

Services, enabling aviation growth

Airbus Services, **because we care.**

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.

AIRBUS

14 October 2026, Toulouse



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Customer Services



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Head of Services Marketing

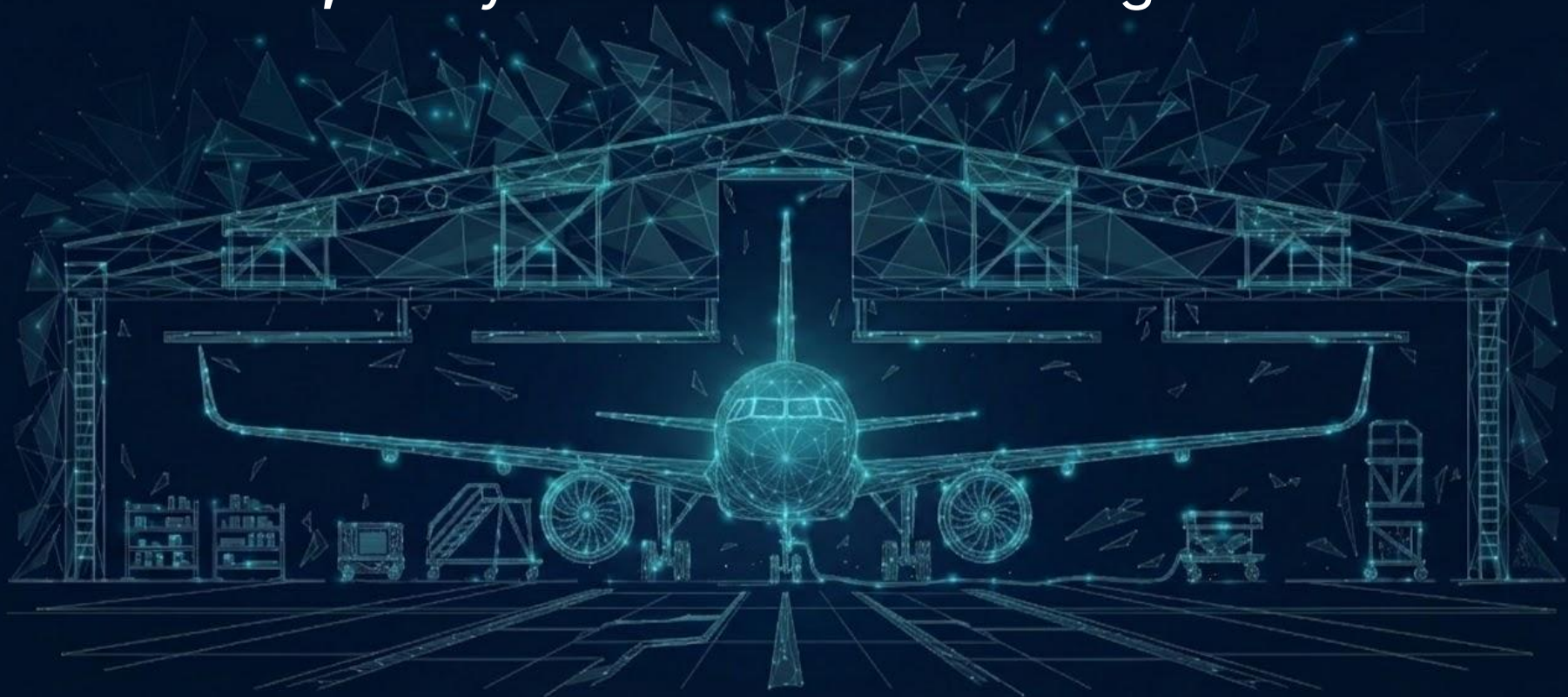


Amaya RODRIGUEZ GONZALEZ

Vice President
Strategic Development and
Transformation

Global Services Forecast 2026-2045

Services , a key enabler for aviation growth



Supporting today's fleet, preparing future standards

Navigating in a complex & fast changing environment

2026 - new challenges

World GDP



Below pre-conflicts projection, GDP under persistent **uncertainty**

Supply chain



Logistics flows and supply chains disruptions accentuated by current conflicts

Jet fuel price



Geopolitical tensions impact operating airline costs

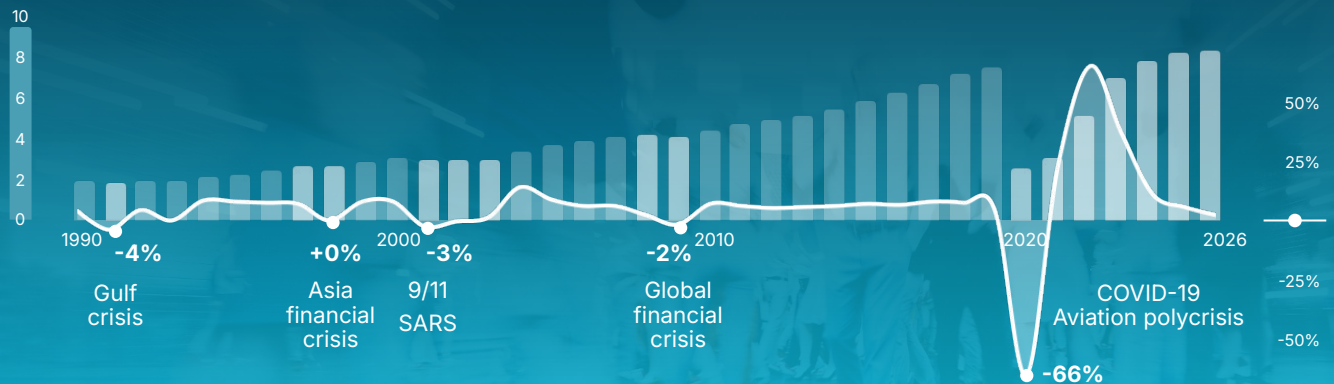
Adapted flight paths



Airlines proactively optimise their networks to ensure seamless travel

Proven aviation growth and resilience

World air traffic in RPK*



