

BAR France

General Assembly of January 29, 2026

Speech by President Jean-Pierre SAUVAGE

Mr. Director General of Civil Aviation, Dear Chems Shkioua,

Mr. Director General of IATA, Dear Willie Walsh,

Ladies and Gentlemen, Presidents and Chief Executives,

Ladies and Gentlemen, Speakers, Dear Colleagues, Dear Friends,

First, allow me to thank you all for your presence here today, which demonstrates your interest not only in our activities but, above all, in the development of air transport—not just in France, but worldwide. Our industry is, by its very nature, international.

Before addressing some major topics of interest to our sector, let us consider a few key figures from the past year.

In France, air traffic has rebounded, with over 18 million passengers transported (+2,8%), driven mainly by international travel (+3,8). Globally, the results published by IATA show a 4.2% increase in passenger numbers, totaling 4.982 billion passengers transported. This suggests that the industry will surpass 5 billion passengers in 2026, generating global revenue of over \$1 trillion and a profit margin of 3.9%.

You are all already aware of these results, which, considering the volumes mentioned, might make our industry appear particularly prosperous. However, while these impressive figures demonstrate resilience capable of absorbing the shocks inherent to its specific context in a complicated geopolitical and economic environment, they also highlight a clear imbalance among airlines within the air transport value chain.

Our guest, Willie Walsh, head of IATA, will undoubtedly address this in his speech.

But, as every year, I cannot help but emphasize the highly contributive nature of air transport to the French economy, thanks to the vitality of all stakeholders involved in the development of our sector.

Let me remind you of a few key figures highlighted by our friends at IATA:

- Over \$145 billion contributed to France's GDP, representing 4.8%, and supporting 1.3 million jobs—including airlines, airports, civil aviation services, the aeronautical production chain, and tourism linked to our activity. This makes air transport an undeniable social and economic contributor, fostering technological innovation and growth to meet the major challenge of energy transition.

This will be the main focus of the various roundtables we invite you to attend today, which will address the impact of AI, the prospect of a high-performing and sustainable European sky, and the need to meet European objectives for transitioning to sustainable fuels.

I will therefore leave it to the eminent experts—whom I thank once again for their presence—to debate these topics. For my part, I would like to highlight certain points that crucially affect the development of air transport in our country.

Taxation of Air Transport

First, I cannot help but return to the implementation of the now-famous TSBA, which has generated the negative economic and commercial consequences our sector has experienced throughout the past year.

It has been sufficiently demonstrated that punitive taxes, supposedly introduced for sustainability, have no effect on the environment and only create perverse effects that endanger an activity making a significant contribution to the national economy.

But what is most shocking is that the revenue from this tax, like that of the TEITLD, has been partially diverted to other forms of mobility unrelated to ours.

As I have said before, I ask the same question: Are air travelers doomed to remain the "useful idiots" of mobility, or should they be considered permanent variables for adjusting the national budget? Let me remind you that this amounts to over €1.3 billion!

We have noted the expression of a pause formulated by Philippe TABAROT, our Minister of Transport, in the context of the 2026 Finance Bill. But what does this mean?

Decarbonization of Air Transport

Why, since these two aforementioned taxes were created to address supposed environmental necessities by the predecessors of our current minister, should their revenue not be allocated to entities dedicated to finding sustainable solutions—such as CORAC—to meet the objectives of reducing greenhouse gas emissions as defined by ICAO and Europe (cf. Green Deal and ReFuel EU)? This should also be integrated into the roadmap for the decarbonization of air transport, which the GIFAS representative will certainly discuss in his roundtable.

The decarbonization of air transport requires the involvement of operators—airlines and airports—but also the State, by promoting the emergence of a French sector for Sustainable Aviation Fuels (SAF) while securing funding for CORAC to support manufacturers' R&D.

In 2025, it is estimated that 1.9 million tons were produced, doubling the 2024 figure. However, according to IATA, the aviation industry may face a worrying slowdown in production.

