



Global Market Forecast 2026-45

Istanbul, October 15th 2026

Antonio da Costa - VP Market Analysis and Forecast

AIRBUS

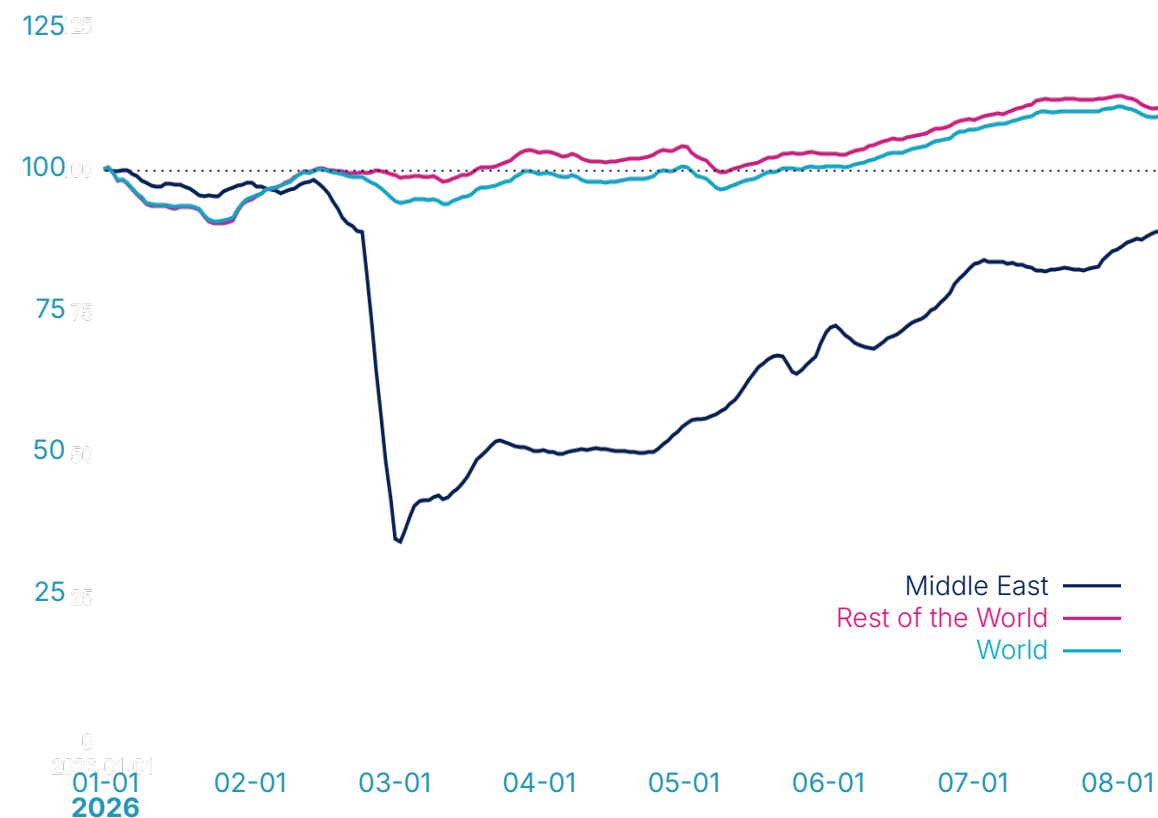
Air transport - A resilient industry



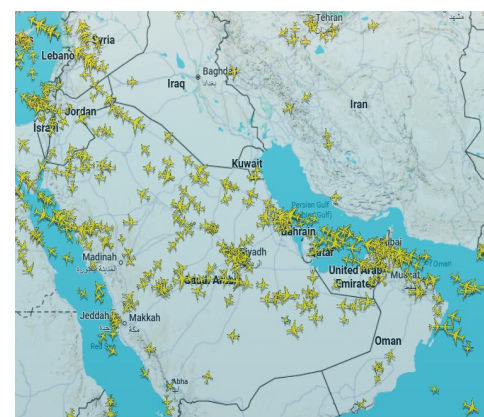
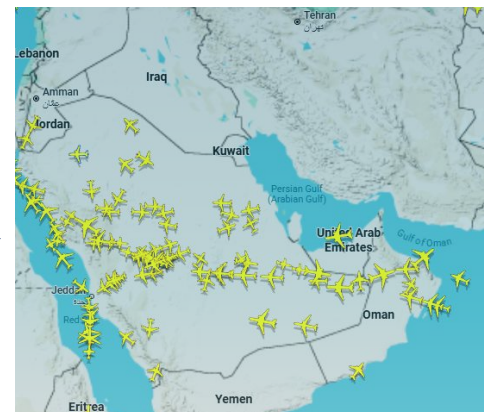
A strong Middle East recovery is underway

Passenger aircraft movement per day

(base 100 January 1st 2026)



(2026/03/01 at 2PM CET)



(2026/06/30 at 9AM CET)

Pax traffic remains
resilient

Worldwide growth

+0.6% Jan-July 2026
vs 2025

World growth
(excluding Middle East)

