

# **Aviation Emissions Control - Impact and Opportunities, 2023 - A Global and Regional Analysis: Focus on Trends, Opportunities, Key Regulations, Markets, and Products - Analysis and Forecast, 2022-2042**

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## **Abstracts**

### Aviation Emissions Control Overview

The global emissions from commercial aviation amounted to 865.72 MMT of CO<sub>2</sub> in 2021, and it is expected to grow at a CAGR of 3.03% and reach 1,203.42 MMT of CO<sub>2</sub> by 2032. The medium-haul and short-haul flight segments are expected to be the highest contributors owing to their increasing demand and newer airport hubs being established for domestic and regional air travel. The ecosystem of aviation emissions control comprises aircraft manufacturers, subsystem manufacturers, and airline operators.

### Market Lifecycle Stage

Traditionally, fleet renewals to more fuel-efficient aircraft and transition to more efficient narrowbody aircraft have been key in the industry's strategy toward emissions control and emissions intensity reduction. However, as the effort of all industries to decarbonize and reduce emissions is becoming a priority, revolutionary solutions such as electric and hydrogen propulsion and low-emissions jet fuels and their development programs are being accelerated by both private participants and government organizations. In the most likely scenario of emissions, the adoption of SAF and fleet renewals is key to the incremental reduction in aviation emissions. However, a high reduction in emissions can be achieved by bringing the technology readiness of green aviation to market for at least short-haul flight demands with eventual growth to include medium-haul flight

segments.

## Impact

The increasing demand for medium-haul flights and short-haul flights is driving the emissions from these segments. The growth to 2019 levels of flight demands and above by around 2029 is expected to decelerate the emissions control measures and their adoption in order to respond to the scale of passenger flights.

Furthermore, the slow pace of the maturation of technologies and the low availability of SAF feedstock for sustained commercial flight operations is expected to cause a bottleneck in the decarbonization efforts of the industry.

## Market Segmentation:

### Segmentation 1: Emissions Analysis by Fleet-Flight

Narrowbody Long-Haul Flights

Narrowbody Medium-Haul Flights

Narrowbody Short-Haul Flights

Widebody Long-Haul Flights

Widebody Medium-Haul Flights

Widebody Short-Haul Flights

Turboprop Medium-Haul Flights

Turboprop Short-Haul Flights

Regional Jet Long-Haul Flights

Regional Jet Medium-Haul Flights

## Regional Jet Short-Haul Flights

Based on Fleet-Flight, the global aviation emissions from commercial flights will be the highest from narrowbody medium-haul flight operations, followed closely by widebody long-haul emissions. Both segments are important for global connectivity and contribute significantly to the aviation industry's revenue from commercial flights. Aircraft and engine manufacturers are investing in research and development of green propulsion technologies, such as hydrogen and electric propulsion, for entry into the market in the next decade to keep commercial flights sustainable in the future.

### Segmentation 2: Emissions Analysis by Scenario

Scenario 1: No Emissions Control

Scenario 2: Optimistic Scenario

Scenario 3: Ideal Scenario

Scenario 4: Most Likely Scenario

Emissions from the no emissions control scenario (Scenario 1) are the highest and are based on the current emissions control technologies and measures projected on the flight forecasts. Scenario 2 is optimistic, with wide adoption of SAF frequent fleet renewals bringing down the emissions significantly by 2042. Emissions from the ideal scenario (Scenario 3) are the lowest and are heavily focused on maturation as well as the adoption of electric and hydrogen propulsion for high-volume flight operations. The emissions reduction possible in this scenario is the highest, with the 2042 emissions reducing to below 2022 levels, even with monotonically increasing flight demands in all segments. The most likely scenario (Scenario 4) factors in realistic levels of adoption of SAF and late emergence and maturation of technologies. The industry is expected to prioritize demand and high frequency heavily, given the contraction in volume during COVID and the slow recovery. Emissions are above those for scenario 2 (optimistic scenario) and below that for no emissions control scenario.

### Segmentation 3: Flight Demand Analysis by Fleet-Flight

Narrowbody Long-Haul Flights

Narrowbody Medium-Haul Flights

Narrowbody Short-Haul Flights

Widebody Long-Haul Flights

Widebody Medium-Haul Flights

Widebody Short-Haul Flights

Turboprop Medium-Haul Flights

Turboprop Short-Haul Flights

Regional Jet Long-Haul Flights

Regional Jet Medium-Haul Flights

Regional Jet Short-Haul Flights

Based on Fleet-Flight, demand for medium and short-haul flights is expected to increase significantly. Newer routes, as well as higher frequencies on dense international and domestic routes, are expected as the global aviation industry recovers from the COVID-induced contraction in demand. The short-haul international flight segments are seen to grow significantly, with neighboring countries strengthening their connectivity and increasing the number of airports domestically. Asia-Pacific short-haul routes to and from nations such as India, China, and Singapore are expected to contribute significantly to the growth in flight demands from this segment.

#### Segmentation 4: e-VTOL Aircraft Production by Range

50 Km or less (500Km)

Based on Range, manufacturers of eVTOL of ranges greater than 500 Km will have the highest production annually. Since eVTOL is very low emissions, their adoption in critical segments of air transport, such as short-haul travel, will improve their uptake significantly while reducing the subsequent emissions from all other modes of transport. The 201-500 Km range of eVTOL will witness high demand as well for low passenger capacity air travel long-distance intracity operations. The solution can eventually be scaled for at least low-capacity short-haul international flights with scheduled operations

from the current airport infrastructure.

