

Supporting
European
Aviation



THE DANUBE REGION TRANSPORT DAYS 2022

EUROCONTROL's view on energy efficient air transport

Philippe MERLO

DIRECTOR EUROPEAN GREEN SKY DIRECTORATE

28th November 2022



NETWORK
MANAGER



Aviation has a Plan: cooperation across aviation

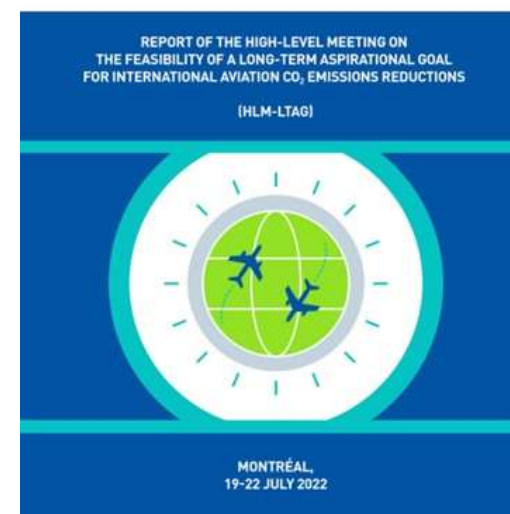


DESTINATION
2050
A ROUTE TO NET ZERO
EUROPEAN AVIATION

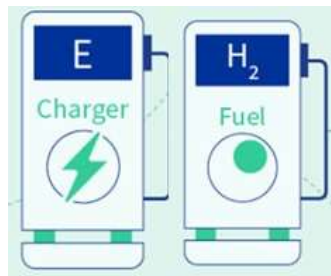


ICAO
INTERNATIONAL CIVIL AVIATION ORGANIZATION

DOC 10178
HLM-LTAG

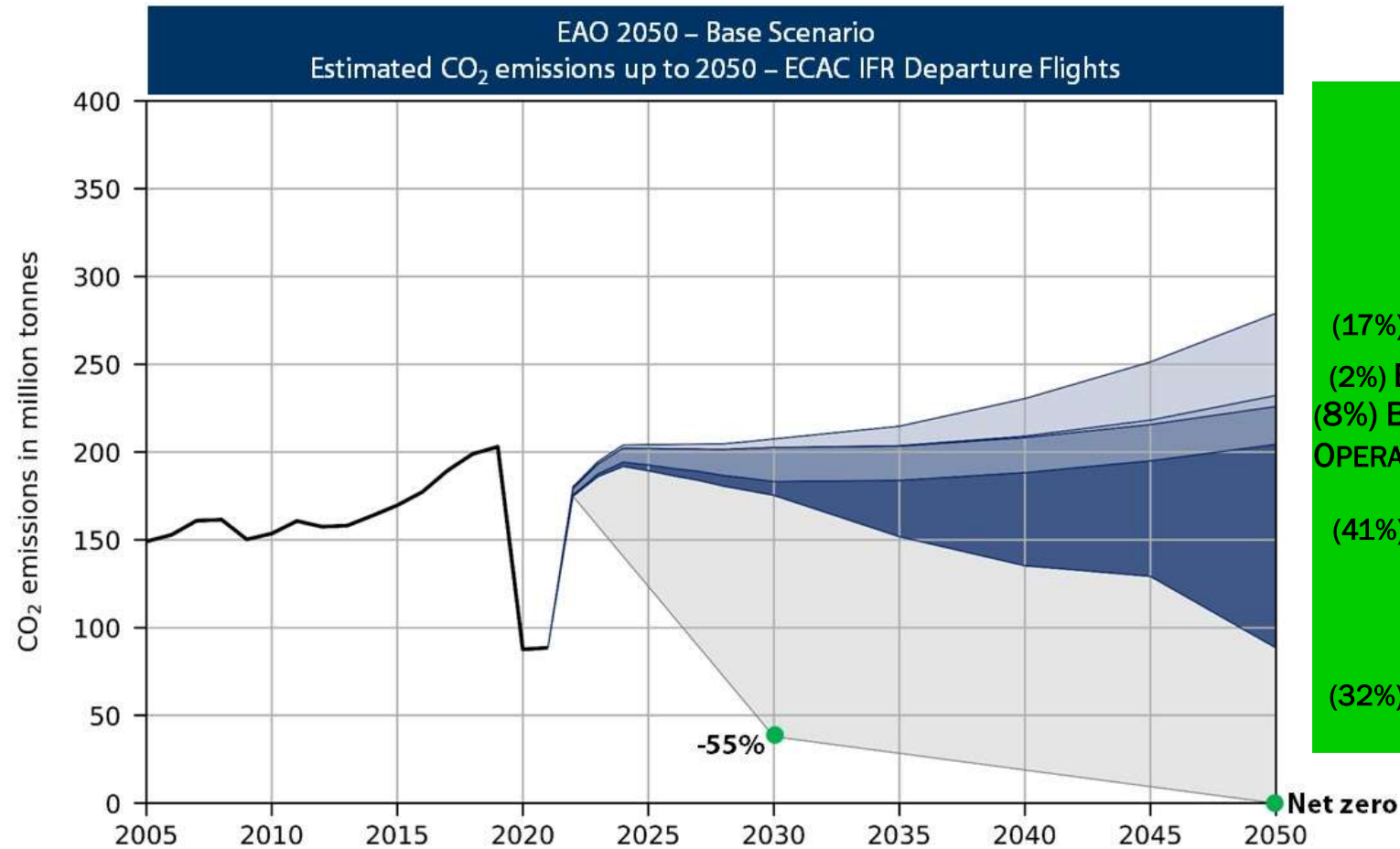


There is no silver bullet...