+2.9% Jan-July 2026
vs 2025

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

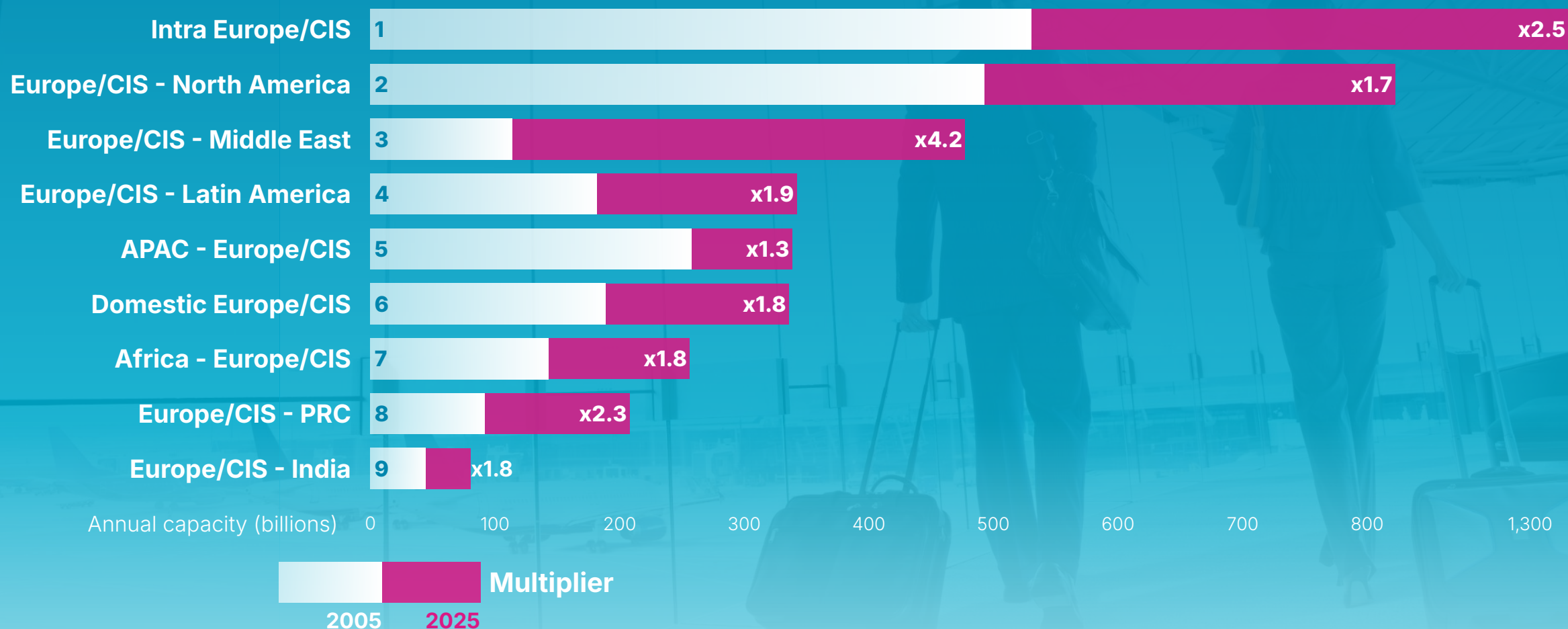


Aviation provides a reliable, affordable and viable travel alternative



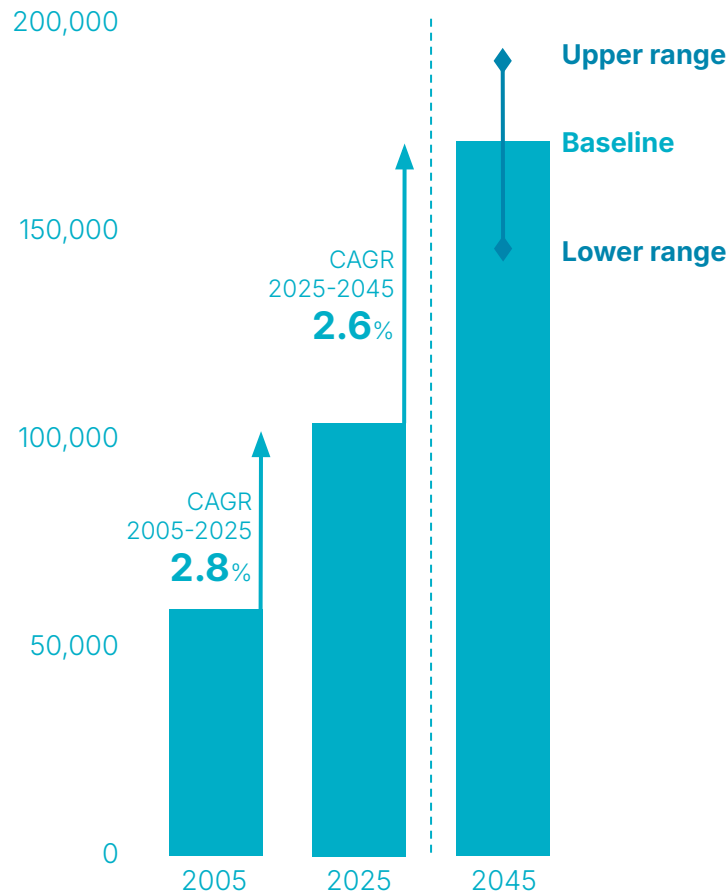
From 2005 to 2025, Europe/CIS capacity more than doubled

Yearly ASKs from/to/within Europe/CIS (billions)

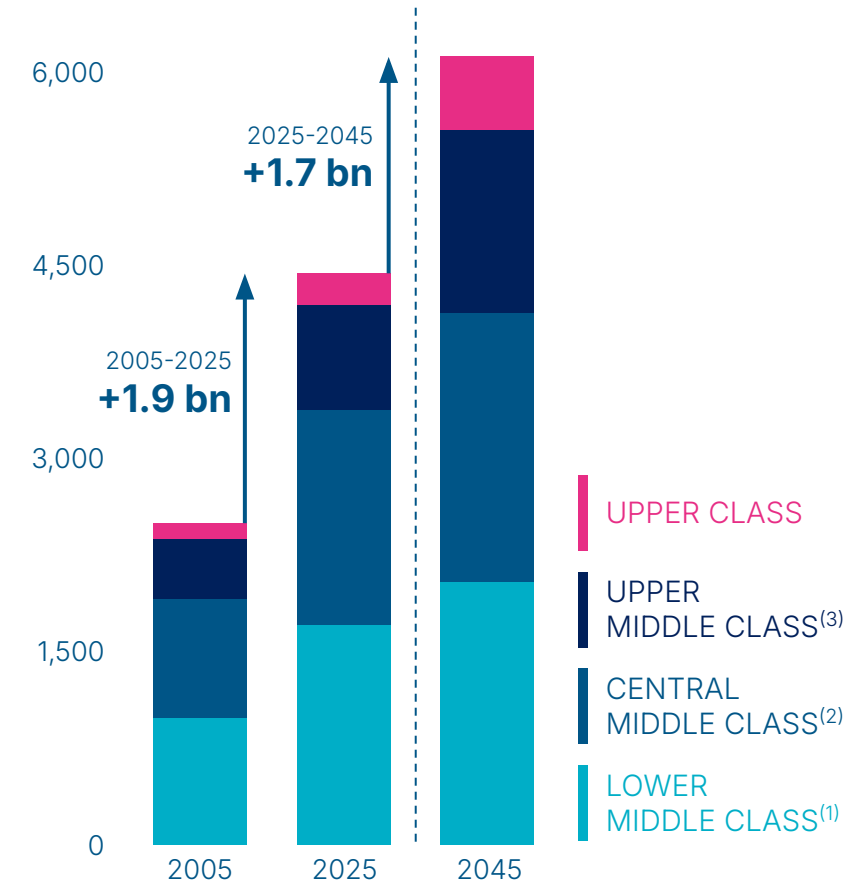


The main drivers for air transport

World real GDP (billion US\$)



Upper and Middle Class population (million people)