2026

YoY% forecast

↗ **+3.8 %**

Total fleet

Number of aircraft

↗ **+3.5 %**

Air cargo traffic

Cargo Tonne Kilometers

↗ **+2.1 %**

Passenger traffic

Revenue Passenger Kilometers

Services Market: the six clusters

2026 Services Market demand

\$ 209 bn



2026 Market Trends

Training



Focus on
aviation
mechanics

Maintenance



Investment on
capacity
increase

Modifications & upgrades



Premiumisation

Digital



Digitalisation of
traditional
services

Connectivity



Shift to LEO*
solutions

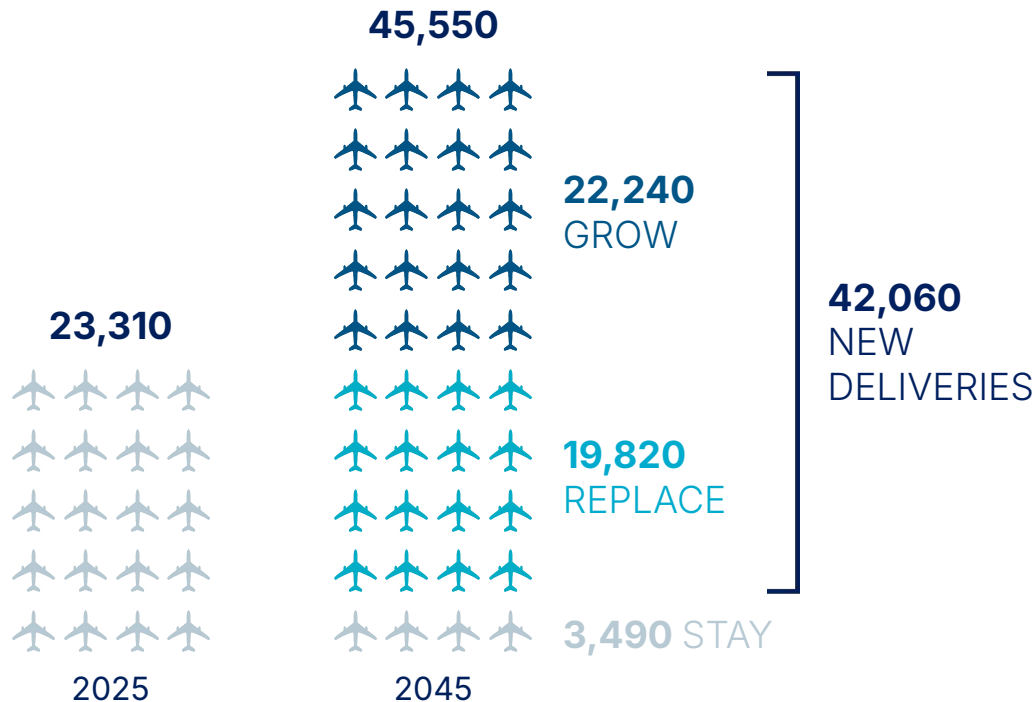
2026-2045 Global Services Forecast



Services, enabling aviation growth

Demand for passenger aircraft over the next 20 years

Fleet in service (# aircraft)



Fleet will **almost double** in the next 20 years

Large proportion of current fleet will be **replaced** offering new opportunities of services

Services market demand will double by 2045

\$ 422 bn

+3.8% CAGR*

Digital services and connectivity
are the foundation of the
transformation of the whole
services ecosystem over the
next 20 years

Digital & connectivity



Transforming the industry
