



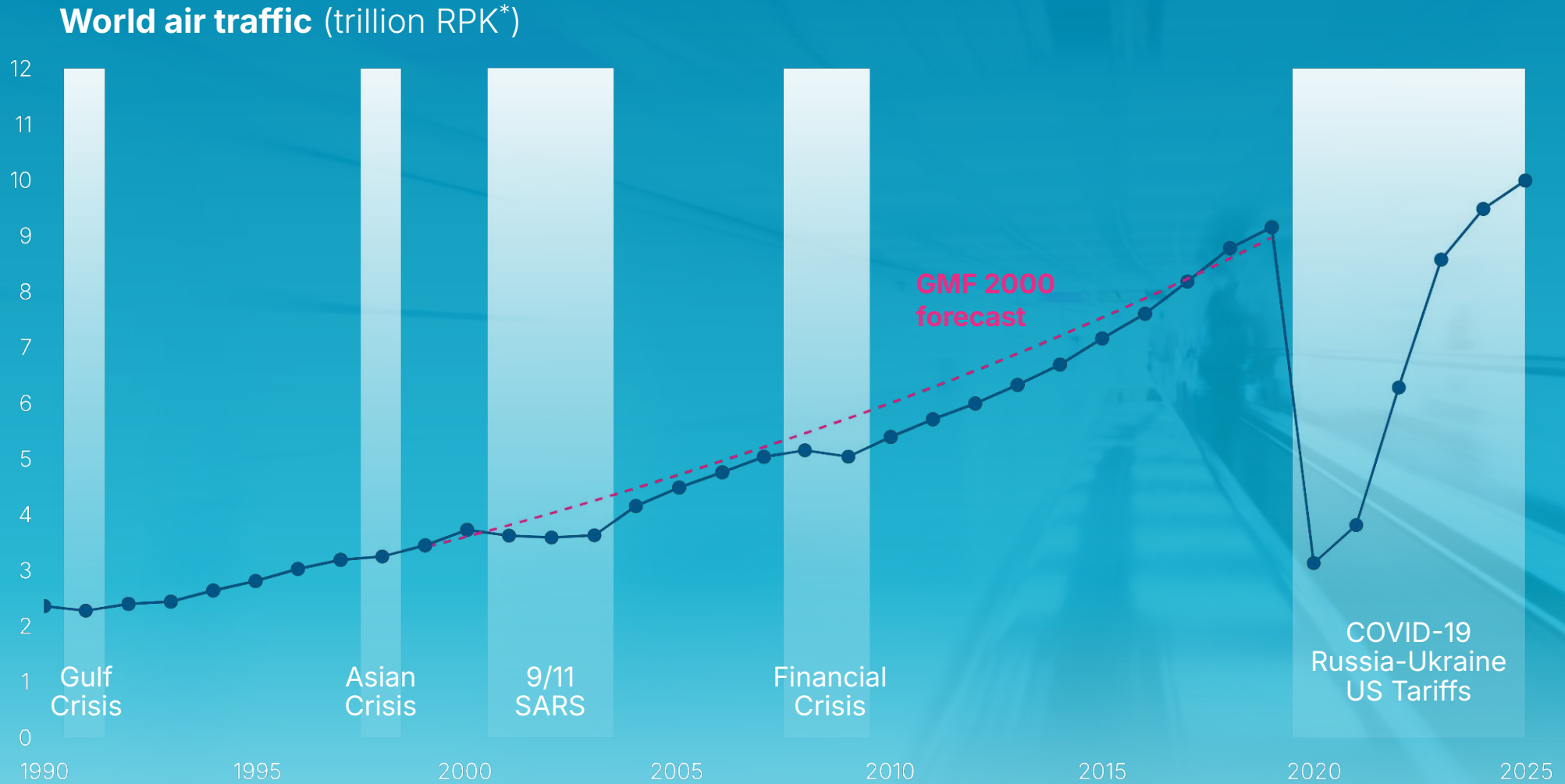
Global Market Forecast 2026

June 2026

Joost van der Heijden - SVP Marketing Airbus Commercial
Antonio da Costa - VP Market Analysis and Forecast

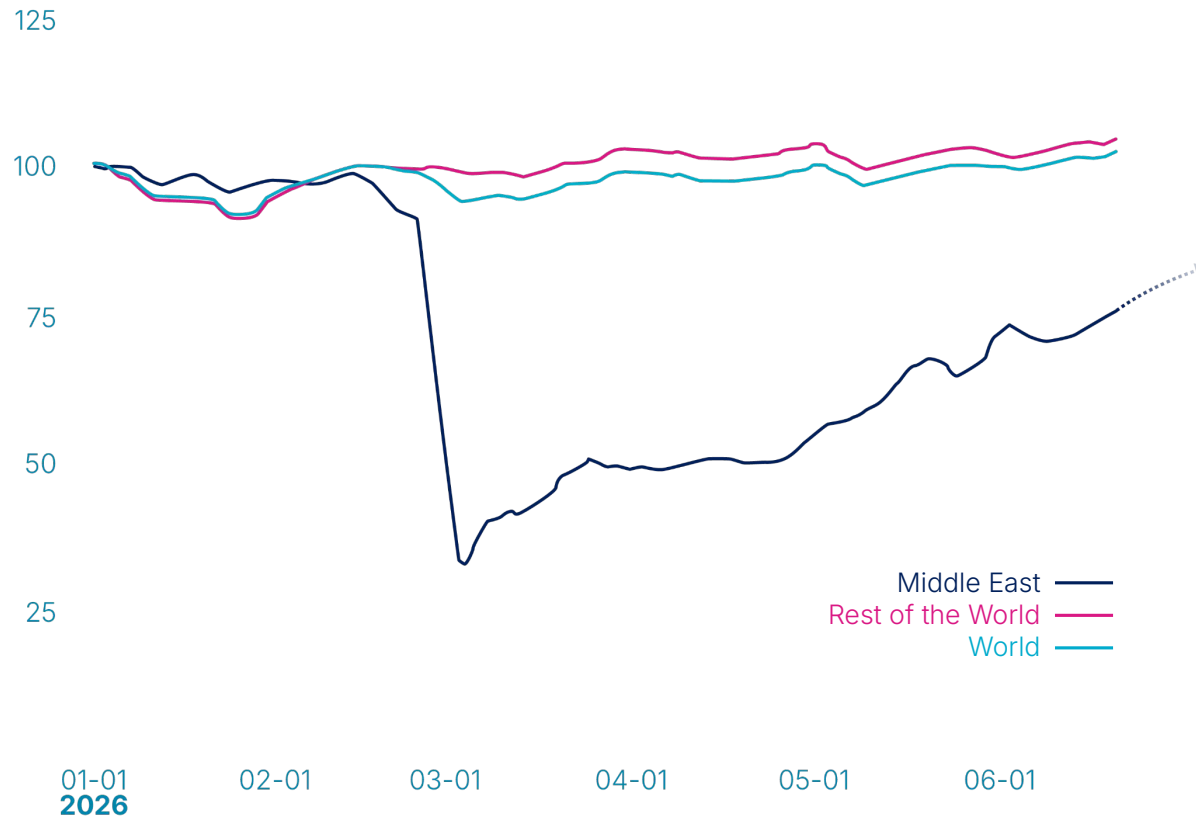
AIRBUS

Air transport - A resilient industry

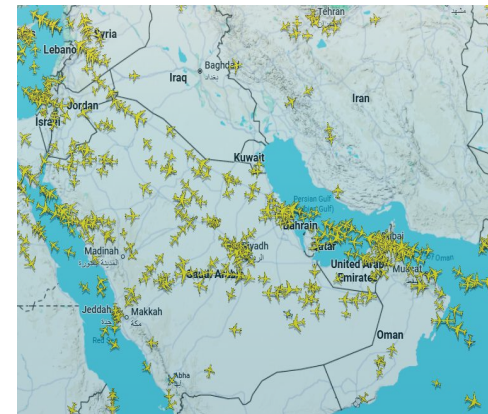


A strong Middle East recovery is underway

Passenger aircraft movement per day
(base 100 January 1st 2026)



(2026/03/01 at 2PM CET)



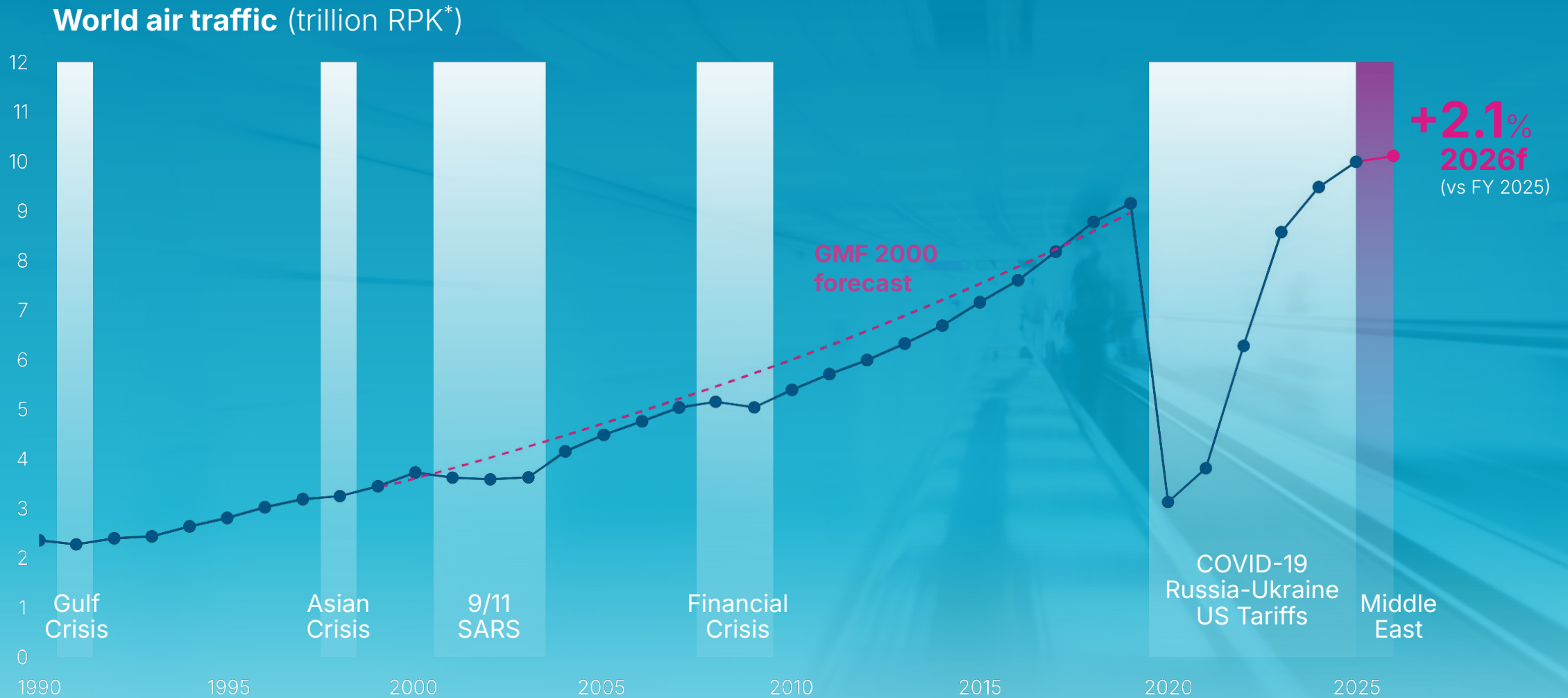
(2026/06/30 at 9AM CET)

