

Envision future aftermarket demand to connect today and tomorrow

Global Services Forecast

2025 | 2044

October 2025

AIRBUS

Customer Services

Acting as **customers' companion** in fleet management and operations all along the **aircraft lifecycle** is our mission, evolving together for a safe & sustainable aerospace, today and tomorrow.



Today,

Airbus supports
more than
13,500 aircraft
around the world

A global context still charting some uncertainty, geopolitical and economic headwinds...

Economics



2.9%

Expected GDP growth for 2025 (0.4pp below 2024)

YoY decline in jet fuel prices strengthening airlines profits

-13%



Tariffs

Hinder effective industry oversight and raise the cost of parts and components

Geopolitics



Airspace complexity

Tensions in the Middle East & Eastern Europe impacting logistics flows and supply chains

Airlines adjusting networks to avoid restricted air zones

Longer flight paths



...But a solid 2025 year with resilient demand, profitability & the drive for operational excellence



+5.8%

RPK YoY 2025E*
(+10.1% vs 2019)

-4%

Pax yields
2025E

\$66bn

Airlines
operating profit
2025E



+4% YoY



passengers
expected in 2025,
a new height.

*E means estimate

First signs of **stability in aftermarket supply, Artificial Intelligence** igniting a new leap in technological progress

Supply



Softening parts shortages

Greater transparency and alternative solutions across the industry (USM*), slow path towards stability.



Skilled labour scarcity

Technicians workforce pipeline remains to be robustified.



Strained MRO capacity

Significant investments and new capabilities established.

Technology



Artificial Intelligence

AI leverage big data to optimise flight routes and planning, improve operations, and streamline the complexity of airline and airport operations.

The ratio of operators actively increasing their overall IT spendings, incl. **predictive models** and **advanced decision tools**

>70%



Airlines have initiated a technological transformation since the 80s... **now accelerating to anticipate future resilience**



1980



Embracing connectivity for greater resilience

Reliability | Real-time diagnostics & alerts

Efficiency | Fewer disruptions, more automation

Enhanced experience | Personalised passenger journey

Today

* Passenger aircraft above 100 seats equipped with in-flight connectivity.

AIRBUS

A robust 2025 services market growth, **fueling operational excellence**



Digital & connectivity

+12% YoY



+10%

to **\$159 bn**

2025 services demand | YoY* evolution



Exploring additional markets, better reflecting Customers operational landscape



Ground
Operations

+11% YoY



Orchestrate & optimise ground activities during aircraft turnarounds



Maintenance
operations
support

+12% YoY



Provide Inventory on time and on quality with state of the art Engineering support to ensure continued airworthiness & aircraft reliability.



Looking forward

The 20-year horizon.
Growth, People,
Operational excellence.