with the interconnection of **people** and **data**

Digital & connectivity

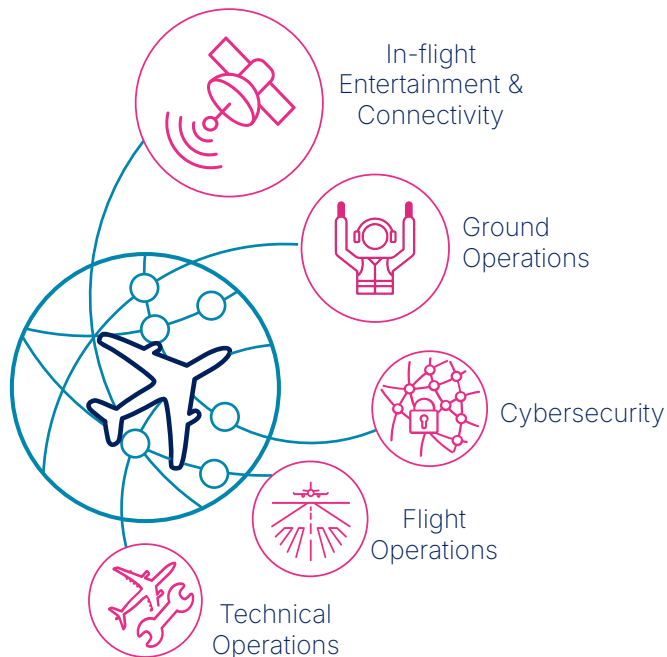
The assets to improve efficiency and passenger experience

\$ 27 bn

estimated market demand

+5.3% CAGR*

Interconnected ecosystem will improve the overall operational performance



2045



Enabling Airline Savings

Up to
30%
In 2045

out of a total \$ 80 bn
cost in delays & cancellations

Maintenance Market

A diversified fleet in service



On-wing
maintenance

\$ 36 bn

Daily **line readiness**
and heavy structural
checks, with over
18,000 annual checks

+2.8 % CAGR*



Off-wing
maintenance

\$ 217 bn

Restore engines and
components in shop
with over **85% driven
by materials**

+3.7 % CAGR*



Maintenance Operations
Support

\$ 104 bn

80% of the market
generated by
spare parts and
engineering support

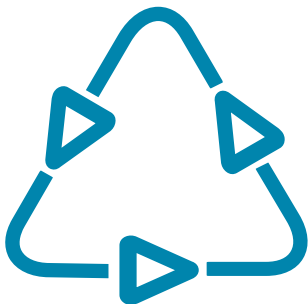
+4.3 % CAGR*

Maintenance evolution

More flexibility and agility with digitalisation driving force

Aircraft capabilities

More connected aircraft will provide **real time information, integrated in a Digital Twin**