Travel demand remains
resilient

Middle East network
and flights recovery

80% - 90%
Early July 2026 update

Despite recent headwinds, traffic expected to grow in 2026



Aviation benefits society

Family ties

Over 300 m migrants



Education

Over 6 m international students



Research and science

>30 scientific congresses taking place every day



Business and trade

3.9% GDP contribution



Tourism

58% of international tourist travel by air



Lifeline to remote communities

Hundreds of remote communities rely entirely on aviation

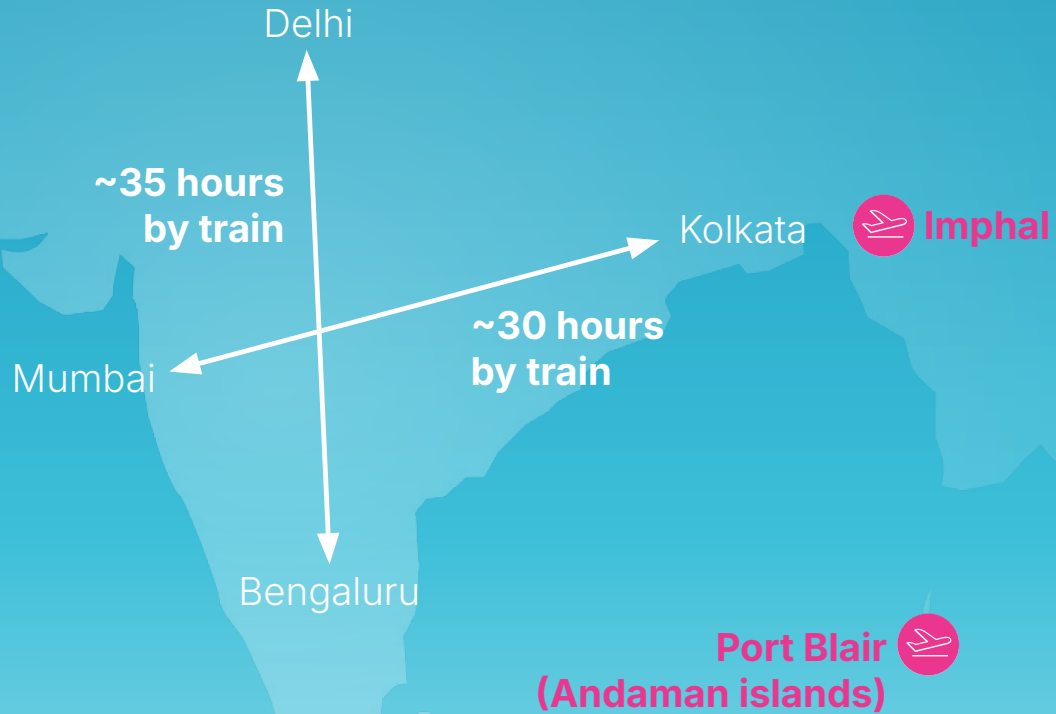


Providing a reliable, affordable and viable travel alternative

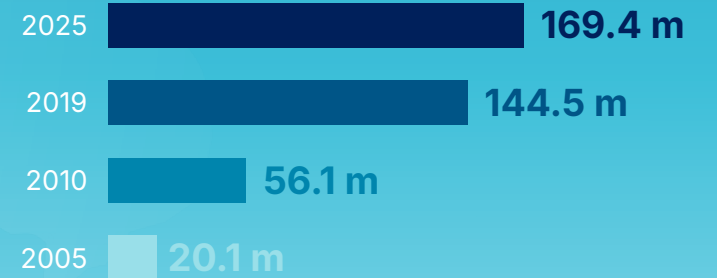


Aviation providing fast connectivity in India

Kullu Bhuntar 

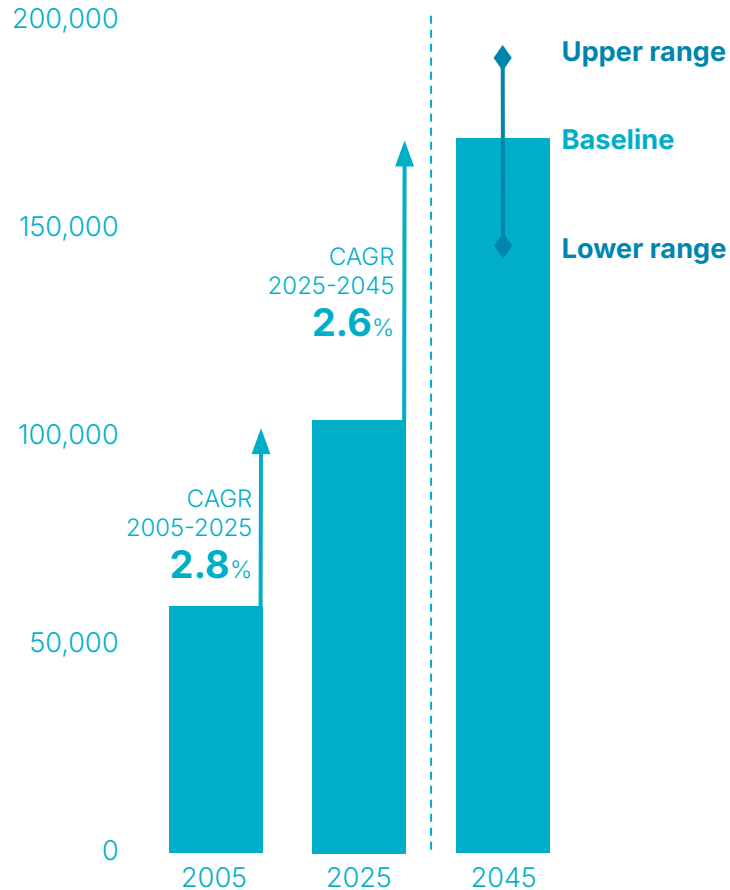


India Domestic Pax

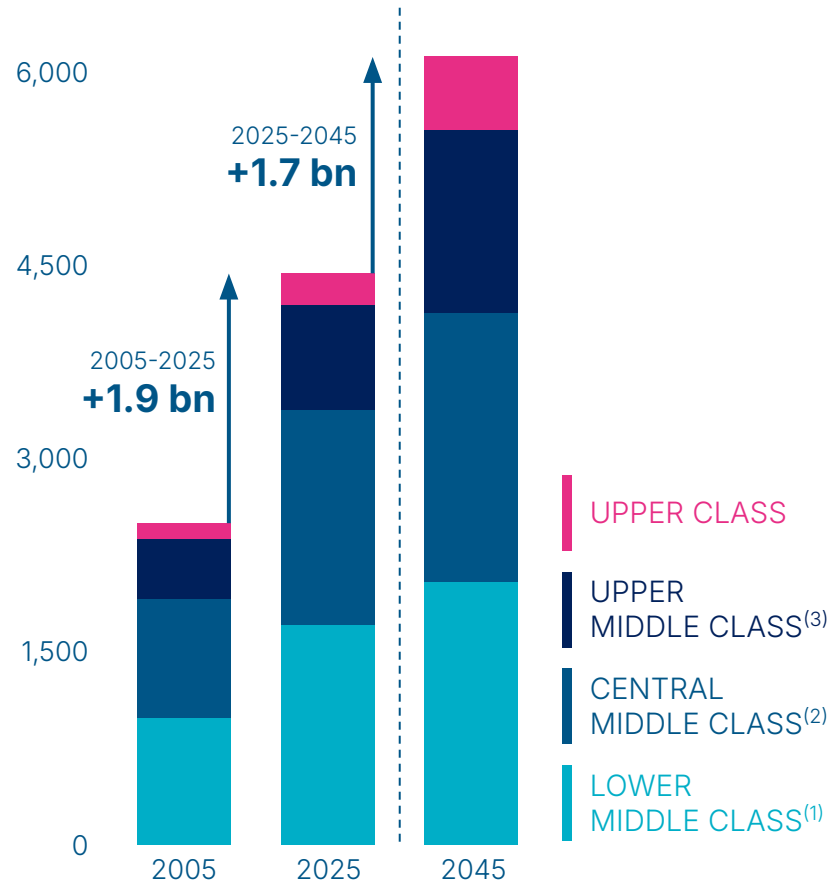


The main drivers for air transport

World real GDP (billion US\$)



Upper and Middle Class population (million people)



World GDP and Middle Class will continue to expand

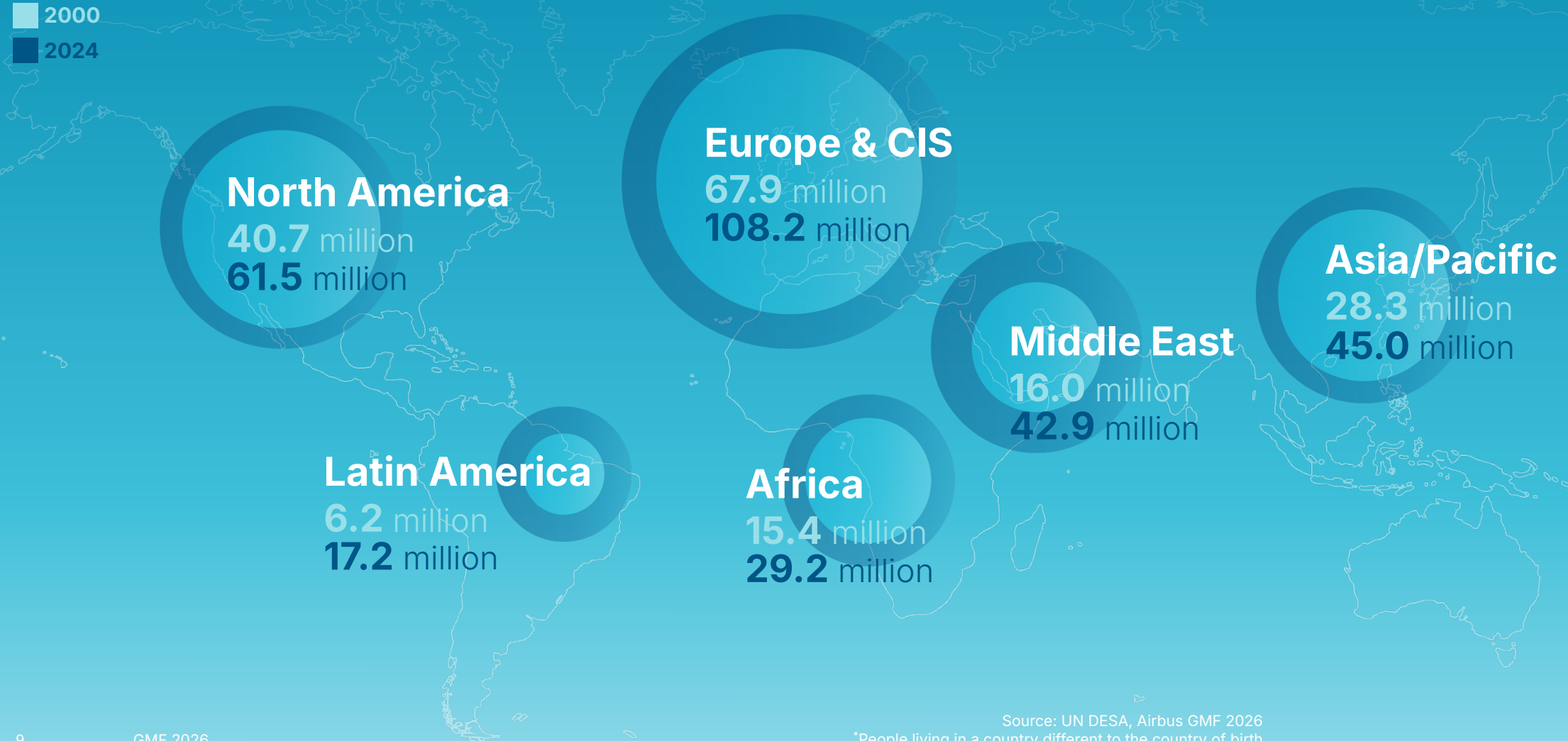
6 bn

people representing the Middle/Upper Class by 2045

Source: Oxford Economics, S&P Global, Airbus GMF 2026
⁽¹⁾Households with yearly income between \$20,000 and \$35,000 at PPP in constant 2019 prices
⁽²⁾Households with yearly income between \$35,000 and \$70,000 at PPP in constant 2019 prices
⁽³⁾Households with yearly income between \$70,000 and \$150,000 at PPP in constant 2019 prices

Migrations and diasporas are stimulating VFR traffic

International migrants* by region



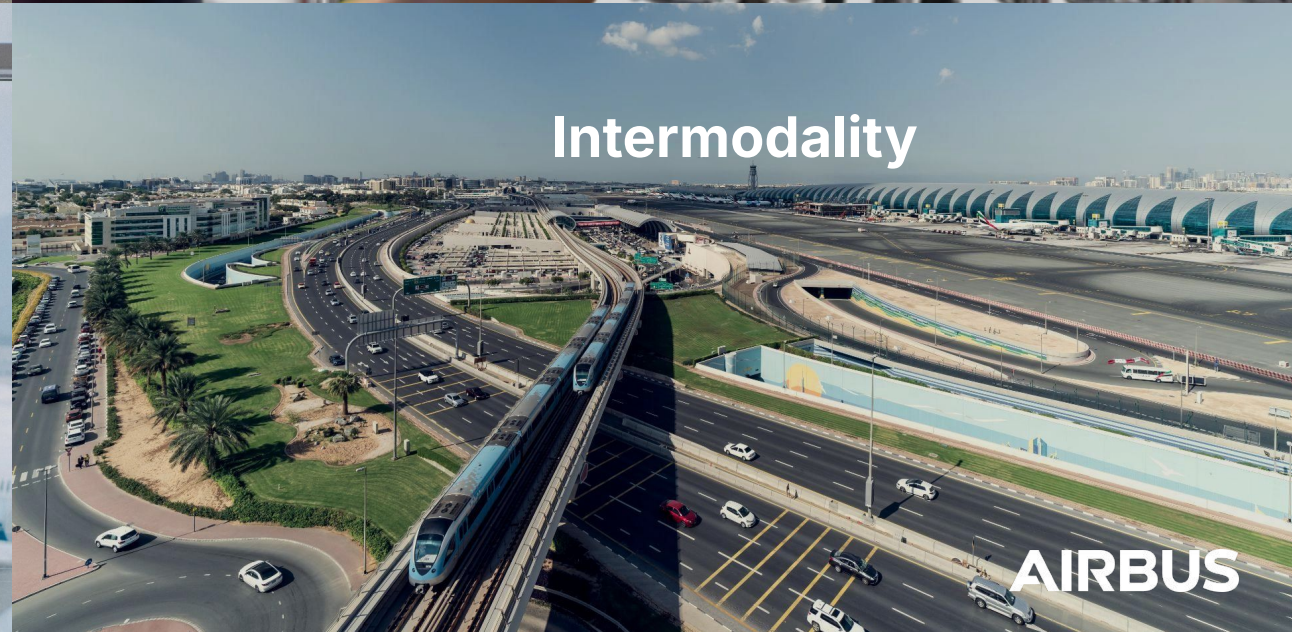
What are the traffic drivers beyond GDP and demographics?



