

# Aviation Forum Austria 2026

Vienna  
Wednesday, March 18

**“Fly Net Zero 2050 -  
Infrastructure as a means to an  
end”**

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# Content

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2. The Value of aviation - Focus on Austria
3. Fly Net Zero 2050
4. Infrastructure – a critical piece of the FNZ50 puzzle



# The global trade association of the world's airlines

IATA was founded in Havana, Cuba in April 1945

## IATA in brief

Some **370** passenger and cargo member airlines, representing over **80%** of global air traffic

Headquarters: **Montreal, Canada**

Executive Office: **Geneva, Switzerland**

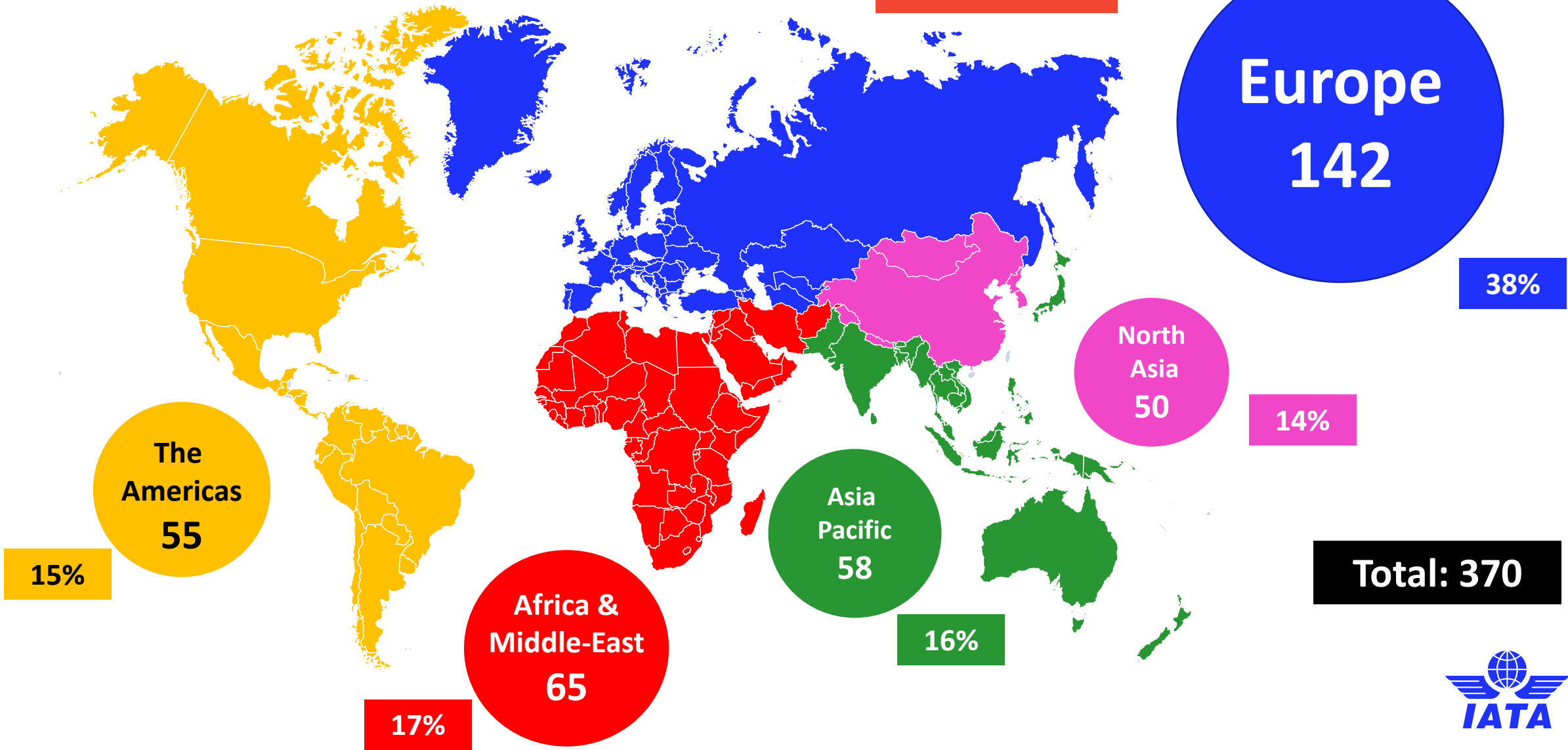
Regional Offices: **Amman, Beijing, Madrid, Miami, Singapore**