#### Segmentation 5: by Region

North America - U.S., Canada

Europe - France, Germany, Russia, U.K., and Rest-of-Europe

Asia-Pacific - Australia, China, India, Japan, Singapore, and Rest-of-Asia-Pacific

Rest-of-the-World

Based on region, North America is expected to continue as the highest contributor to aviation emissions in the most likely scenario (Scenario 4). The emissions from Asia-Pacific are expected to increase, while the Europe region's flight emissions will reduce with the regionwide adoption of decarbonization measures such as SAF adoption and intramodal travel.

#### Recent Developments in Aviation Emissions Control

In February 2022, Embraer S.A., Widerøe Corporation, and Rolls-Royce plc. entered a partnership agreement with the objective of jointly developing green propulsion technology for commercial aviation. The agreement is expected to lead to the development of a potential regional aircraft based on hydrogen and/or electric propulsion. Currently, feasibility studies and conceptual design of the aircraft are underway.

In July 2022, GE Aerospace completed the initial testing phase of its megawatt-class hybrid electric propulsion system designed to power commercial aircraft. The milestone test will take the development toward the integration and certification phases, with the company planning to make the engine available for airframers by 2030 at the earliest.

In June 2022, Airbus and the Japanese government signed an MoU that will develop pathways for the adoption of hydrogen in the Japanese aviation sector. Under the agreement, infrastructure for the use of hydrogen in flights, as well as jet fuel-based ground operations, will be developed.

#### Demand - Drivers and Limitations

The following are the demand drivers for Aviation Emissions Control:

Prioritization of Sustainable Aviation Operations and Manufacturing

Innovation at the Industrial Level for Reduction of Fuel Burn and Improved Aircraft Performance

Demand from New Regulatory Standards for Aviation Emissions

The following are the challenges for Aviation Emissions Control:

Growing Demand for International and Domestic Travel

Impact of Complex Regulatory Requirements from Environmental Agencies

Impact of COVID on the Aviation Market

Impact of Economic Slowdown on the Aviation Market

The following are the opportunities for Aviation Emissions Control:

Emerging Technologies in Aircraft Propulsion - Hydrogen and Electric Propulsion, SAF Fuel Compatibility

Evolving Opportunities in Sustainable Aircraft Design

How can this report add value to an organization?

**Product/Innovation Strategy:** The chapter on estimation and comparative analysis of greenhouse gas emissions from aviation builds on the global fleet and global flight projections to forecast the industry's emissions. Four scenarios of emissions capturing the response of the aviation industry and the corresponding emissions from their operations are presented: No emissions control scenario (scenario 1), Optimistic scenario (scenario 2), Ideal scenario (scenario 3), and the Most likely scenario (scenario 4). Each of them has emissions values from the 12 possible fleet-flight segments

comprised of four aircraft types (narrowbody, widebody, turboprop, and regional jet) and three flight segments (long, medium, and short-haul) based on emissions control measures in each scenario. This enables aircraft manufacturers and airline operators to understand the tangible impact of decarbonization strategy on various fleet-flight emissions. As such, these participants can assess the impact of the adoption of current and future emissions control measures ranging from SAF adoption to the maturation of liquid hydrogen-based propulsion.

**Growth/Marketing Strategy:** There is an increased urgency to address the emissions from all industrial sectors and within aviation to reach a net-zero goal by 2050. In order to achieve this, there has been a significant increase in green aviation developments by key players operating in the market, such as business expansion activities, contracts, mergers, partnerships, collaborations, and joint ventures. The favored strategy for the companies has been MoUs and joint-research agreements to strengthen their position as part of the aviation emissions control methods. For instance, in November 2022, major aerospace companies Airbus, MTU AeroEngines, Pratt & Whitney, Collins Aerospace, and GKN formed a global consortium to accelerate the development of next-generation propulsion technology. The key objective is the development of a Sustainable Water-Injecting Turbofan Comprising Hybrid-Electrics (SWITCH), which will substantially reduce emissions in the full operational envelope of the aircraft. The final engine is also expected to be fully compatible with alternative fuels such as hydrogen and SAF.

**Competitive Strategy:** Key players in aviation emissions control analyzed and profiled in the study involve aircraft manufacturers, subsystem manufacturers as well as airline operators. Moreover, a detailed competitive benchmarking of the players has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as contracts, partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

### Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analysis of the company's coverage, product portfolio, and market penetration.

The top segment players leading the market are established players in the aviation emissions control, who constitute 100% of the presence in the market.

## Key Companies Profiled

### Company Type 1: Aircraft and Subsystem Manufacturers

Airbus SE

Embraer S.A.

GE Aerospace

Gulfstream Aerospace Corporation

MTU Aero Engines

Pratt & Whitney

Rolls-Royce plc.

Safran S.A.

Textron Aviation Inc.

The Boeing Company

### Company Type 2: Airline Operators

American Airlines

Deutsche Lufthansa AG

Singapore Airlines Group (SIA)

The Emirates Group

United Airlines, Inc.