Energy, airline productivity and air fares



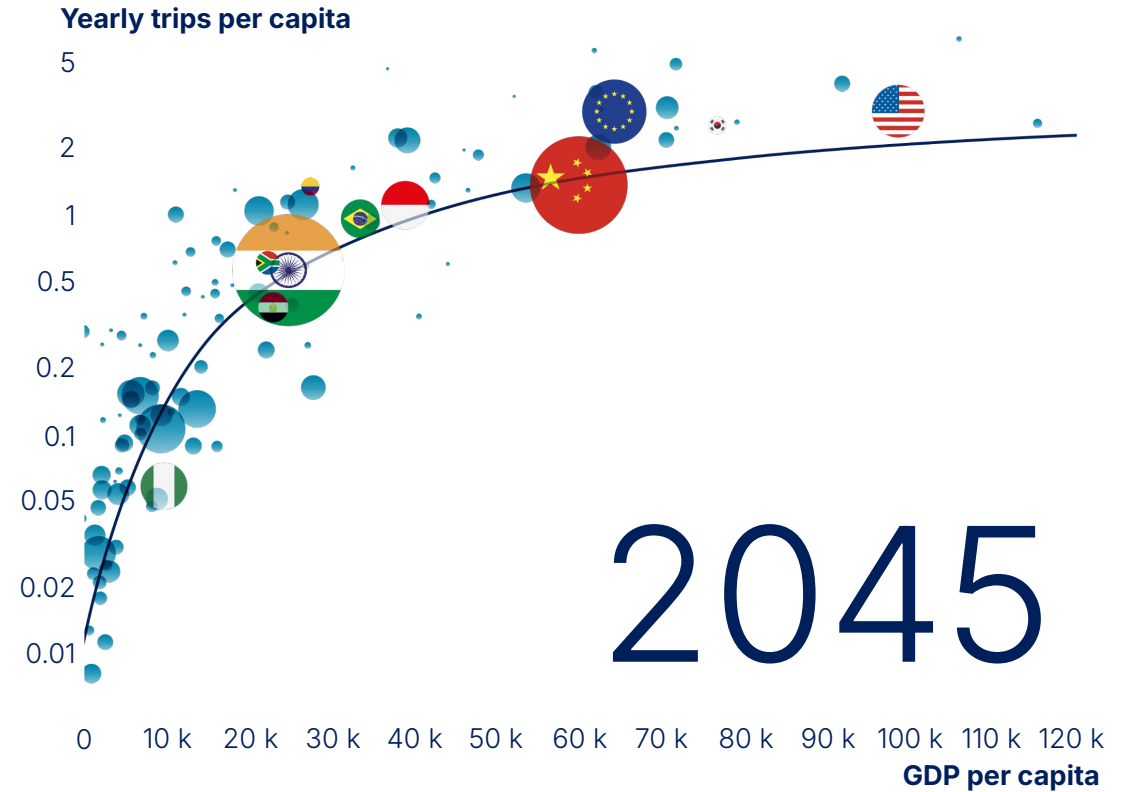
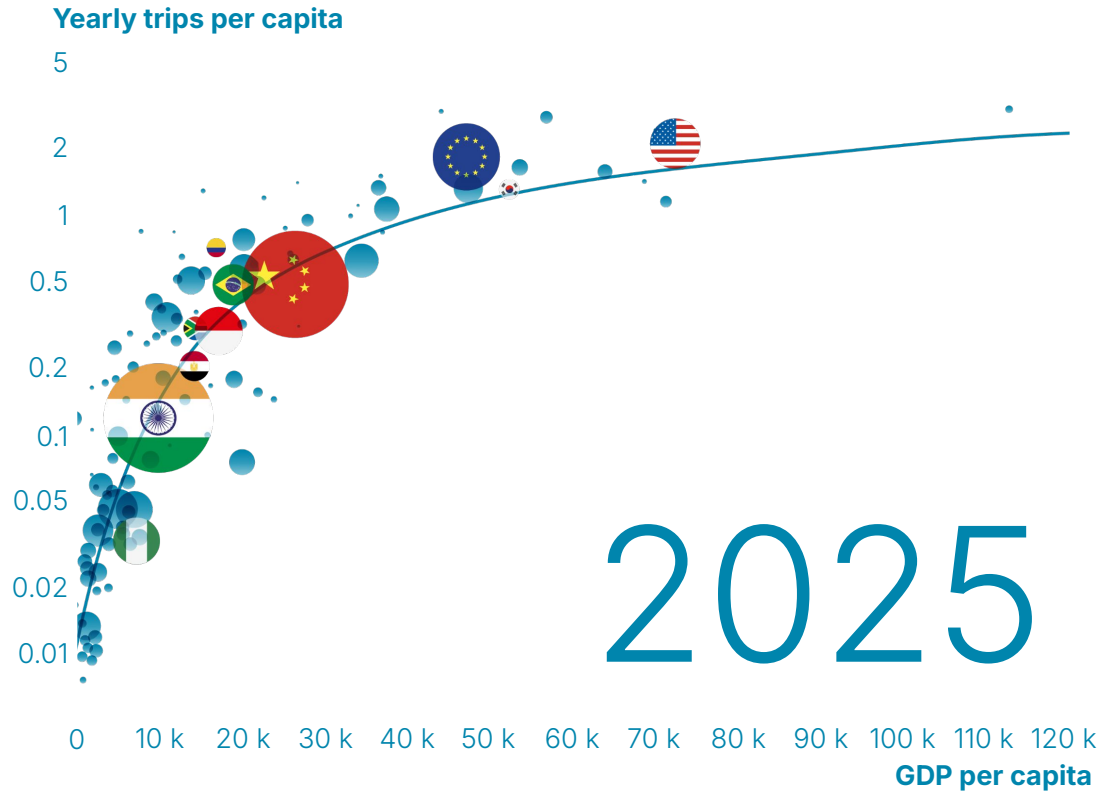
Change in traveler behaviors



Intermodality

AIRBUS

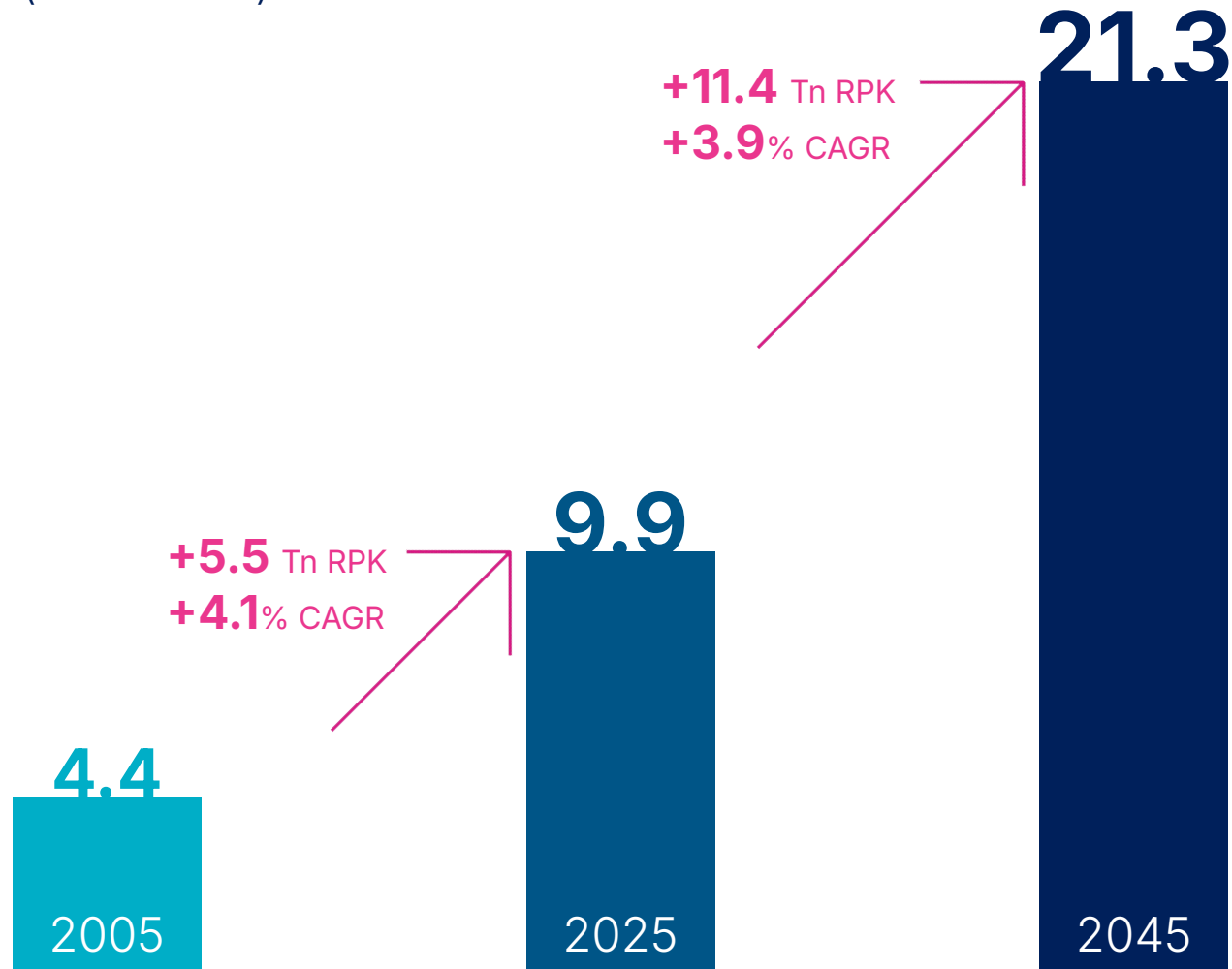
People need and want to travel!



											
2025	0.03	0.2	0.1	0.3	0.5	0.3	0.7	0.5	1.3	1.9	2.1
2045	0.06	0.4	0.6	0.6	1.0	1.1	1.3	1.4	2.5	2.9	2.9

Passenger traffic forecast

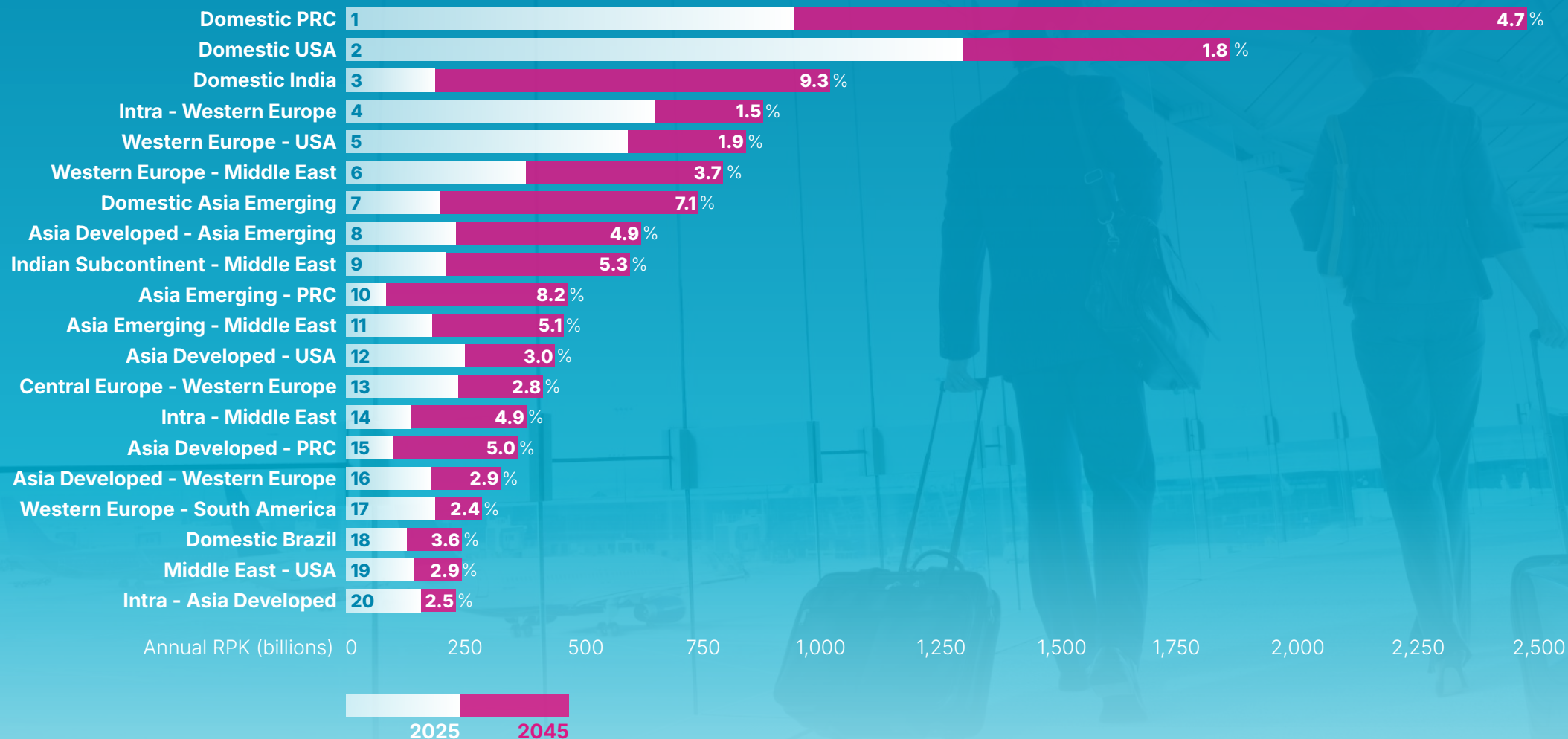
World air traffic (trillion RPK*)