50+ local country offices



# IATA Membership per Region

**IMPORTANT:**  
These maps do not show exact country borders.





# The Value of Air Transport to Austria

Total economic impact of aviation



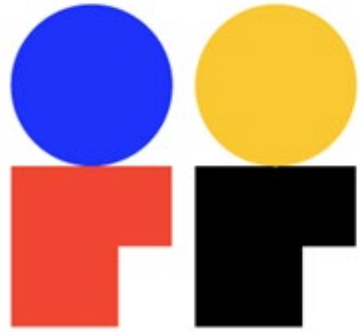
**26.3**

USD billion  
contribution to  
GDP



**5.1**

% of GDP



**242**

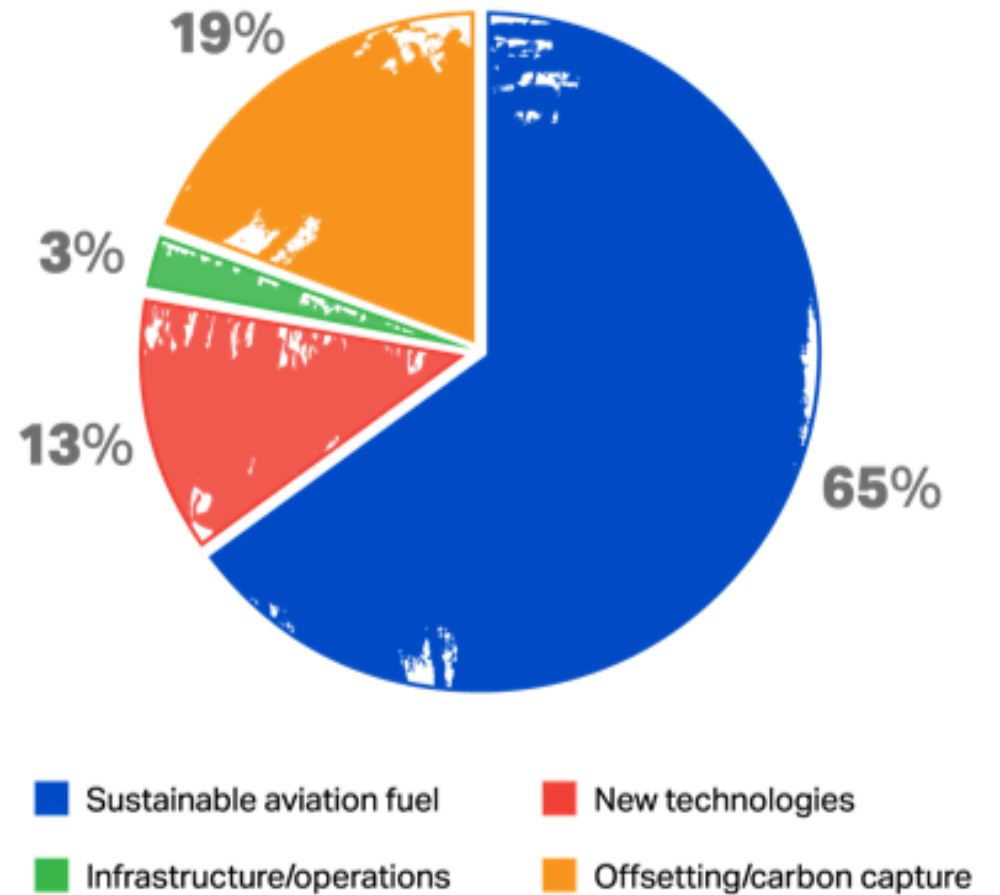
