



TotalEnergies

IDées Transition bas carbone

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TotalEnergies Aviation

A major player with a global presence



280

Number of airlines supplied



300/500

airports/ airdromes serviced in

70 countries



60

Years of experience



Number of employees worldwide

500



Leader in

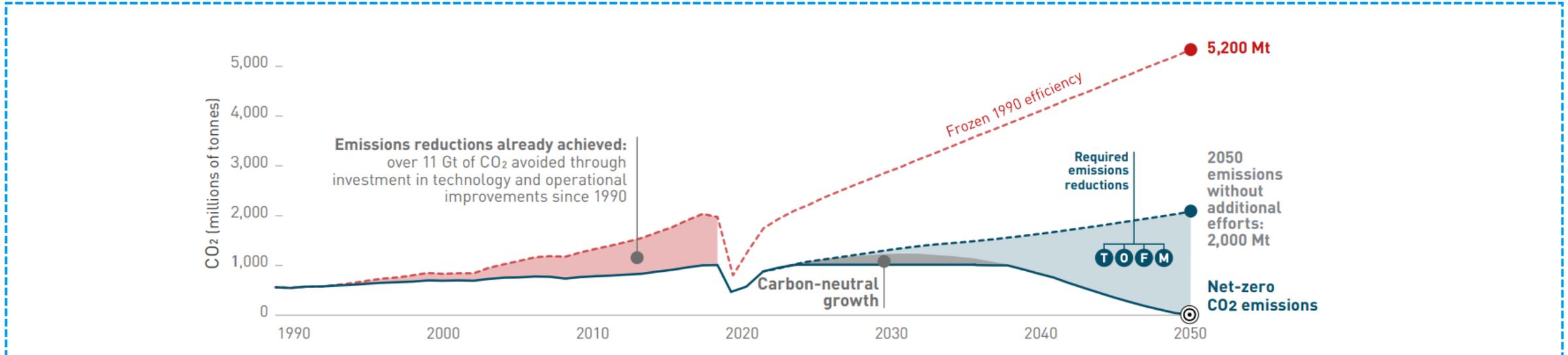
Europe
Africa



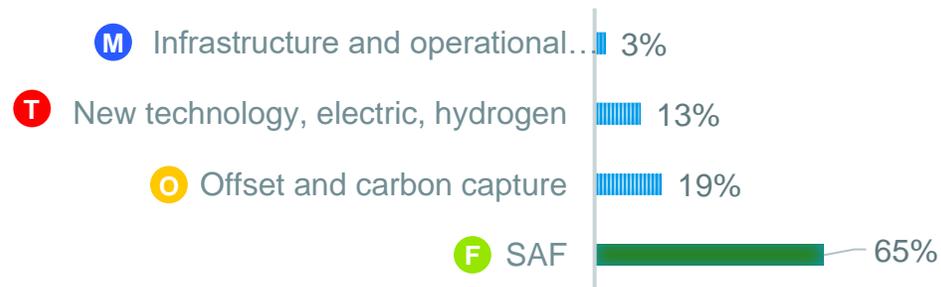
Sector commitment to fly Net Zero by 2050



SAF is the aviation largest decarbonization contributor over the period 2021-2050

