



Finland Take Off - Suomi Lentoon !

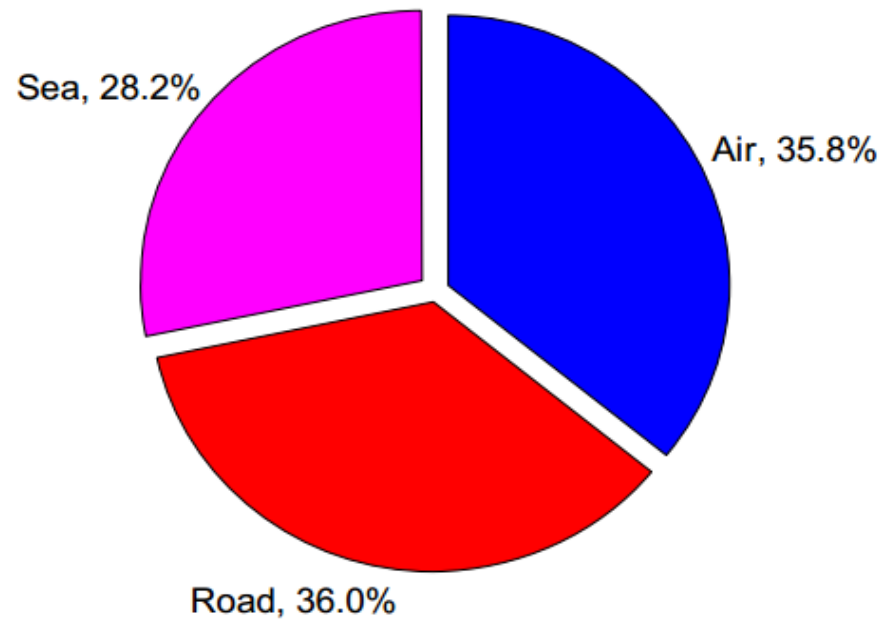
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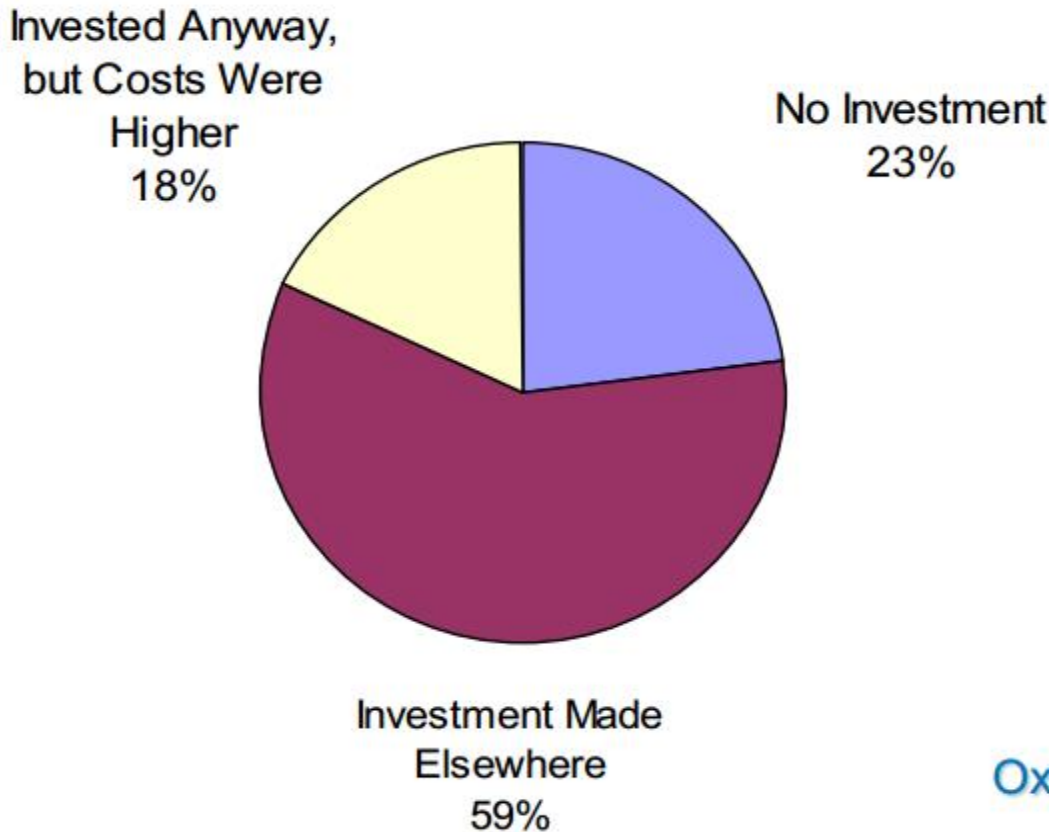
15.1.2015