Skilled workforce

Workforce will interact with the **new technology on a daily basis**

Maintenance ecosystem

Condition Based Maintenance, predictive and preventive **algorithms** allowing a **more flexible** maintenance strategy.
New generation tooling will enhance maintenance tasks efficiency



Material cost reduction

Up to
\$ 8 bn
savings

Maintenance market combined with digital solutions

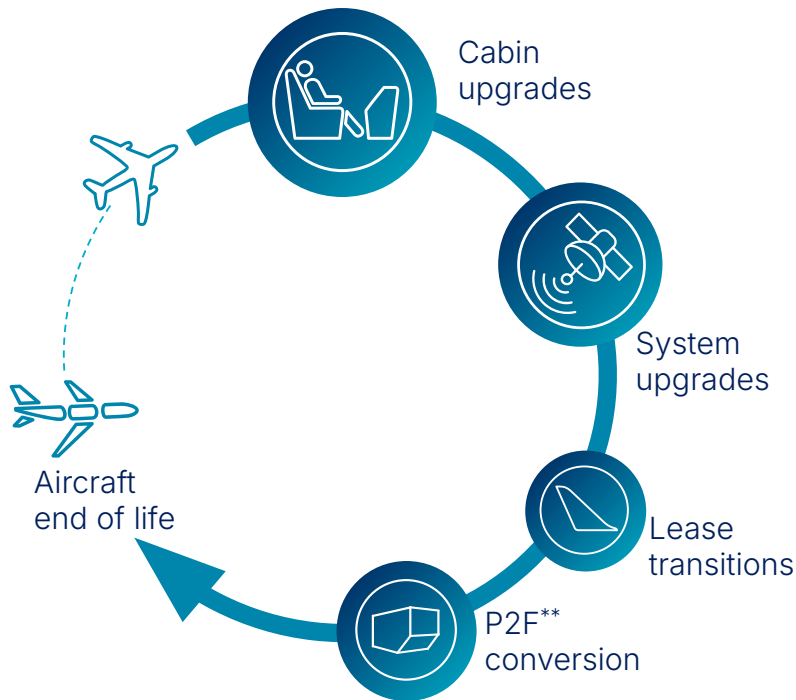
Modifications & upgrades

Optimising asset value through the aircraft lifecycle

\$ 21 bn

estimated market demand

+2.6% CAGR*



Upgrade
leadtime

Major lead
time
reduction for
upgrades

Integrated digital tools
Generative AI
Augmented Reality, Cobots

End of life and circular economy

Opportunities to reuse, repair and recycle

Retirements

>18,400



USM* market demand

\$ 60 bn



Used Serviceable Materials
alleviate supply constraints, and
satisfy a growing demand for
alternative and safe solutions



**Used Serviceable
Materials**

Increased
USM value

Increased traceability
Better targeting

A massive workforce required



660,000
new pilots



730,000
new technicians



1,050,000
new cabin crew



2.44
million
people to train
over the next 20 years

 Needs to sustain the growth
 Needs to replace the current workforce

Training

Redefining aviation training for the next generations

\$ 17 bn

estimated market demand

+3.1% CAGR*



Competency Based Training and Assessment

Driving global standardisation, to prioritise pilot resilience and core competencies



Virtual Reality (VR)

