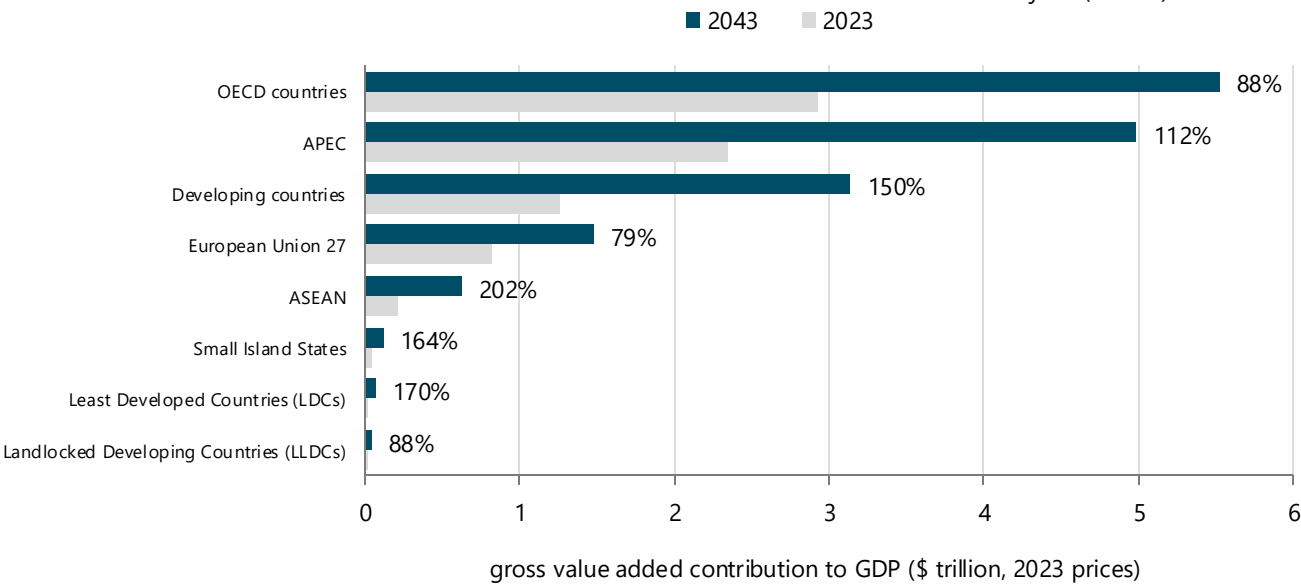
Jobs by aviation
in developing
countries, 2023