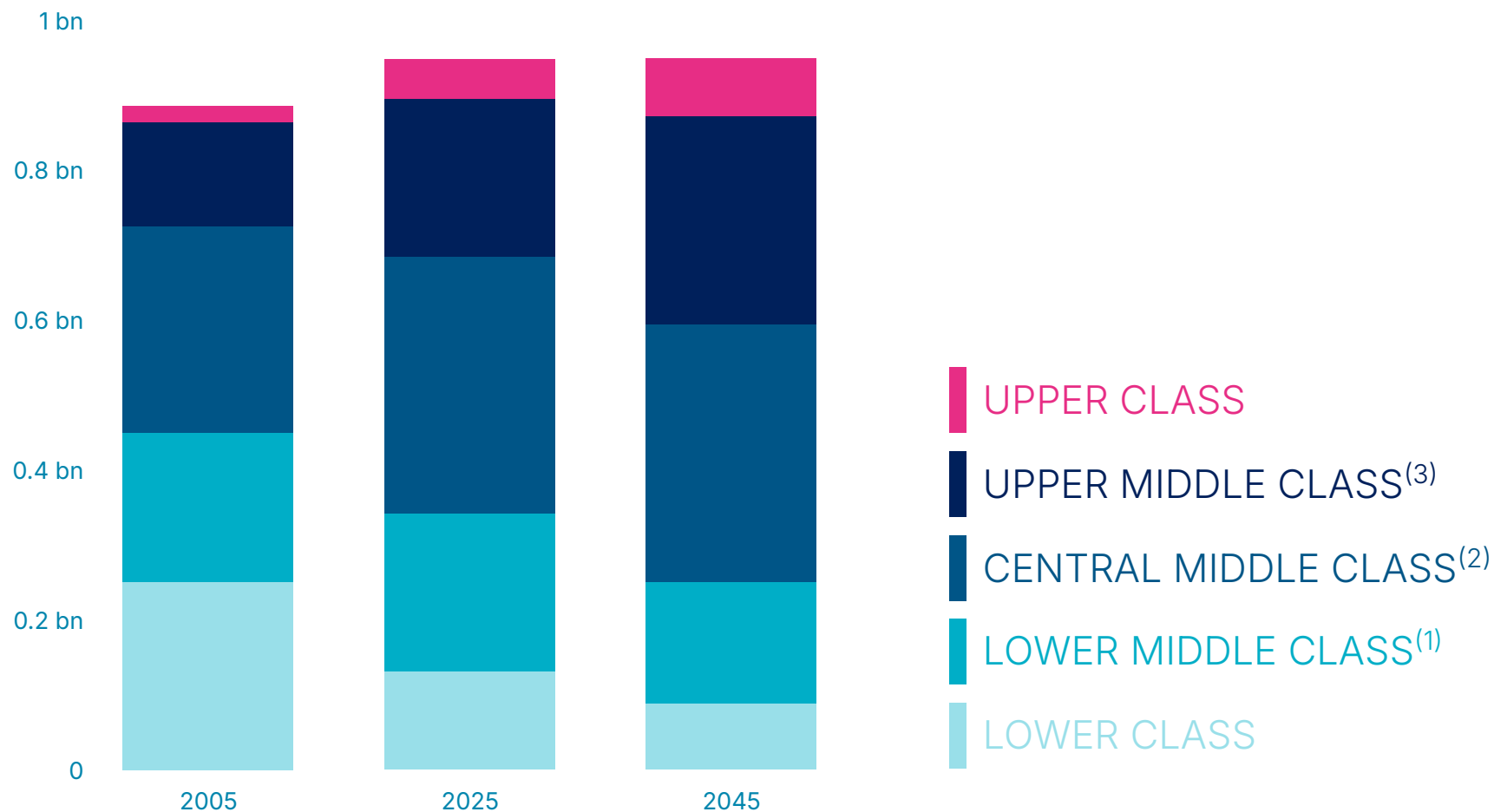
World GDP and Middle Class will continue to expand