Global passenger traffic will **more than double** in the next 20 years

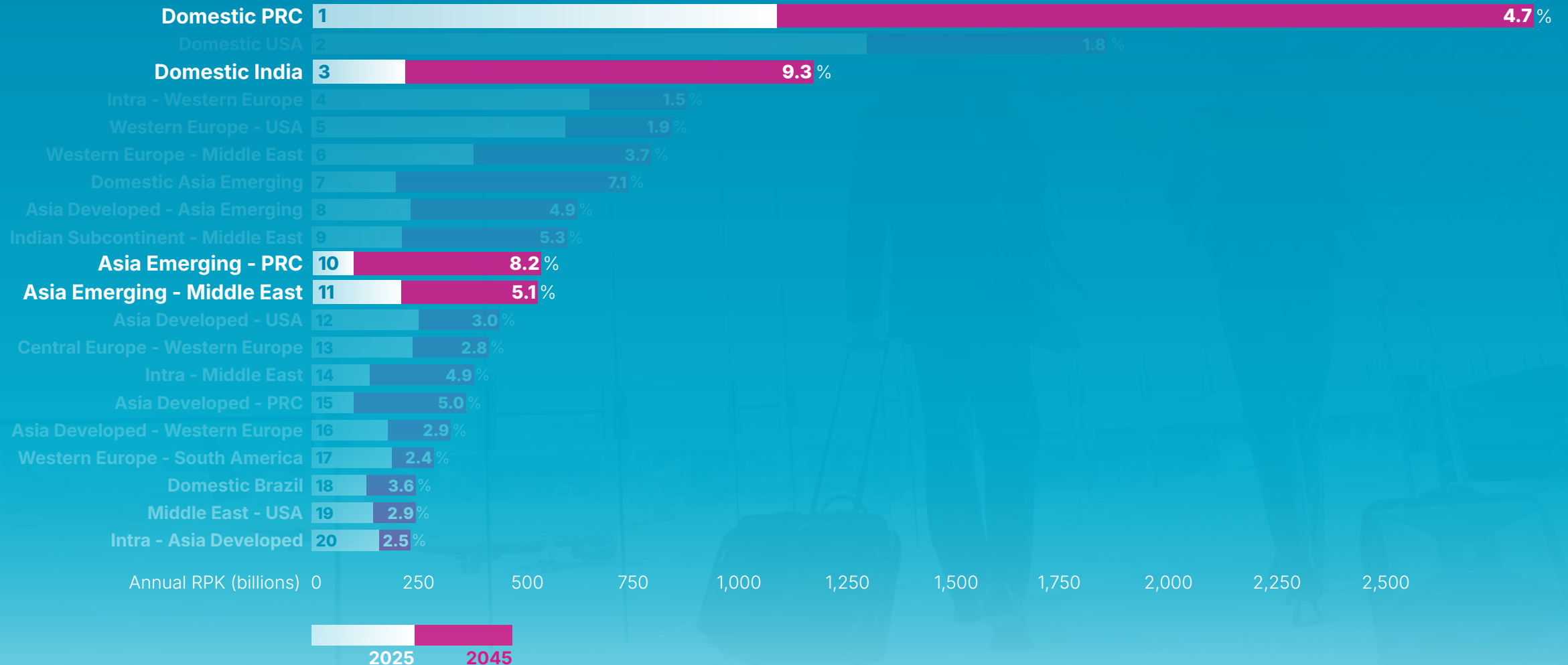
Growth driven by Asia

Top 20 traffic flows in 2045



Growth driven by Asia

Top 20 traffic flows in 2045

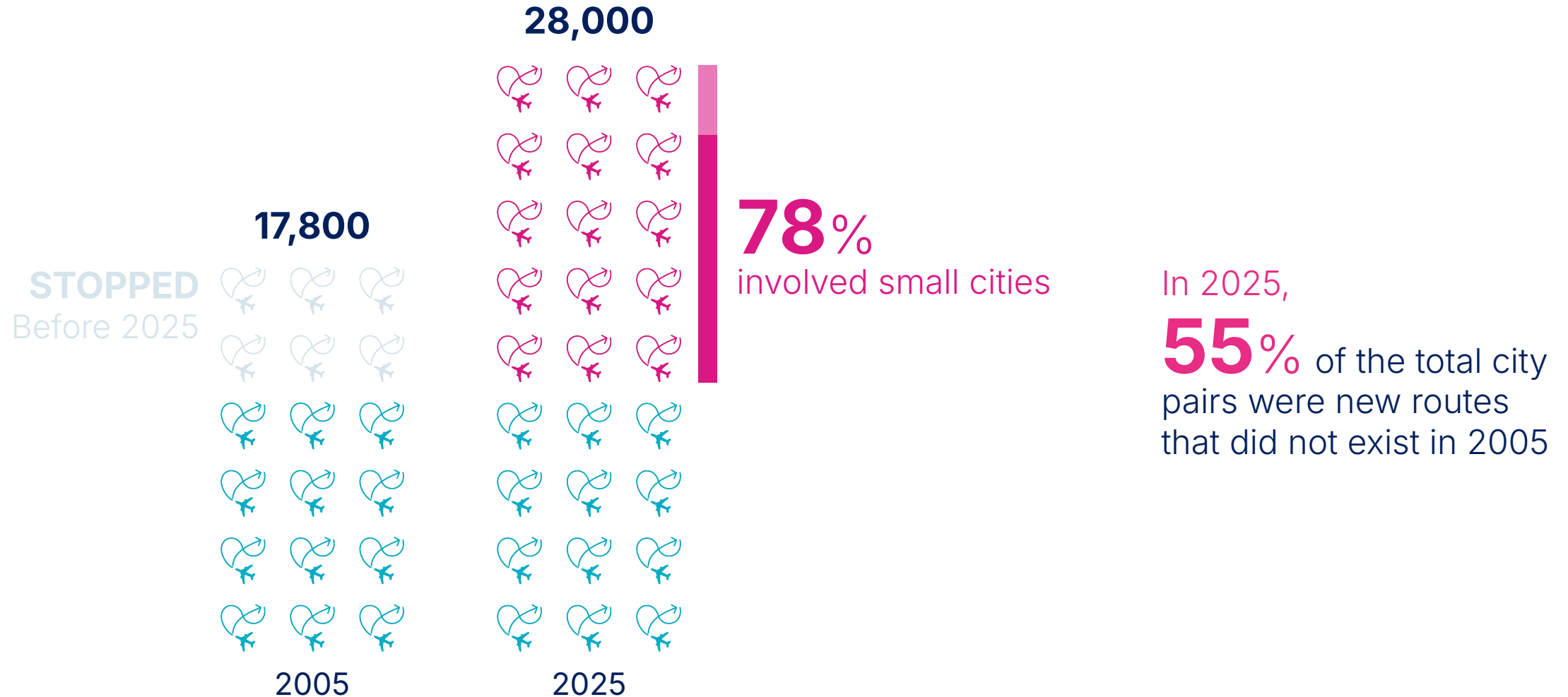


Urbanisation is shifting to smaller cities

	2025	2045	
Megacities (>10 m inhabitants)	33	37	+ 4
Large cities (>5 m inhabitants)	49	67	+ 18
Medium & Small cities (>250 k inhabitants)	2,251	2,857	+ 606

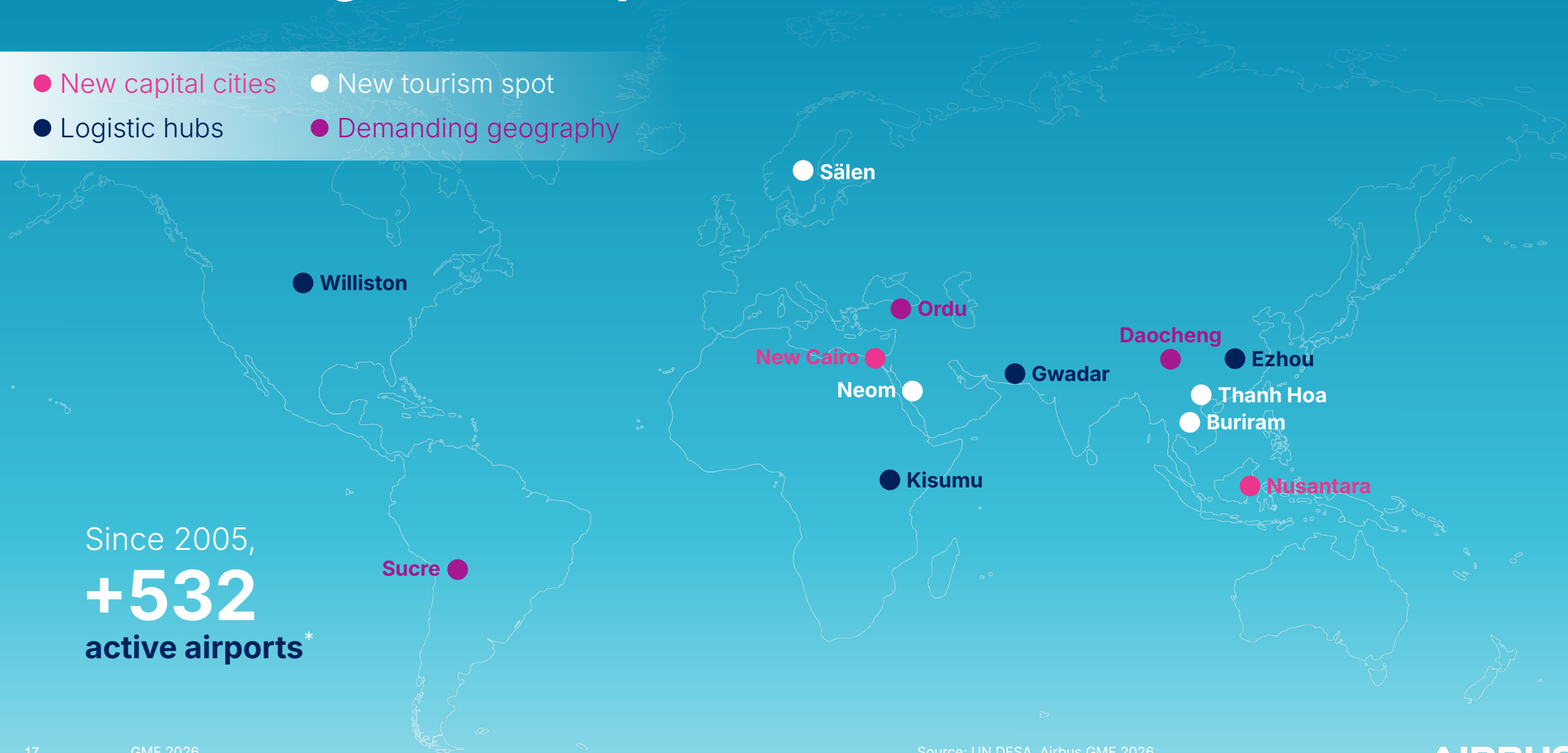
Bypassing megahubs to connect secondary cities

Number of city pairs



Small cities get new airports based on various drivers

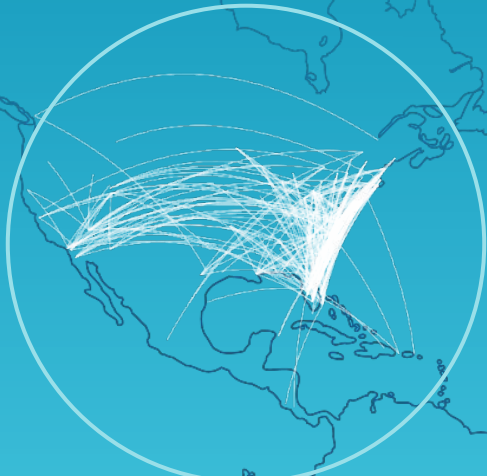
- New capital cities
- New tourism spot
- Logistic hubs
- Demanding geography



Since 2005,
+532
active airports*

A220 makes new thin routes viable

More than **400 new routes** created thanks to the **A220** in North America, Europe and Africa



A220 capable of US transcon, Europe-Middle East/Central Asia, Trans-Asia operations

