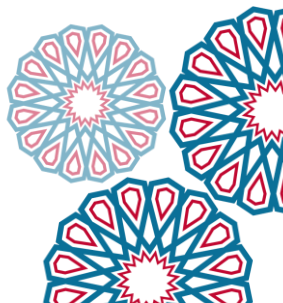


State of The Industry حال الصناعة

Abdul Wahab Teffaha
Secretary General

عبد الوهاب تفاحة
الأمين العام





الإتحاد العربي للنقل الجوي
AAC 58th AGM
الجمعية العامة الثامنة والخمسون

3 - 5 NOVEMBER 2025 • RABAT • MOROCCO

58TH AGM



الخطوط الملكية المغربية
royal air maroc



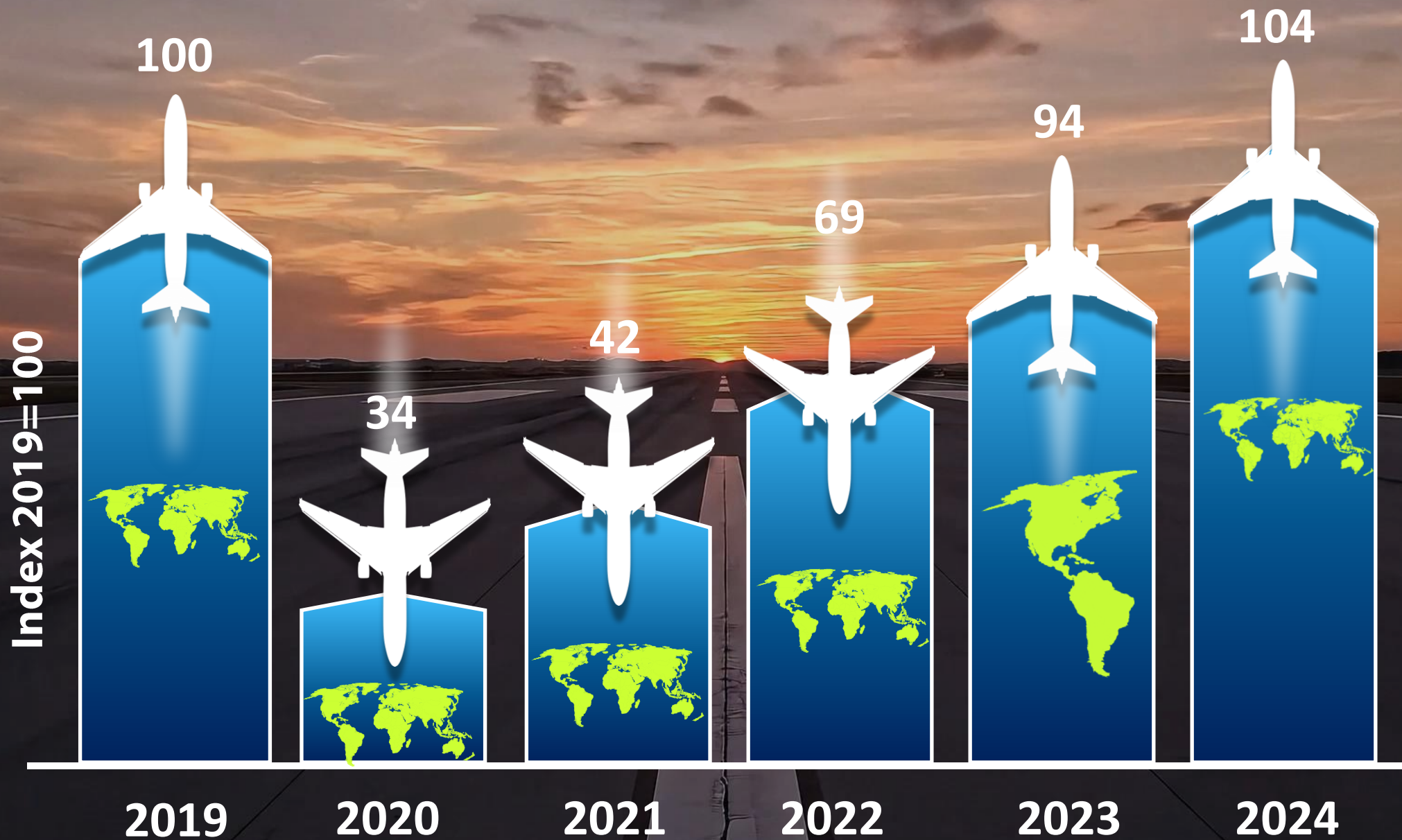
صَاحِبُ الْجَلَالَةِ الْمَلِكُ مُحَمَّدُ السَّادِسُ نَصْرُهُ اللهُ





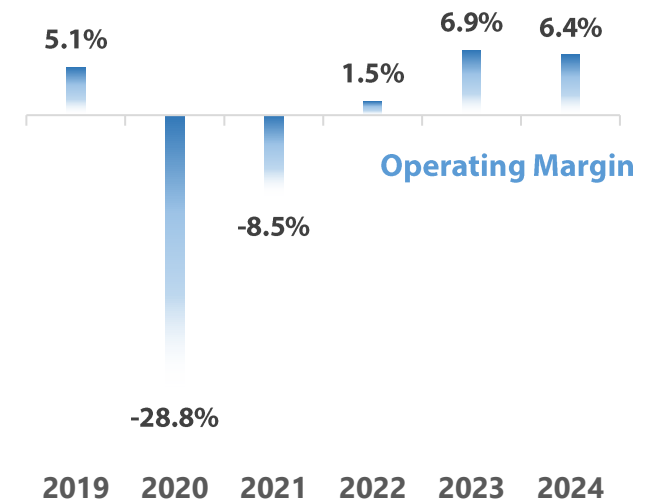
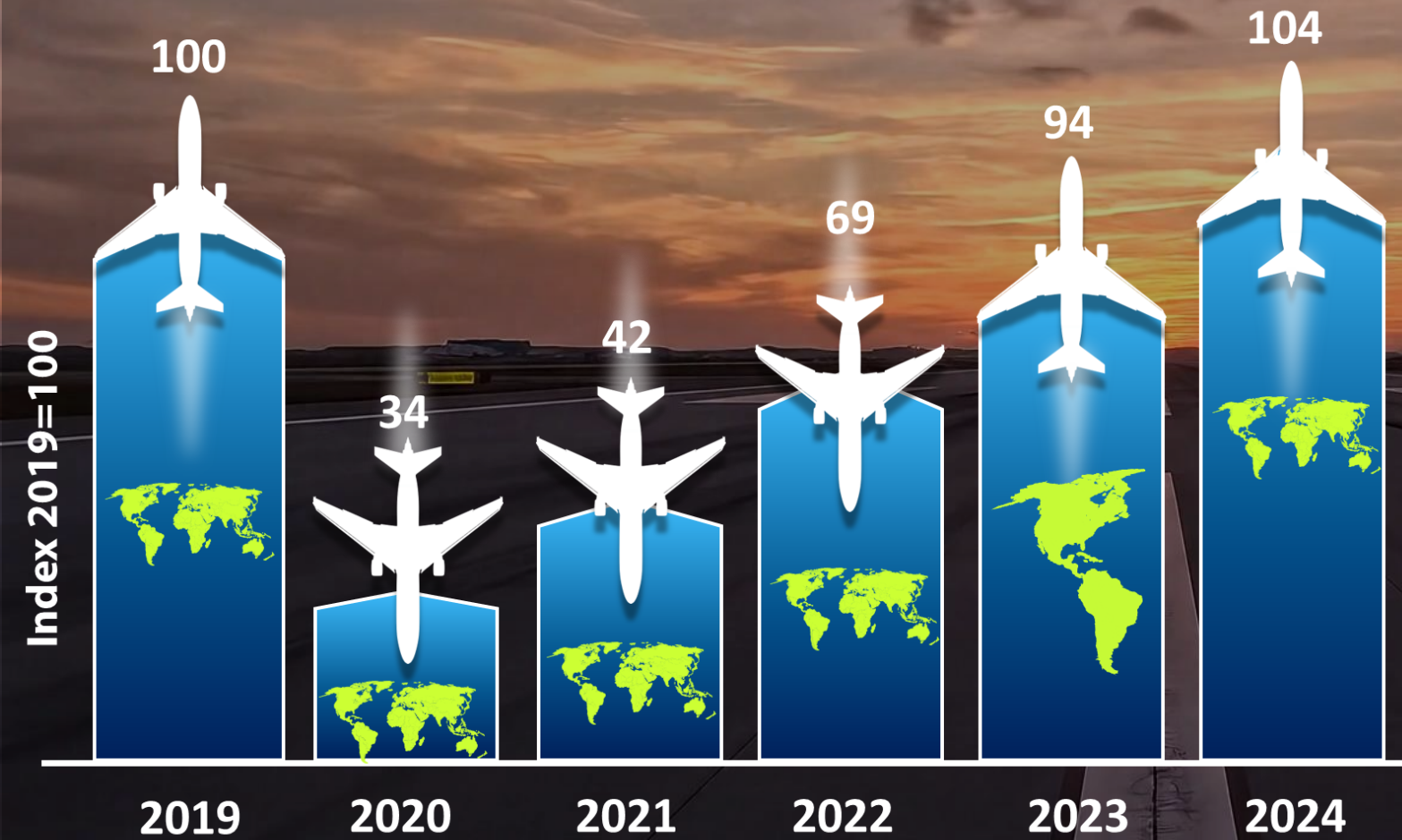
الخطوط الملكية المغربية
royal air maroc