thousand jobs



Airlines will  
achieve carbon net  
zero by 2050



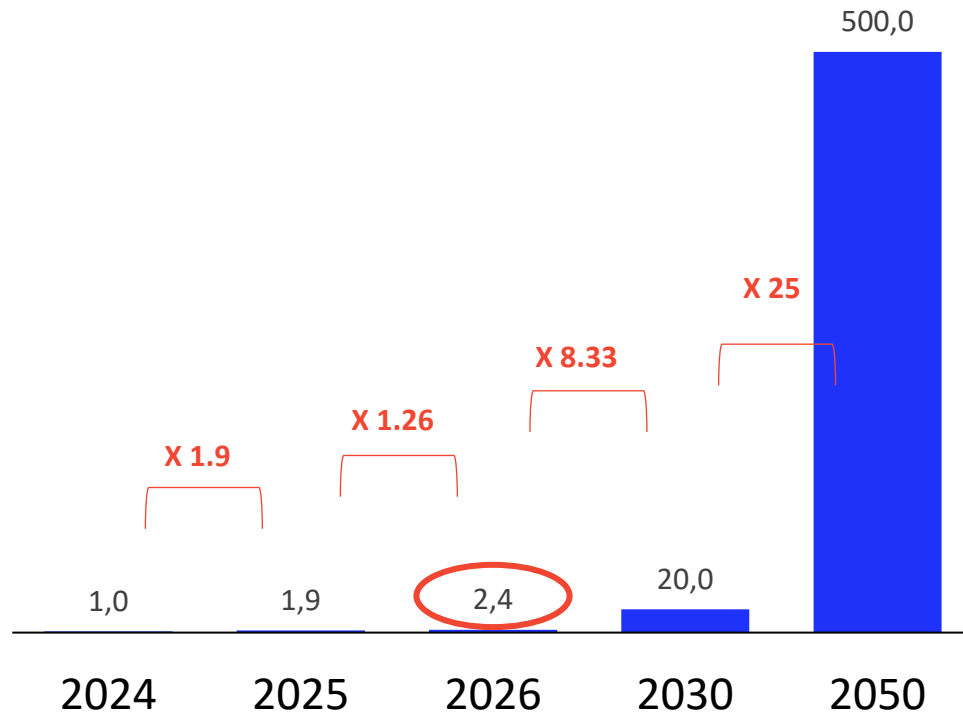
## A sustainable future through a robust plan



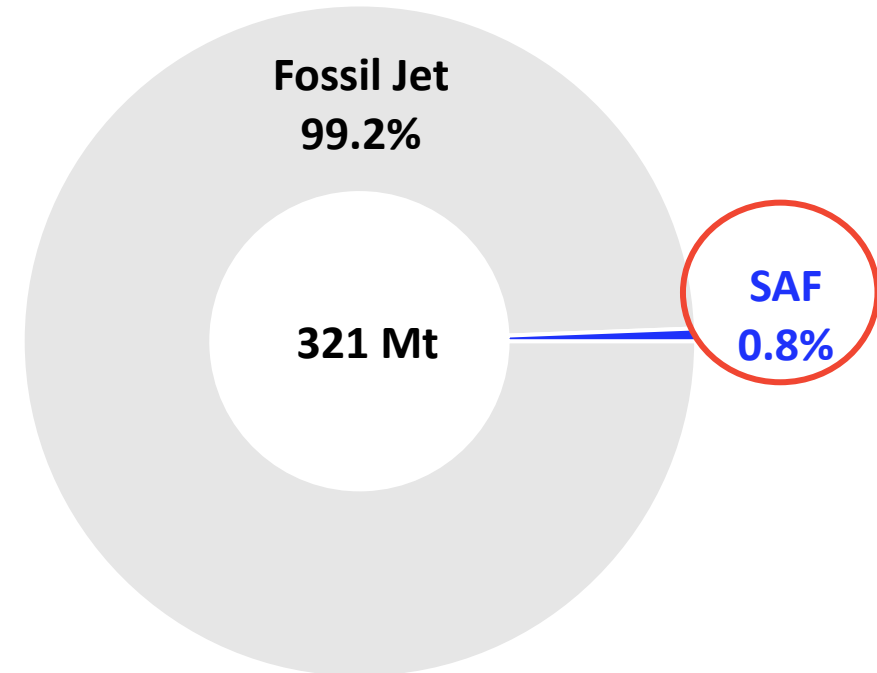
... but impossible without a collective effort of the entire industry together with governments, oil producers and investors.

