



Unrestricted

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## Introduction

The International Air Transport Association (IATA), representing over 360 airlines worldwide, welcomes the opportunity to contribute to the COP30 Presidency Roadmap on transitioning away from fossil fuels in a just, orderly, and equitable manner. This initiative provides an important platform to identify structural barriers and enabling conditions for decarbonization across sectors, including international aviation.

Aviation plays a unique role in supporting global connectivity, trade, tourism, and economic integration, particularly for developing economies and geographically remote regions. At the same time, the sector has committed to achieving net-zero CO<sub>2</sub> emissions by 2050, aligned with the global aviation Long-Term Aspirational Goal (LTAG) adopted by the International Civil Aviation Organization (ICAO) in 2022<sup>1</sup>. Achieving this objective requires coordinated international policy frameworks, large-scale investment in sustainable aviation fuels (SAF), and the effective functioning of global carbon markets.

As highlighted in the COP30 Presidency letter, the roadmap seeks to identify barriers and enabling levers across economic, financial, institutional, and technological dimensions. Aviation's transition pathway illustrates how these dimensions interact and why global coordination is essential to ensure decarbonization progresses efficiently without undermining connectivity, economic development, or international competition.

## Policy Instruments and Market Mechanisms

International aviation already operates under a global climate policy architecture established by ICAO. The Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA)<sup>2</sup> represents the first sector-wide global market-based measure to address CO<sub>2</sub> emissions from international aviation.

CORSIA establishes a multilateral system in which airlines offset emissions growth above a defined baseline by purchasing CORSIA Eligible Emissions Units (EEUs). In the first phase alone (2024–2026), airlines are expected to purchase more than 200 million carbon credits, representing approximately USD 4–5 billion in compliance demand, with this demand increasing significantly through 2035<sup>3</sup>.

This framework demonstrates that aviation already contributes to the development of international carbon markets under the Paris Agreement. However, the full potential of CORSIA depends on the availability of high-integrity carbon credits and the operationalization of Article 6 mechanisms. Strengthening global carbon market infrastructure, including corresponding adjustments and robust accounting frameworks, will be essential to ensure environmental integrity and market liquidity.

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<sup>1</sup>ICAO Long Term Aspirational Goal (LTAG) [Resolution](#),

<sup>2</sup>ICAO Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) [Resolution](#)

<sup>3</sup>IATA COP 30 [Press Release](#)

IATA therefore encourages UNFCCC Parties to reinforce CORSIA as an existing implementation platform, enabling a liquid and credible supply of high-quality emission reduction units compatible with Article 6. In particular, greater alignment between national climate strategies and CORSIA credit authorization frameworks could unlock additional investment in mitigation projects and support countries in achieving their Nationally Determined Contributions (NDCs).

2026 marks the tenth anniversary of the adoption of CORSIA SARPs, providing an opportunity for Parties to reaffirm support for global sectoral solutions and strengthen cooperation between ICAO and the UNFCCC processes.

## **Economic and Financial Systemic Risks**

Today, the aviation energy transition faces a distinctive set of economic and financial risks that must be addressed through effective policy design.

Airlines operate in an environment characterized by volatile fuel prices, tight capital margins, and global competition. Sustainable aviation fuels (SAF), currently the most scalable decarbonization pathway, remain significantly more expensive than conventional jet fuel. Without well-designed policy support frameworks, SAF production may struggle to attract the capital investment required to scale.

Fragmented national policies, inconsistent incentive structures, and uneven blending mandates risk creating market distortions without delivering meaningful emissions reductions. In some jurisdictions, prescriptive mandates have been introduced without sufficient consideration of supply availability, cost pass-through impacts, or international competitiveness.<sup>4</sup>

For capital-intensive energy transitions, policy certainly is essential. Governments can reduce investment risk by prioritizing production incentives, long-term offtake certainty, and financing mechanisms that reduce the cost differential between SAF and conventional fuels. These approaches can unlock private capital while ensuring emissions reductions occur where they are most economically efficient.

## **Technological Pathways and Innovation**

The aviation sector's decarbonization pathway differs fundamentally from those of many other sectors due to the energy density requirements of long-distance flight.

While improvements in aircraft technology, operational efficiencies, and infrastructure modernization will continue to deliver incremental emissions reductions, SAF represents the most viable pathway for large-scale decarbonization over the coming decades.

Scaling SAF production requires coordinated action across the energy, agriculture, finance, and transport sectors. Today's production volumes remain limited relative to projected demand, highlighting the importance of creating stable policy frameworks that incentivize investment across the entire value chain, from feedstock supply to refining capacity and distribution infrastructure.

Governments can play a critical role in enabling SAF scale-up by fostering innovation, facilitating access to sustainable feedstocks, and supporting early-stage deployment of emerging fuel pathways, including synthetic fuels produced with renewable electricity and captured carbon.

## **Differentiated and Sector-Specific Transition Pathways**

The transition away from fossil fuels must recognize that not all sectors or regions can decarbonize at the same pace or through the same technologies.

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<sup>4</sup> IATA Chart of the Week SAF Mandates in Europe, [30 May 2025](#)

For aviation, liquid fuels will remain essential for global air transport for the foreseeable future. Consequently, the sector's transition timeline must reflect technology readiness levels, infrastructure constraints, and the economic importance of air connectivity.

This is particularly relevant for developing economies and small island states that rely heavily on aviation for tourism, trade, and economic integration. A just and orderly transition should therefore consider the connectivity needs of these regions and the limited availability of alternative transport modes.

Sector-specific pathways, such as IATA's net-zero roadmap<sup>5</sup> demonstrate how targeted policies can accelerate decarbonization while preserving essential connectivity.

## **Conclusion and recommendations**

The aviation sector's experience offers several lessons for the COP30 Presidency Roadmap.

First, effective decarbonization requires globally coordinated policy frameworks that minimize market fragmentation and support investment in scalable solutions. Second, carbon markets and international cooperation under Article 6 can play a critical role in mobilizing finance and accelerating emissions reductions across sectors. Third, the transition must recognize sector-specific technological constraints and economic realities to ensure that climate ambition remains compatible with sustainable development and global connectivity.

International aviation has already established a global framework through ICAO, combining technological innovation, sustainable fuels, and market-based measures. Strengthening these mechanisms through international cooperation will be essential to achieving a just, orderly, and equitable transition away from fossil fuels.

IATA looks forward to continuing to work with Parties, the UNFCCC, and ICAO to ensure that international aviation contributes effectively to the global climate objectives of the Paris Agreement.

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<sup>5</sup> IATA Net Zero Roadmaps [2024](#)