Passenger Load Factor

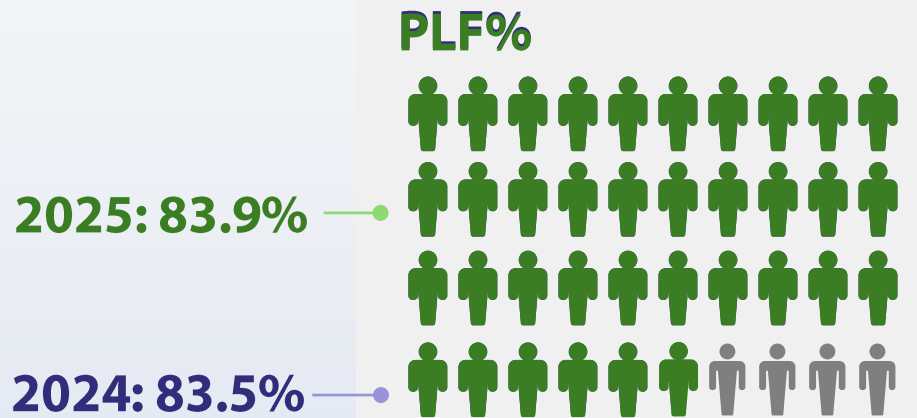
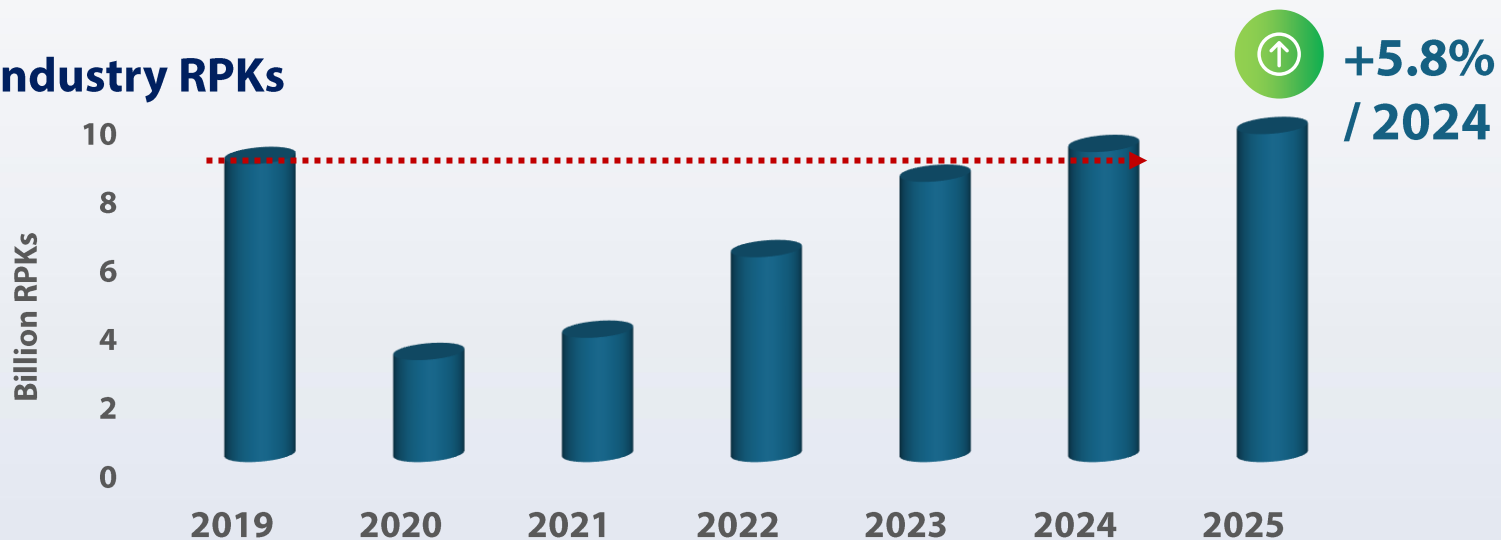
Operating Margin



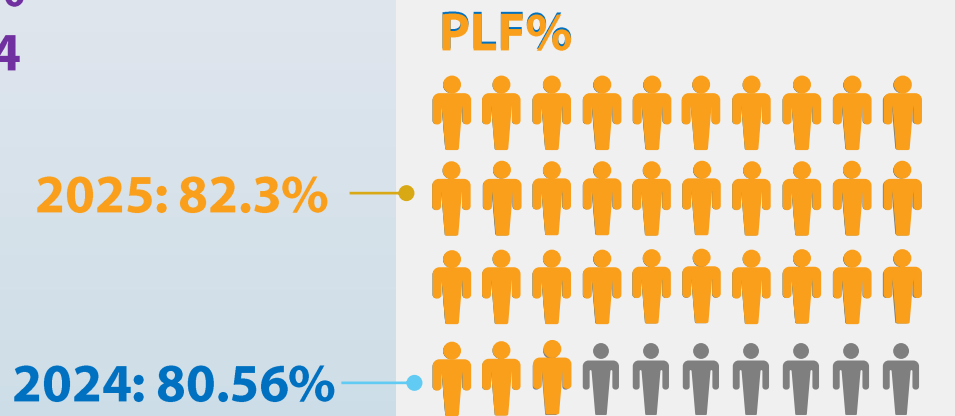


Growth in Passenger Revenue Kilometers (RPKs) & Passenger Load Factor (PLF%) for the Industry & AACO Members