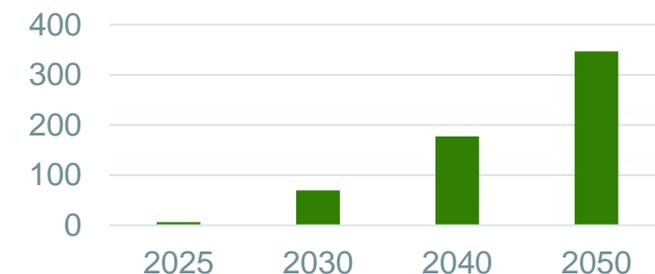


IATA Aviation decarbonization roadmap



IATA expected SAF required to achieve net Zero in 2050

Incorporation of 350Mt in 2050



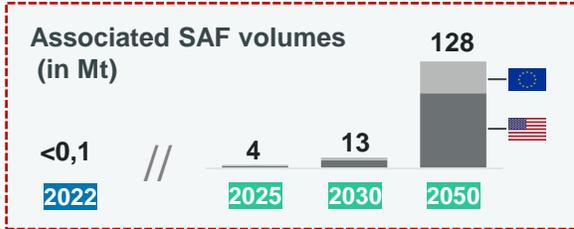
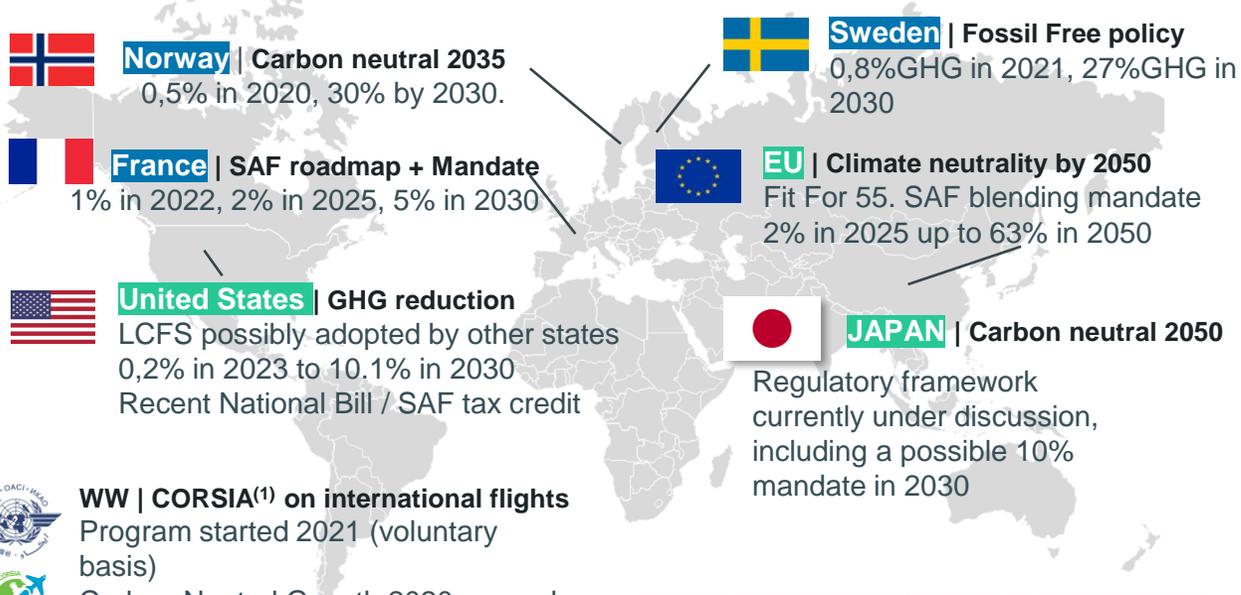
Aviation initiatives towards climate change

Stable long term policy measures coupled with voluntary positive initiatives are crucial to scale up SBC demand



Aviation dedicated legislation initiatives (selected examples)

Legislation already in place Legislation soon to be in place



Aviation voluntary positive initiatives (selected examples)

Airlines / Cargo

- SAF Offtakes
- SAF pledge 10% by 2030
- Equity into SAF projects
- Investment into green tech. funds.

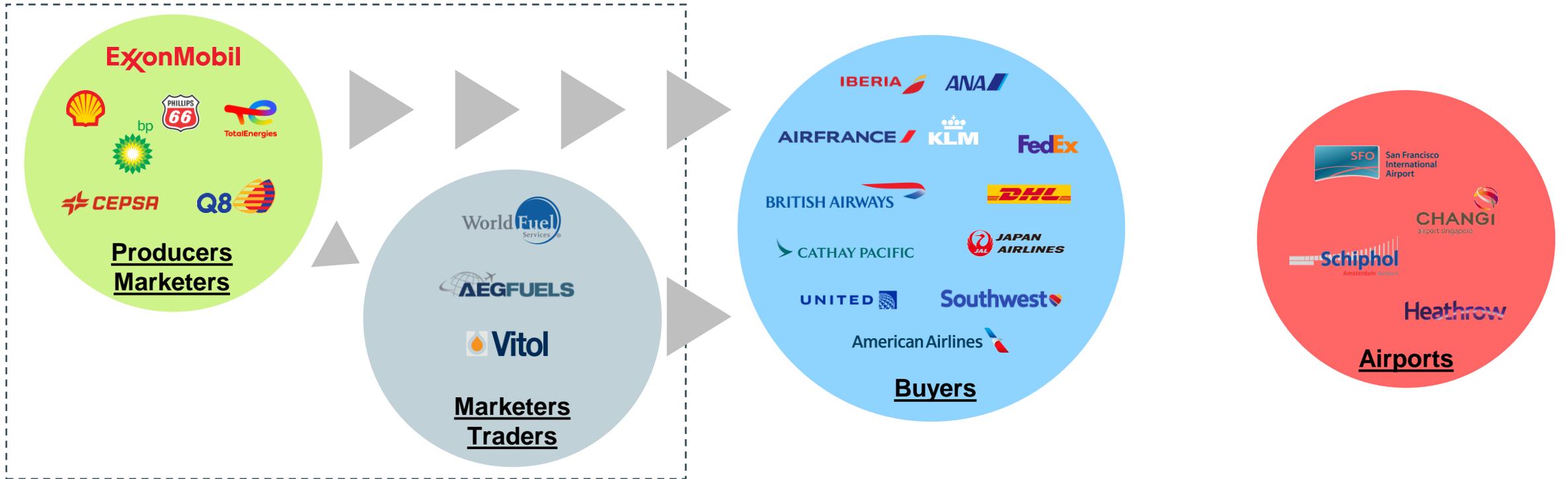
Programs / Alliances

- Corporate programs
- Airports' SAF incentives
- SAF Buyers' alliances
- 100% SAF programs
- Advocacy alignment

