

GLOBAL CAPEX NEEDS

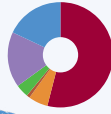
GLOBAL CAPEX NEEDED 2021–2040

US\$ 2.4tr

More than Italy's GDP

NORTH AMERICA
US\$ 400bn

EUROPE
US\$ 427bn



LATIN AMERICA AND THE CARIBBEAN
US\$ 94bn

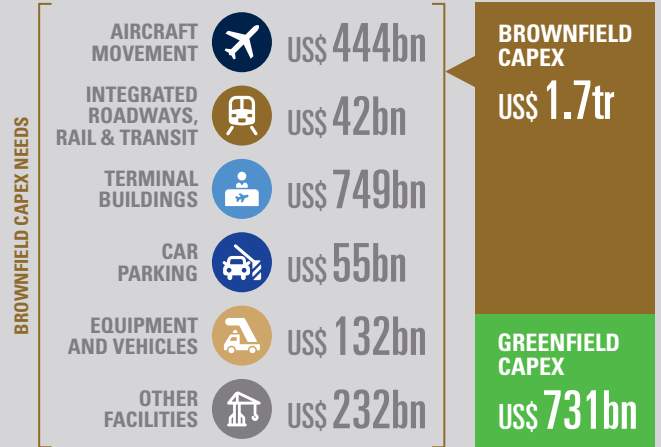
AFRICA
US\$ 32bn

MIDDLE EAST
US\$ 151bn

ASIA-PACIFIC
US\$ 1.3tr

Airport infrastructure investment requires significant capital planning.

GLOBAL CAPEX NEEDS BY INVESTMENT TYPE



Back to 2019 traffic levels in 2023—a world of airport infrastructure capacity constraints

GLOBAL PASSENGER TRAFFIC RECOVERY & GROWTH



IMPLICATIONS OF FALLING SHORT ON CAPEX

In 2040, for every 1 million foregone passengers due to airport capacity constraints, the global air transport industry would support



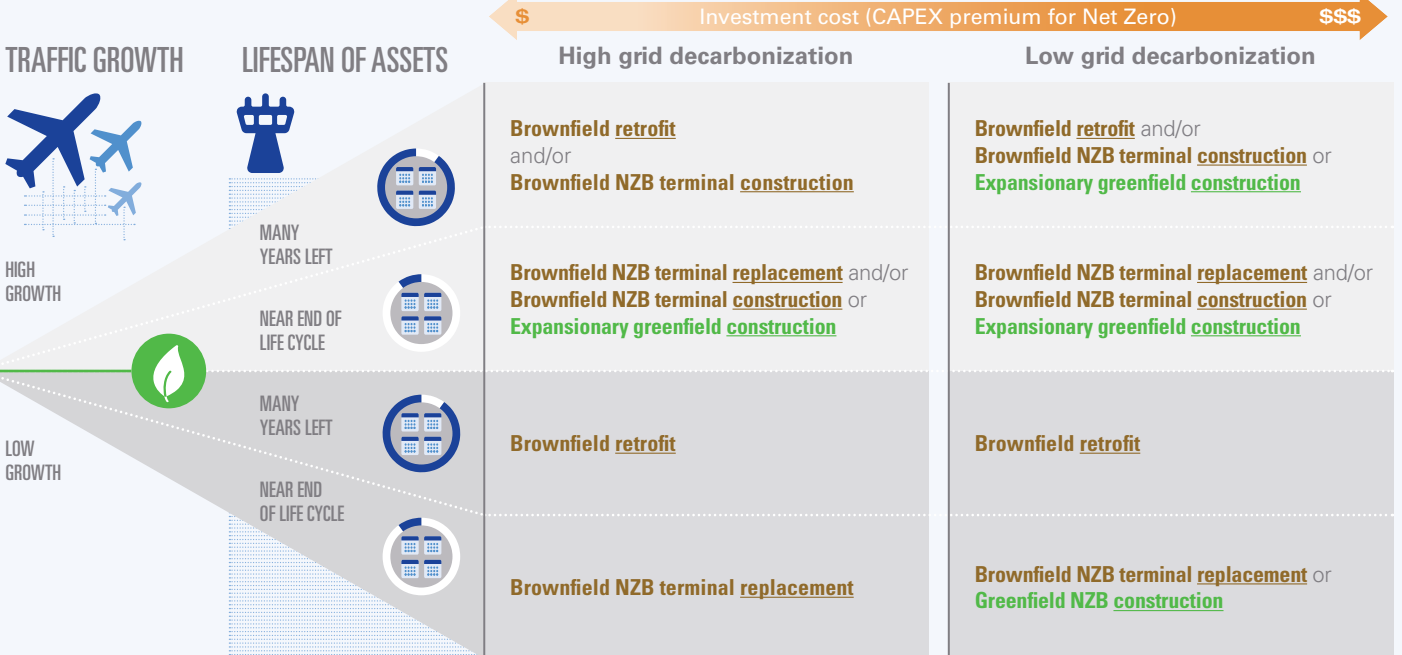
10,500
FEWER JOBS



US\$ 346mn
LESS IN GDP

Airport capital attributes and electric grid affect decarbonization pathways and investment costs.

CAPEX INVESTMENT PATHWAYS TO NET ZERO



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