2025 | 2044

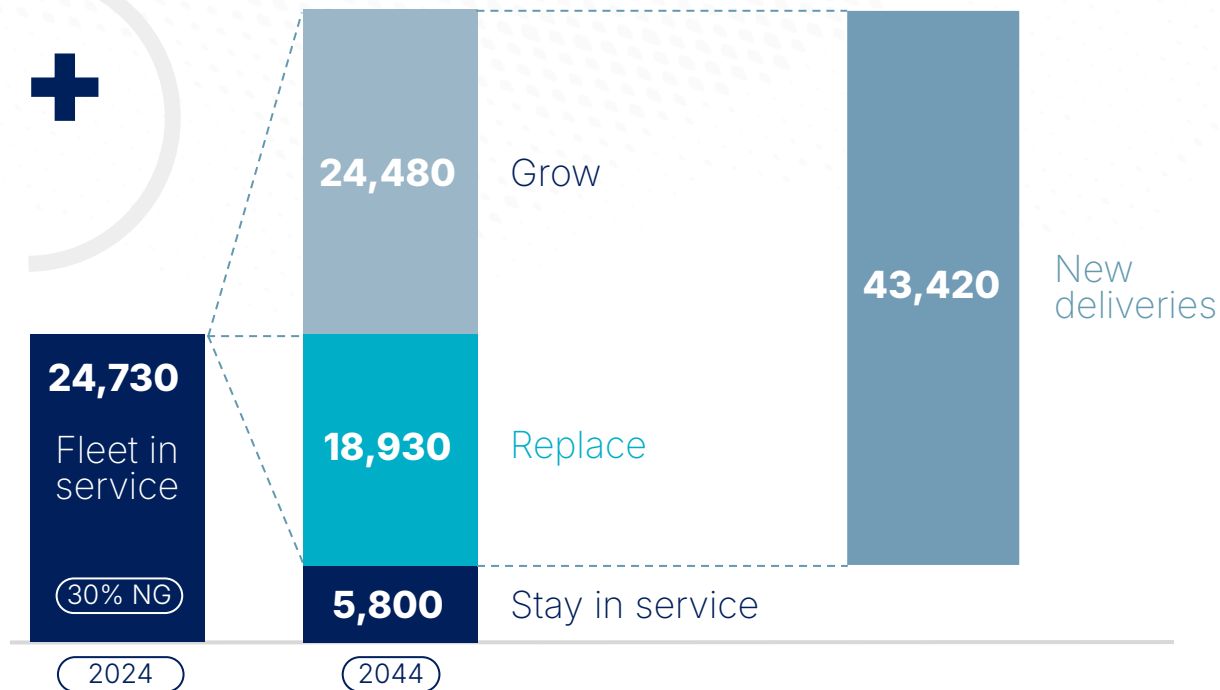
The coming twofold fleet at horizon 2044

GMF 2025 | 2044

49,000 +

In service passenger and freighter aircraft in 2044, the fundamental driver for services demand.

By 2044, **95%** of the fleet will be made up of **new-generation** aircraft.



Envisioning 2044, few drivers shaping Services demand

in 2044



10bn+

Expected
passengers

+3.8% CAGR*



400,000+

Daily Flight Hours

25% WB 75% SA



40,000+

In-service
connected fleet**

~4 times' today



17,000+

Base & heavy
checks

+60% vs 2025

A 20-year leap in fleet efficiency and productivity requires **an aftermarket revolution to advance care.**

The 20-Year Services Horizon, a blueprint for peak efficiency



Digital & connectivity

\$ 26 bn

+5.6% CAGR



A steady services growth powered by **expanding traffic**, **more modern fleets**, and **operational excellence**.