THE VALUE OF AIR TRANSPORTATION FOR FINLAND

Tourist arrival by mode

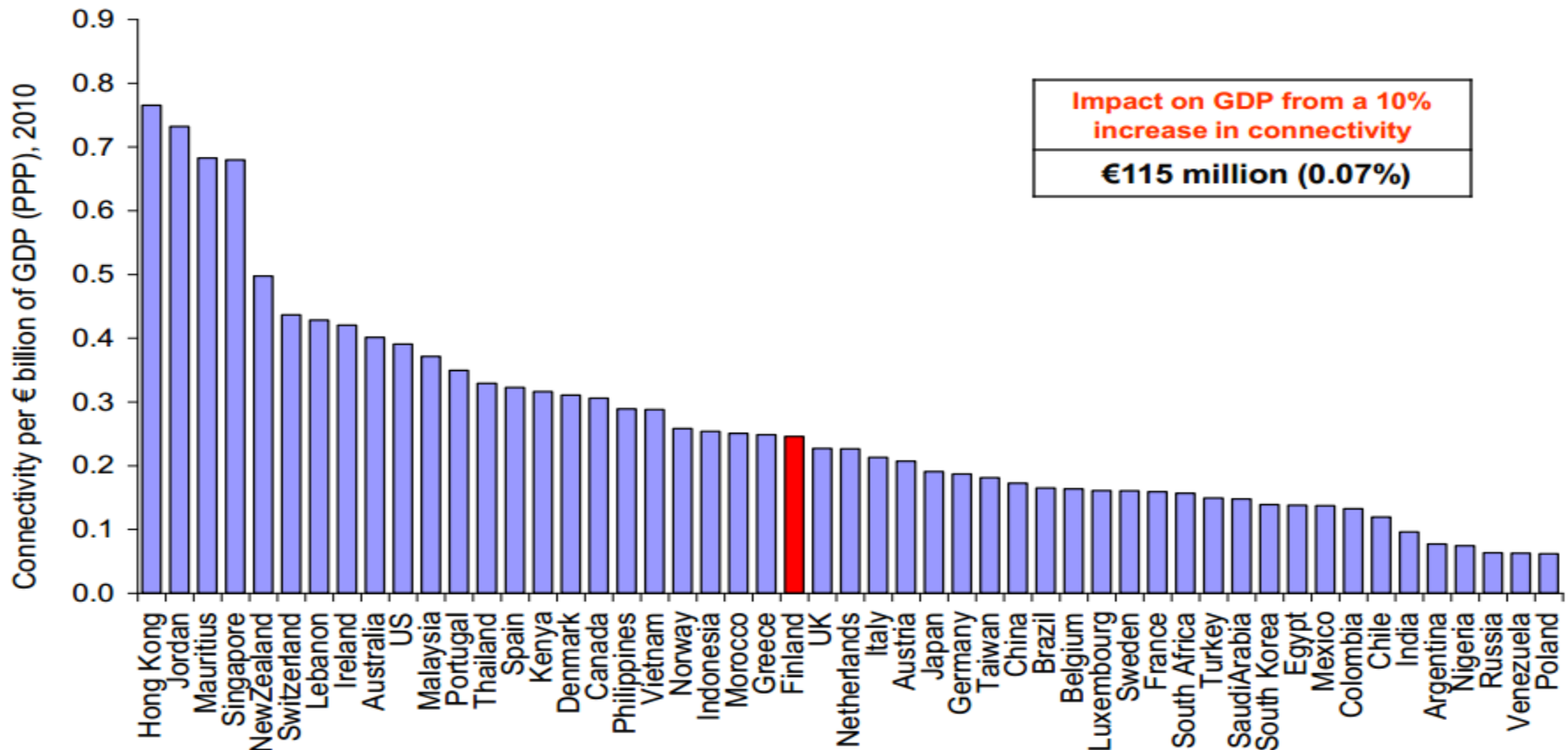


AVIATION AND BETTER ACCESS ENCOURAGE NEW INVESTMENTS



Oxford Economics survey
of 600 companies
worldwide

HOW THE AIR CONNECTIVITY INFLUENCE THE ECONOMY ?



AVIATION AND ENVIRONMENT

2%

The global aviation industry produces around **2%** of all human-induced carbon dioxide (CO₂) emissions.

12%

Aviation is responsible for **12%** of CO₂ emissions from all transport sources, compared to 74% from road transport.

35%

While air transport carries around **0.5%** of the volume of world trade shipments, it is over **35%** by value – meaning that goods shipped by air are very high value commodities, often times perishable or time-sensitive.

80%

Globally, the average occupancy of aircraft is **around 80%**, greater than other forms of transport.

80%

Alternative fuels, particularly sustainable biofuels, have been identified as excellent candidates for helping achieve the industry targets. Biofuels derived from biomass such as algae, jatropha and camelina have been shown to reduce the carbon footprint of aviation fuel by up to **80%** over their full lifecycle. **If commercial aviation were to get 6% of its fuel supply from biofuel by 2020, this would reduce its overall carbon footprint by 5%.**

80%

Around **80%** of aviation CO₂ emissions are emitted from flights of over **1,500 kilometres**, for which there is no practical alternative mode of transport.

Stabilise

From 2020, net carbon emissions from aviation will be capped through carbon neutral growth.