# Producers must prioritize SAF and accelerate technology rollout

## Estimated SAF production (Mt)



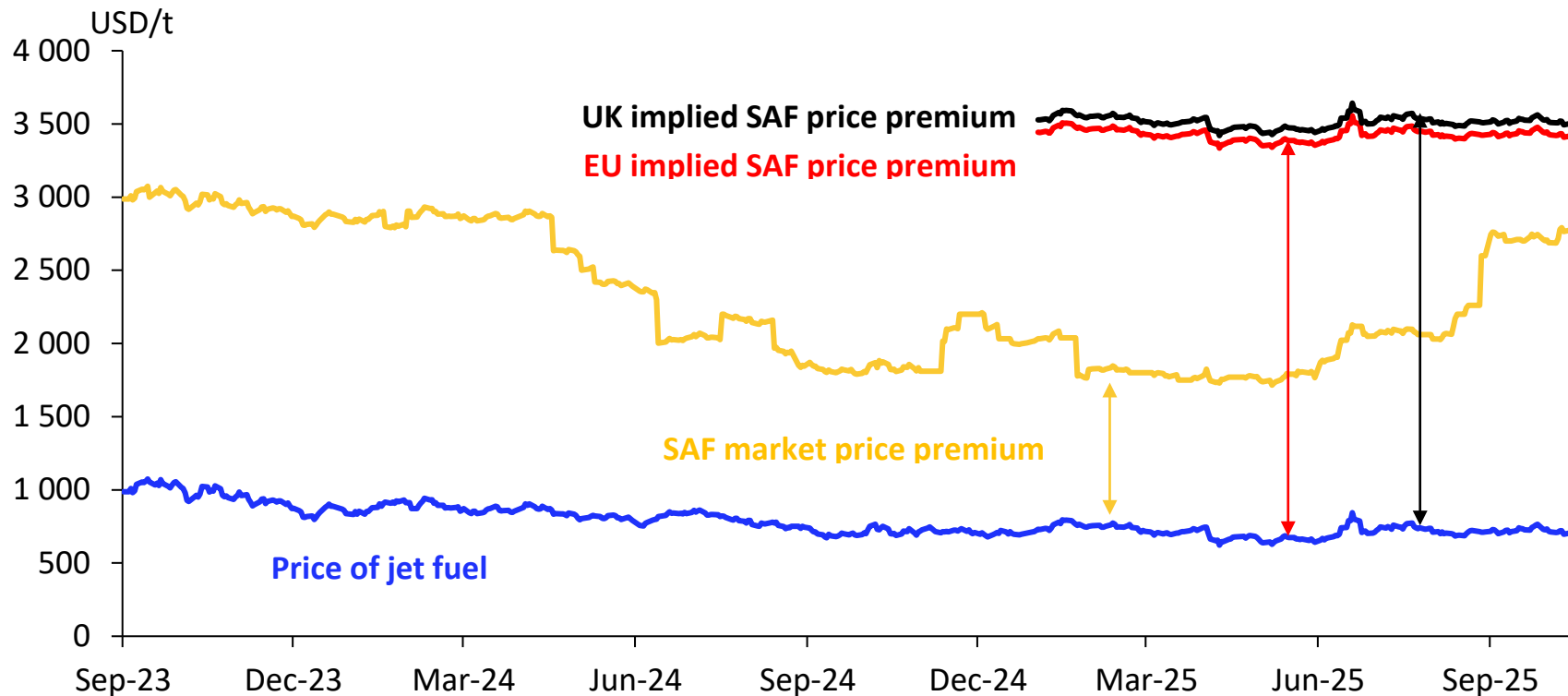
## Jet fuel consumption in 2026



- **Production growth slows** after doubling in 2024–2025.
- **Without policy support this market will not scale.**