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

Europe/CIS' affluence is increasing

Total population by households



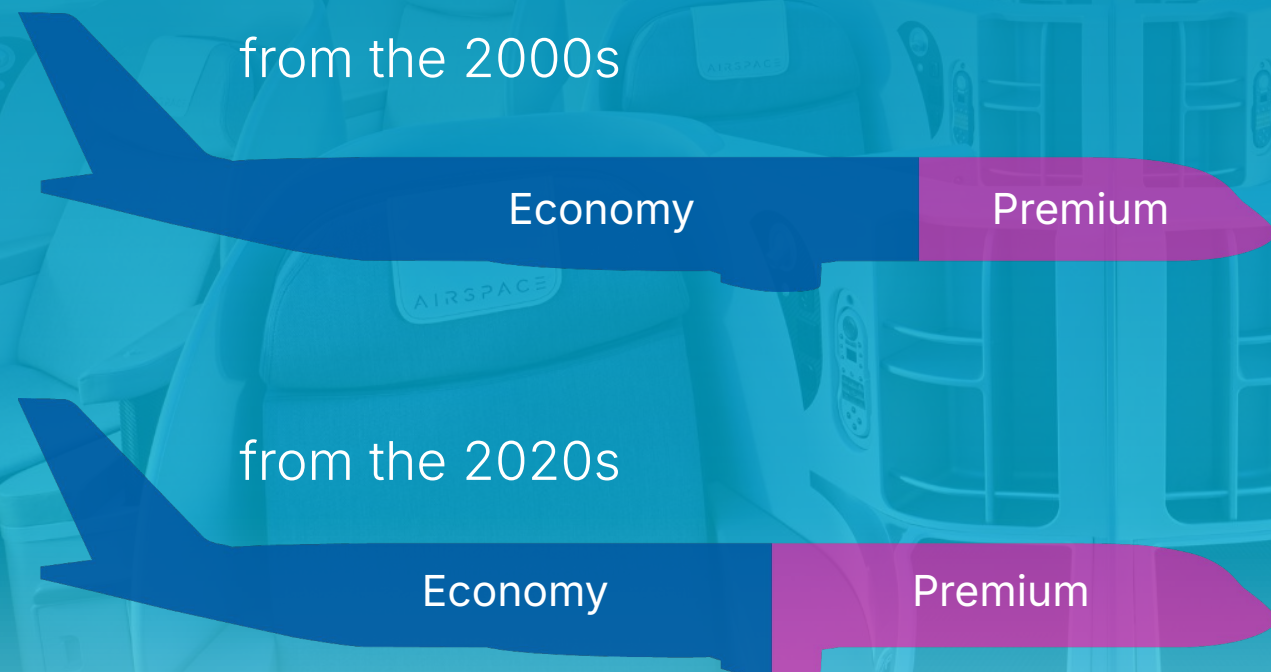
~800 m

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

Premium travel demand and segmentation expanding

Typical widebody cabin arrangement



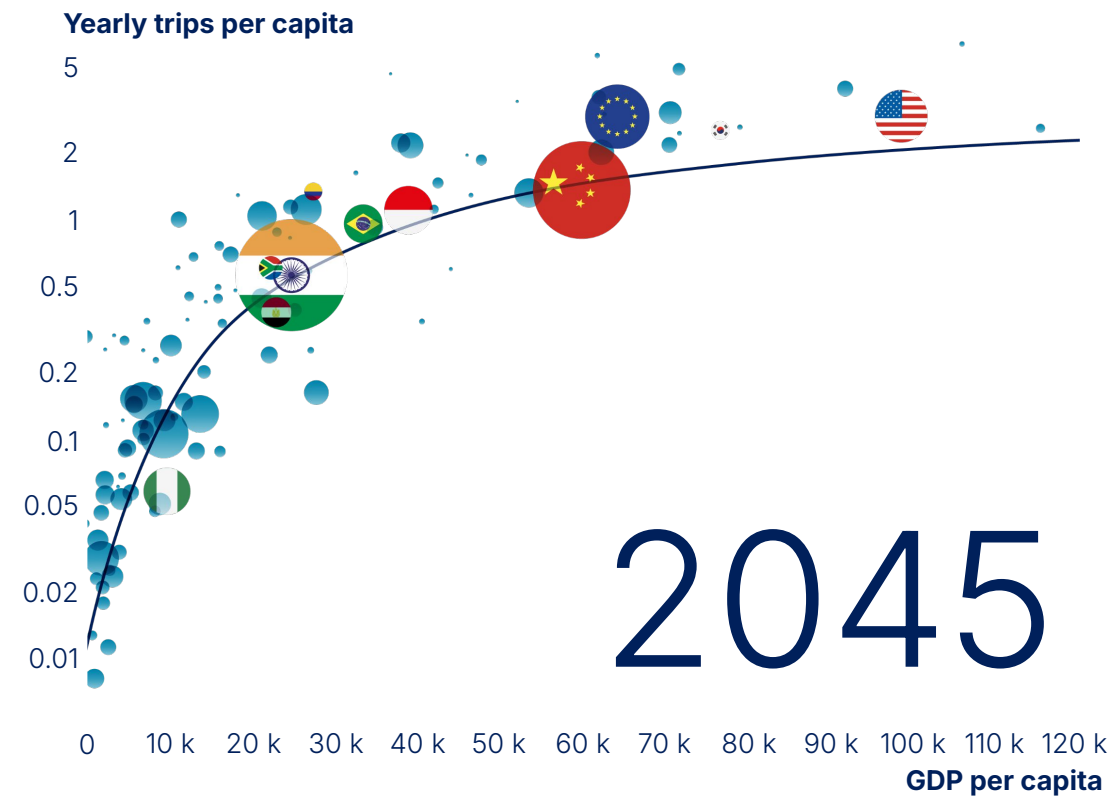
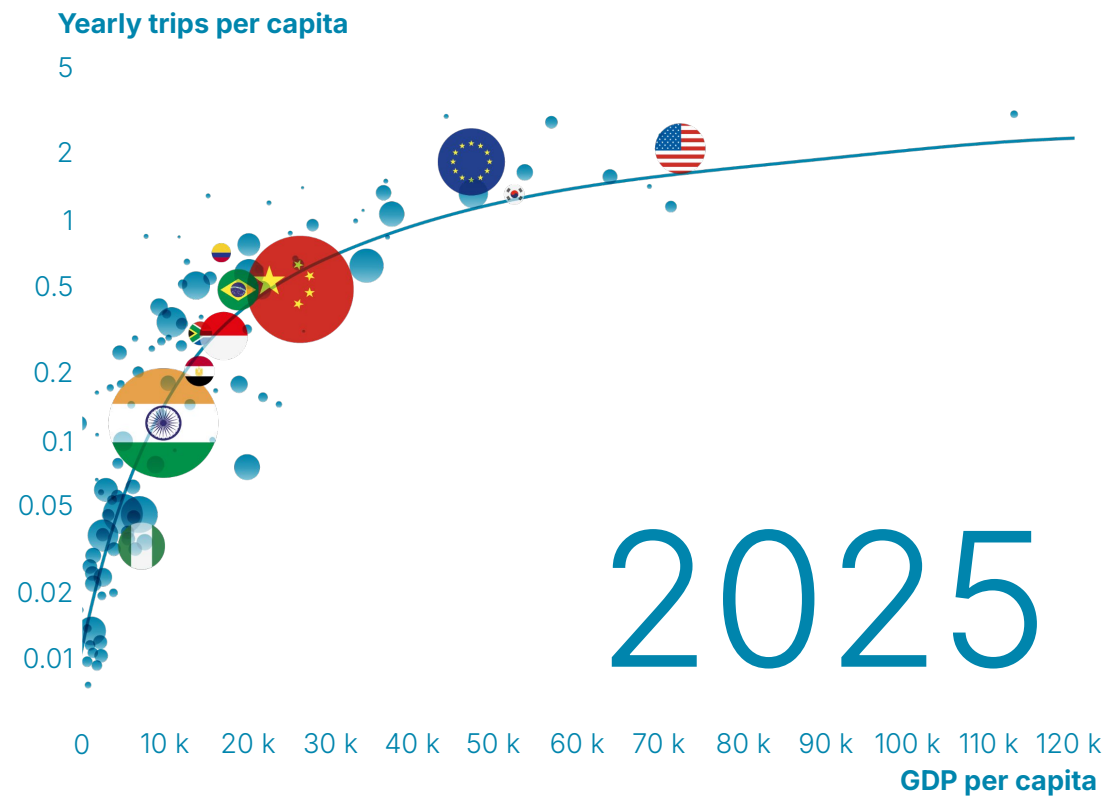
Capacity⁽¹⁾ growth by Class (2005-2025)