EUETS
CORSIA

Achieving net zero in 2050



**NET ZERO CO₂ TO BE ACHIEVED
BY CUTTING**

279 MILLION TONNES WITH:

(17%) MORE EFFICIENT CONVENTIONAL AIRCRAFT
(2%) ELECTRIC & HYDROGEN POWERED AIRCRAFT
(8%) BETTER AIR TRAFFIC MANAGEMENT & AIRLINE OPERATIONS

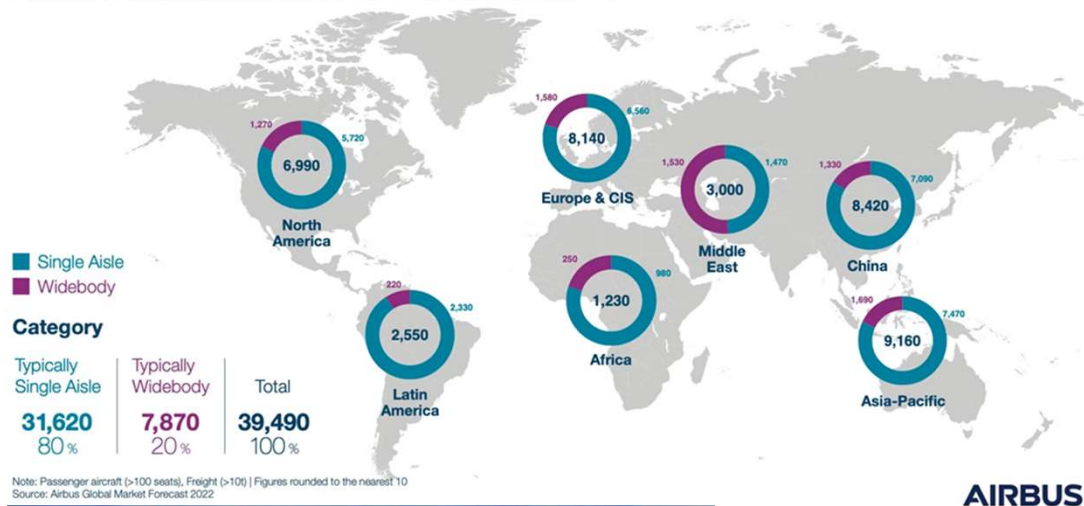
(41%) SUSTAINABLE AVIATION FUEL

(32%) OTHER MEASURES (MBM, CARBON CAPTURE)

Sustainability comes at a cost & with challenge

Commercial Aircraft demand 2022-2041

Asia-Pacific, China, Europe and US continue to be major drivers for growth & replacement

