

GMF 2026-45 Summary

People want to fly. Population, middle class and diaspora increasing

- Long-term air travel expansion remains anchored by population and GDP growth, heavily led by an expanding global middle class and an increasing diaspora population
- By 2045, the middle class demographic most likely to fly will increase by 1.4 billion people (+34%)
- By 2045, air traffic will more than double.

Resilient passenger traffic growth despite shocks

- Global air traffic consistently demonstrates an intrinsic robustness, successfully recovering from major macroeconomic and geopolitical shocks.
- Short term disruptions like regional conflicts and high fuel prices are not dampening demand long term. In the next 20 years, passenger traffic will grow 3.9% annually and global GDP (+2.6%),

Networks are decentralising leading to increased connectivity

- Urbanisation shifts are driving airlines to expand connectivity beyond traditional megacities to increase the share of direct flights between new small and medium city-pairs.
- The number of smaller urban centres will grow at a significantly higher pace compare to larger ones reflecting an urbanisation shift that will influence future network evolution.
- Aircraft efficiencies and range are aiding connectivity beyond trunk routes to smaller and medium city-pairs.
- Riga-Tenerife or Melbourne-Alice Springs can be efficiently served by the A220. Enhanced range is also opening new connectivity bi-passing feeder networks entirely. Such routes include Lisbon-Recife with the A321neo, Dublin-Nashville with the A321XLR, Algiers-Kuala Lumpur with the A330neo and Taipei-Phoenix with an A350.
- In parallel, traffic on existing trunk routes will continue to grow and require large efficient widebody aircraft such as the A350-1000

Demand drivers are evolving

- Traffic patterns are structurally changing due to economic shifts toward the Asia-Pacific (APAC) region, rising international migration boosting family-related (VFR) travel and evolving passenger behaviors.

World fleet becoming younger

- Post-COVID fleet aging is accelerating replacement demand, favoring flexible, highly efficient new-generation single-aisle aircraft to profitably open low-density and longer-range routes.
- By 2045 almost 100% of the world fleet will be the newest aircraft (39% in 2026)

Demand for 42,060 new aircraft. Of these, 22,240 for growth and a record 19,820 for replacement

- With 3,490 existing aircraft remaining, by 2045, the in-service fleet will reach 45,550 aircraft.
- Of the 42,060 new aircraft, the split: 33,920 single-aisle aircraft and 8,140 wide bodies aircraft.

The Airbus GMF is aircraft agnostic.

- It does not forecast deliveries per aircraft model but demand by aircraft size. However, the GMF anticipates aircraft technology evolution and future gains in fuel burn and operating costs.