Proving its versatility operating from regional to long range missions

Strong potential for new routes in Asia-Pacific

A220: The network builder

More than **2,200** unserved routes suited for the **A220**

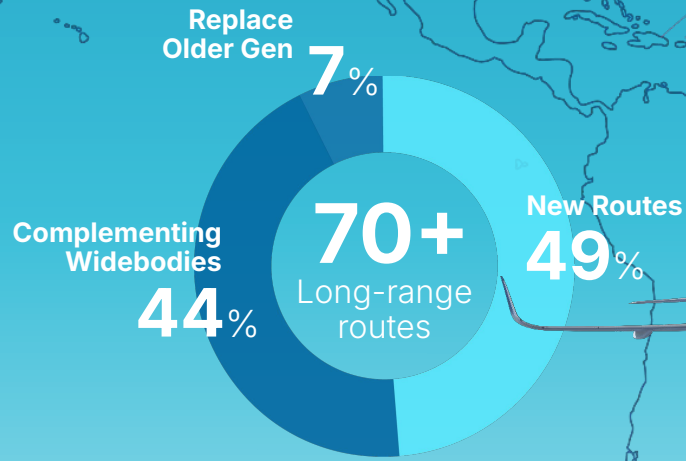


A321XLR: Venturing into new opportunities

In service ———
Announced ———

 **10** Current Operators

 **40+** Deliveries



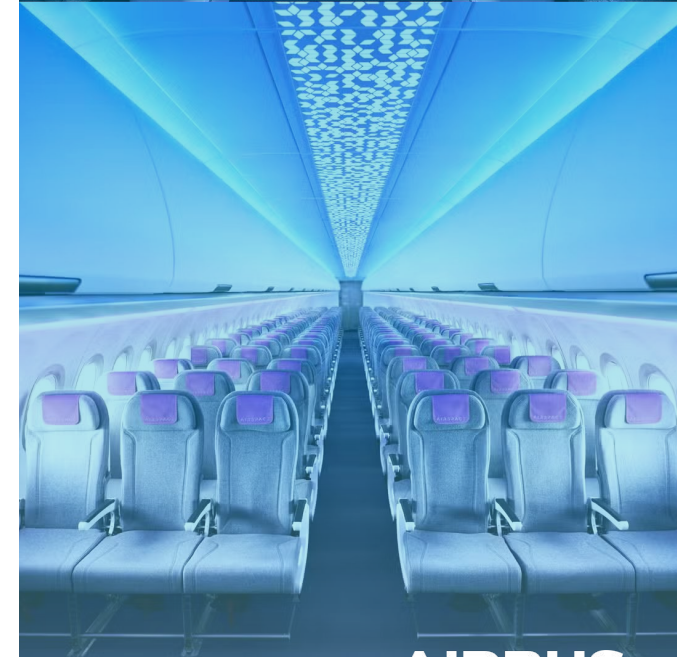
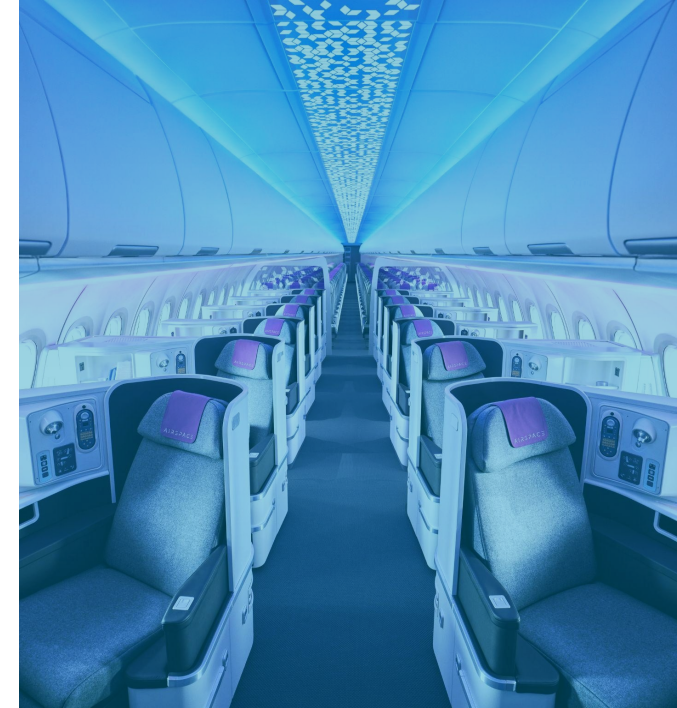
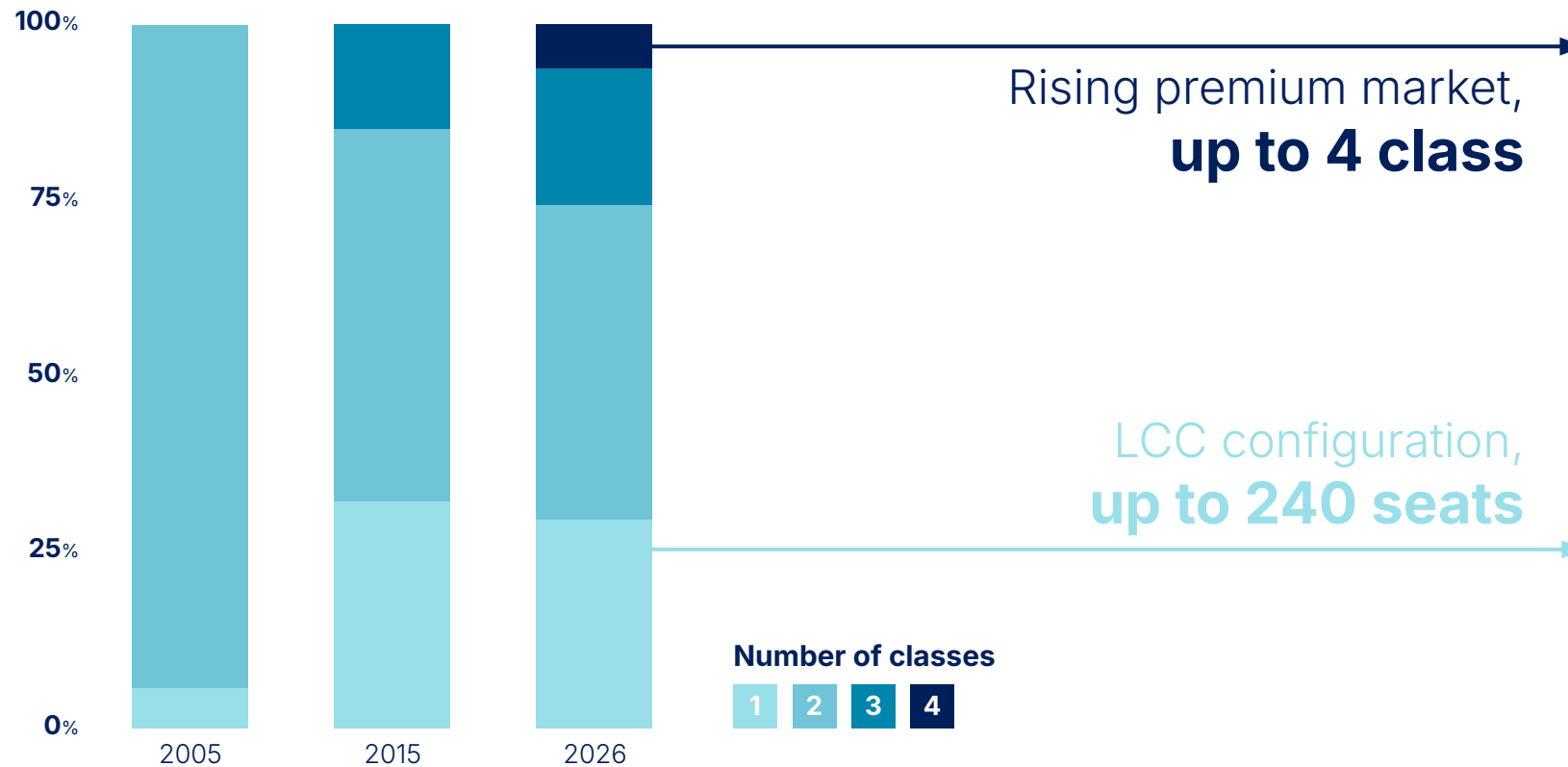
A321XLR: Over 2,200 potential routes



New route —
Existing routes —

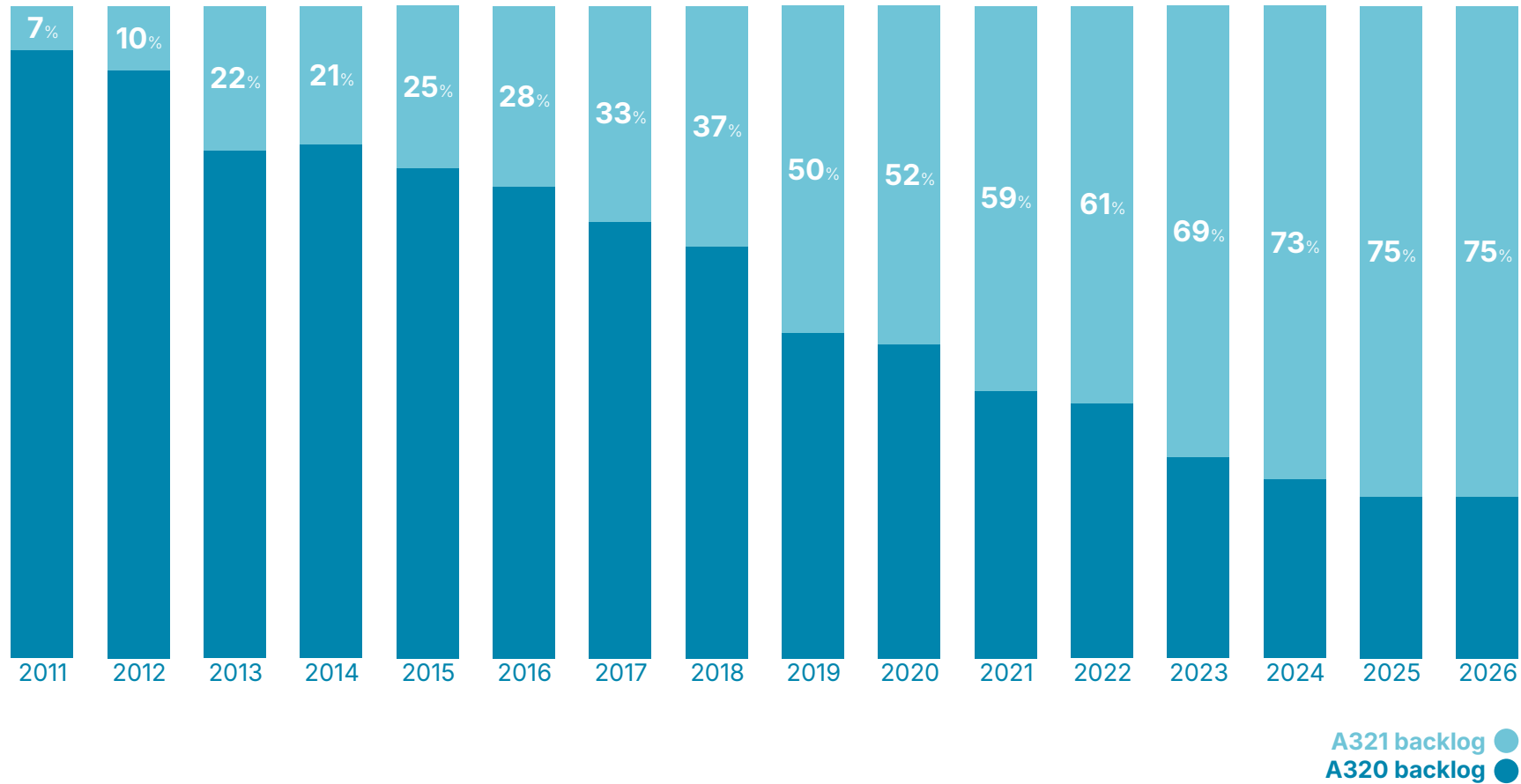
A321 provides both lowest unit cost and largest floor space