## Contents

### 1 MARKET

#### 1.1 Industry Outlook

1.1.1 Aviation Greenhouse Gas Emissions: Historical and Current Overview

1.1.2 Impact of Key Regulations – Operations and Manufacturing

1.1.2.1 Impact on Airline Operations

1.1.2.2 Impact on Subsystem Manufacturers

1.1.2.3 Impact on Key Aircraft Manufacturers

1.1.3 Impact of Regulations on Aircraft Certifications

1.1.4 Current and Future Trends in Aviation Emissions Control

1.1.4.1 Ongoing Development in Aviation Manufacturing

1.1.4.2 Ongoing Development in Airline Business Operations

1.1.5 Evolving Emission Control Requirements

#### 1.2 Business Dynamics

1.2.1 Business Drivers

1.2.1.1 Prioritization of Sustainable Aviation Operations and Manufacturing

1.2.1.2 Innovation at the Industrial Level for Reduction of Fuel Burn and Improved

Aircraft Performance

1.2.1.2.1 Traditional Aircraft Developments - Engine, Airframe, and Fuels

1.2.1.3 Demand from New Regulatory Standards for Aviation Emissions

1.2.2 Business Challenges

1.2.2.1 Growing Demand for International and Domestic Travel

1.2.2.2 Impact of Complex Regulatory Requirements from Environmental Agencies

1.2.2.3 Impact of COVID on the Aviation Market

1.2.2.4 Impact of Economic Slowdown on the Aviation Market

1.2.3 Business Opportunities

1.2.3.1 Emerging Technologies in Aircraft Propulsion - Hydrogen and Electric Propulsion, SAF Fuel Compatibility

1.2.3.2 Evolving Opportunities in Sustainable Aircraft Design

1.2.4 Business Strategies

1.2.4.1 Product Developments, Research Outputs, and Product Launches

1.2.5 Corporate Strategies

1.2.5.1 Partnerships, Collaborations, Agreements, and Contracts

### 2 GREENHOUSE GAS EMISSIONS: ESTIMATION AND COMPARATIVE ANALYSIS

#### 2.1 Comparative Analysis

- 2.1.1 Overview
- 2.1.2 Scenario 1: No Emission Control
  - 2.1.2.1 Emissions Outlook – Trajectory of Emissions
  - 2.1.2.2 Emissions Outlook – Fleet Contribution (Narrowbody, Widebody, Turboprop, and Regional Jets)
  - 2.1.2.3 Emissions Outlook – Flight Type Contribution
  - 2.1.2.4 Key Challenges and Industry Opportunities
- 2.1.3 Scenario 2: Optimistic Emission Control
  - 2.1.3.1 Emissions Outlook – Analyzing Emissions Reduction
  - 2.1.3.2 Emissions Outlook – Fleet Contribution (Narrowbody, Widebody, Turboprop, and Regional Jets)
  - 2.1.3.3 Emissions Outlook – Flight Type Contribution
  - 2.1.3.4 Key Challenges and Industry Opportunities
- 2.1.4 Scenario 3: Ideal Case of Emission Control
  - 2.1.4.1 Emissions Outlook – Analyzing Emissions Reduction
  - 2.1.4.2 Emissions Outlook – Fleet Contribution (Narrowbody, Widebody, Turboprop, and Regional Jets)
  - 2.1.4.3 Emissions Outlook – Flight Type Contribution
  - 2.1.4.4 Key Challenges and Industry Opportunities
- 2.1.5 Scenario 4: Most Likely Scenario for Aviation Emissions
  - 2.1.5.1 Emissions Outlook – Analyzing Emissions Reduction
  - 2.1.5.2 Emissions Outlook – Fleet Contribution (Narrowbody, Widebody, Turboprop, and Regional Jets)
  - 2.1.5.3 Emissions Outlook – Flight Type Contribution
  - 2.1.5.4 Key Challenges and Industry Opportunities
- 2.2 Global Aviation Emissions Assessment
  - 2.2.1 Market Overview: Global Aviation Emissions
    - 2.2.1.1 Emissions Analysis from Commercial Flights (by Fleet-Flight): Scenario
    - 2.2.1.2 Future Emissions Analysis (by Fleet-Flight): Scenario 1 (2032-2042)
    - 2.2.1.3 Emissions Analysis from Commercial Flights (by Fleet-Flight): Scenario
    - 2.2.1.4 Future Emissions Analysis (by Fleet-Flight): Scenario 2 (2032-2042)
    - 2.2.1.5 Emissions Analysis from Commercial Flights (by Fleet-Flight): Scenario
    - 2.2.1.6 Future Emissions Analysis (by Fleet-Flight): Scenario 3 (2032-2042)
    - 2.2.1.7 Emissions Analysis from Commercial Flights (by Fleet-Flight): Scenario
    - 2.2.1.8 Future Emissions Analysis (by Fleet-Flight): Scenario 4 (2032-2042)
  - 2.2.2 Long-Haul Flight Emissions
    - 2.2.2.1 Emissions - Widebody Long-Haul Flights
    - 2.2.2.2 Emissions - Narrowbody Long-Haul Flights
    - 2.2.2.3 Emissions - Regional Jet Long-Haul Flights