Delivering flexible training and a space-saving setup, with growing technology



Full Flight Simulators

2x hours needed over the next 20 years

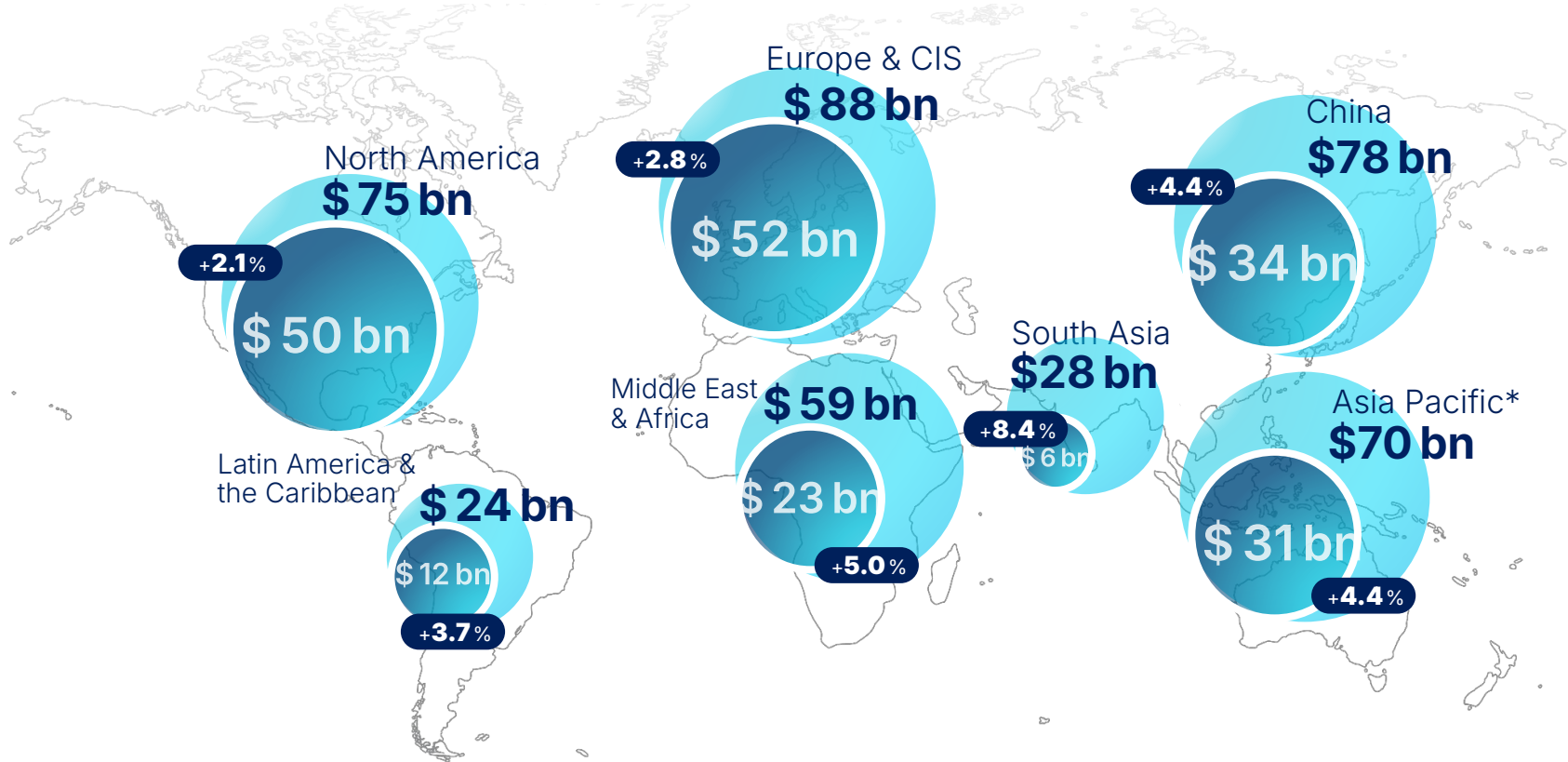


Up to
15%

More time dedicated to
advanced operational
scenario

Growth perspective and disparities

2045
2026
CAGR



Takeaways

Services, a key enabler for aviation growth

\$ 422 bn | Services Market
forecast in 2045

+ 3.8% | Steady market growth
2026-2045 CAGR

**2.44
million** | Cumulated new
workforce needed
over the next 20 years

**Digital solutions and
connectivity** market will
triple over the next 20 years
acting as common thread of
the **aftermarket ecosystem**

COMMERCIAL AIRCRAFT

Airbus GSF 2026 | 2045

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