

Airbus forecasts traffic growth driven by urbanisation and increased connectivity made possible by aircraft efficiency

London, United Kingdom, 8 July 2026 – Urbanisation and GDP growth are driving long-term air travel demand according to Airbus' 2026-2045 Global Market Forecast (GMF). In the next 20 years, urbanisation is shifting to smaller cities. With a rise in middle classes and the diaspora this will lead to new city pairings made economically viable thanks to increasingly efficient aircraft and growing passenger traffic volumes. Not only is aviation essential for the transportation of high value, quick to market goods, aviation also connects people for a multitude of reasons across the globe, providing an economic lifeline to many communities.

Networks are decentralising. The number of smaller urban centres will grow at a significantly faster pace than larger ones, reflecting shifting urban populations. Alongside aircraft efficiencies the Airbus GMF forecasts expanding connectivity beyond trunk routes to smaller and medium city-pairs. Routes such as Riga-Tenerife or Melbourne-Alice Springs can be already efficiently served by aircraft like the A220. Enhanced aircraft range is also opening new city pairs, allowing direct connections. 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.

Airbus product strategy echoes market demand. This is evident in Airbus' record order book which stands at some 9,000 aircraft, underpinning the full product production rates from the A220 to the A350, including rate 75 for the A320. Currently, over 70% of the A320 Family backlog is for the largest A321neo and XLR, ideal aircraft for new city pairs. Higher capacity routes can be served by the A330neo and the longest haul routes by the A350. The A350 is also proving extremely popular in the quick to market cargo segment, with the Freighter variant.

Passenger traffic growth remains resilient. By 2045, the middle class demographic most likely to fly will increase by 1.4 billion people (+34%). Global air traffic is robust and inextricably linked to world economic growth as well as people's desire to travel. Short term disruptions like regional conflicts and high fuel prices are not dampening demand long term as historic data shows. In the next 20 years, the Airbus GMF forecasts passenger traffic to grow 3.9% annually, thanks to global GDP growth (+2.6%), rising urban populations (+1.3 billion) and increasing middle classes. By 2045, air traffic will more than double, reaching about 10 billion passengers per year.

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Mirroring an economic shift toward the Asia-Pacific (APAC) region, demand is evolving accordingly. Traffic patterns are evolving due to robust growth in developing economies like India, Vietnam, Indonesia and Malaysia. A significant evolution includes increased international migration and family-related passenger travel (VFR: visiting friends and relatives).

Demand for new efficient aircraft continues to be strong. Of the requirement of 42,060 aircraft in the next 20 years to compensate for 19,820 aircraft replacements of older aircraft and 22,240 for growth, some 81% will be single aisle and 19% widebodies. This reflects the continued trend for more cost- and CO₂-efficient aircraft.

Fleet renewal and record replacements are driving efficiency. Post-COVID fleet aging is accelerating replacement demand, especially favouring fuel-efficient, flexible, new-generation single aisle and widebody aircraft to profitably open both low-density and longer-haul routes. By 2045, Airbus forecasts the percentage of the global fleet that will be made up of the newest generation aircraft will reach almost 100% from around 39% in 2026.

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