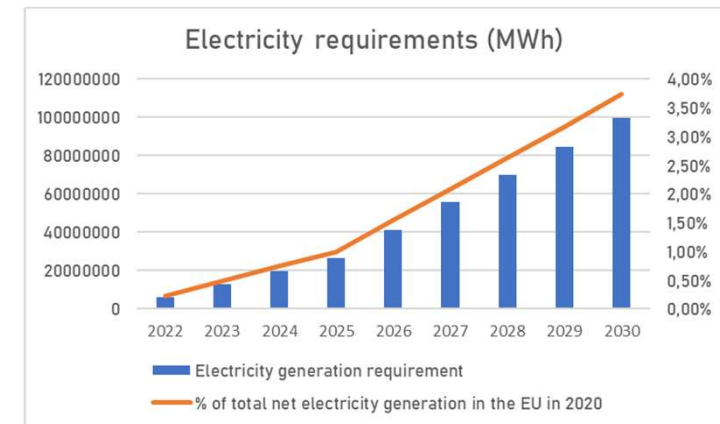
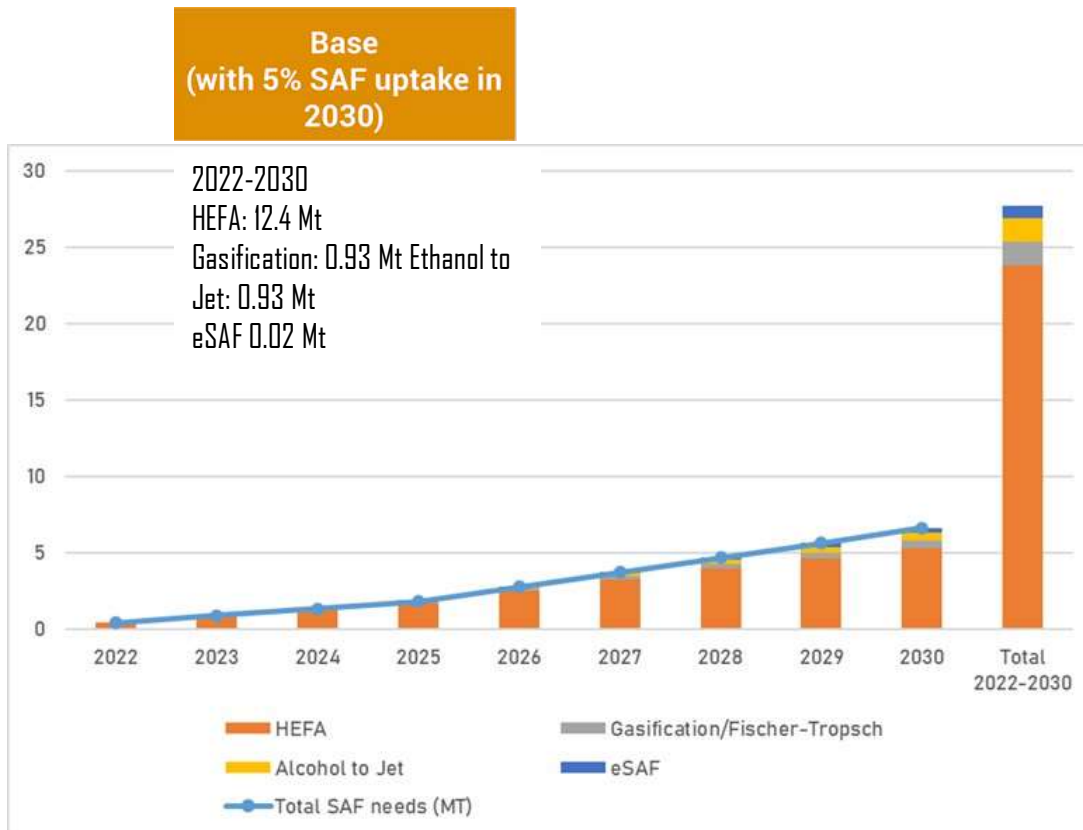


Time to deliver the Single European Sky

80% of fleet not yet latest generation



Base case 5% SAF / How much electricity ?