# Consequences of mandates in Europe

## EU jet fuel and SAF prices, and implied SAF price in EU and UK



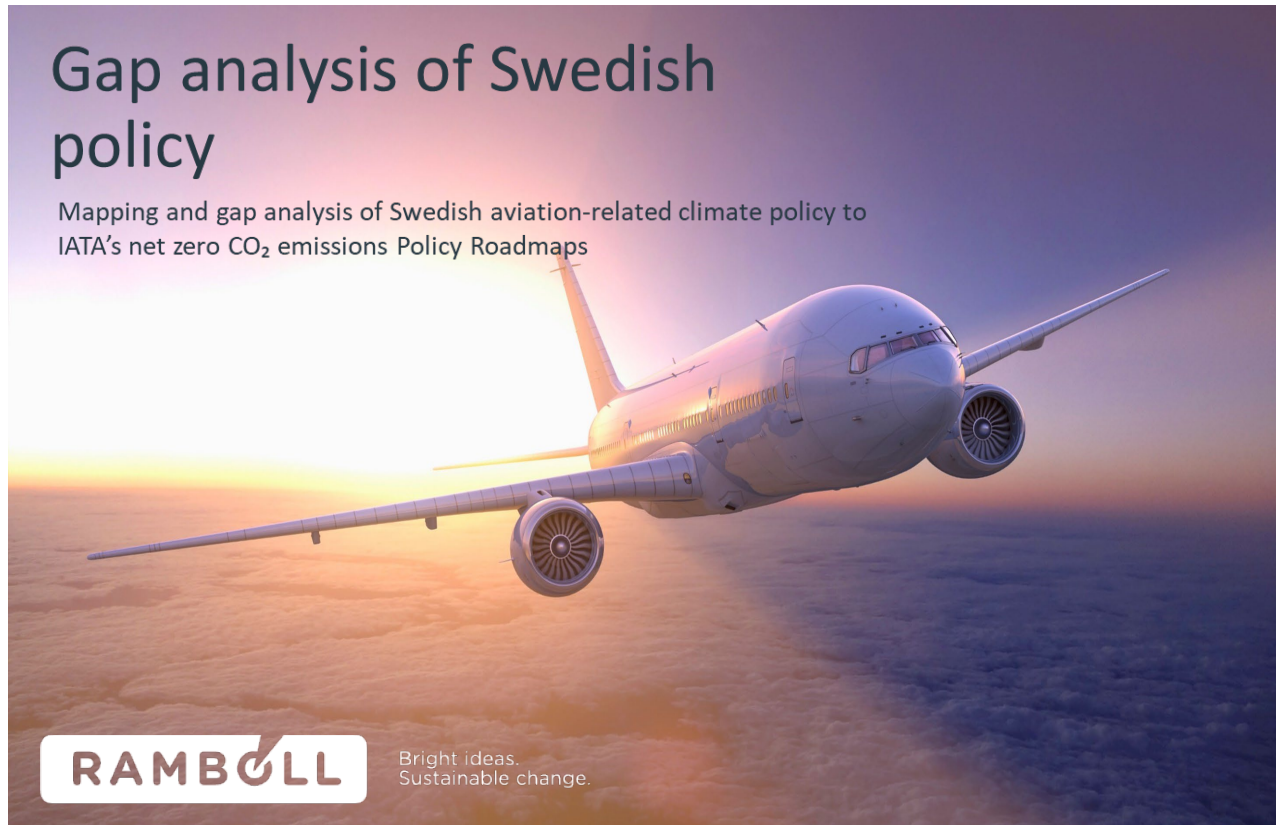
Source: S&P Global Commodity Insights & IATA Sustainability and Economics \* Updated in October 2025

### Consequences:

- Higher price
- No price transparency
- SAF documentation?
- No SAF supply optionality
- Missed opportunity to abate 2.4Mt of CO<sub>2</sub>

The implied SAF price as shown is derived from the average SAF compliance fee aggregated across several EU airports. The data is obtained from a sample of airlines operating at these EU airports. The sample may not be representative. Further, compliance fees vary significantly across different airports. In addition, airlines may have different fuel supply models, and not every airline will have the same fuel cost structure or exposure to the SAF compliance fees.