- 2.2.3 Medium-Haul Flight Emissions
  - 2.2.3.1 Emissions - Widebody Medium-Haul Flights
  - 2.2.3.2 Emissions - Narrowbody Medium-Haul Flights
  - 2.2.3.3 Emissions - Turboprop Jet Medium-Haul Flights
  - 2.2.3.4 Emissions - Regional Jet Medium-Haul Flights
- 2.2.4 Short-Haul Flight Emissions
  - 2.2.4.1 Emissions - Widebody Short-Haul Flights
  - 2.2.4.2 Emissions - Narrowbody Short-Haul Flights
  - 2.2.4.3 Emissions - Turboprop Jet Short-Haul Flights
  - 2.2.4.4 Emissions - Regional Jet Short-Haul Flights
- 2.3 Global Commercial Aviation Fleet - By Fleet Type
  - 2.3.1 Market Overview
    - 2.3.1.1 Demand Analysis of Global Aviation Fleet (by Fleet Type)
    - 2.3.1.2 Future Global Aviation Fleet (by Fleet Type)
  - 2.3.2 Narrowbody Aircraft Fleet
  - 2.3.3 Widebody Aircraft Fleet
  - 2.3.4 Turboprop Aircraft Fleet
  - 2.3.5 Regional Jet Aircraft Fleet
- 2.4 Global Commercial Aviation Flights - By Fleet-Flight Segment
  - 2.4.1 Market Overview
    - 2.4.1.1 Demand Analysis of Commercial Flights (by Fleet-Flight)
    - 2.4.1.2 Future Demand of Commercial Flights (by Fleet-Flight Type)
  - 2.4.2 Long-Haul Flights
    - 2.4.2.1 Widebody Long-Haul Flights
    - 2.4.2.2 Narrowbody Long-Haul Flights
    - 2.4.2.3 Regional Jet Long-Haul Flights
  - 2.4.3 Medium-Haul Flights
    - 2.4.3.1 Widebody Medium-Haul Flights
    - 2.4.3.2 Narrowbody Medium-Haul Flights
    - 2.4.3.3 Turboprop Jet Medium-Haul Flights
    - 2.4.3.4 Regional Jet Medium-Haul Flights
  - 2.4.4 Short-Haul Flights
    - 2.4.4.1 Widebody Short-Haul Flights
    - 2.4.4.2 Narrowbody Short-Haul Flights
    - 2.4.4.3 Turboprop Jet Short-Haul Flights
    - 2.4.4.4 Regional Jet Short-Haul Flights
- 2.5 Global e-VTOL Platforms Production Forecast (by Range)
  - 2.5.1 Market Overview
    - 2.5.1.1 Demand Analysis of Electric VTOL (eVTOL) Aircraft Market (by Range)