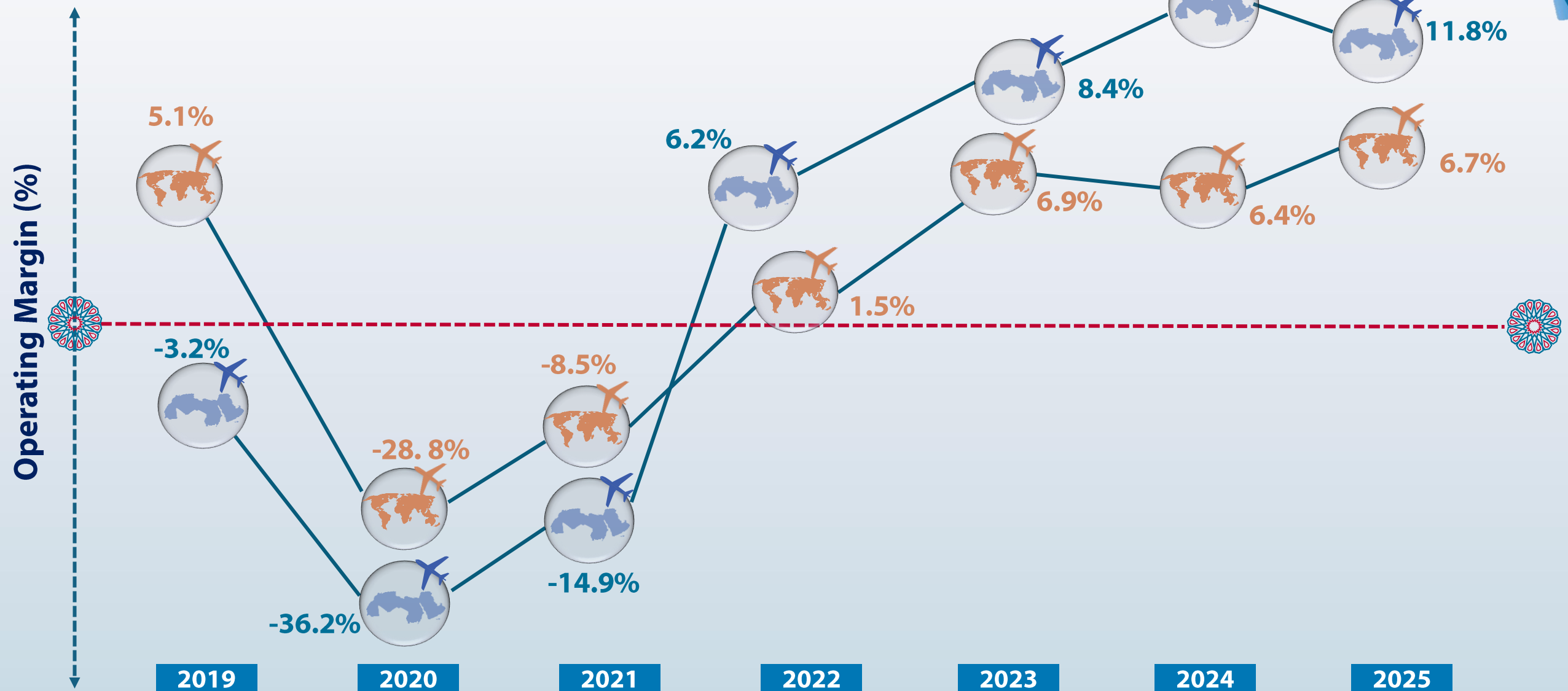
Industry RPKs



AACO Members' RPKs



Operating Margin for the Industry and AACO Members between 2019 and 2025

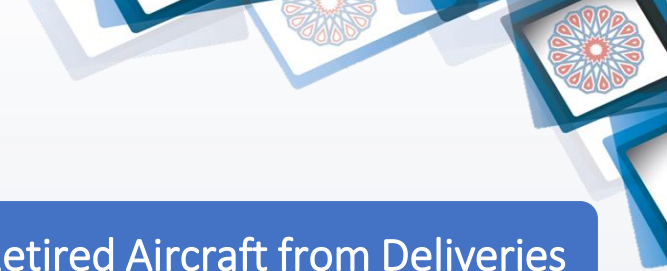




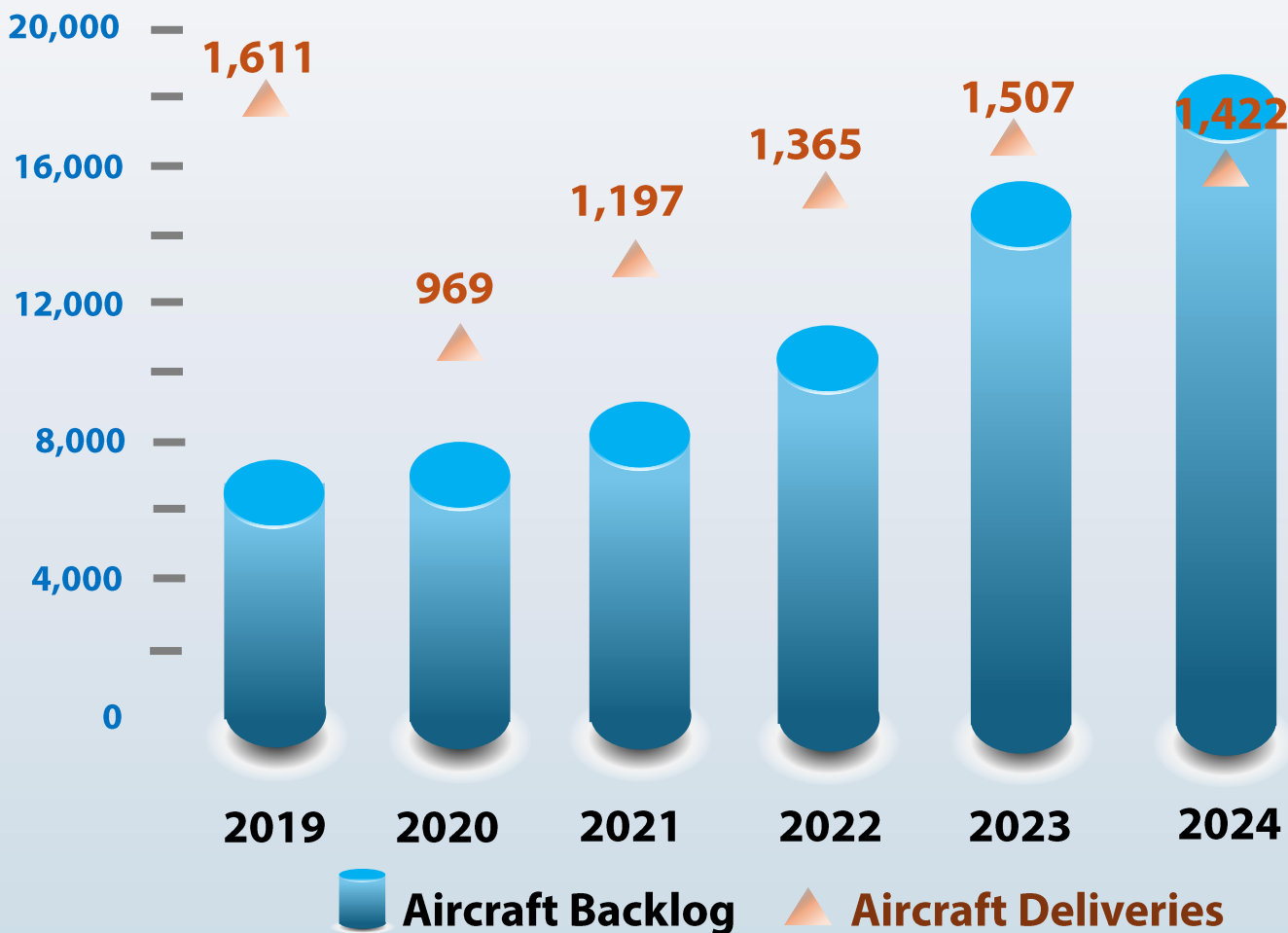




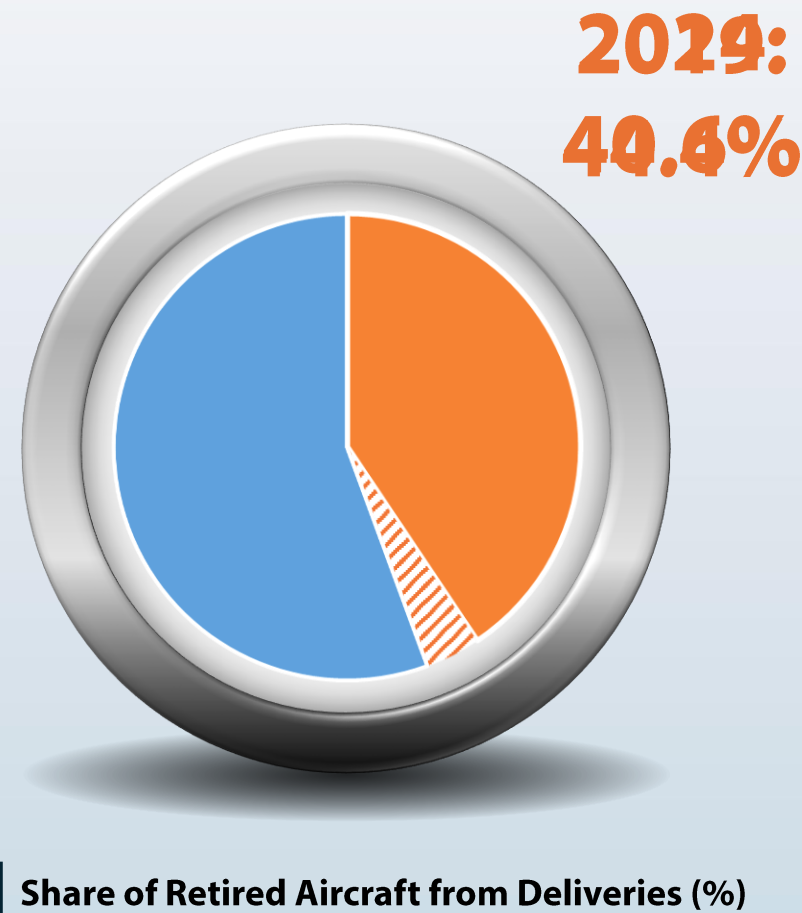
Global Fleet Status



Yearly Global Aircraft Deliveries and Backlog



Share of Retired Aircraft from Deliveries





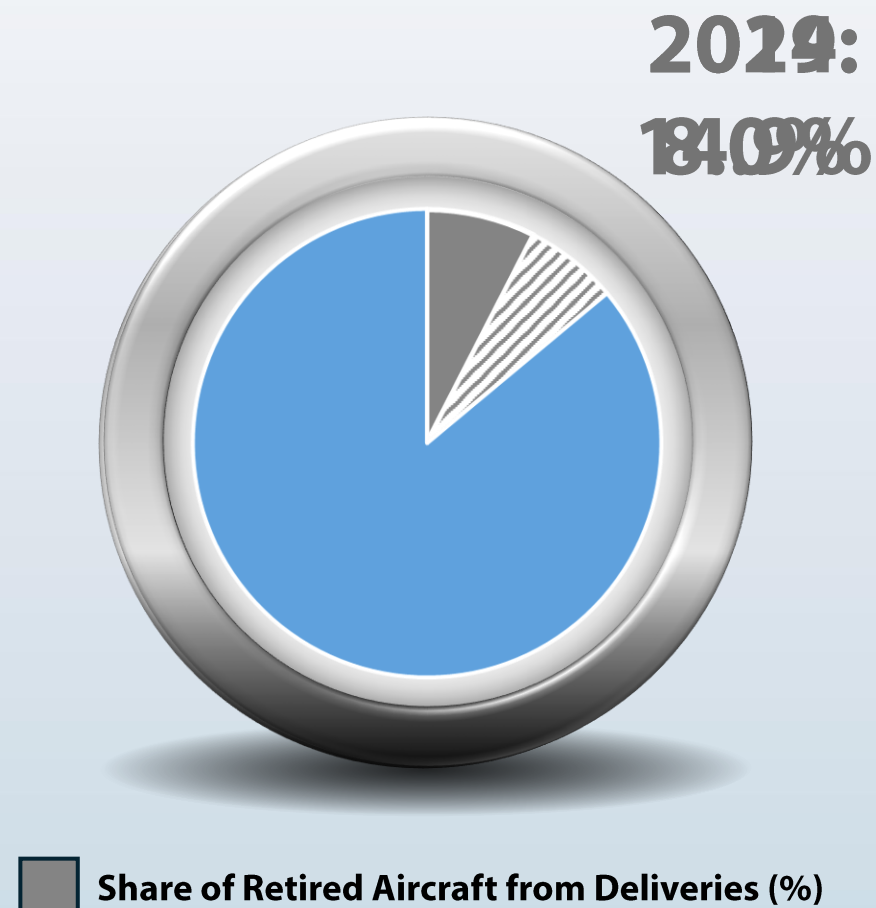
AACO Members' Fleet Status



AACO Members' Yearly Aircraft Deliveries and Backlog

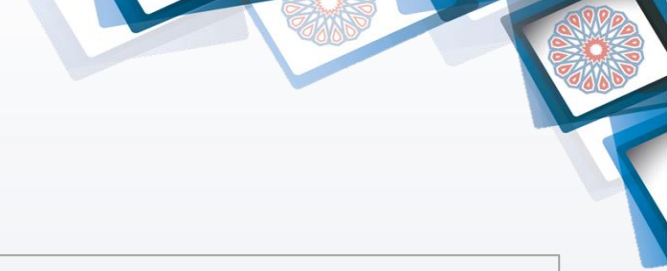


Share of Retired Aircraft from Deliveries

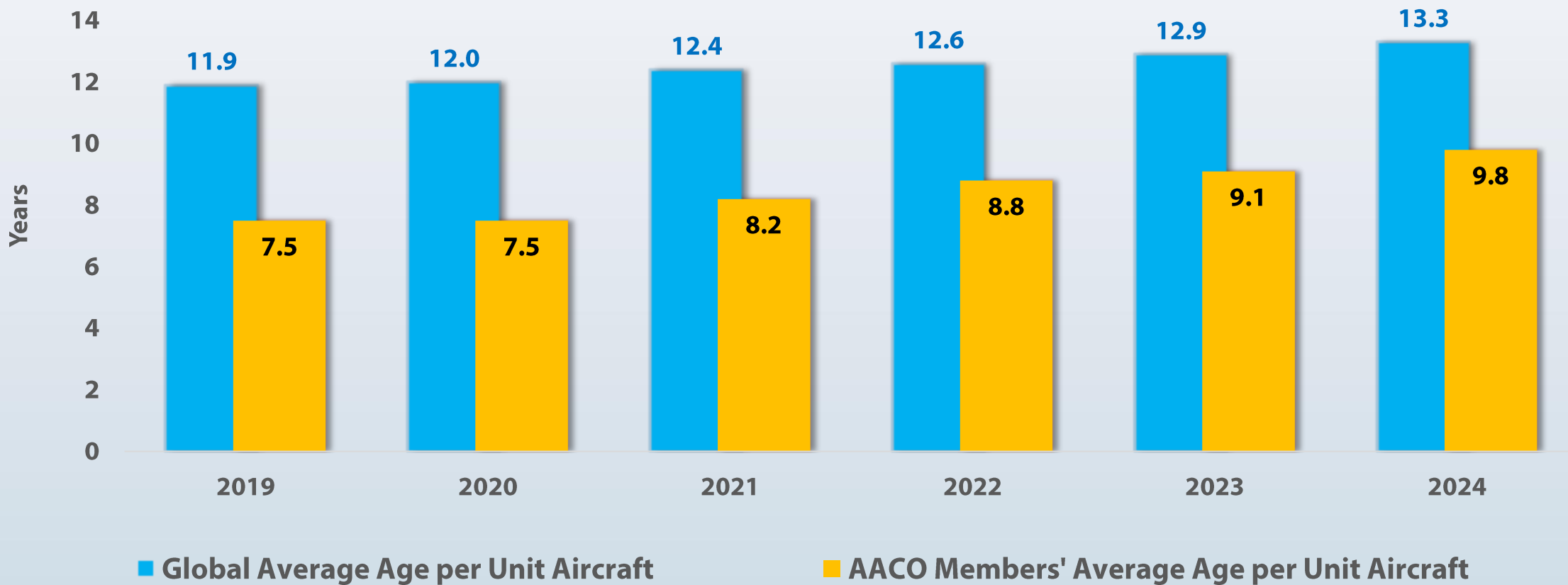




Global and AACO Members Fleet Age



Global and AACO Members' Average Age per Unit Aircraft*



*in-service fleet



Impact of Global Trade Tariffs on Air Freight Activity

Average Effective US Tariff Rate, New 2025 Policy through September 26



Canada
6.7%

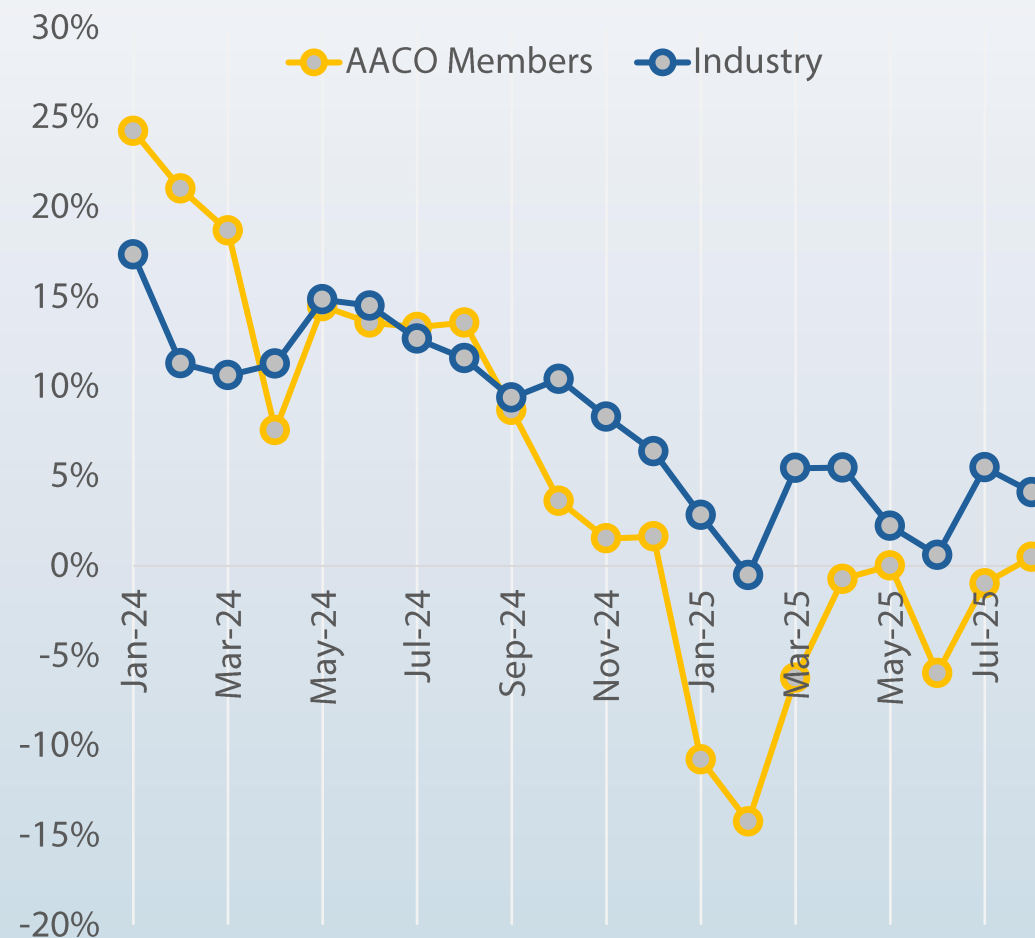
Mexico
7.4%

China
28.4%

ROW*
16.4%

*Rest of the World

Monthly Year-on-Year Change in the Industry's and AACO Members' Cargo Tonne Kilometers (CTKs)







2010

أصدرت الجمعية العامة للأياتا
قراراً دعا الى اعتماد نمو محايد في
الكربون اعتباراً من العام 2020

IATA AGM Issued a
Resolution Calling for
Carbon-Neutral Growth as
of 2020 onwards



2010

تبنت الإيكاو استراتيجية الاستدامة
البيئية في جمعيتها العامة لعام
2013

2013

ICAO's Adoption of a
Strategy in Sustainability
at its Assembly in 2013

2016

2010

2013

2016

تَبْنِي كورسيا في الجمعية العامة
للايكاو في العام 2016

CORSIA

Adoption of CORSIA at
the ICAO 2016 Assembly





تجنب قيام البلدان بإجراءات بيئية
متباينة

Avoid a Patchwork of
Environmental Measures

2010



التطور التكنولوجي
Technological
Advancements

الكفاءة التشغيلية
Operational
Improvements

الوقود المستدام
SAF

إجراءات السوق
MBMs



CORSIA

Carbon Offsetting and Reduction
Scheme for International Aviation



التطوير التكنولوجي لصناعة
الطائرات والمحركات

Technological
Advancements In Airframe