Increasing

premium class demand and product segmentation, requiring larger Widebodies

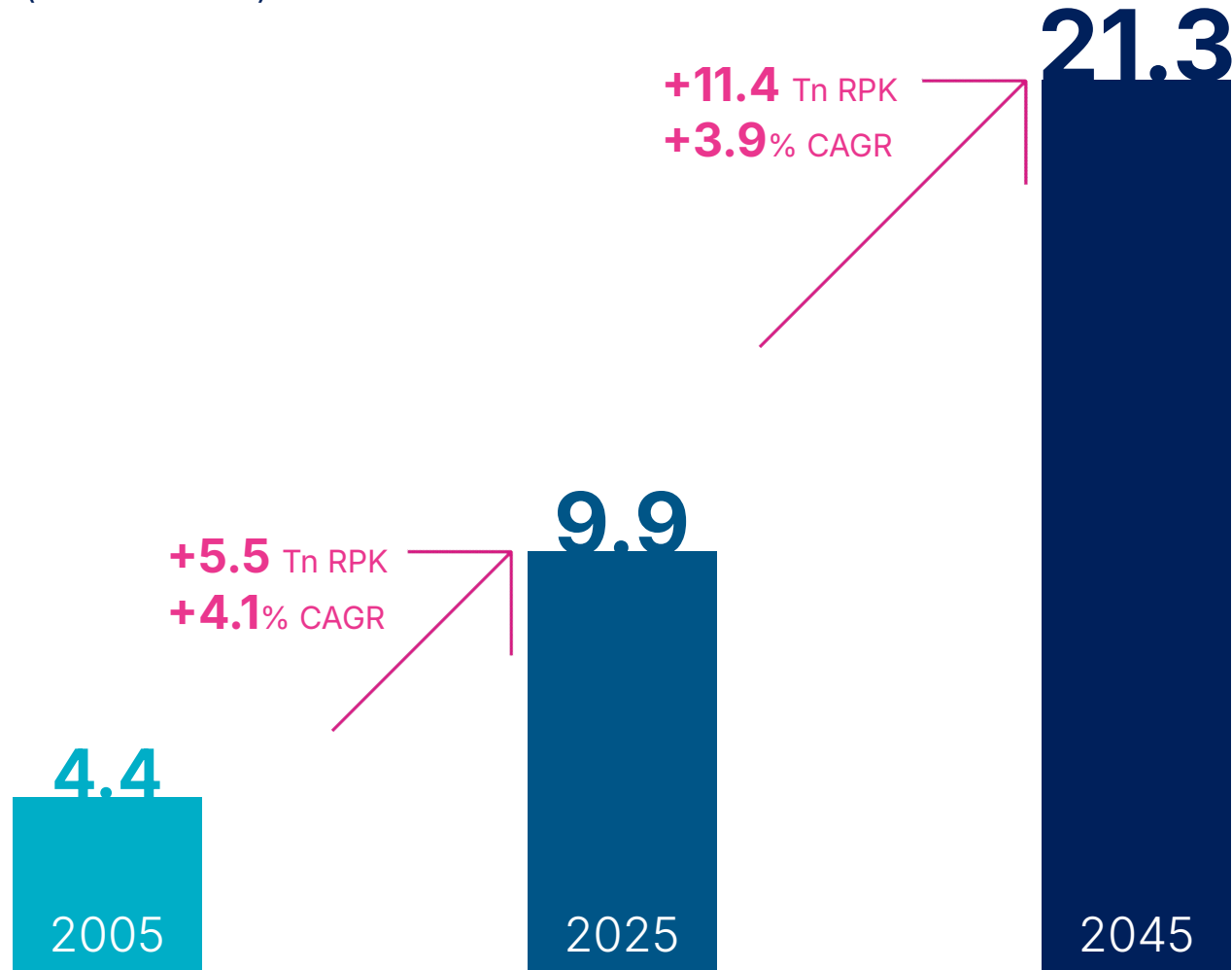
People need and want to travel



	Nigeria	Egypt	India	South Africa	Brazil	Indonesia	Colombia	China	South Korea	Europe	United States
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

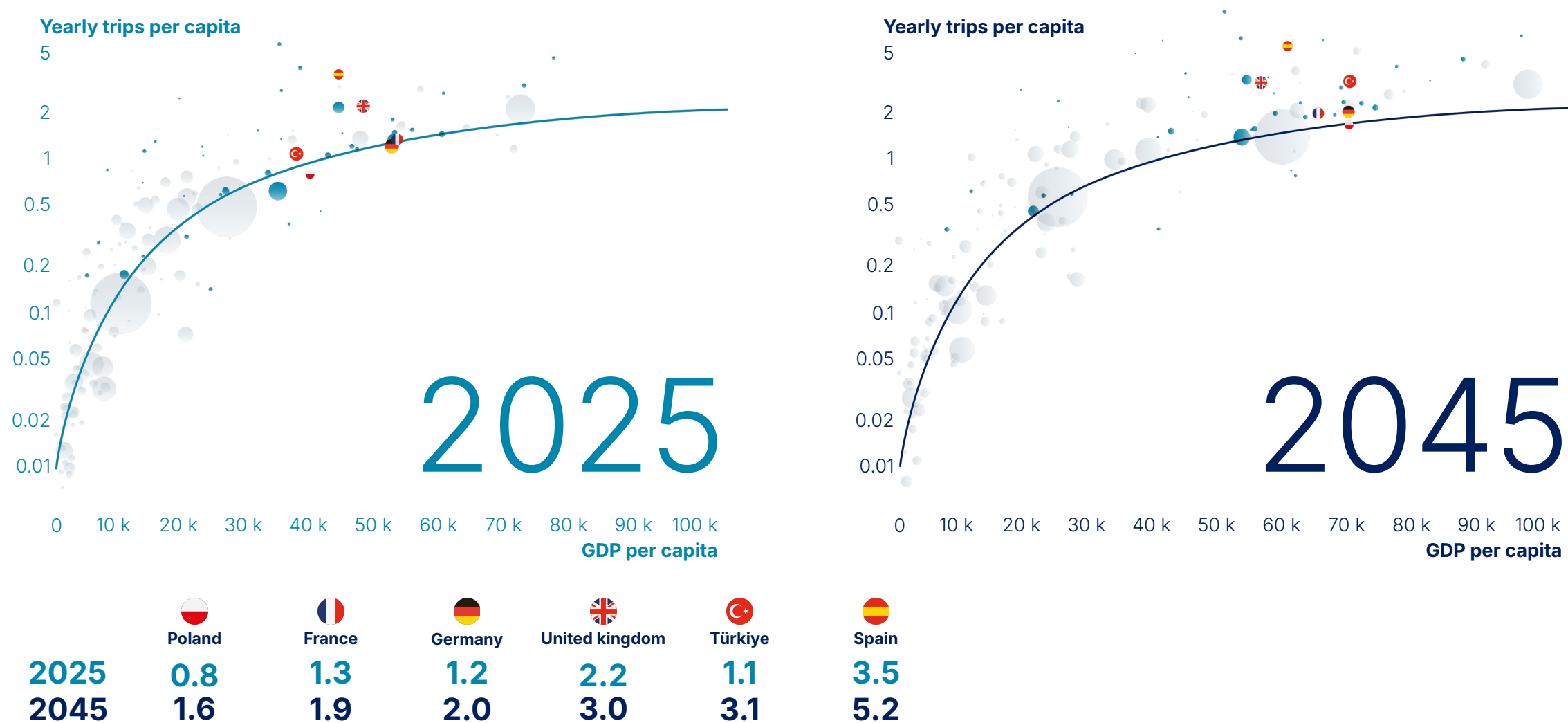
Global passenger traffic forecast

World air traffic (trillion RPK*)



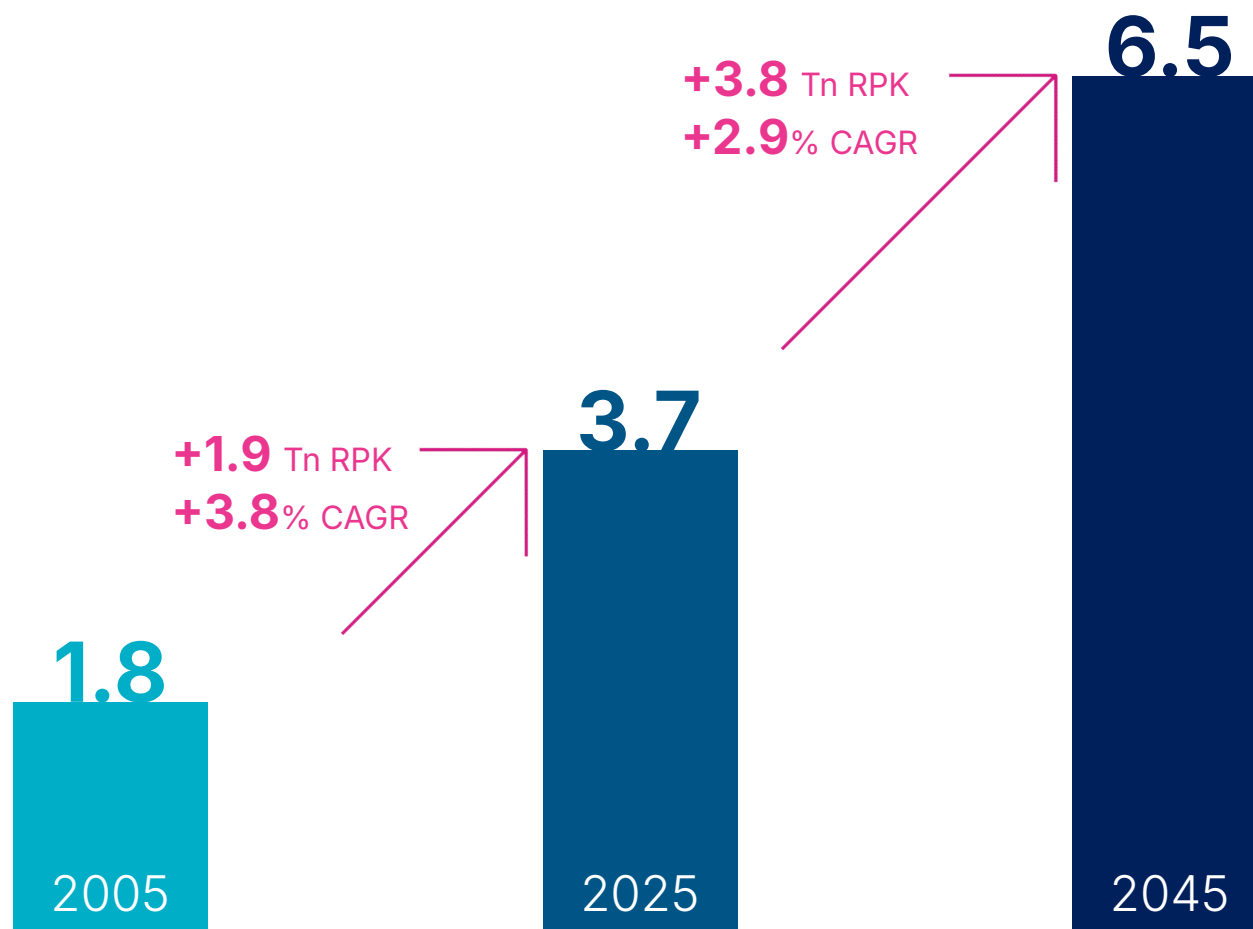
Global passenger traffic
will **more than
double**
in the next 20 years