2.5.2 501 Km

### **3 FUTURE OF EMISSIONS CONTROL**

3.1 Sustainable Aviation and Carbon Emissions - Outlook

3.1.1 Future of Emissions Control Regulations

3.1.2 Future of Commercial Aviation Manufacturing Efforts

### **4 REGION**

4.1 Global Aviation Emissions (by Scenario)

4.2 North America

4.2.1 Aviation Emissions: Technologies, Regulations, and Developments

4.2.1.1 Key Manufacturers and Airline Operators in North America

4.2.2 Aviation Industry GHG Emissions

4.2.2.1 North America Aviation Emissions Analysis (2021-2032)

4.2.2.2 North America Aviation Emissions Analysis (2032-2042)

4.2.3 North America (by Country)

4.2.3.1 U.S.

4.2.3.1.1 Aviation Emissions: Technologies, Regulations, and Developments

4.2.3.1.1.1 Key Manufacturers and Suppliers in the U.S.

4.2.3.1.2 U.S. Aviation Emissions Analysis (2021-2032)

4.2.3.1.3 U.S. Aviation Emissions Analysis (2032-2042)

4.2.3.2 Canada

4.2.3.2.1 Aviation Emissions: Technologies, Regulations, and Developments

4.2.3.2.1.1 Key Manufacturers and Suppliers in Canada

4.2.3.2.2 Canada Aviation Emissions Analysis (2021-2032)

4.2.3.2.3 Canada Aviation Emissions Analysis (2032-2042)

4.3 Europe

4.3.1 Aviation Emissions: Technologies, Regulations, and Developments

4.3.1.1 Key Manufacturers and Airline Operators in Europe

4.3.2 Aviation Industry GHG Emissions

4.3.2.1 Europe Aviation Emissions Analysis (2021-2032)

4.3.2.2 Europe Aviation Emissions Analysis (2032-2042)

4.3.3 Europe (by Country)

4.3.3.1 France

4.3.3.1.1 Aviation Emissions: Technologies, Regulations, and Developments

4.3.3.1.1.1 Key Manufacturers and Suppliers in France

4.3.3.1.2 France Aviation Emissions Analysis (2021-2032)

- 4.3.3.1.3 France Aviation Emissions Analysis (2032-2042)
- 4.3.3.2 Germany
  - 4.3.3.2.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.3.3.2.1.1 Key Manufacturers and Suppliers in Germany
  - 4.3.3.2.2 Germany Aviation Emissions Analysis (2021-2032)
  - 4.3.3.2.3 Germany Aviation Emissions Analysis (2032-2042)
- 4.3.3.3 Russia
  - 4.3.3.3.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.3.3.3.1.1 Key Manufacturers and Suppliers in Russia
  - 4.3.3.3.2 Russia Aviation Emissions Analysis (2021-2032)
  - 4.3.3.3.3 Russia Aviation Emissions Analysis (2032-2042)
- 4.3.3.4 U.K.
  - 4.3.3.4.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.3.3.4.1.1 Key Manufacturers and Suppliers in the U.K.
  - 4.3.3.4.2 U.K. Aviation Emissions Analysis (2021-2032)
  - 4.3.3.4.3 U.K. Aviation Emissions Analysis (2032-2042)
- 4.3.3.5 Rest-of-Europe
  - 4.3.3.5.1 Aviation Emissions: Technologies, Regulations, and Developments
  - 4.3.3.5.2 Rest-of-Europe Aviation Emissions Analysis (2021-2032)
  - 4.3.3.5.3 Rest-of-Europe Aviation Emissions Analysis (2032-2042)
- 4.4 Asia-Pacific
  - 4.4.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.4.1.1 Key Manufacturers and Airline Operators in Asia-Pacific
  - 4.4.2 Aviation Industry GHG Emissions
    - 4.4.2.1 Asia-Pacific Aviation Emissions Analysis (2021-2032)
    - 4.4.2.2 Asia-Pacific Aviation Emissions Analysis (2032-2042)
  - 4.4.3 Asia-Pacific (by Country)
    - 4.4.3.1 Australia
      - 4.4.3.1.1 Aviation Emissions: Technologies, Regulations, and Developments
        - 4.4.3.1.1.1 Key Manufacturers and Airline Operators in Australia
      - 4.4.3.1.2 Australia Aviation Emissions Analysis (2021-2032)
      - 4.4.3.1.3 Australia Aviation Emissions Analysis (2032-2042)
    - 4.4.3.2 China
      - 4.4.3.2.1 Aviation Emissions: Technologies, Regulations, and Developments
        - 4.4.3.2.1.1 Key Manufacturers and Airline Operators in China
      - 4.4.3.2.2 China Aviation Emissions Analysis (2021-2032)
      - 4.4.3.2.3 China Aviation Emissions Analysis (2032-2042)
    - 4.4.3.3 India
      - 4.4.3.3.1 Aviation Emissions: Technologies, Regulations, and Developments

- 4.4.3.3.1 Key Manufacturers and Airline Operators in India
- 4.4.3.3.2 India Aviation Emissions Analysis (2021-2032)
- 4.4.3.3.3 India Aviation Emissions Analysis (2032-2042)
- 4.4.3.4 Japan
  - 4.4.3.4.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.4.3.4.1.1 Key Manufacturers and Airline Operators in Japan
  - 4.4.3.4.2 Japan Aviation Emissions Analysis (2021-2032)
  - 4.4.3.4.3 Japan Aviation Emissions Analysis (2032-2042)
- 4.4.3.5 Singapore
  - 4.4.3.5.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.4.3.5.1.1 Key Manufacturers and Airline Operators in Singapore
  - 4.4.3.5.2 Singapore Aviation Emissions Analysis (2021-2032)
  - 4.4.3.5.3 Singapore Aviation Emissions Analysis (2032-2042)
- 4.4.3.6 Rest-of-Asia-Pacific
  - 4.4.3.6.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.4.3.6.1.1 Key Manufacturers and Airline Operators in the Rest-of-Asia-Pacific
  - 4.4.3.6.2 Rest-of-Asia-Pacific Aviation Emissions Analysis (2021-2032)
  - 4.4.3.6.3 Rest-of-Asia-Pacific Aviation Emissions Analysis (2032-2042)
- 4.5 Rest-of-the-World
  - 4.5.1 Aviation Emissions: Technologies, Regulations, and Developments
    - 4.5.1.1 Key Manufacturers and Airline Operators in the Rest-of-the-World
  - 4.5.2 Aviation Industry GHG Emissions
    - 4.5.2.1 Rest-of-the-World Aviation Emissions Analysis (2021-2032)
    - 4.5.2.2 Rest-of-the-World Aviation Emissions Analysis (2032-2042)

## **5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES**

- 5.1 Competitive Benchmarking
- 5.2 Key Aircraft and Subsystem Manufacturers
  - 5.2.1 Airbus SE
    - 5.2.1.1 Company Overview
      - 5.2.1.1.1 Role of Airbus SE in Aviation Emissions Control
      - 5.2.1.1.2 Product Portfolio
    - 5.2.1.2 Corporate Strategies
      - 5.2.1.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
    - 5.2.1.3 Business Strategies
      - 5.2.1.3.1 Research Outputs, Developments, and Product Launches
    - 5.2.1.4 Analyst View
  - 5.2.2 Embraer S.A.