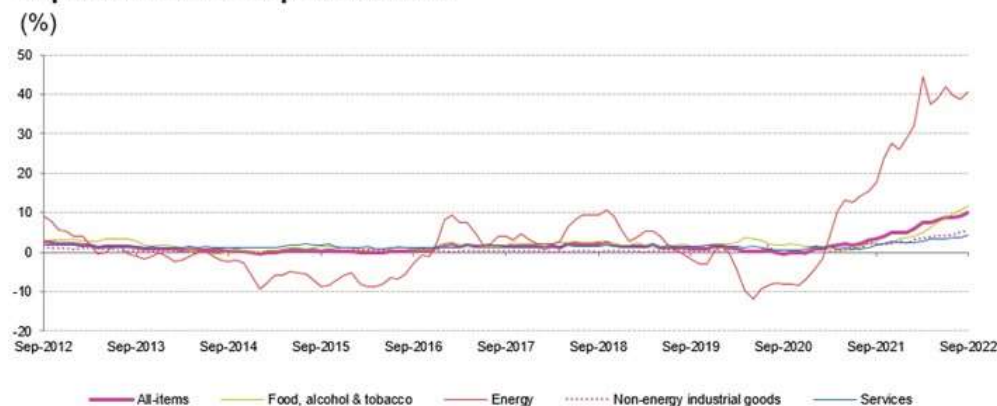


Nuclear reactor_{equivalent} (mean value)
911 MWh, 77% load
365 days/24 hrs

7.2 reactors ~ in 2030

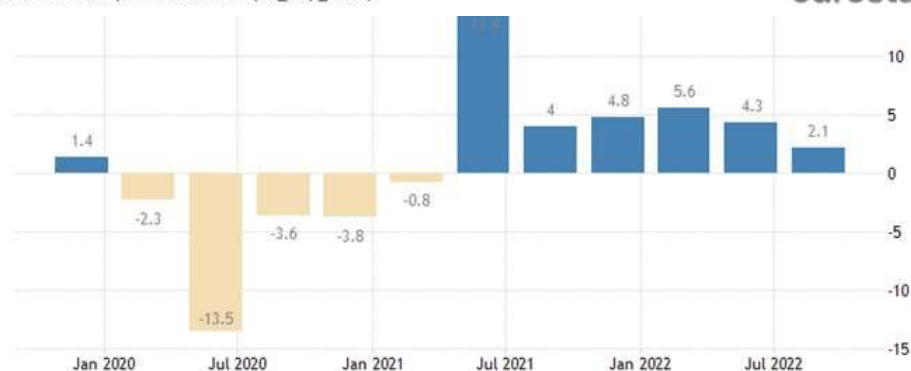
Toxic Mix of High Inflation, Flagging Growth and High Jet Fuel Prices

Euro area annual inflation and its main components, September 2012 - September 2022 (%)



Source: Eurostat (online data code: prc_hicp_manr)

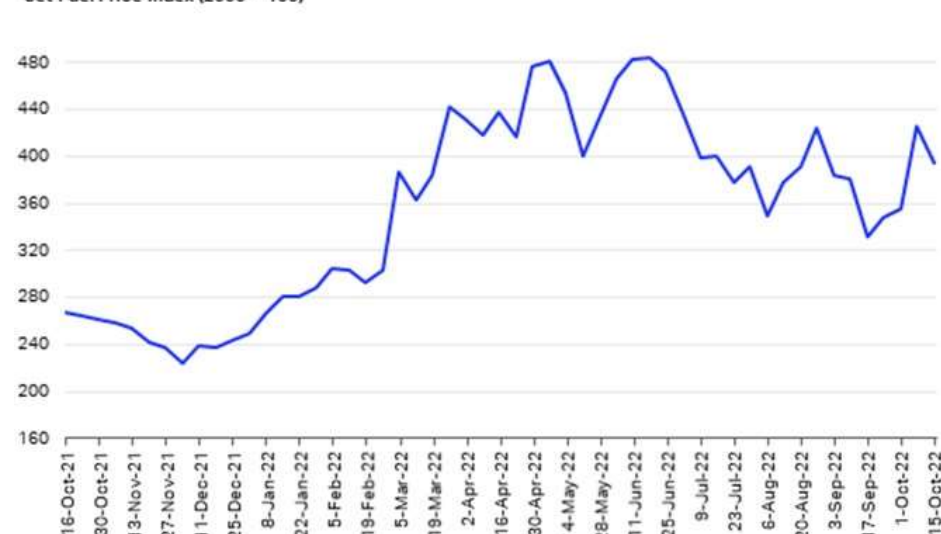
eurostat



European Union GDP Annual Growth Rate

TRADINGECONOMICS.COM | EUROSTAT

Jet Fuel Price Index (2000 = 100)



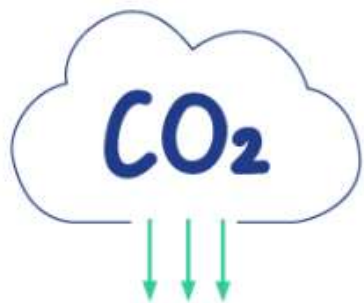
Source: S&P Global

Energy chaos:
Higher prices likely to last well into next year, if not longer...

There is a bigger picture



Ban of the sale of new CO_2 -emitting cars and vans by 2035

An illustration of a white electric car with a charging cable plugged into its side, set against a green, textured background.

Overall supply of future green electrical energy



And more is needed to boost



INCENTIVE

Financial conditions / incentives
to support airlines to deploy



Gained momentum only if a
global approach is taken



Availability of
enormous
quantities of green
energy

*If the supply is limited,
which applications
would take priority?*

SUPPORTING EUROPEAN AVIATION