Europe/CIS travel propensity will almost double by 2045



Europe/CIS passenger traffic forecast

Air traffic from/to/within Europe/CIS (trillion RPK*)

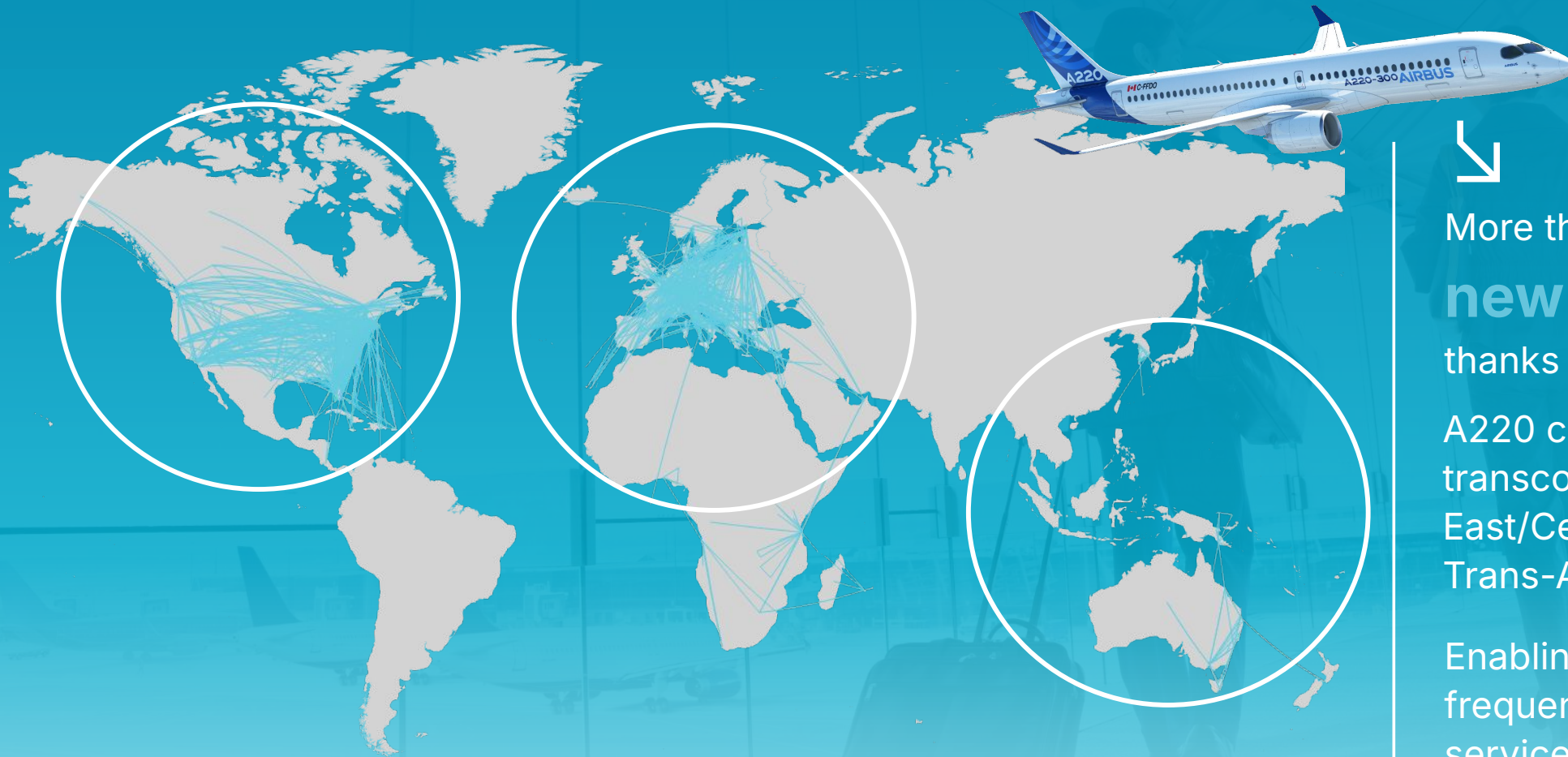


Europe/CIS' passenger traffic will **almost double** in the next 20 years

Global 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

A220 - Right-sized for small city growth



More than **400**
new routes created
thanks to the A220

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

Enabling higher
frequencies, better