+3.6%

to **\$311 bn**

2025 | 2044 services demand CAGR*

Training

\$ 17 bn

+3.0% CAGR



Modifications & upgrades

\$ 17 bn

+1.9% CAGR



On-wing maintenance

\$ 34 bn

+2.6% CAGR



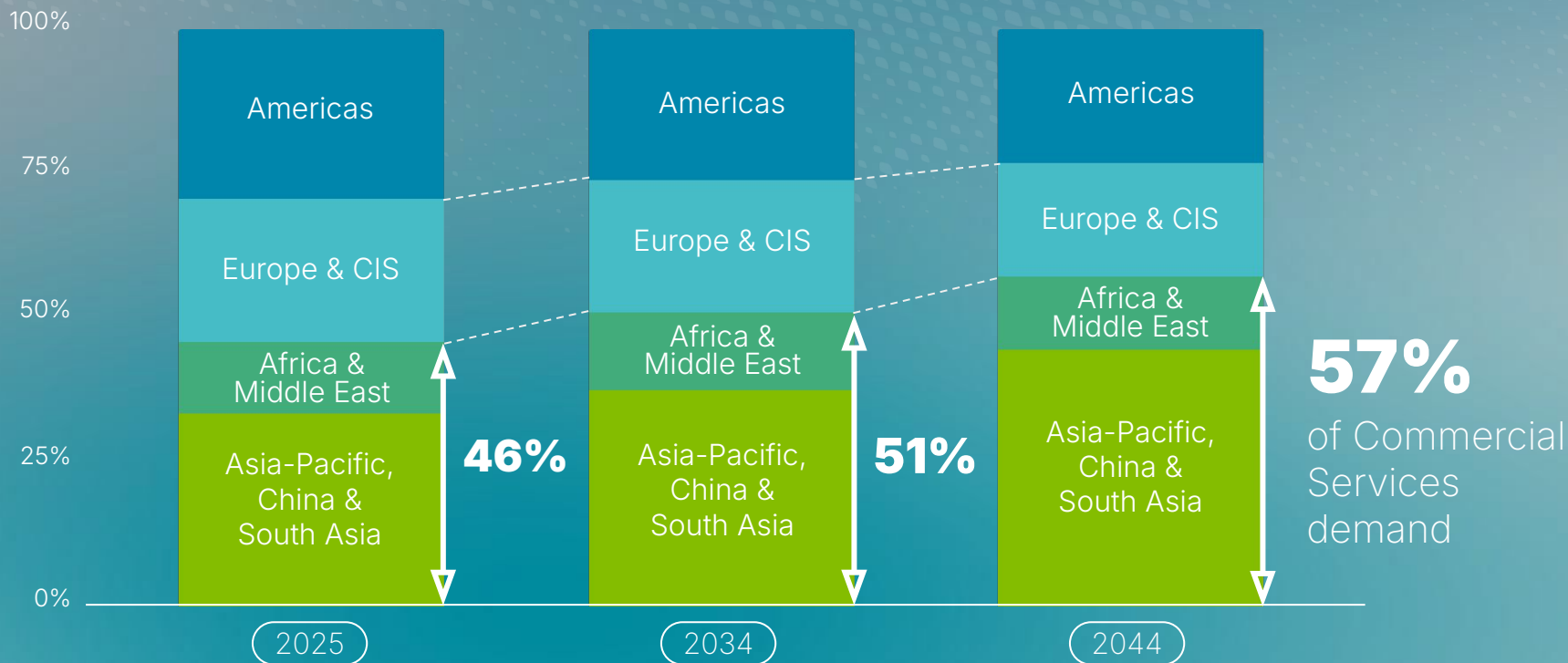
Off-wing maintenance

\$ 218 bn

+3.8% CAGR

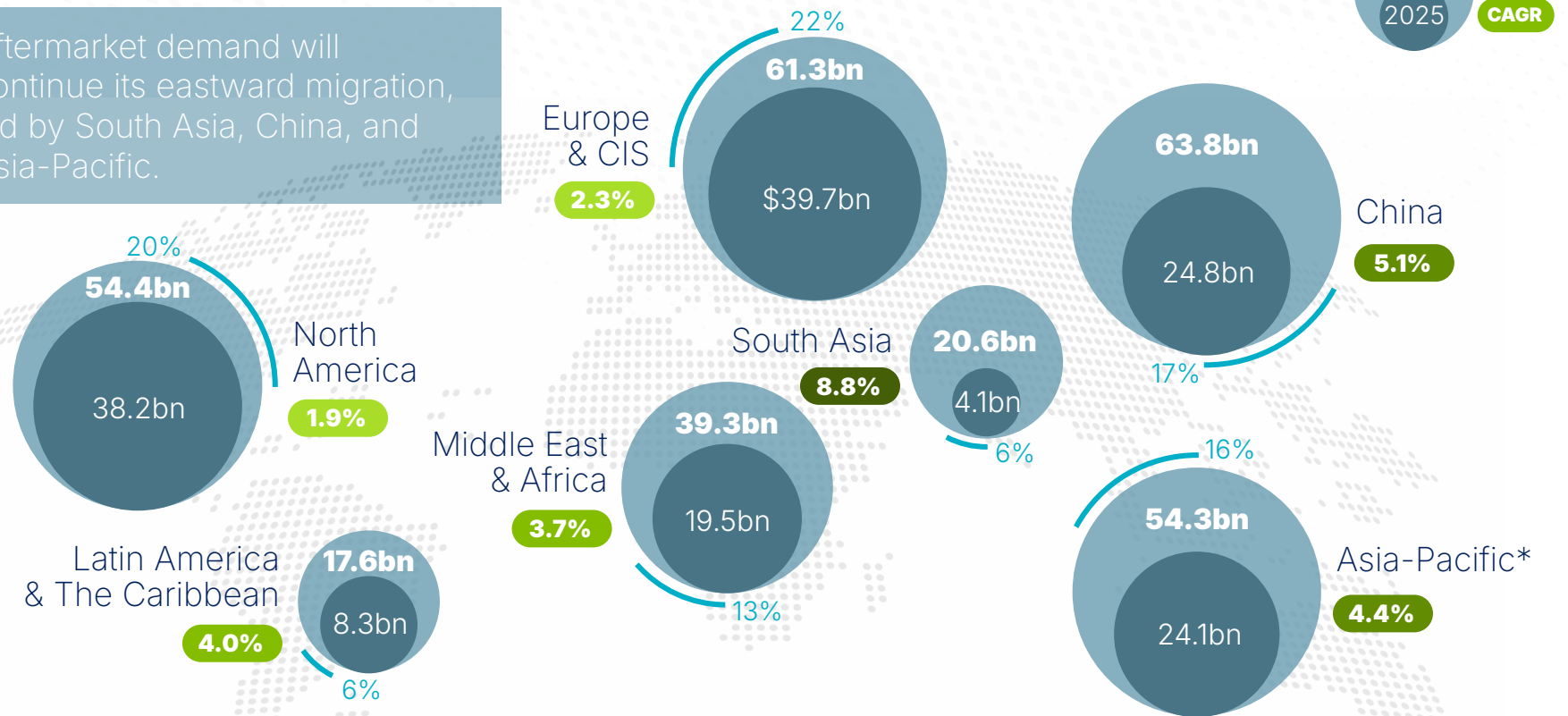