A321 cabin configuration choices at delivery



A321 rapid growth to a successful backlog

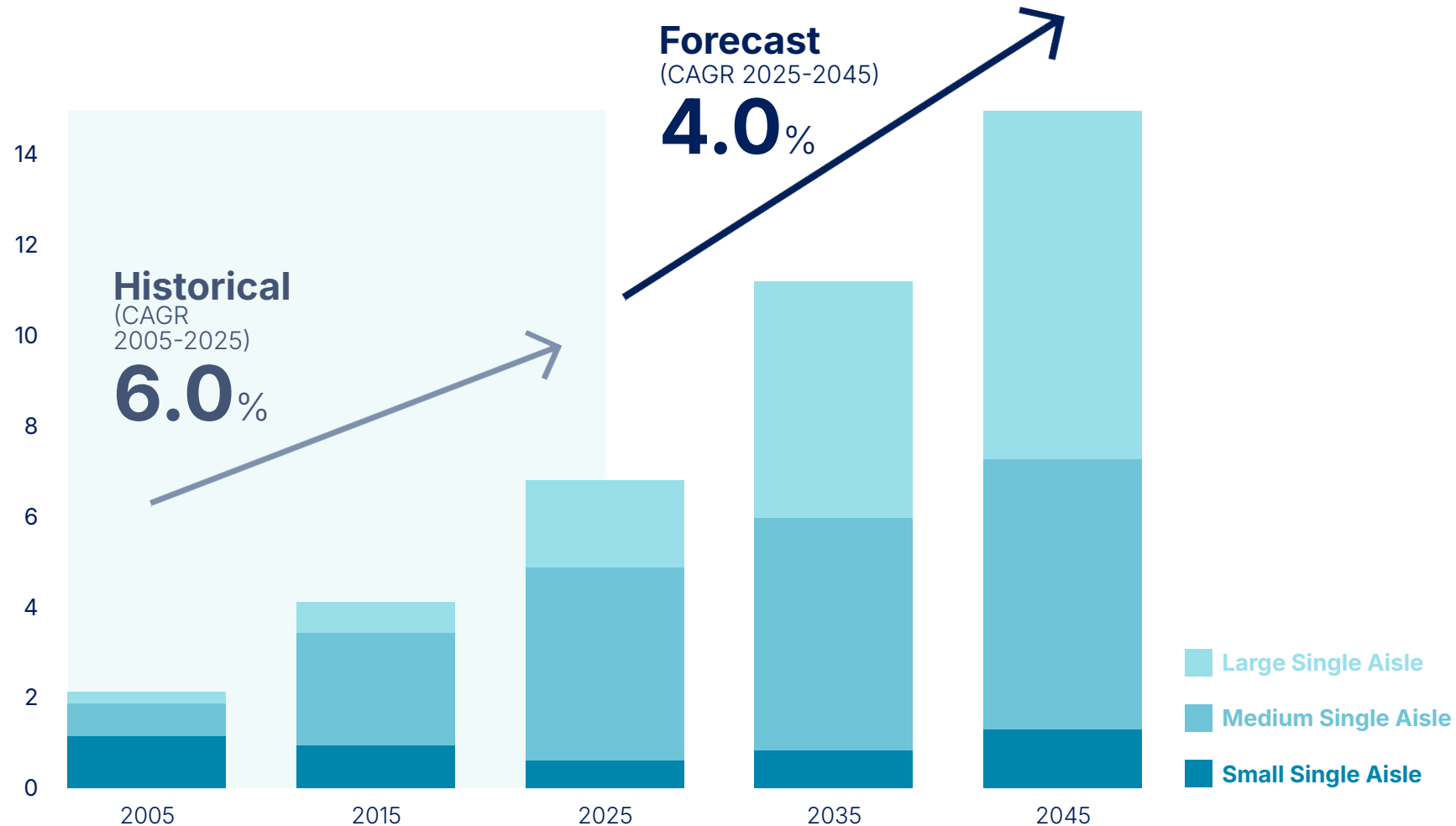
Large Single Aisle growing demand



A321neo
momentum from
7% to 75%
of the family's backlog
over 15 years

Large Single Aisles driving segment growth

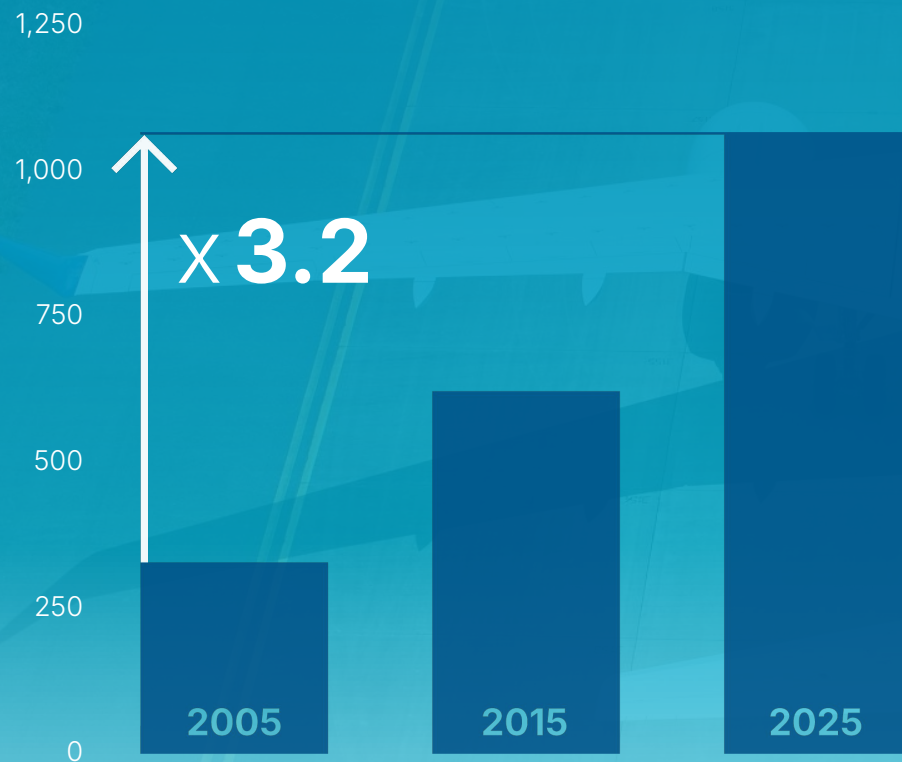
Evolution of total world ASK per size (trillion)



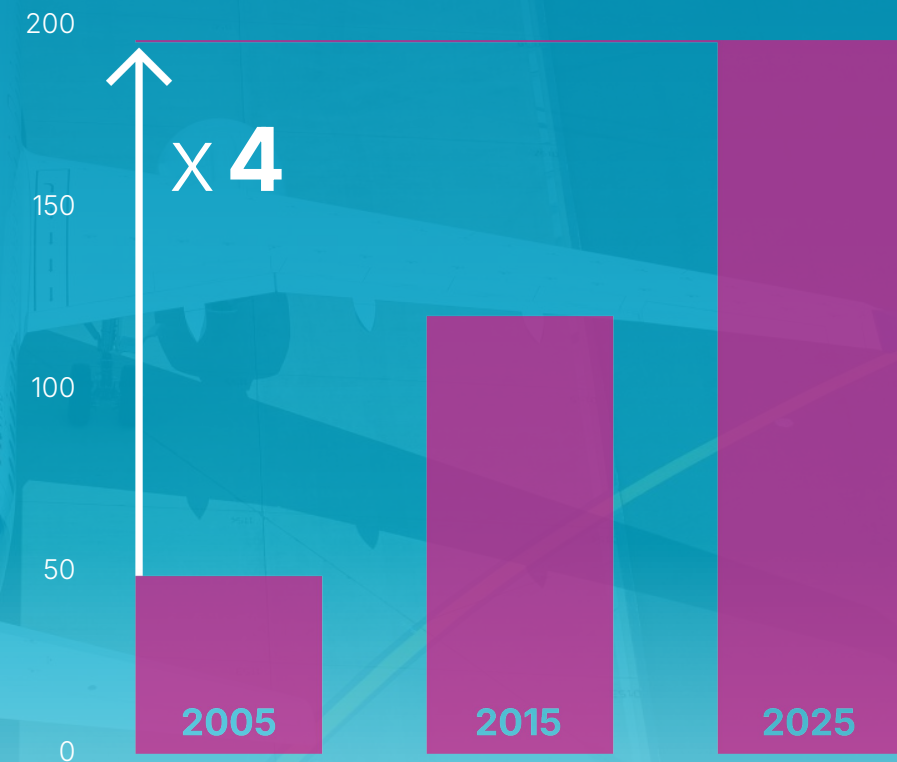
Single Aisle capacity set to more than **double** over the next 20 years

Airlines are flying longer distances

Single Aisle number of flights longer than 5h
(thousand)

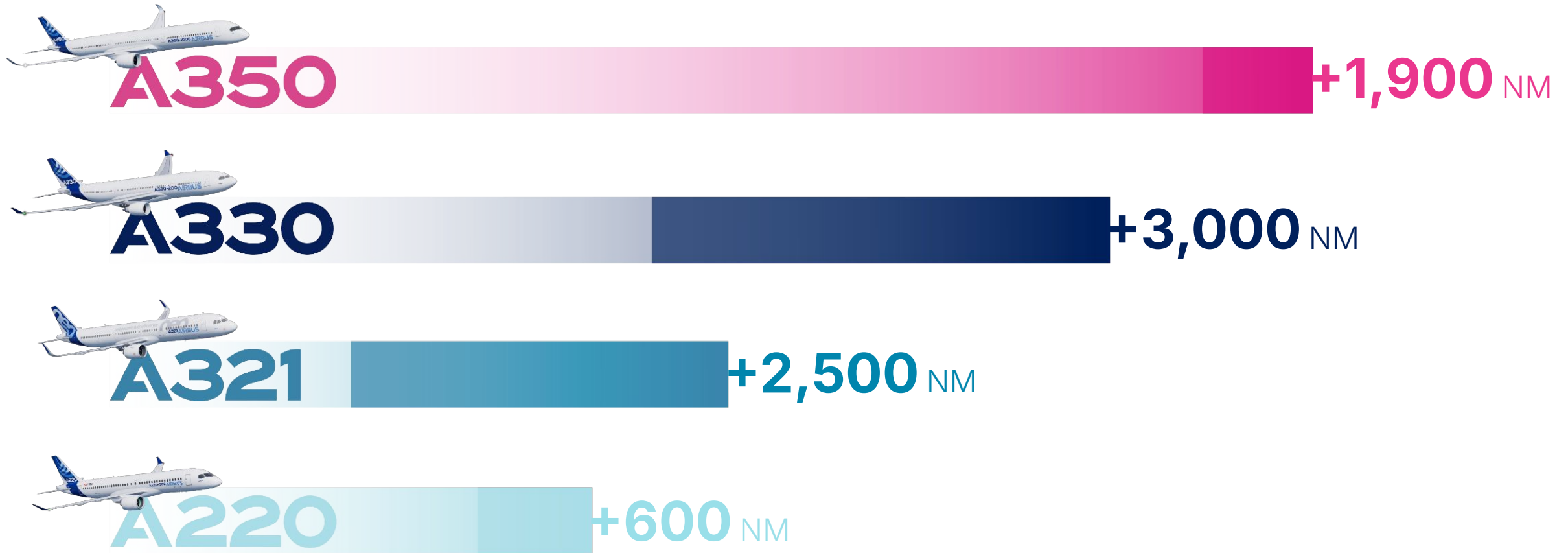


Widebodies number of flights longer than 13h
(thousand)



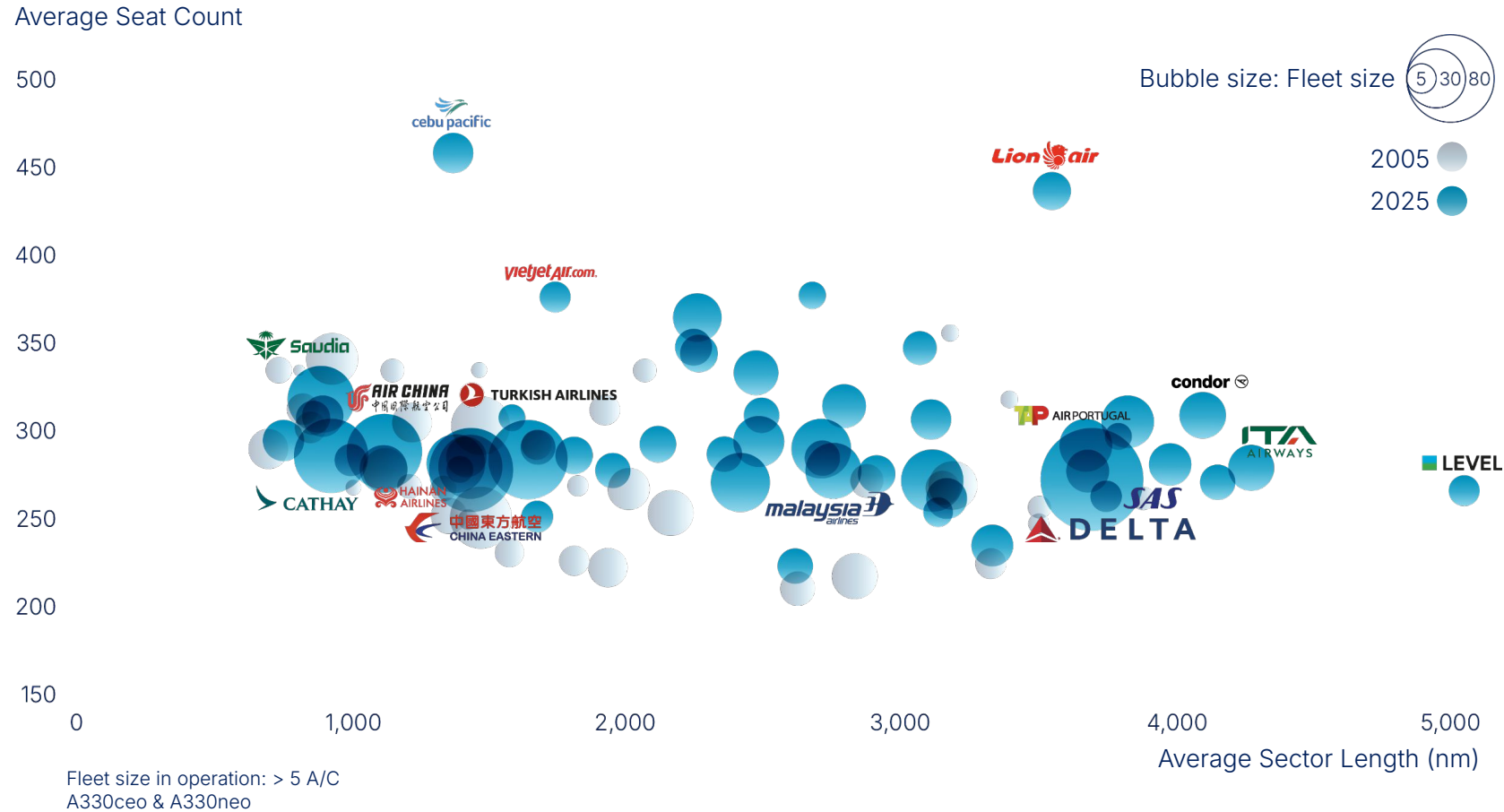
Unlocking new horizons through range evolution

Range increase at programme level since Entry Into Service (EIS)



A330's unique versatility

Average sector length and seat count per A330 operator



From regional routes to long-haul missions, from high density layouts to premium cabins, the A330 delivers efficiency and passenger comfort as the true