- 5.2.2.1 Company Overview
  - 5.2.2.1.1 Role of Embraer S.A. in Aviation Emissions Control
  - 5.2.2.1.2 Product Portfolio
- 5.2.2.2 Corporate Strategies
  - 5.2.2.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
- 5.2.2.3 Business Strategies
  - 5.2.2.3.1 Research Outputs, Developments, and Product Launches
- 5.2.2.4 Analyst View
- 5.2.3 GE Aerospace
  - 5.2.3.1 Company Overview
    - 5.2.3.1.1 Role of GE Aerospace in Aviation Emissions Control
    - 5.2.3.1.2 Product Portfolio
  - 5.2.3.2 Corporate Strategies
    - 5.2.3.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.3.3 Business Strategies
    - 5.2.3.3.1 Research Outputs, Developments, and Product Launches
  - 5.2.3.4 Analyst View
- 5.2.4 Gulfstream Aerospace Corporation
  - 5.2.4.1 Company Overview
    - 5.2.4.1.1 Role of Gulfstream Aerospace Corporation in Aviation Emissions Control
    - 5.2.4.1.2 Product Portfolio
  - 5.2.4.2 Corporate Strategies
    - 5.2.4.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.4.3 Business Strategies
    - 5.2.4.3.1 Research Outputs, Developments, and Product Launches
  - 5.2.4.4 Analyst View
- 5.2.5 MTU Aero Engines
  - 5.2.5.1 Company Overview
    - 5.2.5.1.1 Role of MTU Aero Engines in Aviation Emissions Control
    - 5.2.5.1.2 Product Portfolio
  - 5.2.5.2 Corporate Strategies
    - 5.2.5.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.5.3 Analyst View
- 5.2.6 Pratt & Whitney
  - 5.2.6.1 Company Overview
    - 5.2.6.1.1 Role of Pratt & Whitney in Aviation Emissions Control
    - 5.2.6.1.2 Product Portfolio
  - 5.2.6.2 Corporate Strategies
    - 5.2.6.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

- 5.2.6.3 Business Strategies
  - 5.2.6.3.1 Research Outputs, Developments, and Product Launches
- 5.2.6.4 Analyst View
- 5.2.7 Rolls-Royce plc.
  - 5.2.7.1 Company Overview
    - 5.2.7.1.1 Role of Rolls-Royce plc. in Aviation Emissions Control
    - 5.2.7.1.2 Product Portfolio
  - 5.2.7.2 Corporate Strategies
    - 5.2.7.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.7.3 Business Strategies
    - 5.2.7.3.1 Research Outputs, Developments, and Product Launches
  - 5.2.7.4 Analyst View
- 5.2.8 Safran S.A.
  - 5.2.8.1 Company Overview
    - 5.2.8.1.1 Role of Safran S.A. in Aviation Emissions Control
    - 5.2.8.1.2 Product Portfolio
  - 5.2.8.2 Corporate Strategies
    - 5.2.8.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.8.3 Business Strategies
    - 5.2.8.3.1 Research Outputs, Developments, and Product Launches
  - 5.2.8.4 Analyst View
- 5.2.9 Textron Aviation Inc.
  - 5.2.9.1 Company Overview
    - 5.2.9.1.1 Role of Textron Aviation Inc. in Aviation Emissions Control
    - 5.2.9.1.2 Product Portfolio
  - 5.2.9.2 Corporate Strategies
    - 5.2.9.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.9.3 Business Strategies
    - 5.2.9.3.1 Research Outputs, Developments, and Product Launches
  - 5.2.9.4 Analyst View
- 5.2.10 The Boeing Company
  - 5.2.10.1 Company Overview
    - 5.2.10.1.1 Role of The Boeing Company in Aviation Emissions Control
    - 5.2.10.1.2 Product Portfolio
  - 5.2.10.2 Corporate Strategies
    - 5.2.10.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
  - 5.2.10.3 Business Strategies
    - 5.2.10.3.1 Research Outputs, Developments, and Product Launches
  - 5.2.10.4 Analyst View