Aftermarket demand will continue its eastward migration, led by South Asia, China, and Asia-Pacific.



Regional growth perspectives & disparities 2025 | 2044

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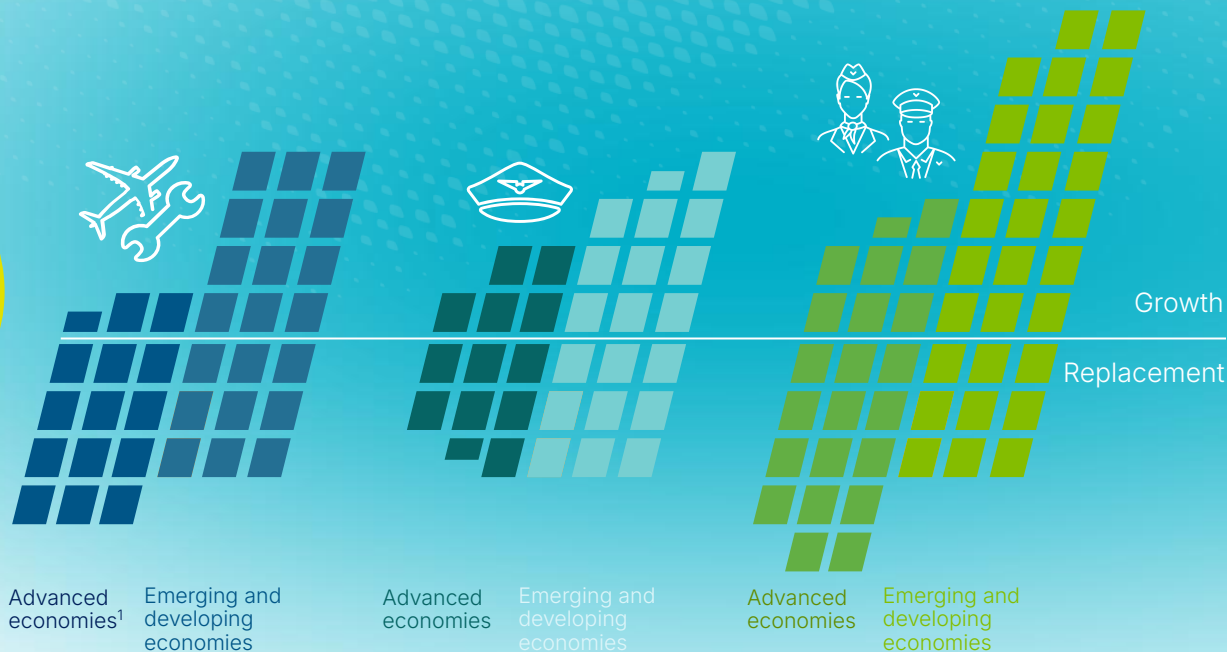
New
workforce to
train by 2044