And Engines



إجراءات تشغيلية من قبل شركات
الطيران وتطوير البنية التحتية في
المطارات والطرق الجوية

Operational improvements by
airlines, and the development
of infrastructure in airports
and air traffic management



إنتاج وقود الطيران المستدام

Production of Sustainable Aviation Fuel



اعتماد إجراءات السوق، من خلال قيام
شركات الطيران بشراء شهادات للتعويض
عن انبعاثاتها الكربونية لرحلاتها الدولية

**Introduce market-based
measures through offsetting
international aviation's carbon
emissions**





		PILOT PHASE			FIRST PHASE		SECOND PHASE									
2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
MONITORING, REPORTING & VERIFICATION TO SET THE BASELINE (and then annually up till the end of the scheme)		VOLUNTARY <i>States are volunteering to be part of the scheme from 2021</i> <i>Operators flying routes between volunteering States will offset emissions based on:</i> CO2 growth above 2019 levels					MANDATORY <i>With exemptions for: small islands, least developed countries, land-locked developing countries, and states which have less than 0.5% of air traffic (although they can still volunteer)</i> <i>Operators flying routes between participating States will offset emissions based on:</i> CO2 growth above 85% of 2019 levels									



فكيف يمكننا وصف الوضع
الحالي بناءً على المحاور
الأربعة



Let's see what
happened at
the level of the
four Pillars





تحديث الأسطول
Fleet Modernization



تشغيل الرحلات بكفاءة وقود أعلى
Fuel-Efficient
Flight Operations

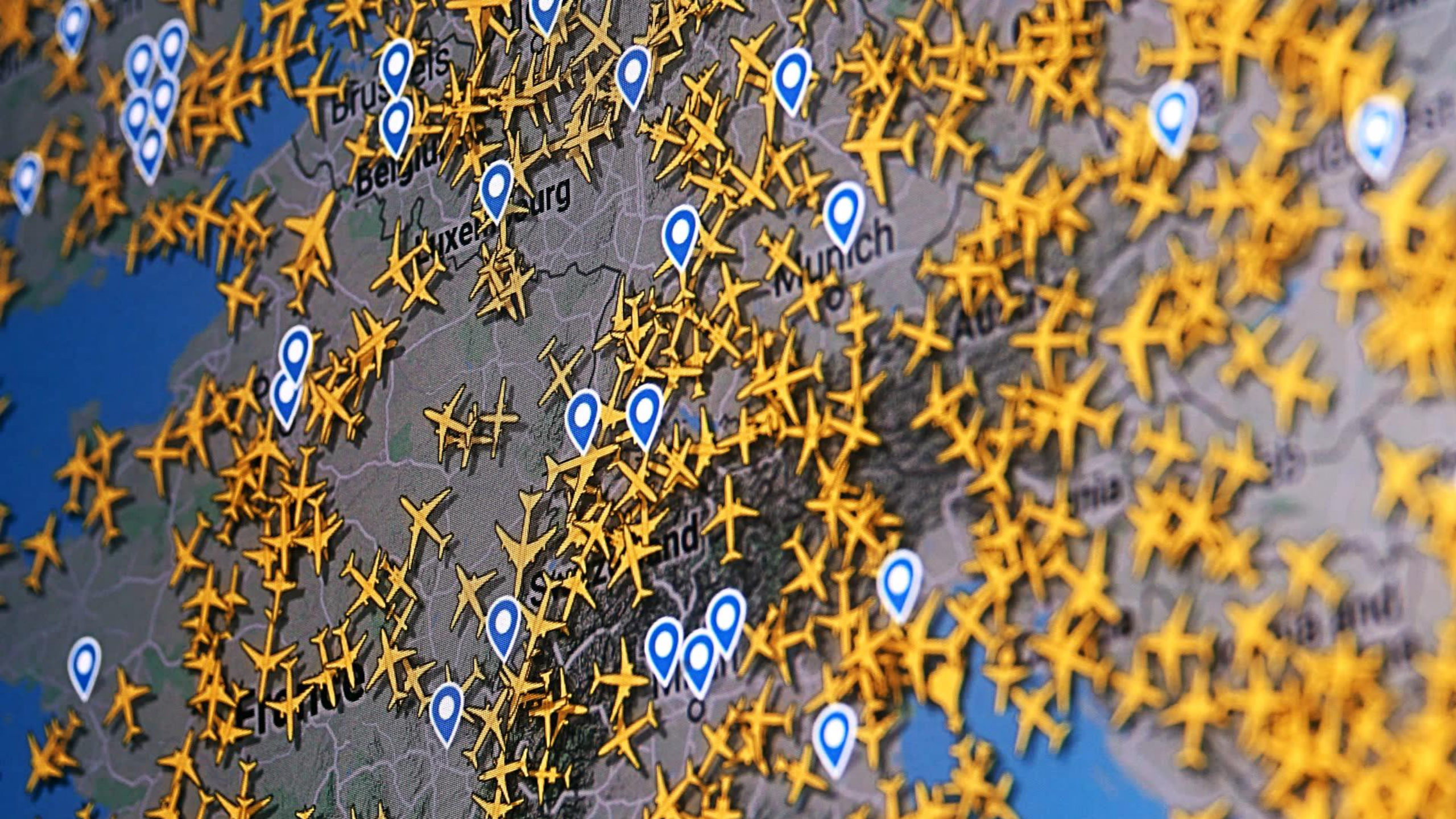


تحسين العمليات الأرضية
Efficient Ground
Operations



الصيانة ومراقبة الأداء
Maintenance and
Performance Monitoring







TACKLING LIMITS TO GROWTH

Single European Sky (SES)

Increasing the overall efficiency and competitiveness
of the Air Traffic Management (ATM) in Europe
by achieving the Single European Sky.



MODERNIZING ATM IN EUROPE

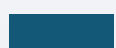
Growth & Jobs – Internal Market – EU in the World – Energy Union – #AviationStrategyEU