Versatile Champion

Airline networks are spreading farther

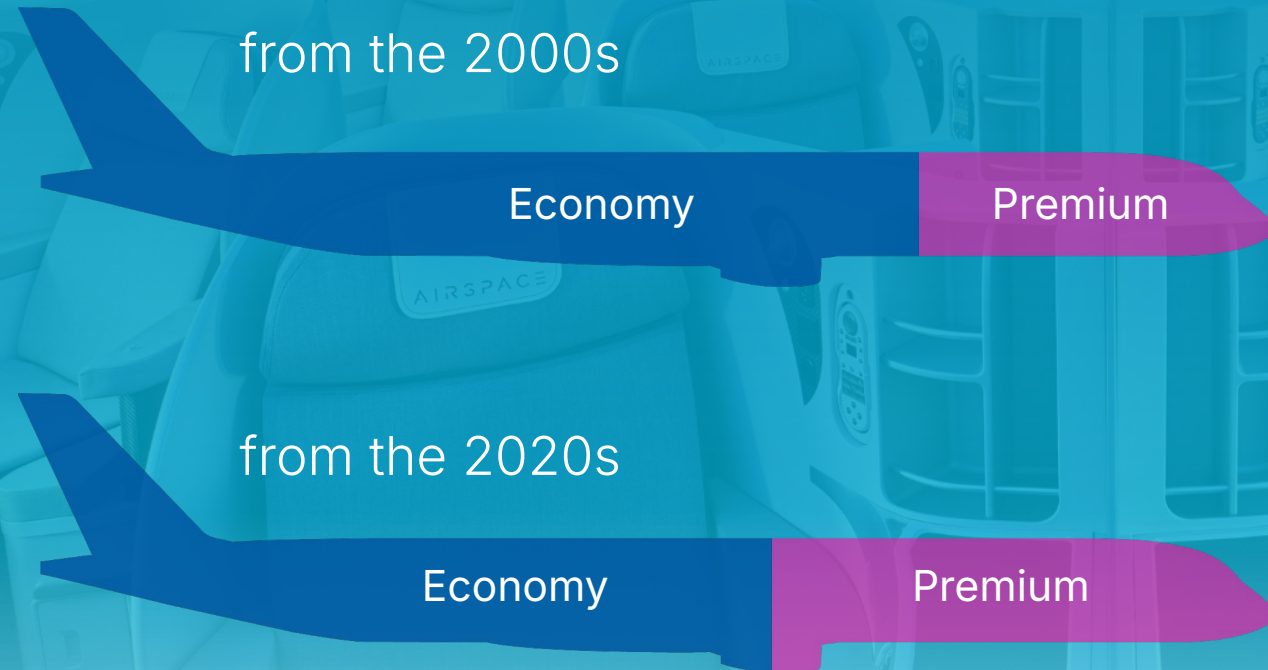


The A350 breaks the barriers of distance



Premium travel demand and segmentation expanding

Typical widebody cabin arrangement



Capacity⁽¹⁾ growth by Class (2005-2025)

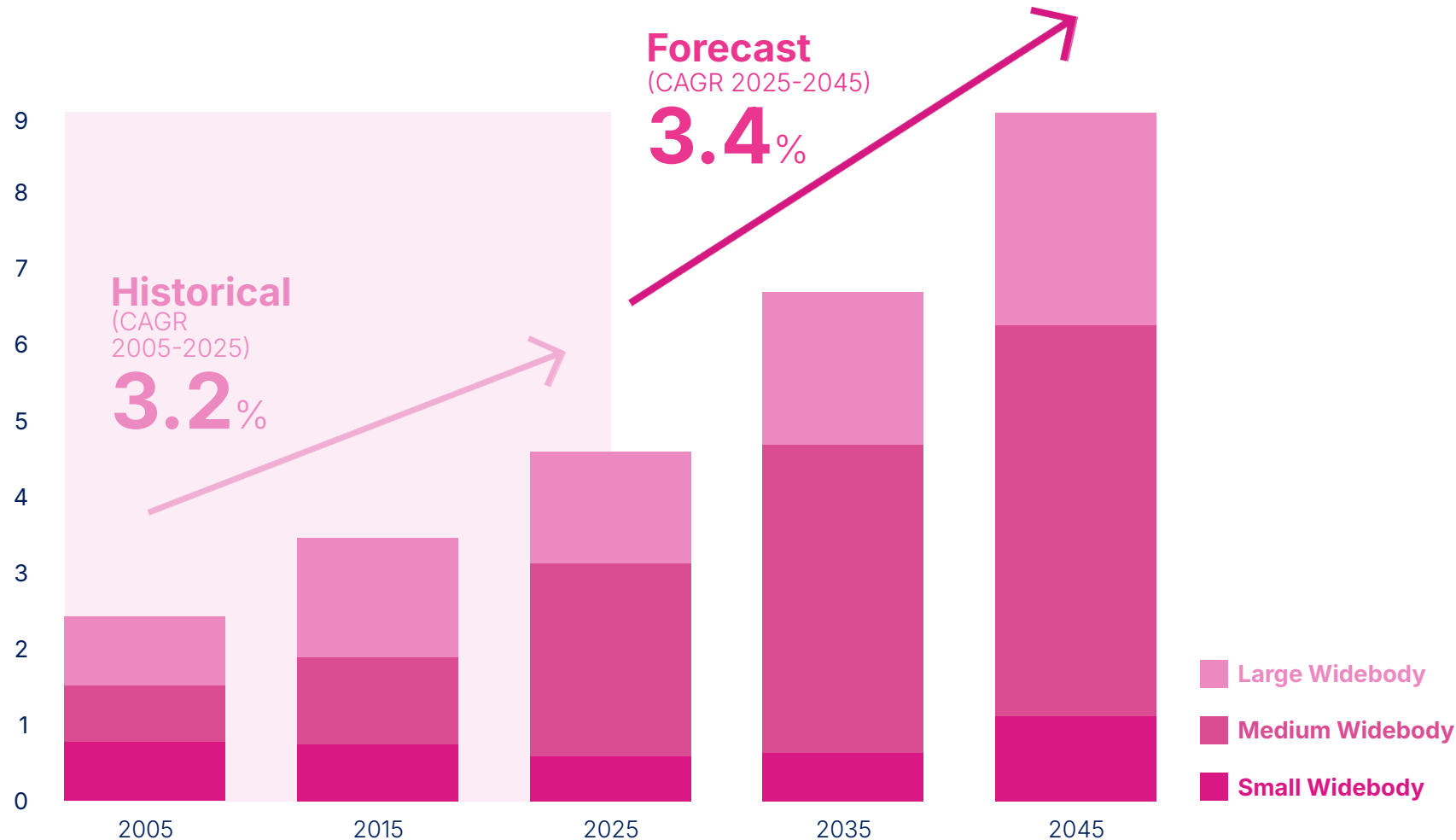


Increasing

premium class demand and product segmentation, requiring larger Widebodies

Growth powered by Medium/Large modules

Evolution of total world ASK per size (trillion)

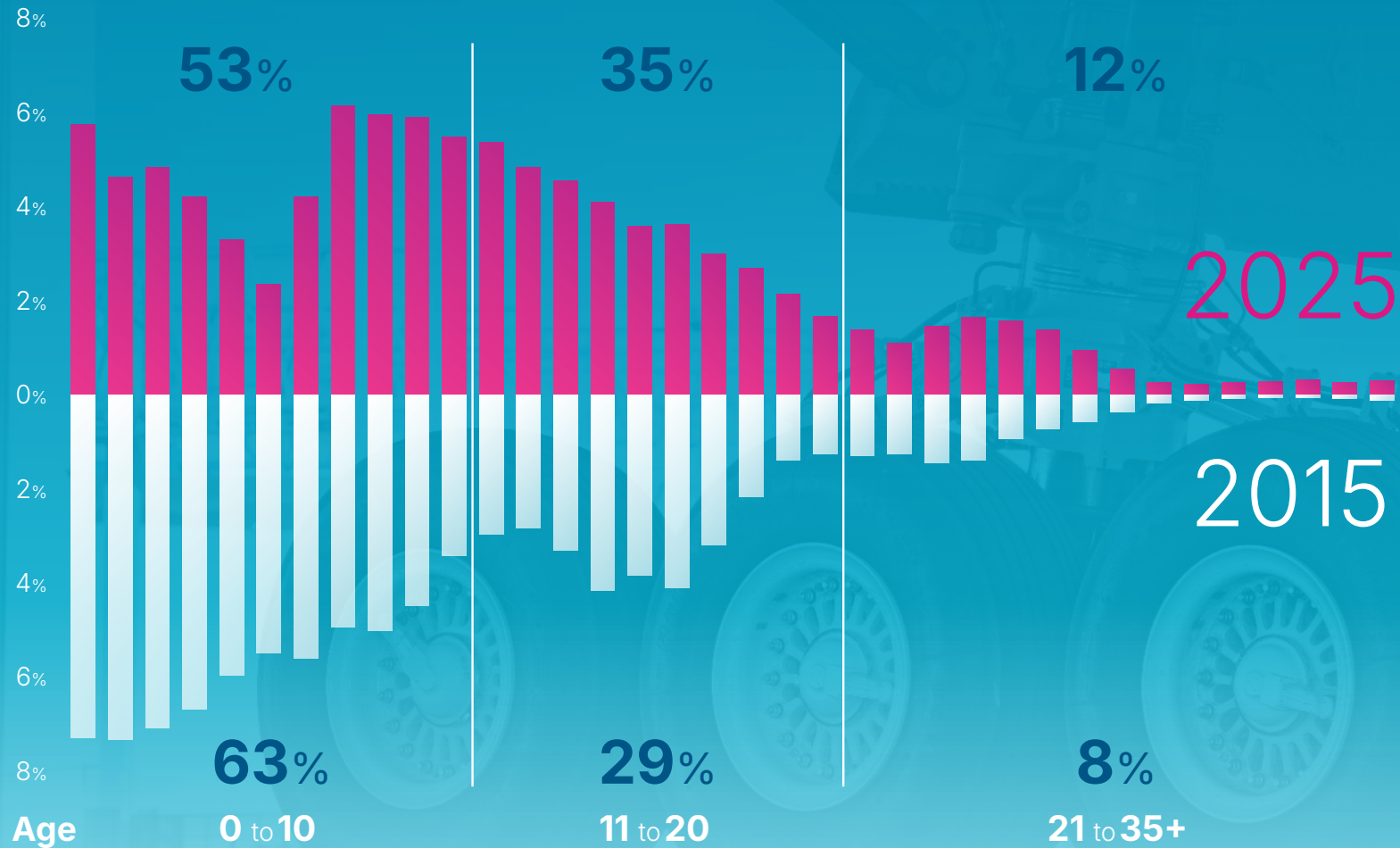


Increasing demand for larger Widebodies is driven by the need for higher

efficiency, segmentation and premiumisation

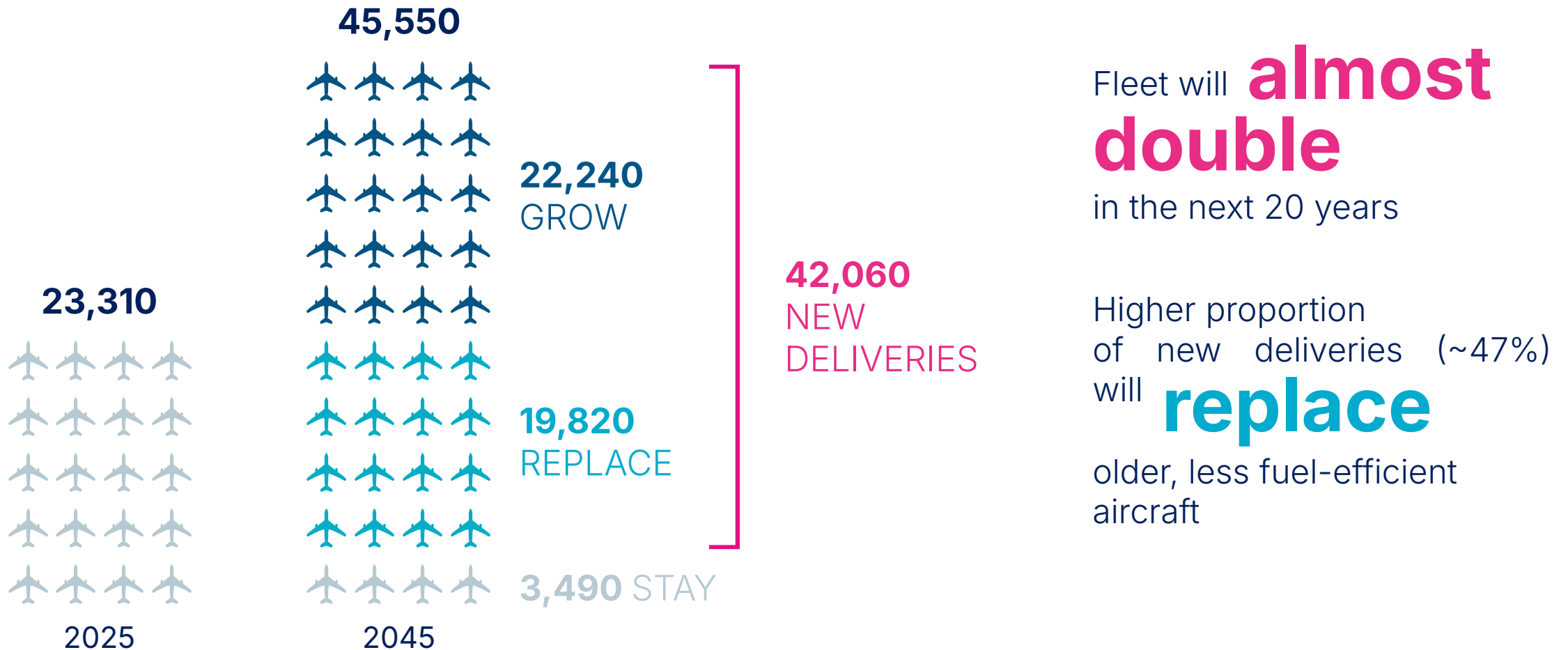
Strong need for fleet replacement

Aircraft* fleet age distribution (%)