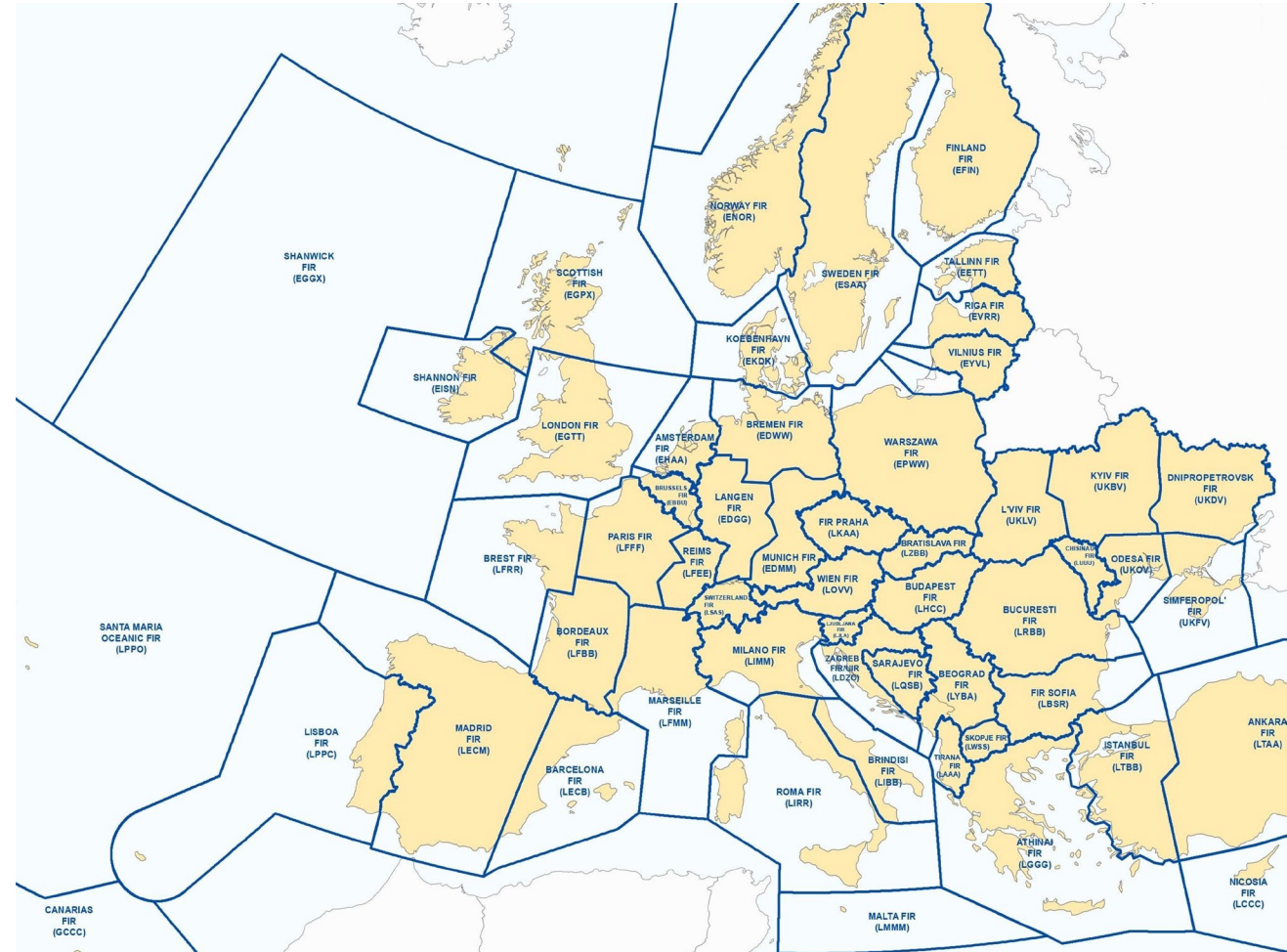
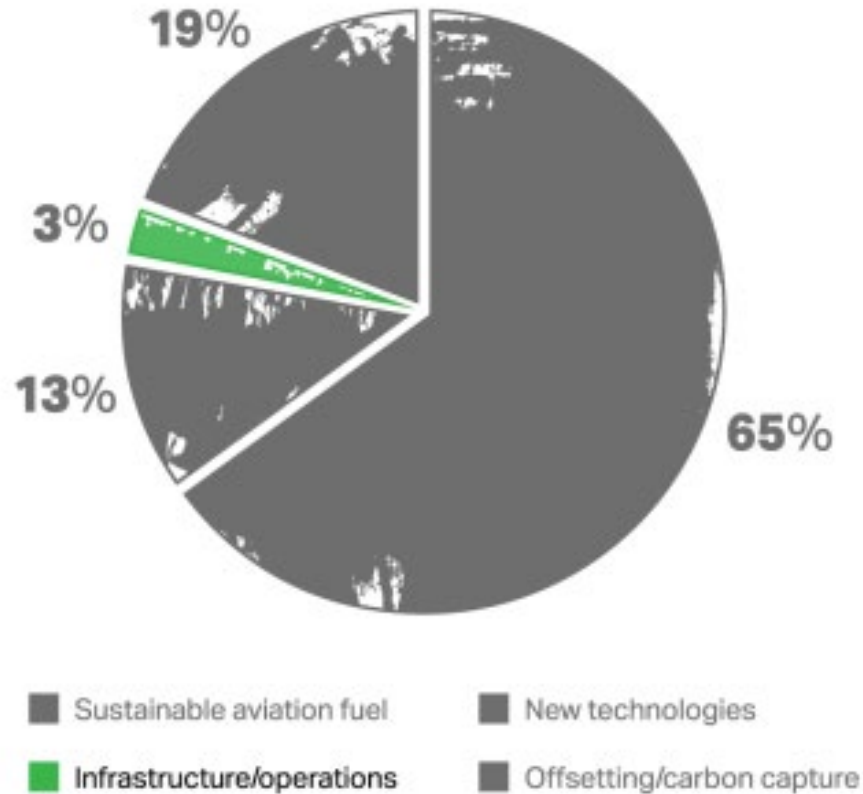
# Building business cases to ensure adequate policy