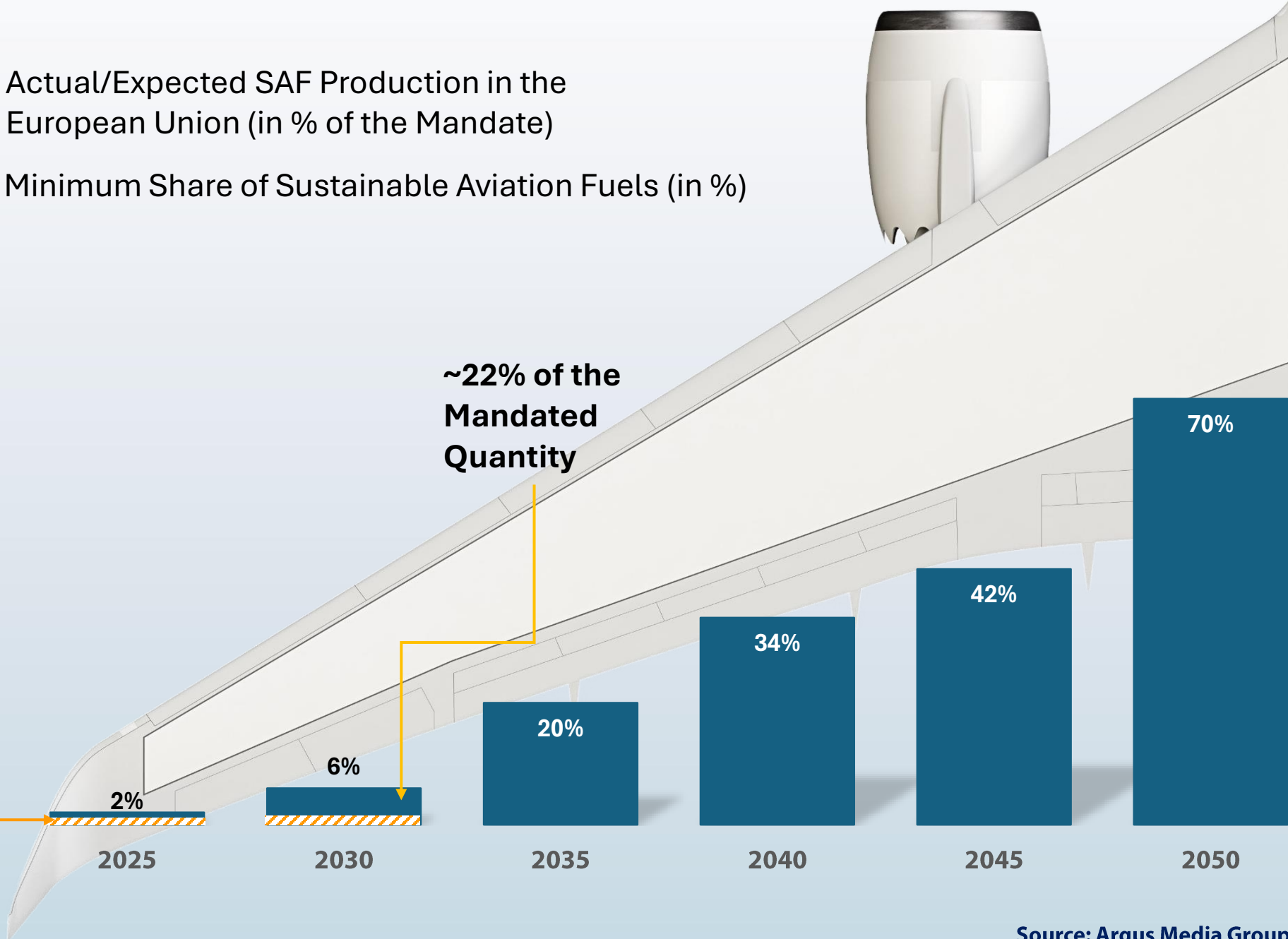


 Actual/Expected SAF Production in the European Union (in % of the Mandate)

 Minimum Share of Sustainable Aviation Fuels (in %)

~60% of the Mandated Quantity

~22% of the Mandated Quantity







***Offsetting
Requirements***

121.4
Million Tons of CO₂

2024-2025

November 2025
Source: ICAO and AACO Sources



**CARBON
CREDIT**

***Available CORSIA
Eligible Emission
Units***

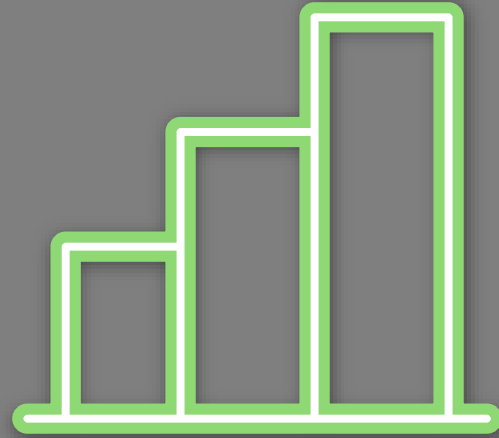
Available CORSIA Eligible Emission Units

18.4
Million

\$25
Per Ton

\$460
Million

November 2025
Source: ICAO and AACO Sources



Net Offsetting Requirements

Net Offsetting Requirements 2024-2025

121.4
MtCO₂

18.4
Million
tons

103
MtCO₂



***The Offsetting
Alternative***



The Offsetting Alternative

103
MtCO₂

=

38.4
Million Tons of
SAF
(85% carbon
Intensity)

SAF Available In 2025
~182,000 Tons

November 2025

Source: ICAO and AACO Sources



Cost

\$

Cost

SAF \$950 / Ton

CORSIA Credits \$25 / Ton

November 2025

Source: ICAO and AACO Sources

39th

TRIENNIAL ASSEMBLY

ICAO HQ, MONTRÉAL, 27 SEP–07 OCT 2016



ICAO

UNITING AVIATION

Canada

10% of aviation fuel to come from sustainable sources by 2030. Carbon intensity to be reduced by 15% in 2030.

USA

SAF target to domestic consumption to 3 billion gallons in 2030 and tax credits for production of SAF

Brazil

SAF mandate for domestic airlines to reduce emissions by 1% starting 2027, increasing annually to reach a 10% by 2037

Korea

SAF blend of 1% in 2027. Rising gradually to 3% - 5% by 2030 & 7%-10% by 2035

EU

SAF mandate for all fuel uplifted at EU airports, of 2% in 2025, 6% in 2030, up to 70% in 2050.

UK

SAF mandate in 2025 at 2% of total UK jet fuel demand increasing to 10% in 2030 and then to 22% in 2040

India

1% SAF for international flights in 2027, rising to 2% in 2028 and possibly 5% by 2030.

Singapore

1% blending target for SAF starting 2026, rising to 3-5% by 2030, and partly funded by a levy on air fares.

Japan

Requires international flights out of Japanese airports to use at least 10% SAF by 2030.

Türkiye

Proposed 5% SAF mandate by 2026

Canada

10% of aviation fuel to come from sustainable sources by 2030. Carbon intensity to be reduced by 15% in 2050.

UK

SAF mandate in 2025 at 2% of total UK jet fuel demand increasing to 10% in 2030 and then to 22% in 2040

USA

CORSIA

at 1% in 2027, 3% in 2028, and 5% in 2029

Brazil

SAF mandate to reduce emissions by 1% starting 2027, increasing annually to reach a 10% by 2037

Indonesia

20% of SAF starting 2025, rising to 5% by 2030, and partly funded by levy on air fares.

Korea

SAF by 2030 & 7%-

Japan

Requires international flights out of Japanese airports to use at least 10% SAF by 2030

EU

SAF mandate all fuel uplifted at EU airports 2% in 2025, 6% in 2030, up to 70% in 2050.

Türkiye

Proposed 5% SAF mandate by 2026



المعايير المتباينة
لإنتاج وقود الطيران
المستدام



The Varying
Standards for
SAF Production





2025

Tons of Sustainable Aviation Fuel



182,000



Proof of Compliance (PoC) with the sustainability and greenhouse gas emissions savings criteria of the EU RED II		v1.0
Please note: This Proof of Compliance (PoC) document can only be issued for a batch of product if the Proof of Sustainability (PoS) document for that batch of product is no longer available, due to the PoS document having been retired under a fuel supplier obligation or incentive scheme. For use in regulated markets, a prerequisite for issuance of this PoC document is the acceptance by the competent authorities. Please indicate under which fuel supplier obligation or incentive scheme the original PoS document was retired under (e.g., UK RTFO): Refuel EU (2% Mandate) 45645644645466 1-1-2026 45641231233 1-1-2025  www.iscc-system.org		
Supplier		Recipient
Name: ABC		Name: DEF
Address:		Address:
Certification System: ISCC EU		Contract Number:
Certificate Number:		
Address of dispatch/shipping point of the sustainable product:		
☐ Same as address of supplier		
Date of dispatch of the sustainable product:		
1. General information		
Type of Product:	HEFA SAF	
Type of Raw Material/Feedstock	Used cooking oil	
Additional Information (voluntary):		
Country of Origin (of the raw material/feedstock):		
Quantity ² :	m3/15°C ☐ m ³ ☐ metric tons	
Energy content (MJ):	MJ	
Product density, if available (at 15°)	kg/m ³	
EU RED II Compliant material	☐ Yes	
Chain of custody option	Mass balance	
2. Scope of certification of raw material		
The raw material complies with the relevant sustainability criteria according to Art. 29 (2) - (7) RED II ⁴ ☐ Yes ☐ No		
The raw material meets the definition of waste or residue according to the RED II ⁵ ☐ Yes ☐ No		
3. GHG emission information (based on life cycle emissions calculation as per Directive (EU) 2018/2001)		
Total default value according to RED II applied ☐ Yes ☐ No		
E = Total GHG emissions from supply and use of the fuel (gCO ₂ eq/MJ) gCO ₂ eq/MJ		
E = Eec + EI + Ep + Etd + Eu⁶ - Esca - Eccs - Eccr = 0 gCO ₂ eq/MJ		
Allocated heat: gCO ₂ eq/MJ heat Allocated electricity: gCO ₂ eq/MJ electricity		
GHG emission savings 490,000 Tons of CO₂		

2025

Tons of Sustainable Aviation Fuel

200,000

180,000

160,000

140,000

120,000

100,000

80,000

60,000

40,000

20,000

0

182,000



Proof of Compliance (PoC) with the sustainability and greenhouse gas emissions savings criteria of the EU RED II v1.0

Please note: This Proof of Compliance (PoC) document can only be issued for a batch of product if the Proof of Sustainability (PoS) document for that batch of product is no longer available, due to the PoS document having been retired under a fuel supplier obligation or incentive scheme.
For use in regulated markets, a prerequisite for issuance of this PoC document is the acceptance by the competent authorities.

Please indicate under which fuel supplier obligation or incentive scheme the original PoS document was retired under (e.g., UK RTFO):

Refuel EU (2% Mandate)

Unique Number of the PoC¹: **45645644645466**

Date of Issuance of the PoC: **1-1-2026**

Unique Number of the underlying PoS²: **45641231233**

Date of Issuance of the PoS (if available): **1-1-2025**

Supplier

Name: **ABC**

Address:

Certification System: **ISCC EU**

Certificate Number:

Recipient

Name: **DEF**

Address:

Contract Number:

Address of dispatch/shipping point of the sustainable product:

☐ Same as address of supplier

Date of dispatch of the sustainable product:

1. General information

Type of Product: **HEFA SAF**

Type of Raw Material/Feedstock: **Used cooking oil**

Additional Information (voluntary):

Country of Origin (of the raw material/feedstock):

Quantity³: **m³/15°C** ☒ **m³** ☐ **metric tons**

Energy content (MJ): **MJ**

Product density, if available (at 15°): **kg/m³**

EU RED II Compliant material ☐ Yes

Chain of custody option: **Mass balance**

2. Scope of certification of raw material

The raw material complies with the relevant sustainability criteria according to Art. 29 (2) - (7) RED II⁴ ☐ Yes ☐ No

The raw material meets the definition of waste or residue according to the RED II⁵ ☐ Yes ☐ No

3. GHG emission information (based on life cycle emissions calculation as per Directive (EU) 2018/2001)

Total default value according to RED II applied ☐ Yes ☐ No

E = Total GHG emissions from supply and use of the fuel (gCO₂eq/MJ)

E = **Eec** + **Ei** + **Ep** + **Etd** + **Eu** ⁶ - **Escs** - **Eocs** - **Eocr** = **0** gCO₂eq/MJ

Allocated heat: **gCO₂eq/MJ heat** Allocated electricity: **gCO₂eq/MJ electricity**

GHG emission savings 490,000 Tons of CO₂



Certificate

according to the
Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA)
As developed by the International Civil Aviation Organization (ICAO)

Certificate Number: ISCC-CORSIA-Cert-DE105-83050301

Control Union Certifications Germany GmbH
Dorotheastr. 30, D-10318 Berlin

certifies that

BP Oil España S.A.U. Refinería de Castellón
Poligono El Serrallo, 12080 Castellón,
Spain

complies with the requirements of CORSIA and the certification system
ISCC CORSIA
(International Sustainability and Carbon Certification)
which is approved by the ICAO Council.