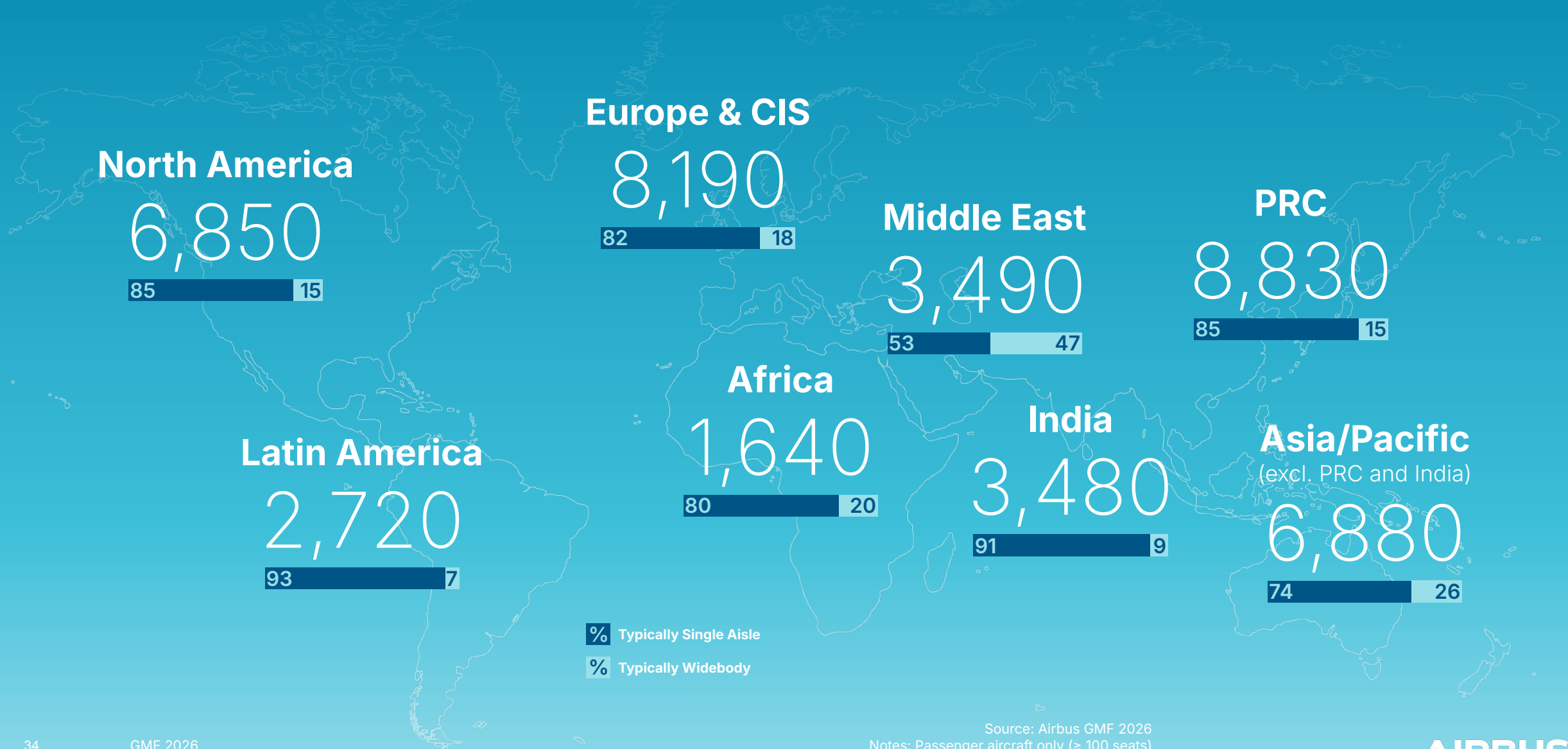


Demand for passenger aircraft between 2026 and 2045

Fleet in service (# aircraft)



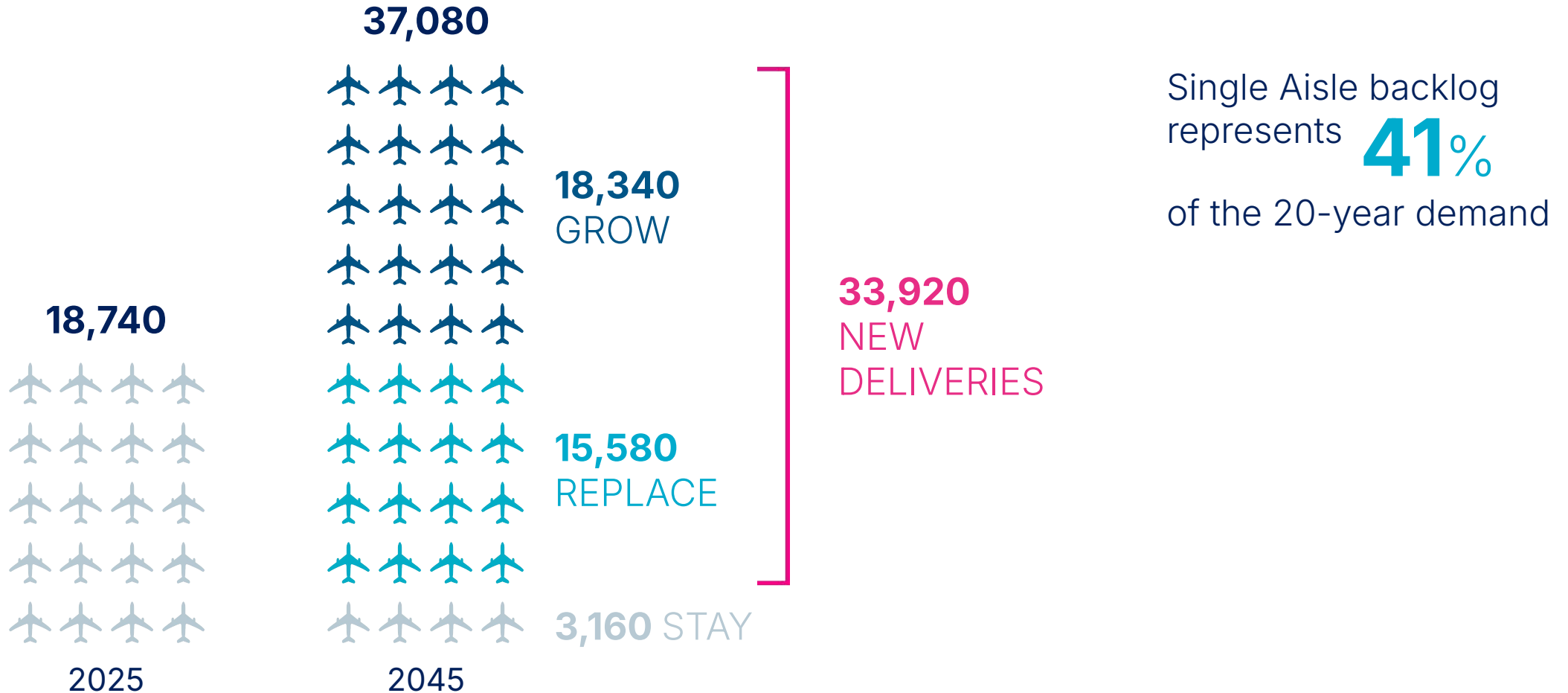
Asia leads the demand for passenger aircraft



% Typically Single Aisle
% Typically Widebody

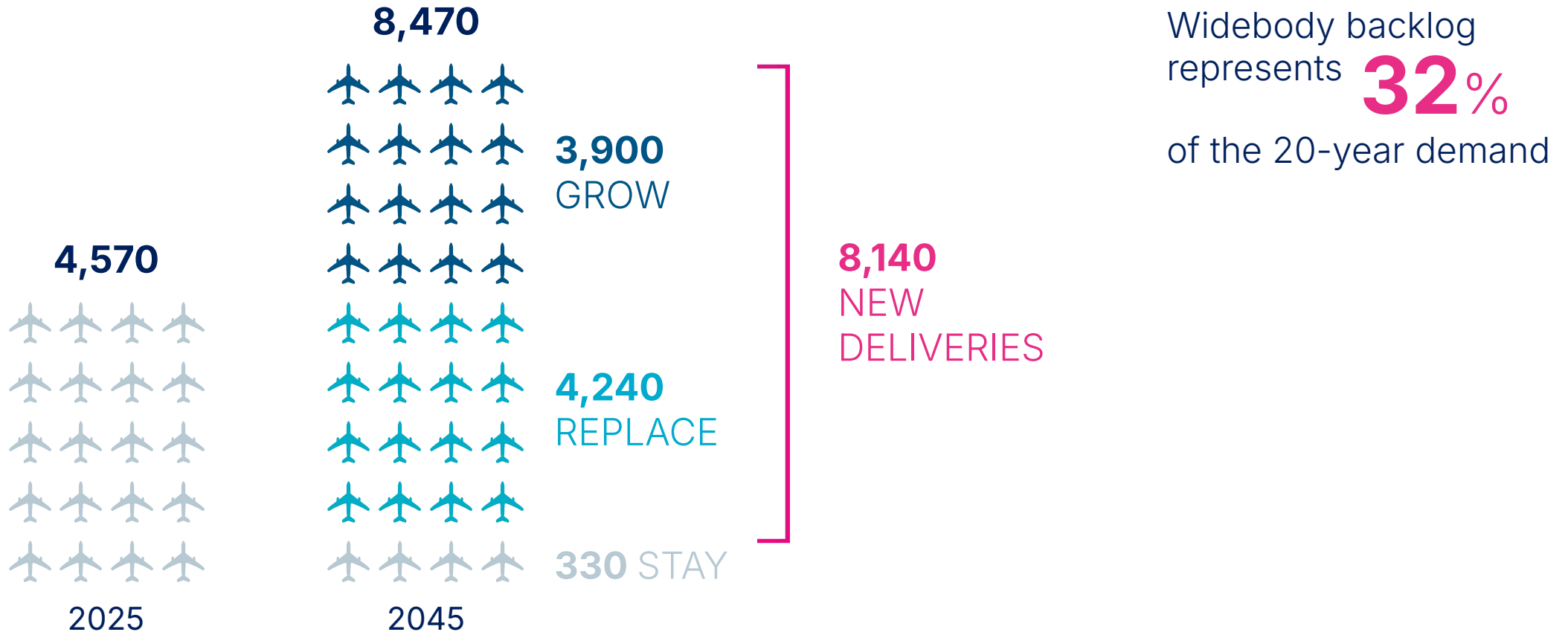
33,920 Single Aisle will be needed up to 2045

Fleet in service (# aircraft)



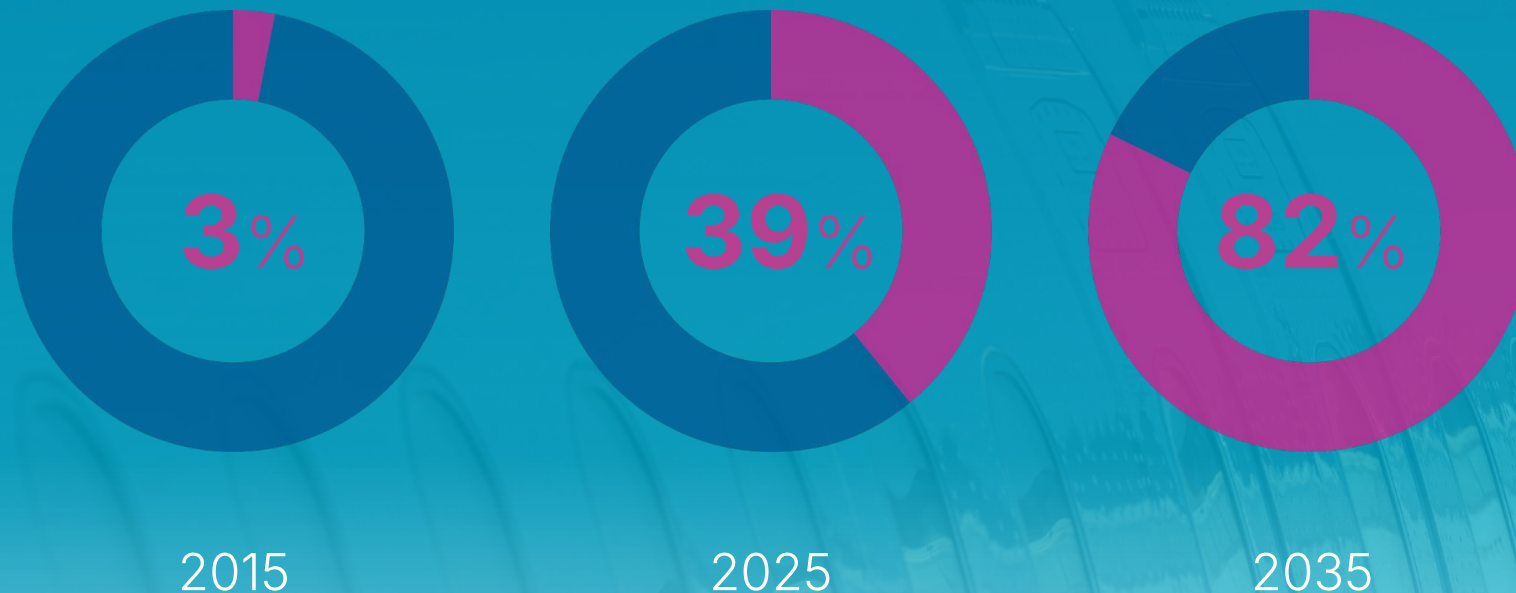
8,140 Widebodies will be needed up to 2045

Fleet in service (# aircraft)



Progressing toward an “all new-gen” fleet

Share of new-gen aircraft*



New generation

aircraft enable cost efficiency and environmental footprint improvements

Takeaways

Growing GDP and **Middle Class** population
propel air travel growth

Expanded connectivity driven by small city
growth and improved aircraft efficiency

Nearly **50% of deliveries** are expected
for **replacement** of the currently **ageing fleet**

Aviation brings **important social benefits**

3.9% | Passenger Traffic
2025-2045

23,310 | Passenger Fleet in service
aircraft | end-2025

45,550 | Fleet in service
aircraft | end-2045

42,060 | New Deliveries
aircraft | 2026-2045

Thank you

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