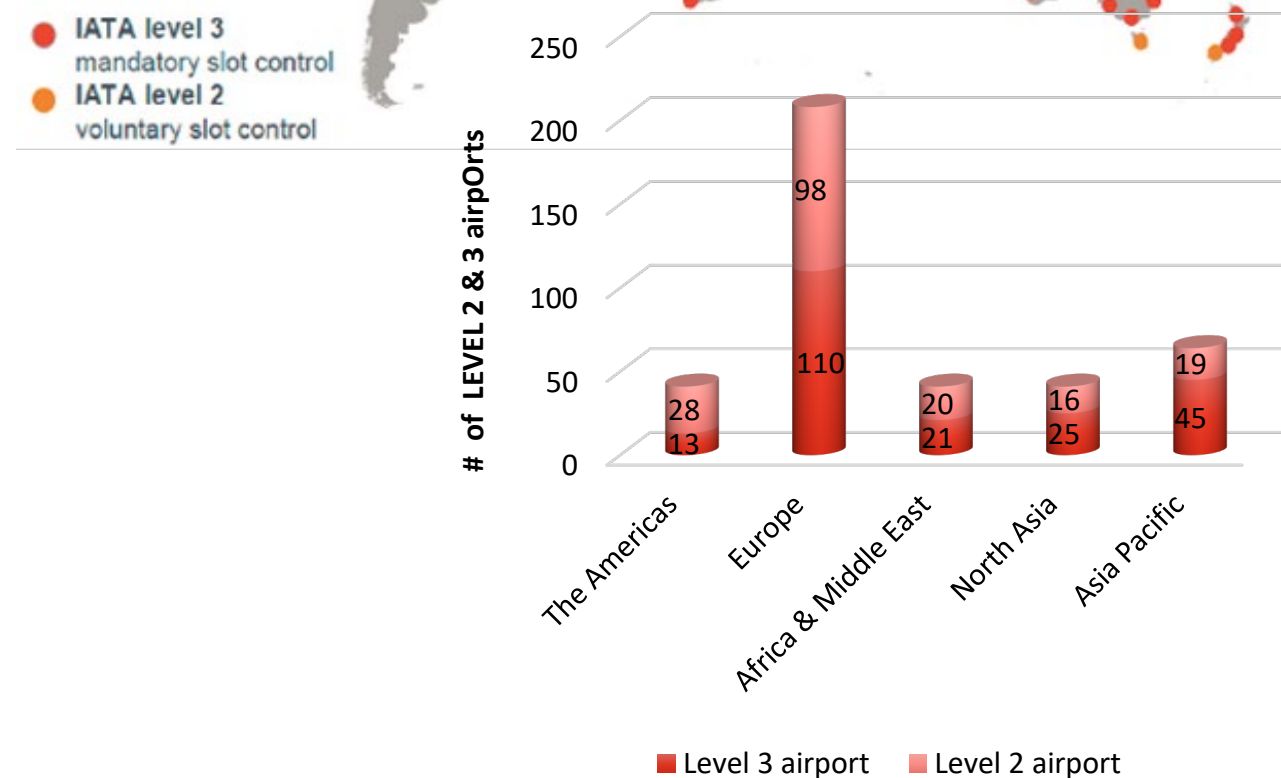
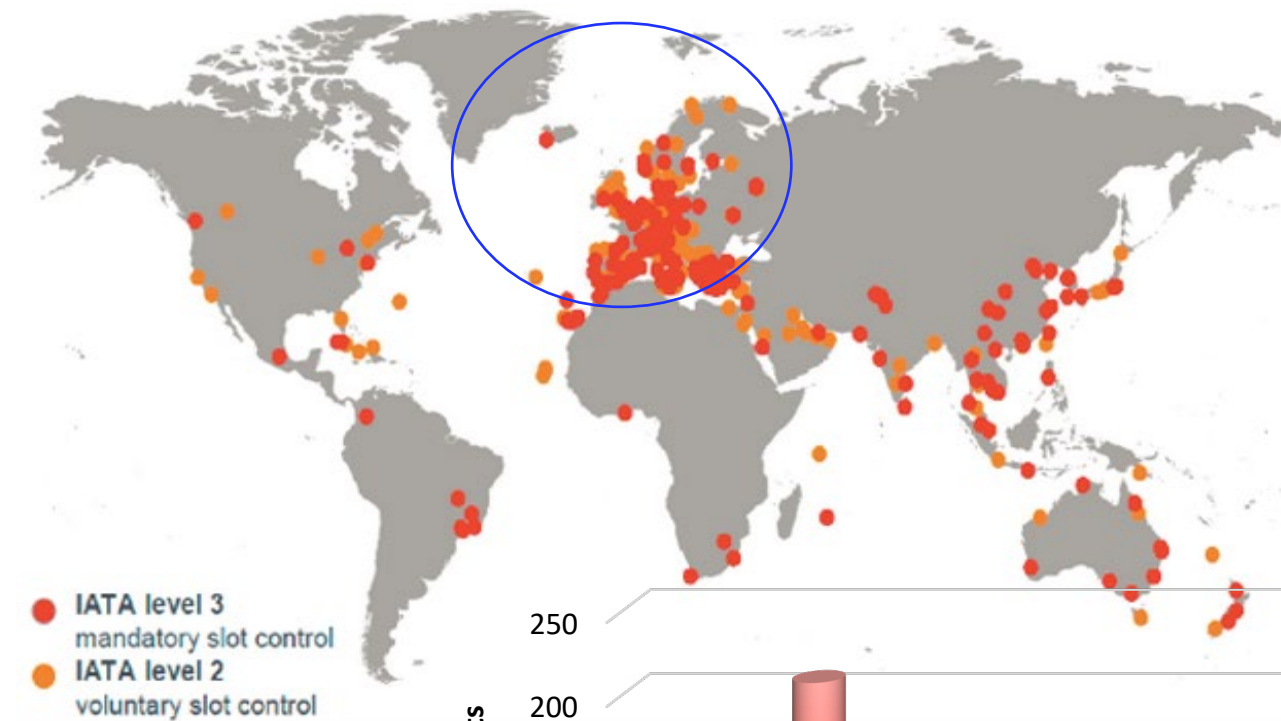
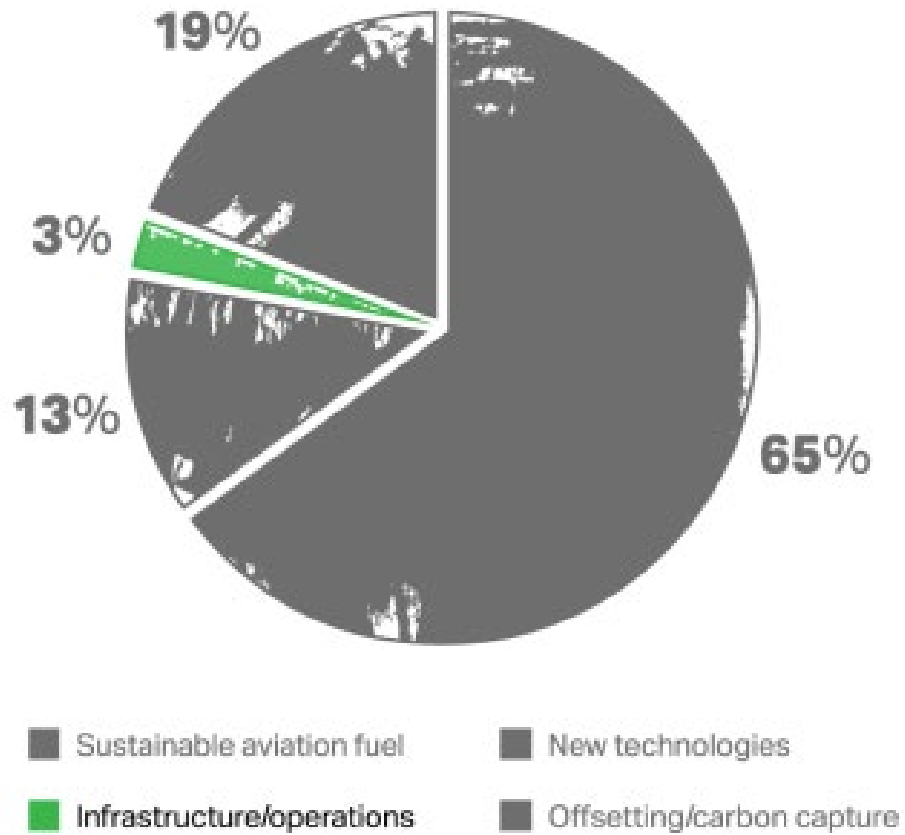
## Key Recommendations

- **Targeted incentives**
- **Book & Claim**
- **SAF export**

# Infrastructure challenge – Skies far from unified



# More than 50% of worldwide constrained airports



Thank you, and see you at the  
**Wings of Change Europe**

- An aero-political forum focusing on a **sustainable and competitive European air transport**.
- **18-19 November 2025** in Brussels, Belgium.
- **Key topics:** competitiveness, environmental and financial sustainability; safety and security; infrastructure, digitalization, tourism.

**Features:**

- Dynamic format with keynotes, fireside chats, and panels
- CEO and Minister interviews

**For:** C-suite and industry decision-makers; regional governments

**IATA  
WINGS  
OF CHANGE  
EUROPE**

**280+**  
Attendees  
**10+**  
Airline CEOs  
and Ministers



2025 Brussels, Belgium