50%

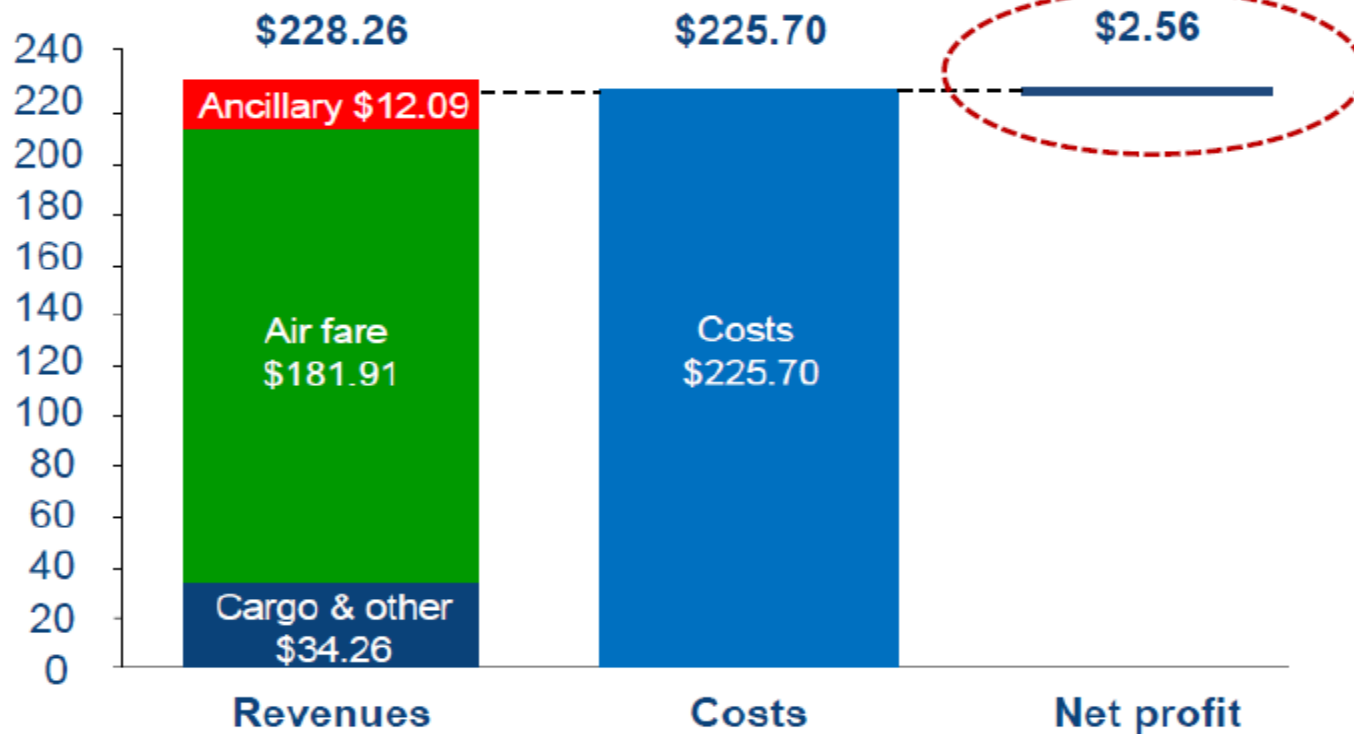
By 2050, net aviation carbon emissions will be half of what they were in 2005.

AIRLINE PROFITABILITY

Airline industry operating margins are very thin !

2012

2012 worldwide airline financial results per departing passenger



2014 estimated margin \$ 4.25

CHALLENGES OF AVIATION IN FINLAND

- **Will Finland get its share of international growth automatically ?**
- **Is aviation treated equally with other modes of transportation ?**
- **Is the current airport network principle sustainable or obstacle for growth ?**
- **What is the responsibility of the government in maintaining the infrastructure ?**
- **Does Finland need a new separate airport for airfreight ?**
- **Who is responsible for securing the growth and promotion of Finland ?**
- **Is there a misconception when it comes to aviation and environment ?**

ECONOMIC CONTRIBUTION OF AVIATION IN FINLAND

- **Contribution to GDP 3,2 % (indirect effect 3,9 %)**
- **Direct and indirect employment effect 120.000**
- **Induced effect to employment 136.000 (5 % of the labour force)**
- **International input to national economy from travellers € 4,4, mrd**
- **Access is one of the key factors for willingness to invest in Finland**
- **Value of airfreight is 27 % of total freight value**
- **Aviation Sectors direct tax contribution € 1,072 mrd**
- **Tax generated through the aviation sector's induced impact € 1.595 bn**
- **Total tax attributable to the aviation sector's footprint € 2.667 bn**

PLEASE WELCOME OUR GUESTS

Mr. Juha Järvinen, CCO Finnair

Mr. Markus Suomi, CEO Finpro

Mr. Henry Hasselbarth, Aviation Specialist

Moderator : Pekka Mäkinen, Chairman BARIF