(1) Carbon Offsetting And Reduction Scheme for International Aviation

Conventional fossil fuel linear supply chain

A very competitive fragmented global market yet organized by airports



Fragmented global market with large number of players

- **Global players:** Air BP, World Fuel Services (WFS) and AEG
- **Multi-regional players:** Major oil companies benefiting from historical positions. Traders seeking regional integration

Driven by Commercial activity

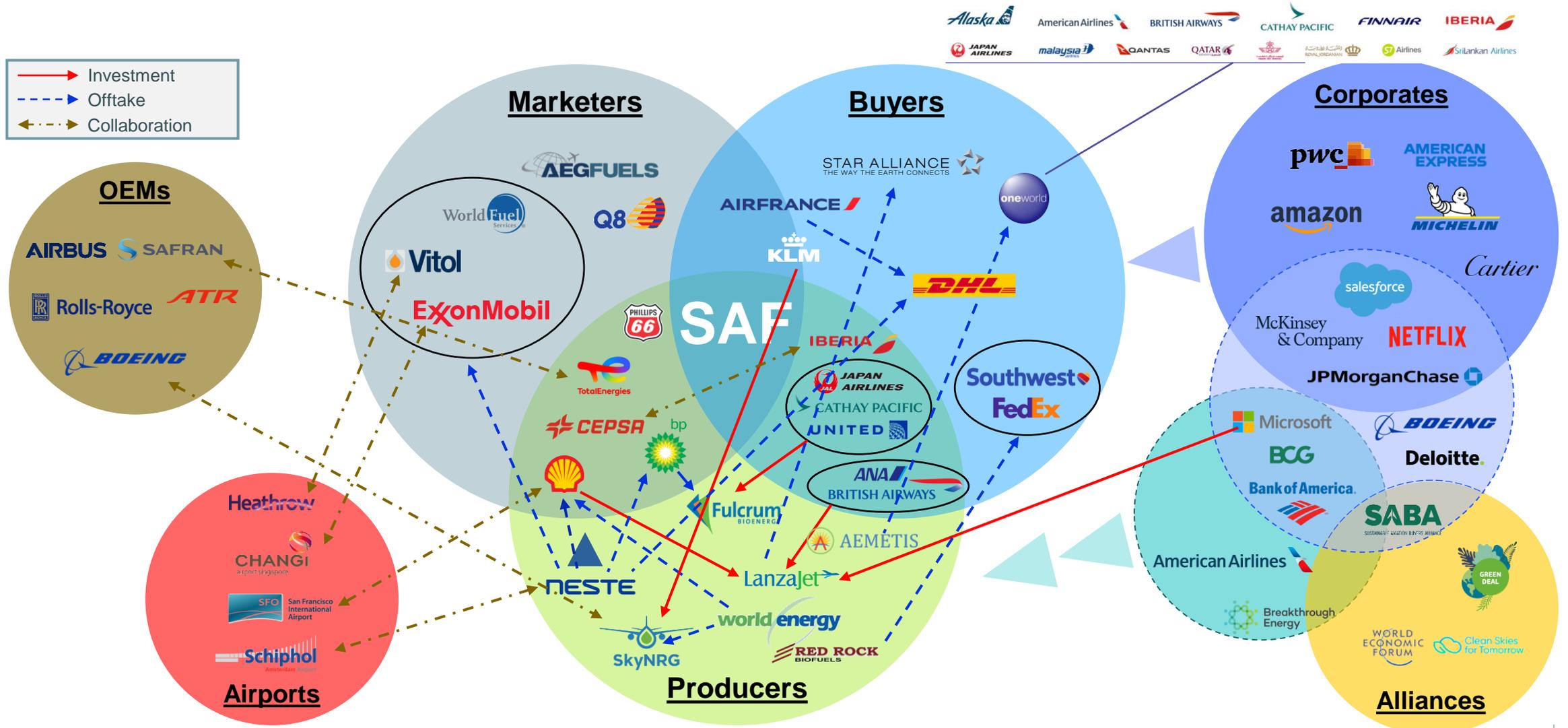
- Passengers, Cargo – Large volumes, small margins. Some self-supply
- General aviation, Industry – Lucrative

Each airport is a specific market

- Limited number of players
- Usually one on small airports, up to five on large platforms

SAF is completely changing market dynamics

Aviation sector decarbonization strategy centers around SAF



Aviation - SAF - IDées Transition bas carbone

* Star Alliance members – United Airlines | Aegean Airlines | Air Canada | Airindia Limited | Air China | Asiana Airlines | Austrian Airlines | Avianca | Brussels Airlines | Copa Airlines | Croatia Airlines | EGYPTAIR | Ethiopian Airlines | EVA Airways Corp. | LOT Polish Airlines | Lufthansa | Singapore Airlines | South African Airways | Swiss International Air Lines | TAP Air Portugal | Thai Airways International | Turkish Airlines

Thank you