In its 2025 technical report referring to ReFuel Aviation, EASA (European Union Aviation Safety Agency) mentioned three possible scenarios for production capacity, with the most realistic estimating 3.6 million tons.

Are France and Europe capable of maintaining this production pace in 2026 to enable airlines to meet the European mandates set for 2030?

We can ask ourselves this question, and even more so regarding e-SAF, whose production seems even more problematic, with prohibitive costs.

To give you an idea of the volumes to be produced by 2050—the key date set by ICAO for net-zero carbon—we would need at least the equivalent of current jet fuel consumption, i.e., over 450 million tons.

You can see the scale of the challenge our industry faces and must tackle with determination to avoid giving credence to those advocating for the decline of our activity.

Air Navigation Services

Now, let us address another issue linked, in some respects, to the problem of decarbonizing French and European skies.

This concerns the functioning of our national air traffic management system, a recurring source of frustration for air operators due to the economic and environmental consequences of operational capacity and human resource shortages, as highlighted almost weekly by Eurocontrol publications.

This situation is doubly concerning because it affects not only the regularity of national air operations but also international ones, given France's position as an essential hub for European air traffic.

Responsible for controlling nearly 10,000 daily flights serving or overflying French territory, DSNA—the leading provider of air navigation services ahead of Germany, the UK, and Spain—bears the enormous responsibility of ensuring the safety and operational regularity of over one-third of European traffic.

However, it is also a leader in the TOP 5 of ANSPs for en-route delays, with an average delay of 1.90 minutes per flight, compared to other European countries with an average of around 0.90 minutes per flight.

Everyone will understand the operational performance gap between our controllers and their European colleagues. This is why we urgently call on the leaders of our civil aviation to take the necessary corrective measures to align the service provided—fully financed by the annual fees paid by airlines—with the expected standards.

These operational irregularities have a well-established cost. I will give you just one figure to appreciate the economic consequences borne by air operators: the cost of one minute of delay is €127 (source: Eurocontrol).

I leave it to you to calculate the total annual financial impact based on the 10,000 daily flights mentioned earlier!

To conclude this topic, I cannot help but share with you, for your consideration, the economic and environmental consequences of the operational disruptions caused by the ATC France strike on July 3 and 4:

- Over 6 million additional kilometers flown
- 18,000 tons of fuel burned
- 60,000 excess tons of CO₂ produced
- Cost of delays over two days: €47 million
- Cost of cancellations: €73 million

Without further comment, except to recall the proposals made to the Minister of Transport by the representative bodies of airlines and airports to reconsider the conditions for applying minimum service to avoid a recurrence of such catastrophic situations for our industry and the national economy.

At the same time, these same bodies raised the question of whether a profound revision of the functioning of French air navigation services is not indispensable, with organizational changes integrating, under an independent regulatory authority, the air transport stakeholders who fully finance as said before air navigation through their fees.

Revision of European Regulation 2004/261

Another concern for carriers, somewhat linked to the previous issue, relates to the latest proposals from the European Parliament's Transport and Tourism Committee (TRAN), which has just voted for stricter restrictions on passenger compensation rules in the event of flight irregularities, particularly for delays.

In short, this involves revising the compensation levels provided for by European Regulation 261/2004, which, since its publication, has been subject to jurisprudential modifications by the CJEU, progressively restricting carriers' ability to invoke exemption for extraordinary circumstances.

It seems that European deputies are not exactly in line with the European Commission, which, in the context of revising EU 261, is more inclined to rebalance certain elements of passenger protection in the absence of any impact study.

There is one, conducted by IATA, AE4, and ERA, highlighting the €8.1 billion paid out in compensation under Regulation 261/2004.

Our industry is constantly confronted with political, economic, health, climate, and regulatory challenges, to name just a few. However, it has always known how to face them, demonstrating its resilience and adaptability, and looking to the future with optimism and determination.

My best wishes, and those of BAR France, accompany you in this endeavor.

Thank you for your attention.