service and a superior
experience

Airline networks are spreading farther



The A350 breaks the barriers of distance

STARLUX
星宇航空

QATAR
القطرية

SINGAPORE
AIRLINES

SFO
LAX
PHX

YYZ
ATL
JFK

AIR INDIA

LHR

TURKISH
AIRLINES

IST

SINGAPORE
AIRLINES

CATHAY

Philippine Airlines

DELTA

JNB
CPT

DOH
DEL

TPE
HKG
MNL

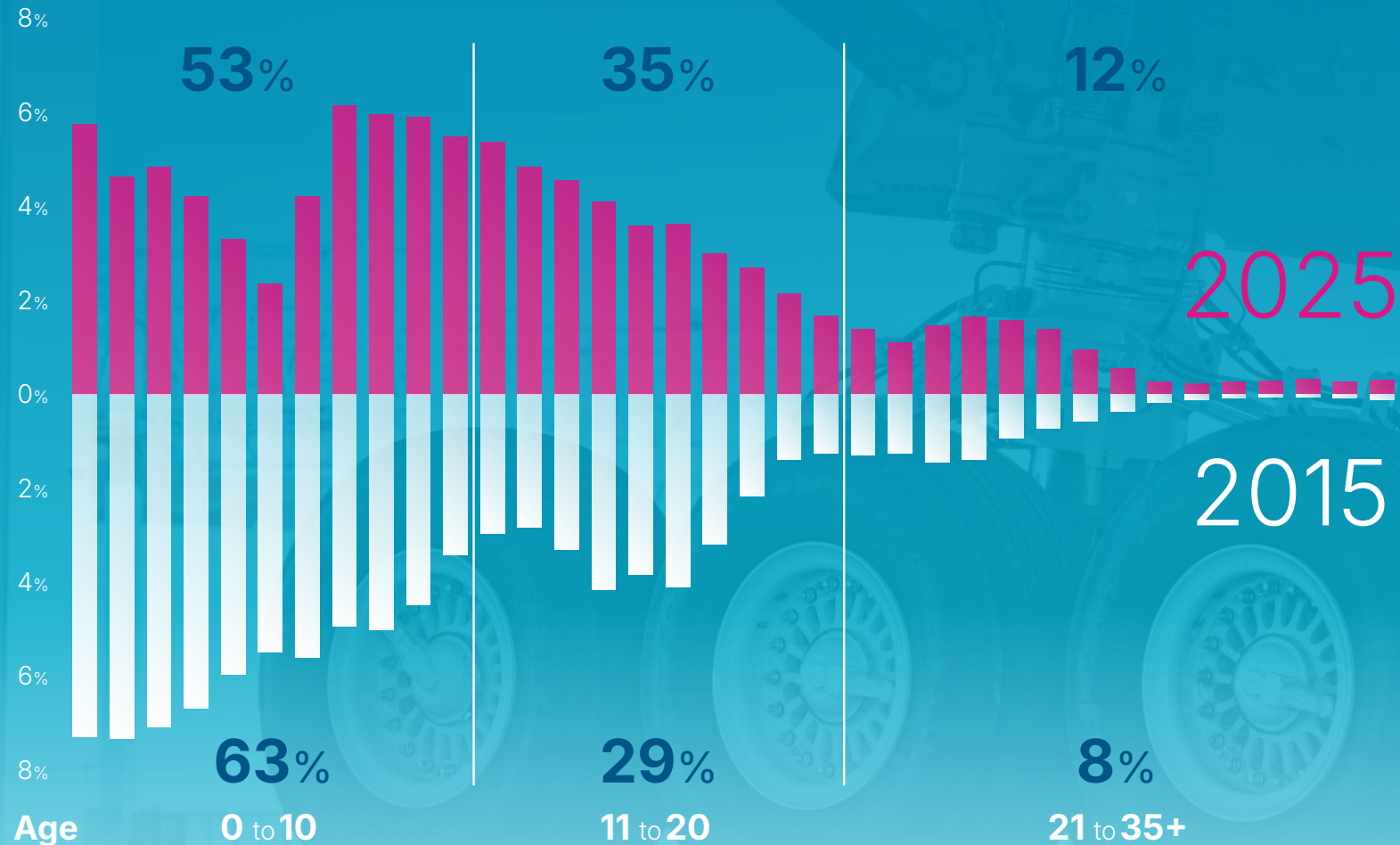
SIN

QANTAS

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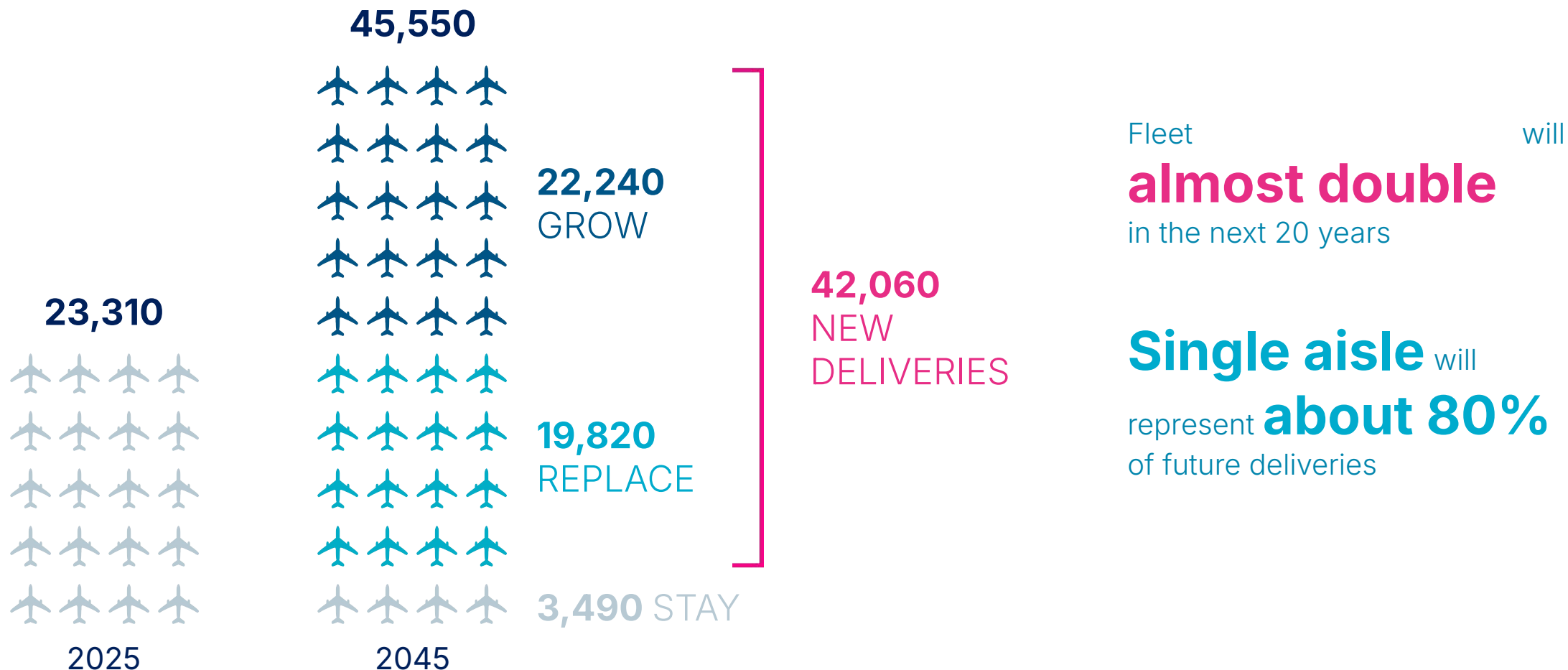
Strong need for fleet replacement

Aircraft* fleet age distribution (%)