## 5.3 Key Airline Operators

### 5.3.1 American Airlines

#### 5.3.1.1 Company Overview

##### 5.3.1.1.1 Role of American Airlines in Aviation Emissions Control

##### 5.3.1.1.2 Product Portfolio

#### 5.3.1.2 Corporate Strategies

##### 5.3.1.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

#### 5.3.1.3 Business Strategies

##### 5.3.1.3.1 Research Outputs, Developments, and Product Launches

#### 5.3.1.4 Analyst View

### 5.3.2 Deutsche Lufthansa AG

#### 5.3.2.1 Company Overview

##### 5.3.2.1.1 Role of Deutsche Lufthansa AG in Aviation Emissions Control

##### 5.3.2.1.2 Product Portfolio

#### 5.3.2.2 Corporate Strategies

##### 5.3.2.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

#### 5.3.2.3 Business Strategies

##### 5.3.2.3.1 Research Outputs, Developments, and Product Launches

#### 5.3.2.4 Analyst View

### 5.3.3 Singapore Airlines Group (SIA)

#### 5.3.3.1 Company Overview

##### 5.3.3.1.1 Role of Singapore Airlines Group (SIA) in Aviation Emissions Control

##### 5.3.3.1.2 Product Portfolio

#### 5.3.3.2 Corporate Strategies

##### 5.3.3.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

#### 5.3.3.3 Analyst View

### 5.3.4 The Emirates Group

#### 5.3.4.1 Company Overview

##### 5.3.4.1.1 Role of The Emirates Group in Aviation Emissions Control

##### 5.3.4.1.2 Product Portfolio

#### 5.3.4.2 Corporate Strategies

##### 5.3.4.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

#### 5.3.4.3 Business Strategies

##### 5.3.4.3.1 Research Outputs, Developments, and Product Launches

#### 5.3.4.4 Analyst View

### 5.3.5 United Airlines, Inc.

#### 5.3.5.1 Company Overview

##### 5.3.5.1.1 Role of United Airlines, Inc. in Aviation Emissions Control

##### 5.3.5.1.2 Product Portfolio

#### 5.3.5.2 Corporate Strategies

##### 5.3.5.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

#### 5.3.5.3 Business Strategies

##### 5.3.5.3.1 Research Outputs, Developments, and Product Launches

#### 5.3.5.4 Analyst View

## **6 RESEARCH METHODOLOGY**

### 6.1 Factors for Data Prediction and Modeling

## **7 GROWTH OPPORTUNITIES AND RECOMMENDATION**

### 7.1 Aviation Regulatory Authorities

#### 7.1.1 Growth Opportunity: Incentivizing Cross-Industry Carbon Trading

##### 7.1.1.1 Recommendations

### 7.2 Airline Operators and Enabling Solution Providers

#### 7.2.1 Growth Opportunity: Emissions and Emission Control Analytics

##### 7.2.1.1 Recommendations

### 7.3 Aircraft and Engine Manufacturers

#### 7.3.1 Growth Opportunity: Optimizing Aircraft for Medium-Haul Segments

##### 7.3.1.1 Recommendations

## List Of Figures

### LIST OF FIGURES

Figure 1: Global Commercial Aviation Fleet, Units, 2021-2032

Figure 2: Global Commercial Aviation Fleet, Units, 2033-2042

Figure 3: Global Commercial Flights, Million Departures, 2021-2032

Figure 4: Global Commercial Flights, Million Departures, 2033-2042

Figure 5: Global Emissions from Commercial Flights in the Most Likely Scenario (Scenario 4), MMT CO<sub>2</sub>, 2021-2032

Figure 6: Global Emissions from Commercial Flights in the Most Likely Scenario (Scenario 4), MMT CO<sub>2</sub>, 2033-2042

Figure 7: Global Aviation Fleet (by Aircraft Type), Volume (Number of Aircraft in Global Fleet), 2021 and 2032

Figure 8: Global Commercial Flights (by Fleet-Flight Segment), in Millions (Departures), 2021 and 2032

Figure 9: Global Emissions from Commercial Flights in the Most Likely Scenario (Scenario 4), (by Fleet-Flight Segment), in MMT CO<sub>2</sub>, 2021 and 2032

Figure 10: Global Aviation Emissions (by Region), in MMT CO<sub>2</sub> 2032

Figure 11: Global Aviation Emissions Control Coverage

Figure 12: Global Aviation Emissions Control Market, Business Dynamics

Figure 13: Change in Flight Demand and Emissions from Scenario 4 (Most Likely Scenario), (2021-2042)

Figure 14: Global Aviation Emissions, All Scenarios (2004-2042)

Figure 15: Scenario 1- No Emission Control, Projection of Global Emissions (2022-2042), (in MMT)

Figure 16: Scenario 1 - Emissions Contribution from Fleet Operations (2021,2027,2032,2037,2042)

Figure 17: Scenario 1 - Emissions Contribution from Flight Operations (2021,2027,2032,2037,2042)

Figure 18: Comparing Emissions from Scenario 1 and 2 (2022-2042), (in MMT)

Figure 19: Scenario 2 - Emissions Contribution from Fleet Operations (2027,2032,2037,2042)

Figure 20: Scenario 2 - Emissions Contribution from Flight Operations (2027,2032,2037,2042)

Figure 21: Comparing Emissions from Scenarios 1,2, and 3(2022-2042), (in MMT)

Figure 22: Scenario 3 – Emissions Contribution from Fleet Operations (2027,2032,2037,2042)

Figure 23: Scenario 3 - Emissions Contribution from Flight Operations

(2027,2032,2037,2042)

Figure 24: Comparing Emissions from Scenarios 1, 2, and 4 (2022-2042), (in MMT)

Figure 25: Scenario 4 - Emissions Contribution from Fleet Operations

(2027,2032,2037,2042)

Figure 26: Scenario 4 – Emissions Contribution from Flight Operations

(2027,2032,2037,2042)

Figure 27: Aviation Emissions Control Players, Benchmarking Score, 2021

Figure 28: Research Methodology

Figure 29: Top-Down and Bottom-Up Approach

Figure 30: Assumptions and Limitations

## List Of Tables

### LIST OF TABLES

Table 1: Product Developments, Research Outputs, and Product Launches, January 2021 - January 2023

Table 2: Partnerships, Collaborations, Agreements, Investments, and Mergers & Acquisitions, January 2021-January 2023

Table 3: Global Aviation Carbon Emissions, Scenario-1 (by Fleet-Flight), in MMT CO<sub>2</sub>, 2021-2032

Table 4: Global Aviation Carbon Emissions, Scenario-1(by Fleet-Flight), in MMT CO<sub>2</sub>, 2032-2042

Table 5: Global Aviation Carbon Emissions, Scenario 2 (by Fleet-Flight), in MMT CO<sub>2</sub>, 2021-2032

Table 6: Global Aviation Carbon Emissions, Scenario 2(by Fleet-Flight), in MMT CO<sub>2</sub>, 2032-2042

Table 7: Global Aviation Carbon Emissions, Scenario 3 (by Fleet-Flight), in MMT CO<sub>2</sub>, 2021-2032

