

## Global Services Forecast (GSF) 2025-2044

### Context

- The GSF forecasts the services demand in commercial aviation over the next 20 years for aircraft above 100 seats plus freighters over 10 tons.
- Historically displayed in 3 market streams ('Maintain'; 'Train & Operate' and 'Enhance'), the GSF 2025 breaks down services demand in 5 clusters to better reflect the aftermarket landscape;
  - 'On-wing maintenance' focuses on light inspections to heavy checks;
  - 'Off-wing maintenance' is about restoring components and engines in shop to full operational capability;
  - 'Digital & Connectivity' includes digital services for flight, technical and ground operations, cybersecurity, in-flight connectivity and passenger experience enhancement.
  - 'Modification & Upgrades' encompasses upgrades for systems and cabins, lease transitions and the conversion of passenger-to-freighter aircraft.
  - 'Training' with all markets related to the training of pilots, technicians and cabin crew, from initial to the yearly required.
- Two additional markets have been explored and come on top of this forecast: 'Ground Operations' with all services demand related to turnarounds management; and 'Maintenance Operations Support' including all services to provide inventory on time and on quality and Engineering support to ensure continued airworthiness & aircraft reliability.
- This forecast includes the required number of pilots, technicians and cabin crews to operate these aircraft.
- It breaks down the market by type of service, aircraft family and world region.
- The GSF combines drivers specific to estimate aftermarket demand (flight cycles, in-service fleet, aircraft age, fleet renewal and modernisation...) with market measures connected to the Airbus Global Market Forecast (GMF).

### Main highlights

- The services market supports more than 28,000 aircraft in 2025 and is forecasted to reach \$159bn.
- Over the next 20 years, commercial aviation and services will evolve towards more digital and connected operations to improve the overall efficiency whilst facing traffic growth and operational complexity.
- Our traditional market forecast is expected to reach a services demand worth \$311bn in 2044 (+3.6% CAGR in the next 20-year period).

- There is a cumulative need for 705,000 new maintenance technicians, 633,000 new pilots and 1,010,000 new cabin crew, totalling more than 2.35 million additional skilled people calling for the industry to intensify efforts in attracting and training new talents.
- In 2044, the 'Off-wing maintenance' stream is doubling to reach \$218bn (CAGR +3.8% over the period 2025 to 2044), the 'On-wing maintenance' stream projects to reach \$34bn (CAGR +2.6%), the 'Digital & Connectivity' stream will see the highest growth (CAGR +5.6%) to \$26bn in 2044, the 'Modifications & Upgrades' is forecasted to grow to \$17bn (CAGR +1.9%), and the 'Training' stream is to reach in demand \$17bn in 2044 (CAGR +3%)
- 'Ground Operations' services demand will reach \$74bn in 2044 with a 2.6% 20-yr CAGR, and the 'Maintenance Operations Support' will climb to \$100bn in 2044 (CAGR +4.1%)
- The opportunities to improve operational efficiency are significant, with an estimated potential cost saving for airlines of \$83 billion in 2044.
- China will become the largest services market by 2044. A fast growing demand is also foreseen in South Asia which include India, as well as China and the Asia-Pacific region.