2.35 m

705,000
new technicians

633,000
new pilots

1,010,000
new cabin crew



Future-proofing aviation, connecting data & stakeholders

2025 | 2044

Unlocking the full potential of a connected aviation ecosystem requires seamless data leverage and deep collaboration across all stakeholders. This digital integration is key to radically enhancing operational efficiency, mitigating network disruptions, elevating the passenger experience, and making significant strides in CO₂ emissions reduction.



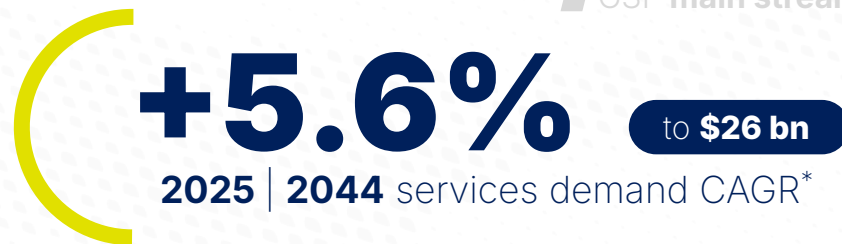
**Connected &
automated systems**

**AI & Machine
Learning**

**Real-time
monitoring**

**Data to
business**

Digital & Connectivity, a market to almost triple over the next 20 years



In-Flight
Connectivity



Ensure real-time connectivity for airline operations and passengers

Digital
Flight
Operations



Optimise network, fleet, crew and flight operations, reducing fuel and CO₂

Digital
Technical
Operations



Increase operational readiness and airworthiness

Digital
Ground
Operations



Improve turnaround management

Passenger
Experience



Enhance passengers services and ancillary revenues

Digital
Cybersecurity



Ensure compliance and security

Automation and digitalisation in **Ground operations**, the shift to more operational efficiency



2025 | 2044

Estimated 20-year market growth

to **\$74 bn** in 2044

+2.6%
CAGR*

Ground Support Equipment
modernisation, real time
digital monitoring and
skilled staff will potentially
**reduce between 20-25%
the cost per turnaround
in 2044**

Improve
turnaround time
robustness

Reduce
delays

Leverage
training
& upskilling

Mitigate
labour shortage

Reduce
damages

Operational efficiencies

\$ 83bn

In 2044

Airlines operational savings, high potential to unlock with Digital and Connectivity



Reduce Fuel Spending



Lower Material Costs



Boost Staff Efficiency



Decrease network disruption costs

Airlines are set to enhance the passenger experience and boost operational efficiency, leading to fewer network disruptions and lower CO₂ emissions.



Takeaways

By 2044 ,
The aftermarket ecosystem is expected to be **more digital, more connected, more efficient.**

Services market forecast

\$ 311bn estimated global market value with a **3.6% CAGR***

Digital & connectivity market

\$ 26bn market forecast to **almost triple** over the period

Operational efficiency gains

\$ 83bn potential estimated savings thanks to digital and connectivity services

New workforce needed

2.35m of 20-year cumulated and skilled staff to on-board the industry

Commercial Aircraft

Airbus GSF 2025 | 2044

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