Table 8: Global Aviation Carbon Emissions, Scenario 3(by Fleet-Flight), in MMT CO<sub>2</sub>, 2032-2042

Table 9: Global Aviation Carbon Emissions, Scenario 4 (by Fleet-Flight), in MMT CO<sub>2</sub>, 2021-2032

Table 10: Global Aviation Carbon Emissions, Scenario 4(by Fleet-Flight), in MMT CO<sub>2</sub>, 2032-2042

Table 11: Global Aviation Fleet (by Fleet Type), Units, 2021-2032

Table 12: Global Aviation Fleet (by Fleet Type), Units, 2032-2042

Table 13: Global Commercial Flight Demand (by Fleet-Flight Type), Number of Flights in Million, 2021-2032

Table 14: Global Commercial Flight Demand (by Fleet-Flight Type), Number of Flights in Million, 2032-2042

Table 15: Global Electric VTOL (eVTOL) Aircraft Market (by Range), Value (\$Million) and Volume (Number of Units to be Manufactured), 2021-2032

Table 16: Global Aviation Emissions, Scenario 1(No Emission Control), in MMT CO<sub>2</sub>, 2021-2032

Table 17: Global Aviation Emissions, Scenario 1(No Emission Control), in MMT CO<sub>2</sub>, 2032-2042

Table 18: Global Aviation Emissions, Scenario 2(Optimistic Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 19: Global Aviation Emissions, Scenario 2(Optimistic Scenario), in MMT CO<sub>2</sub>,

2032-2042

Table 20: Global Aviation Emissions, Scenario 3(Ideal Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 21: Global Aviation Emissions, Scenario 3(Ideal Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 22: Global Aviation Emissions, Scenario 4(Most Likely Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 23: Global Aviation Emissions, Scenario 4(Most Likely Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 24: North America Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 25: North America Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 26: U.S. Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 27: U.S. Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 28: Canada Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 29: Canada Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 30: Europe Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 31: Europe Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 32: France Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 33: France Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 34: Germany Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 35: Germany Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 36: Russia Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 37: Russia Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 38: U.K. Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 39: U.K. Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 40: Rest-of-Europe Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 41: Rest-of-Europe Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 42: Asia-Pacific Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 43: Asia-Pacific Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 44: Australia Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 45: Australia Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 46: China Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 47: China Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 48: India Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 49: India Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 50: Japan Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 51: Japan Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 52: Singapore Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 53: Singapore Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 54: Rest-of-Asia-Pacific Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 55: Rest-of-Asia-Pacific Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 56: Rest-of-the-World Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2021-2032

Table 57: Rest-of-the-World Aviation Emissions (by Scenario), in MMT CO<sub>2</sub>, 2032-2042

Table 58: Benchmarking and Weightage Parameters

Table 59: Airbus SE: Product and Service Portfolio

Table 60: Airbus S.E.: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 61: Airbus SE: Research Outputs, Developments, and Product Launches

Table 62: Embraer S.A.: Product and Service Portfolio

Table 63: Embraer S.A.: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 64: Embraer S.A.: Research Outputs, Developments, and Product Launches

Table 65: GE Aerospace: Product and Service Portfolio

Table 66: GE Aerospace: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 67: GE Aerospace: Research Outputs, Developments, and Product Launches

Table 68: Gulfstream Aerospace Corporation: Product and Service Portfolio

Table 69: Gulfstream Aerospace Corporation: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 70: Gulfstream Aerospace Corporation: Research Outputs, Developments, and Product Launches

Table 71: MTU Aero Engines: Product and Service Portfolio

Table 72: MTU Aero Engines: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 73: Pratt & Whitney: Product and Service Portfolio

Table 74: Pratt & Whitney: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 75: Pratt & Whitney: Research Outputs, Developments, and Product Launches

Table 76: Rolls-Royce plc.: Product and Service Portfolio

Table 77: Rolls-Royce plc.: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 78: Rolls-Royce plc.: Research Outputs, Developments, and Product Launches

Table 79: Safran S.A.: Product and Service Portfolio

Table 80: Safran S.A.: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 81: Safran S.A.: Research Outputs, Developments, and Product Launches



Table 82: Textron Aviation Inc.: Product and Service Portfolio

Table 83: Textron Aviation Inc.: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 84: Textron Aviation Inc.: Research Outputs, Developments, and Product Launches

Table 85: The Boeing Company: Product and Service Portfolio

Table 86: The Boeing Company: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 87: The Boeing Company: Research Outputs, Developments, and Product Launches

Table 88: American Airlines: Product and Service Portfolio

Table 89: American Airlines: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 90: American Airlines: Research Outputs, Developments, and Product Launches

Table 91: Deutsche Lufthansa AG: Product and Service Portfolio

Table 92: Deutsche Lufthansa AG: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 93: Deutsche Lufthansa AG: Research Outputs, Developments, and Product Launches

Table 94: Singapore Airlines Group (SIA): Product and Service Portfolio

Table 95: Singapore Airlines Group (SIA): Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 96: The Emirates Group: Product and Service Portfolio

Table 97: The Emirates Group: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 98: The Emirates Group: Research Outputs, Developments, and Product Launches

Table 99: United Airlines, Inc.: Product and Service Portfolio

Table 100: United Airlines, Inc.: Partnerships, Collaborations, Agreements, Investments, and Contracts

Table 101: United Airlines, Inc.: Research Outputs, Developments, and Product Launches



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