Place of the audit

(if different from the legal address of the system user as stated above; only applicable for paper traders):

n.a.

This certificate is valid from 30.08.2021 to 29.08.2022.

The site of the system user is certified as:

Trader
Co-Processing plant

CUC Germany GmbH
Dorotheastr. 30, D-10318 Berlin
Tel: +49 (0) 30 509 69 88 - 0
Fax: +49 (0) 30 509 69 88 - 88

Berlin, 30.08.2021

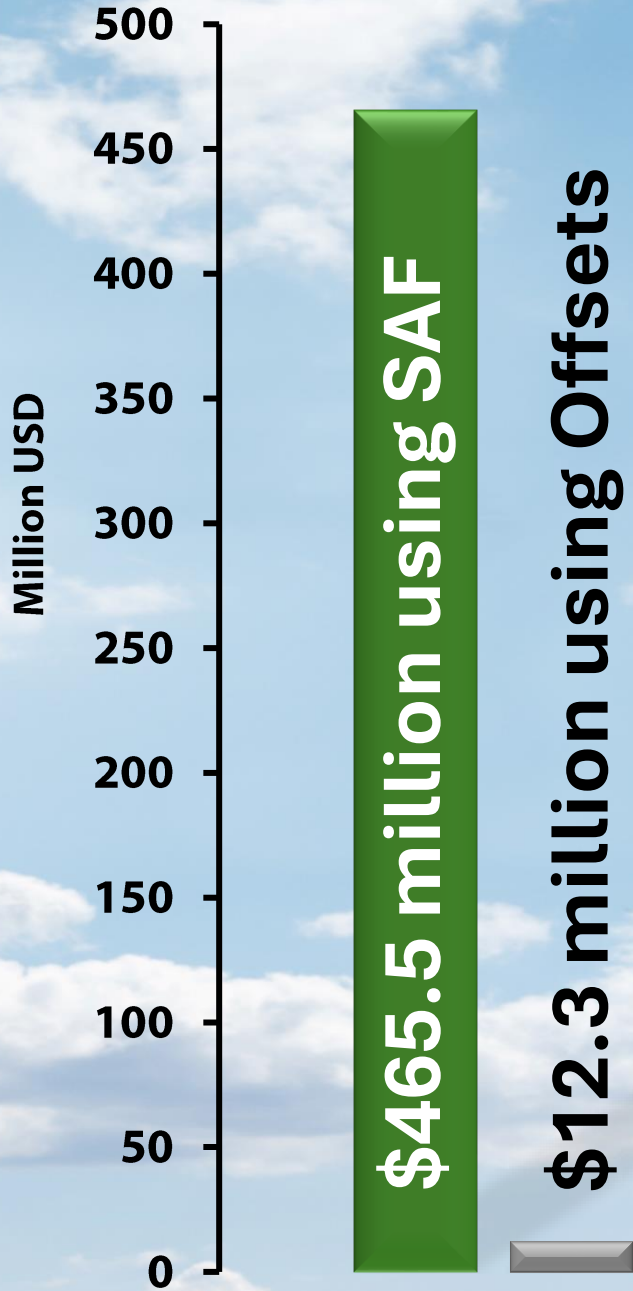
Place and date of issue

Stamp, Signature of issuing party

The issuing Certification Body is responsible for the accuracy of this document.
Version / Date: 1 (no adjustments) / 30.08.2021

Page 1 of 2

2025



 **CONTROLUNION**



Certificate
according to the
Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA)
As developed by the International Civil Aviation Organization (ICAO)

Certificate Number: ISCC-CORSIA-Cert-DE105-83050301

Control Union Certifications Germany GmbH
Dorotheastr. 30, D-10318 Berlin
certifies that

BP Oil España S.A.U. Refinería de Castellón
Poligono El Serrallo, 12080 Castellón,
Spain

complies with the requirements of CORSIA and the certification system
ISCC CORSIA
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Place of the audit
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Trader
Co-Processing plant

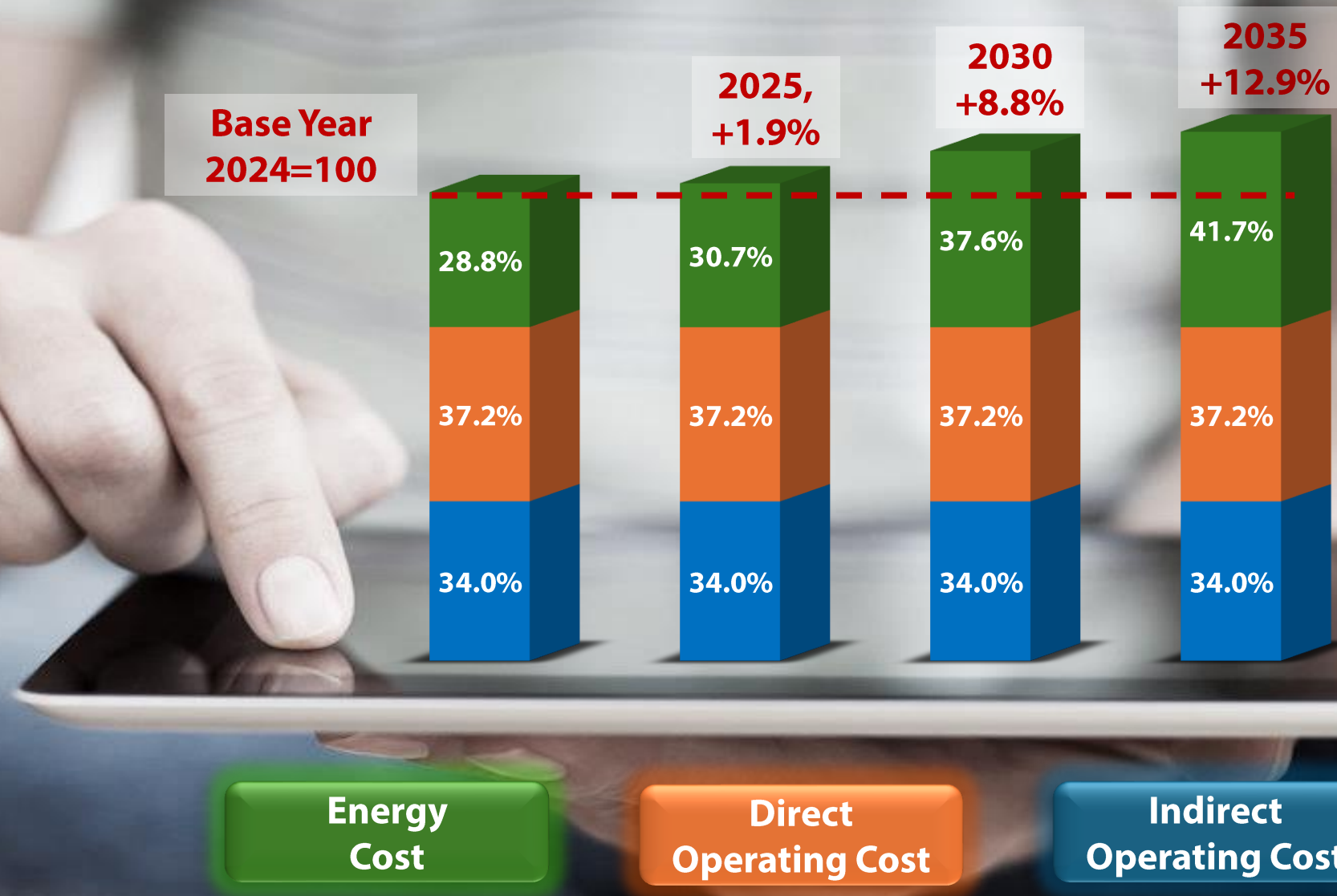
Berlin, 30.08.2021
Place and date of issue


CUC Germany GmbH
Dorotheastr. 30, D-10318 Berlin
Tel: +49 (0) 30 509 69 88 - 0
Fax: +49 (0) 30 509 69 88 - 88
Stamp, Signature of issuing party

The issuing Certification Body is responsible for the accuracy of this document.
Version / Date: 1 (no adjustments) / 30.08.2021