61 million

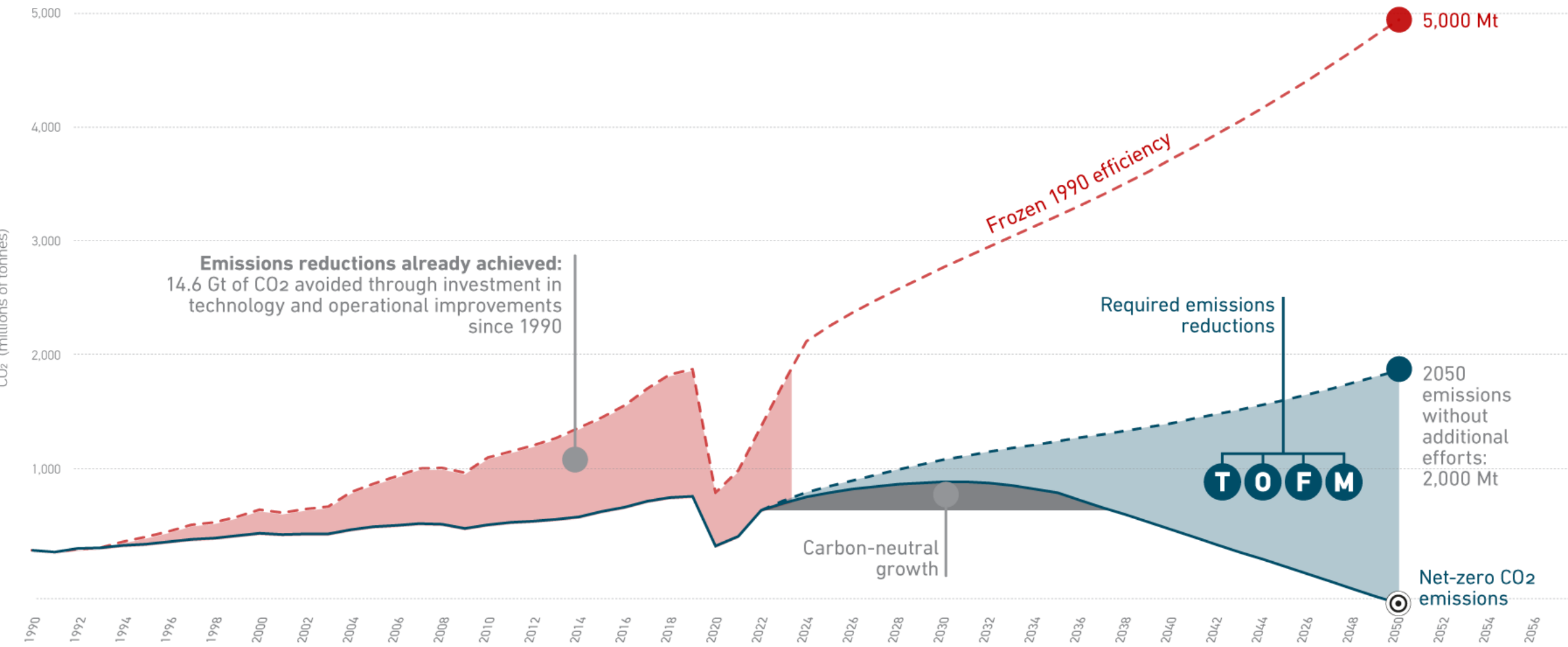


GDP supported by
aviation in developing
countries, 2023

\$1.3 trillion



Charting a course for 2050: net-zero globally



SAF scale-up is starting... slowly

2008

First flight on SAF on a commercial aircraft followed by years of testing and certification

2016

First daily supply and flights on SAF

1 Mt

SAF production / use in **2024** (0.3% of total fuel use)

Up from 500,000 tonnes in 2023, 240,000 tonnes in 2022

2.1 Mt

SAF production / use expected in **2025** (0.7% of total fuel use)

11

Pathways currently certified for SAF production (3 of which are co-processing). **11 more being explored**

45

States with SAF policy in place or in progress = ~23Mt of SAF needed by 2030

50

Airlines covering 40% of global traffic with SAF goals from 2030. **98 airports** with ongoing SAF deliveries in 2024.

~20

Production plants delivering SAF, 200 more in announced plans

Solidarity levy distraction

1

World's governments have negotiated an aviation market-measure: CORSIA. Have also agreed in ICAO Assembly Resolution that this would be the only measure.

2

Levies are not designed to decrease CO₂ emissions, just raise money.

3

Impact on developing and emerging economies, particularly significant for those which rely heavily on trade and tourism. Rebate mechanisms replace jobs with 'aid'.

4

Aviation has a plan for climate action requiring significant investment by governments, aviation industry, finance and energy sectors. A levy would divert funds from this mission.

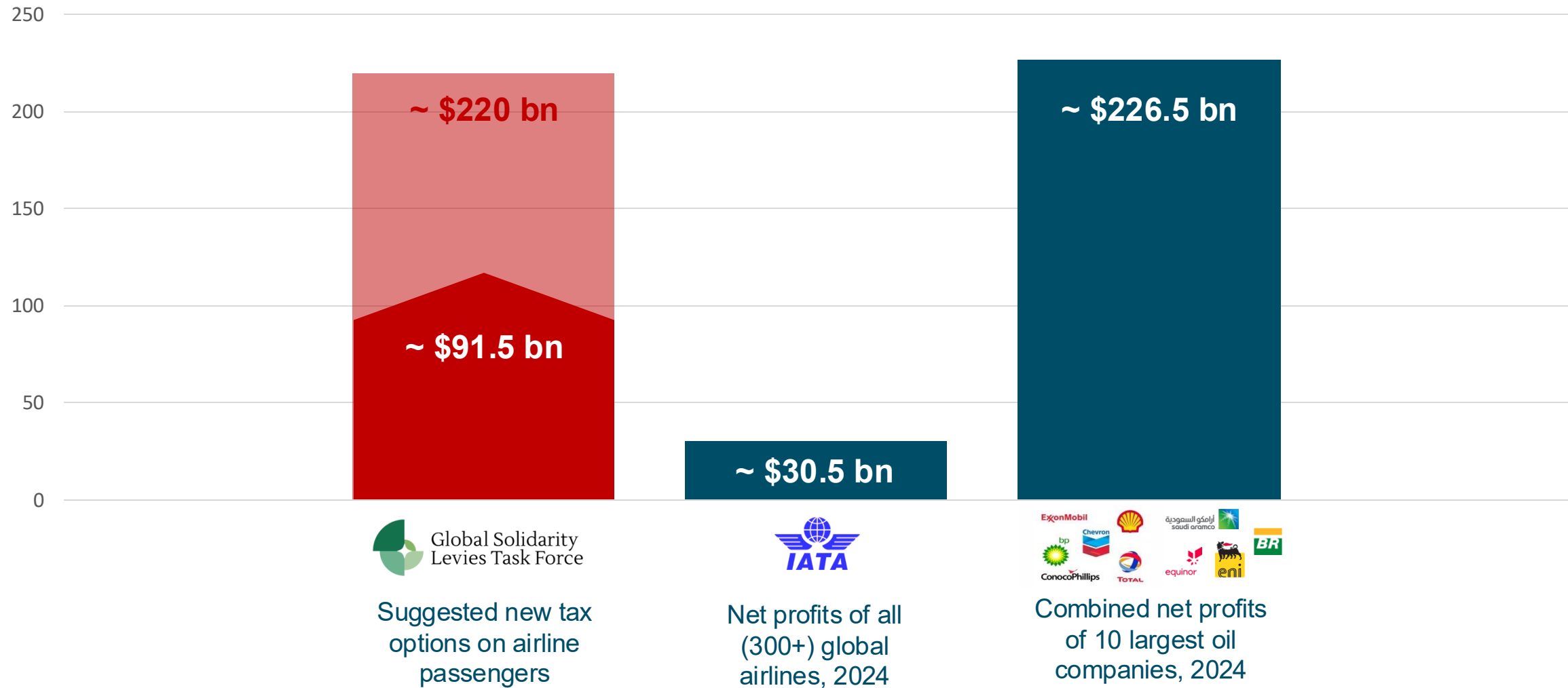
5

In aviation, global measures are important to ensure efficiency of standards, having a small 'club' of States implement a levy will lead to uneven results.

6

The proposals for an aviation levy have largely ignored alternative levy options that would be far more effective targeting emissions at their source

Solidarity levy distraction



Net profits of airlines as projected by the [2024 IATA Airline Profitability Outlook](#); net profits of the 10 largest oil companies globally is accumulated from Saudi Aramco, ExxonMobil, Shell, Chevron, TotalEnergies, BP, Equinor, Eni, ConocoPhillips, and Petrobras 2024 annual reports; The expected revenue from an aviation levy is based on the €187 bn [estimate](#) provided by the Global Solidarity Levies Task Force (June 2025) and converted to US-Dollar. www.aviationbenefits.org | 10