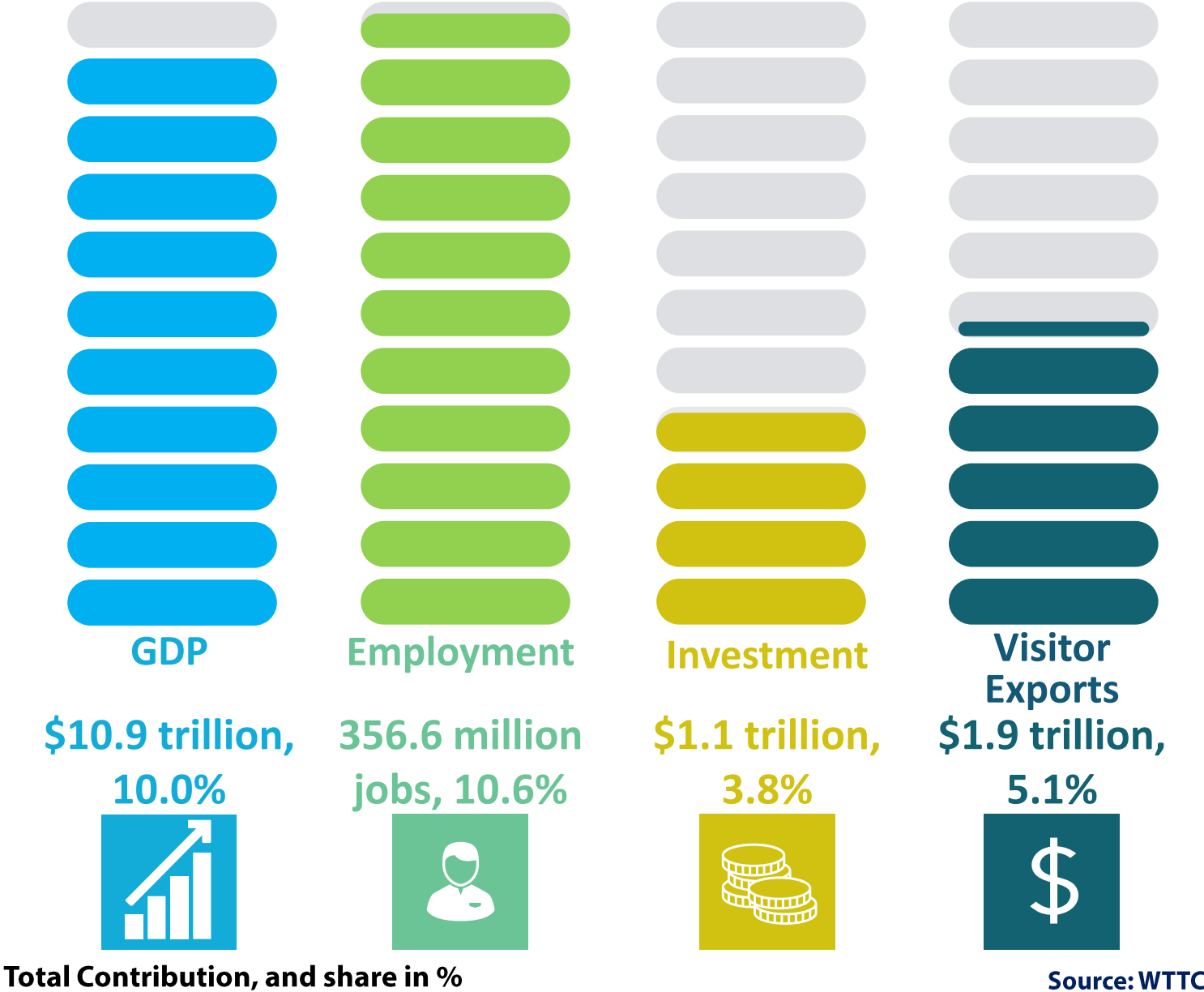
Page 1 of 2

Expected Increase in the Industry's Operating Expenses due to Various Sustainability Requirements





Travel and Tourism (T&T) Contribution to the Global Economy in 2024



TAXES

REFUEL EU

EU ETS

MANDATES

GFAAF





THE 1944 CHICAGO CONVENTION



CO₂





21%

**Aircraft
Technologies**



55%

**SAF/LCAF
(Other
renewables)**



11%

**Infrastructure &
Operational
Efficiencies**



13%

**Offsets/
Residuals**





AIRLINES

SUSTAINABILITY MANAGEMENT SOLUTION

ENVIRONMENTAL TAXES

MANDATES

SAF AVAILABILITY

SAF PRICE

CORSIA

OFFSETS

JET A1

BOOK AND CLAIM

STANDARDS

CERTIFICATES

CORPORATE DEMANDS

CUSTOMER EXPECTATIONS

EU ETS

GREEN LABELLING





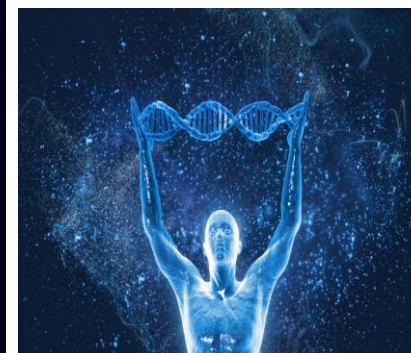
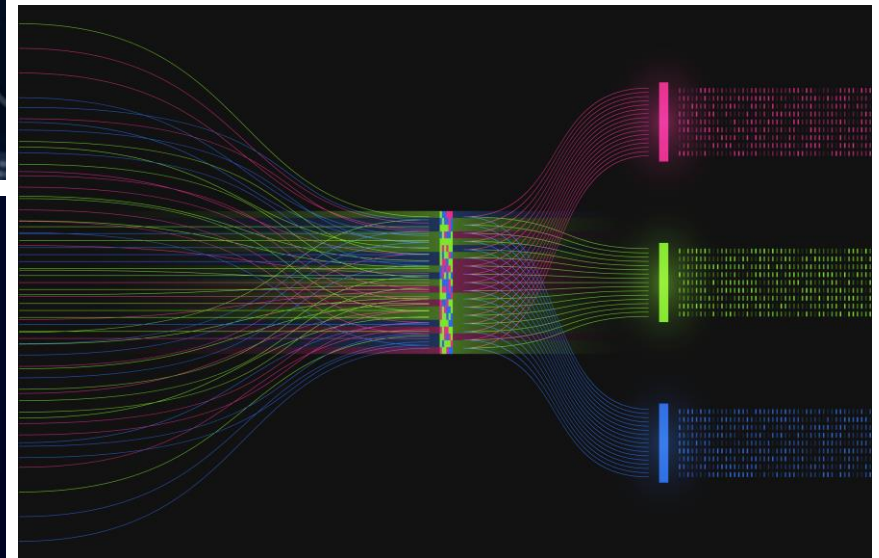
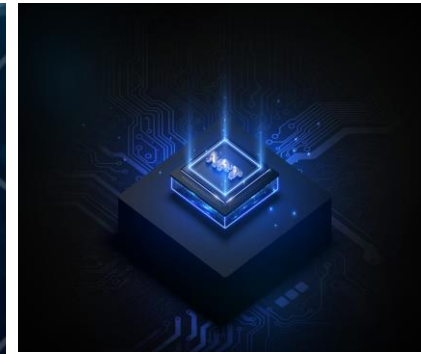
Now I Understand





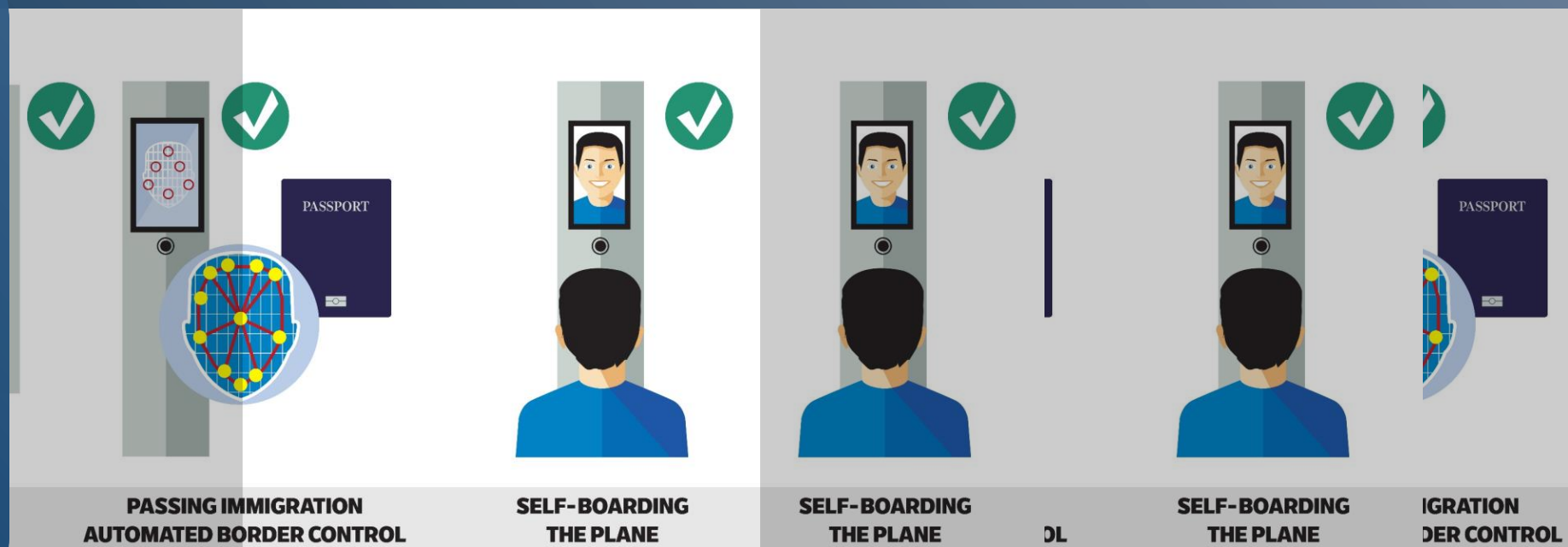
رقمته التعامل مع المسافر

Digitizing the Relationship with the Customer



رقمته التعامل مع
المسافر

Digitizing the Relationship with the Customer

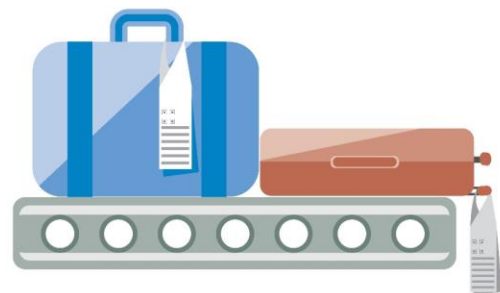


التوسع التدريجي من المطارات الرئيسية الى شبكة التشغيل

Expand from Hub Airports to Network Airports



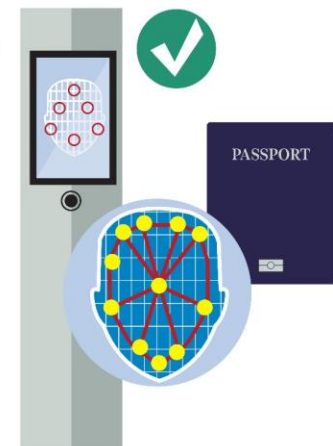
SELF CHECK-IN OR ONLINE



SELF - BAG DROP



PASSING SECURITY
CHECK AUTOMATED ACCESS



PASSING IMMIGRATION
AUTOMATED BORDER CONTROL



SELF-BOARDING
THE PLANE

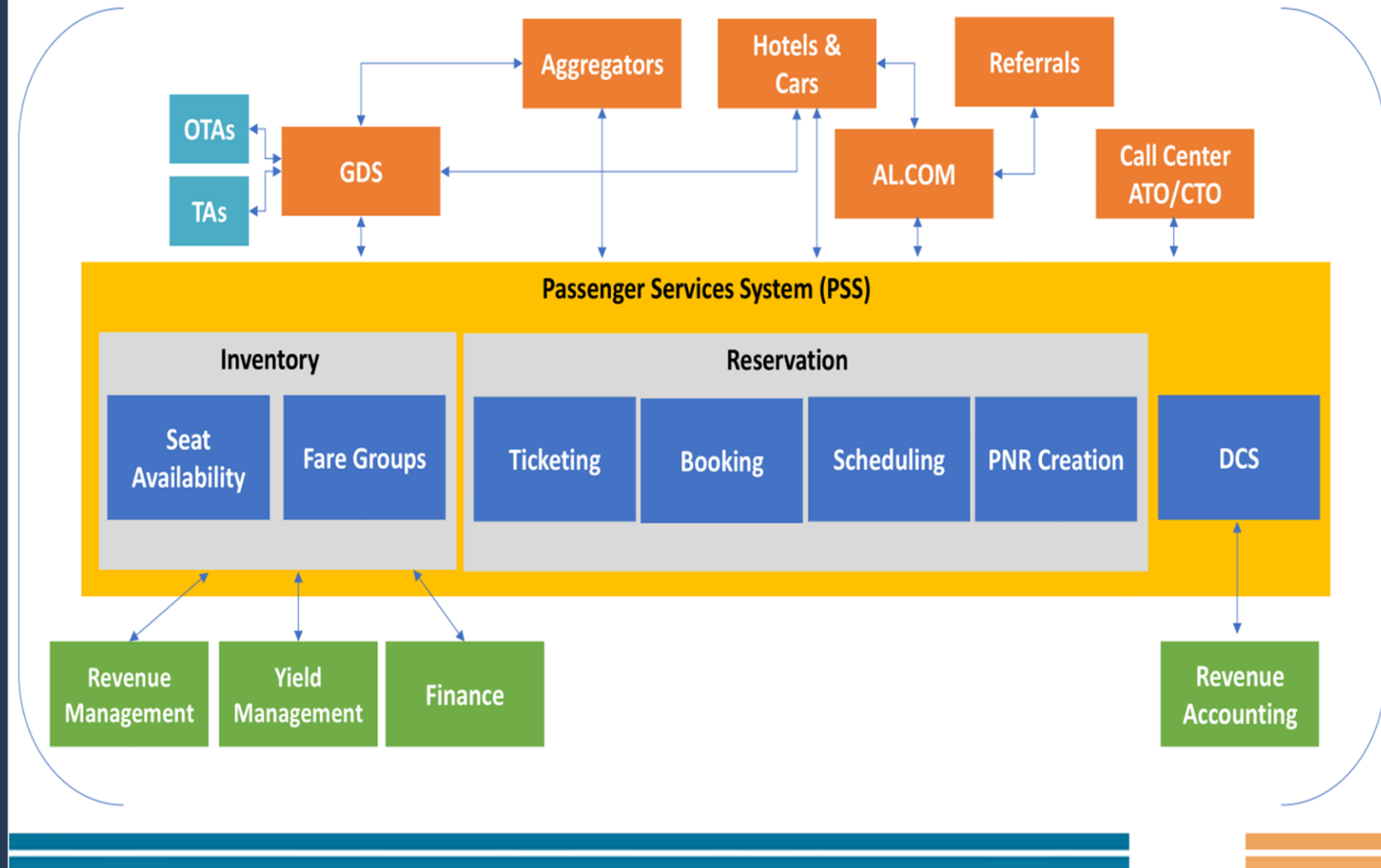
ويتعاون الاتحاد في رقمته التعامل مع المسافرين

AACO Collaborates in Digitizing the Relationship with the Customer

amadeus

SITA

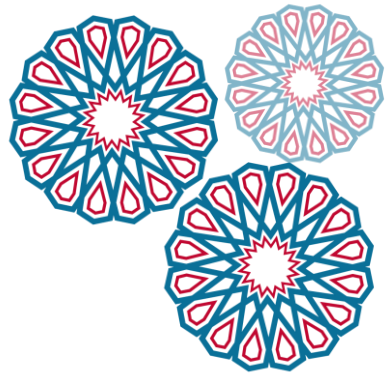
The Current IT Infrastructure Airlines are Using Today



Transformation of Sales Ecosystems

تغيير بيئة المبيعات

نُظْمُ الحِجْزِ الْعَالَمِيَّةِ Global Distribution Systems



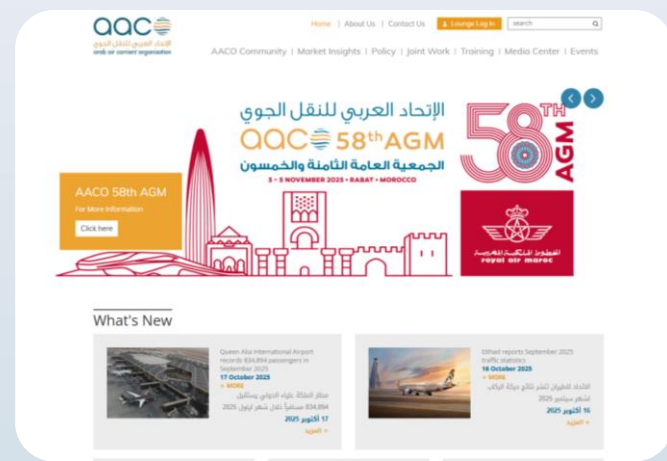
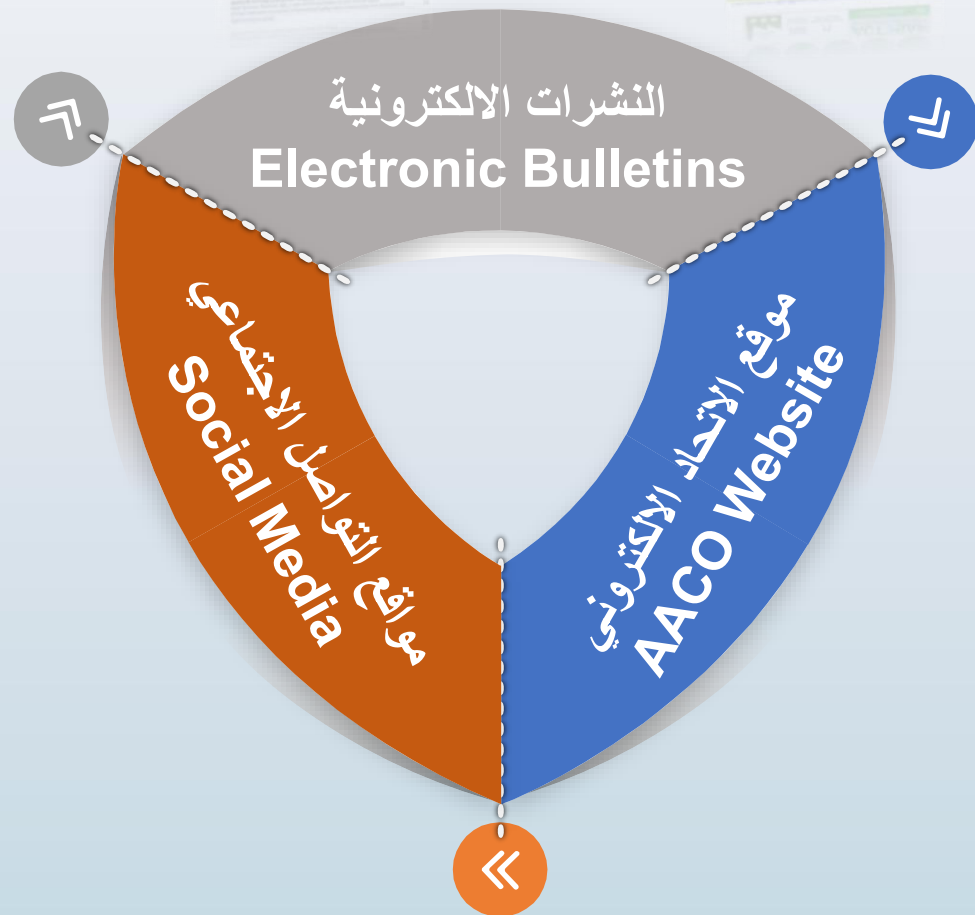
مشروع الوقود
Fuel

التعاون في الصيانة والهندسة والتعمير
Maintenance, Repair and
Overhaul

تخطيط الاستجابة للطوارئ
Emergency Response Planning

الخدمات التدريبية
Training Services





يستمر الاتحاد بأن يكون صوت الشركات
الاعضاء

AACO Continues to be the Voice
of its Members

ADVOCACY





H.E. Eng. Ibrahim Al-Omar
Chairman

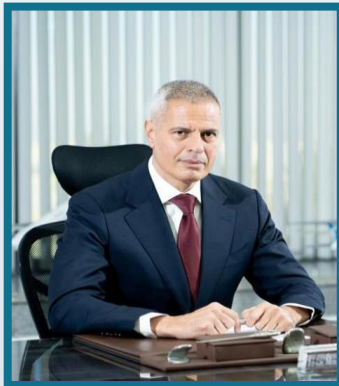


اللجنة التنفيذية

Executive Committee



Mr. Abdelhamid Addou



Capt. Ahmed Adel



Mr. Antonoaldo Neves



Engr. Badr Al-Meer



Mr. Bander Almohanna



Mr. Mohamad El-Hout



Eng. Samer Majali



Member Airlines

أعضاء الاتحاد



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AirArabia
العربية للطيران



المصرية للطيران
ALMASRIA
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الطيران الجديد



الأردنية للطيران
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ROYAL JORDANIAN

السعودية
Saudia

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الخطوط التونسية
TUNISAIR

اليمنية
Yemenia
Yemen Airways
الخطوط الجوية اليمنية



المجالس التوجيهية وفرق العمل

Steering Boards & Task Forces



المجلس التوجيهي
لمجموعة أماديوس
AACO Amadeus
Steering Board

المجلس التوجيهي لإدارة
تخطيط الطوارئ
Emergency Response
Planning Steering
Board

المجلس التوجيهي
للصيانة والهندسة والتعمير
Engineering &
Maintenance
Steering Board

المجلس التوجيهي للوقود
Fuel Steering Board

المجلس التوجيهي
للخدمات الأرضية
Ground Handling
Steering Board

المجلس التوجيهي لتنمية
وتطوير الموارد البشرية
Human Resources
Development
Steering Board

فريق عمل السياسات
الجوية
AeroPolitical
Watch Group

الفريق الاستشاري لأمن
الطيران
AVSEC Advisory
Group

فريق عمل السياسات
البيئية
Environmental
Policy Group

فريق عمل التحول
الرقمي
Digital
Transformation
Task Force

فريق عمل وقود
الطائرات المستدام
Sustainable Fuel
Aviation Task Force



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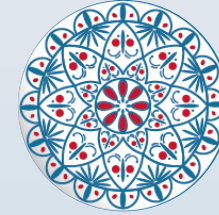
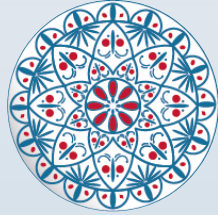
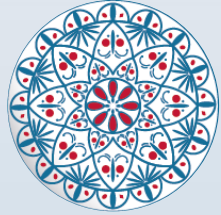
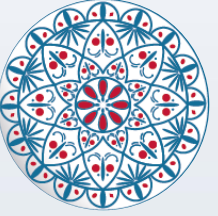
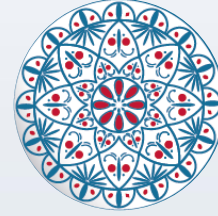
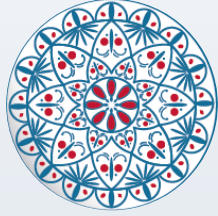


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النشرة السنوية لإحصاءات النقل الجوي

Arab Air Transport Statistics



التقرير السنوي للاتحاد

AACO Annual Report







نعتز دائماً بخدمةكم
We are always proud to serve you





58TH
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الإتحاد العربي للنقل الجوي

QAC 58th AGM

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3 - 5 NOVEMBER 2025 • RABAT • MOROCCO



Thank You

وشكراً