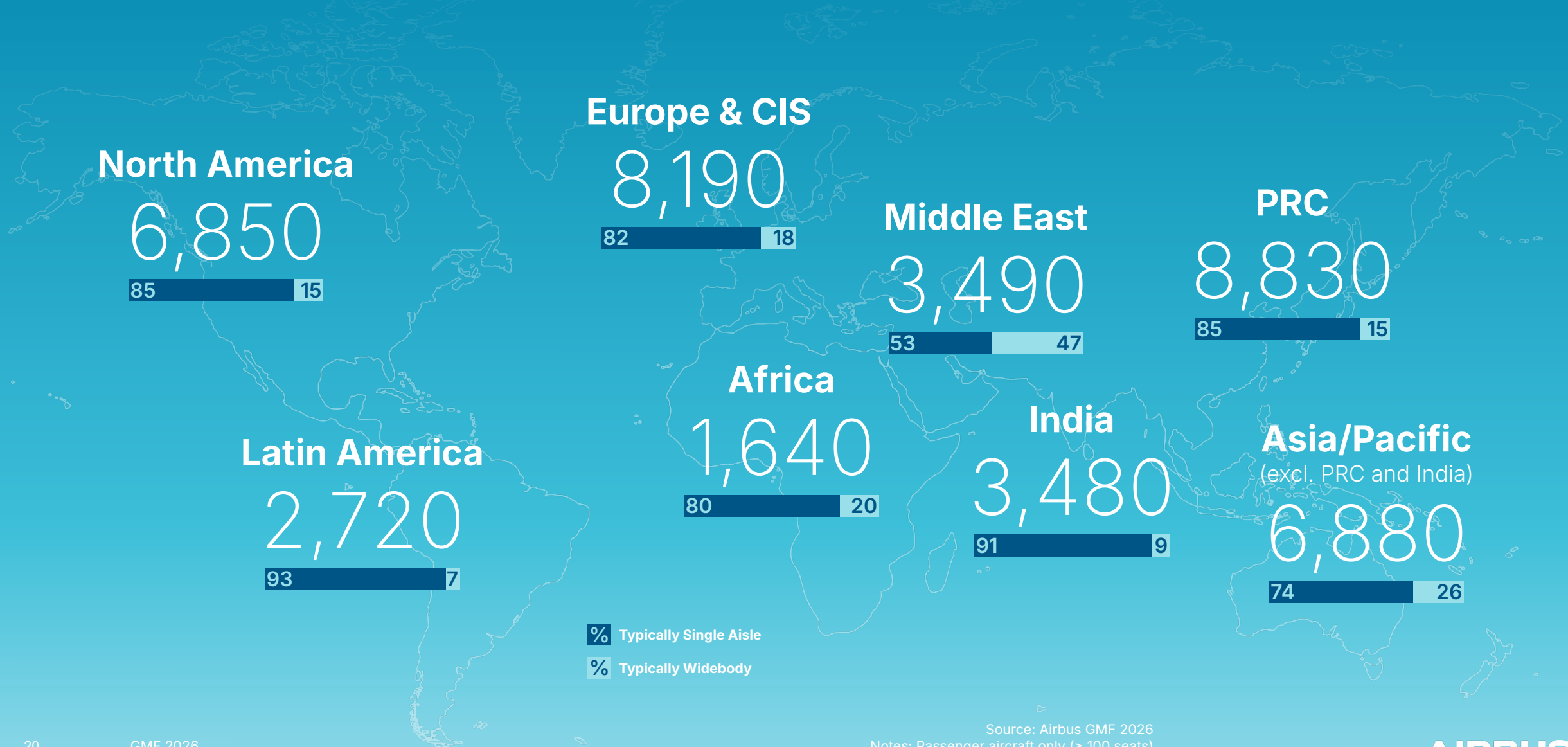


Global demand for passenger aircraft between 2026 and 2045

Fleet in service (# aircraft)



Asia leads the demand for passenger aircraft



% Typically Single Aisle

% Typically Widebody

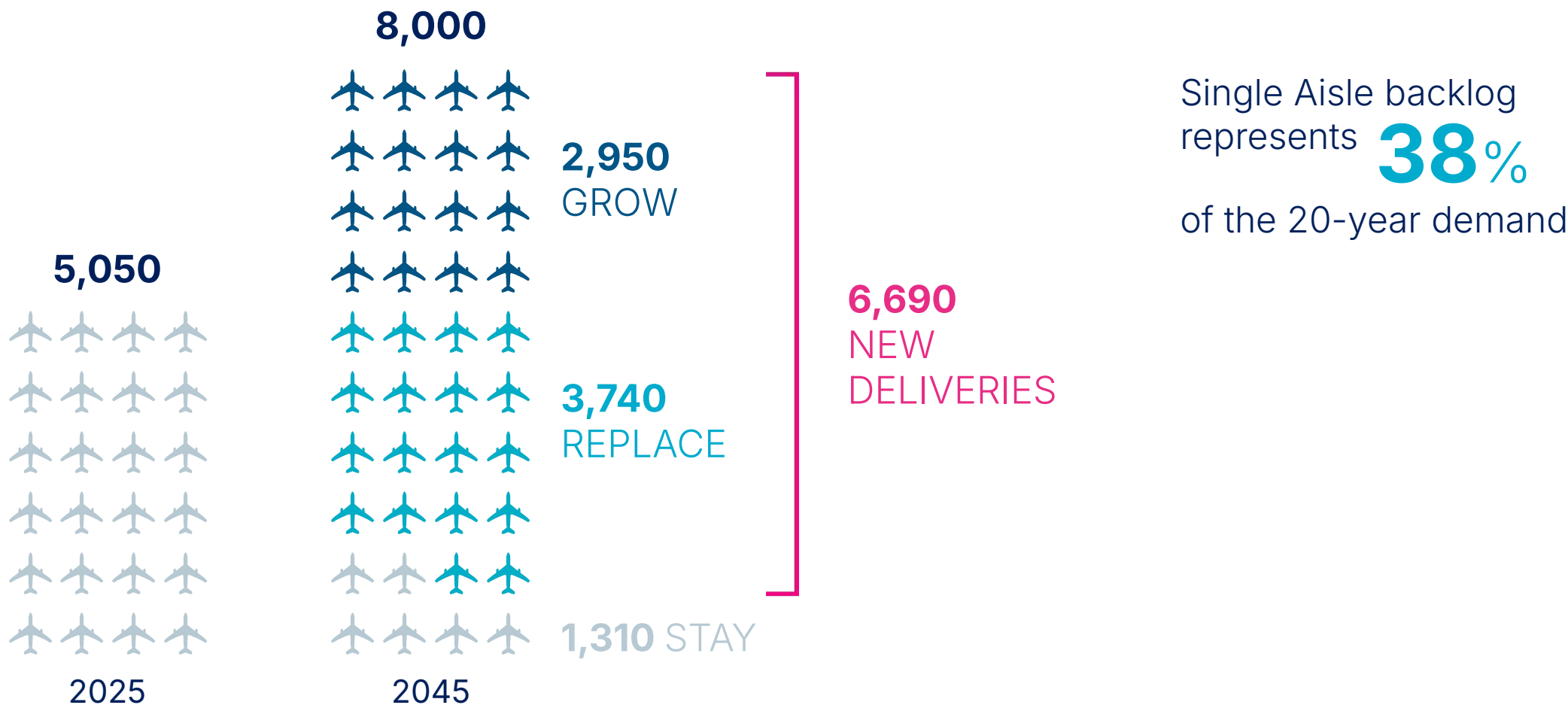
Source: Airbus GMF 2026

Notes: Passenger aircraft only (≥ 100 seats)

Figures rounded to nearest 10 | totals rounded separately

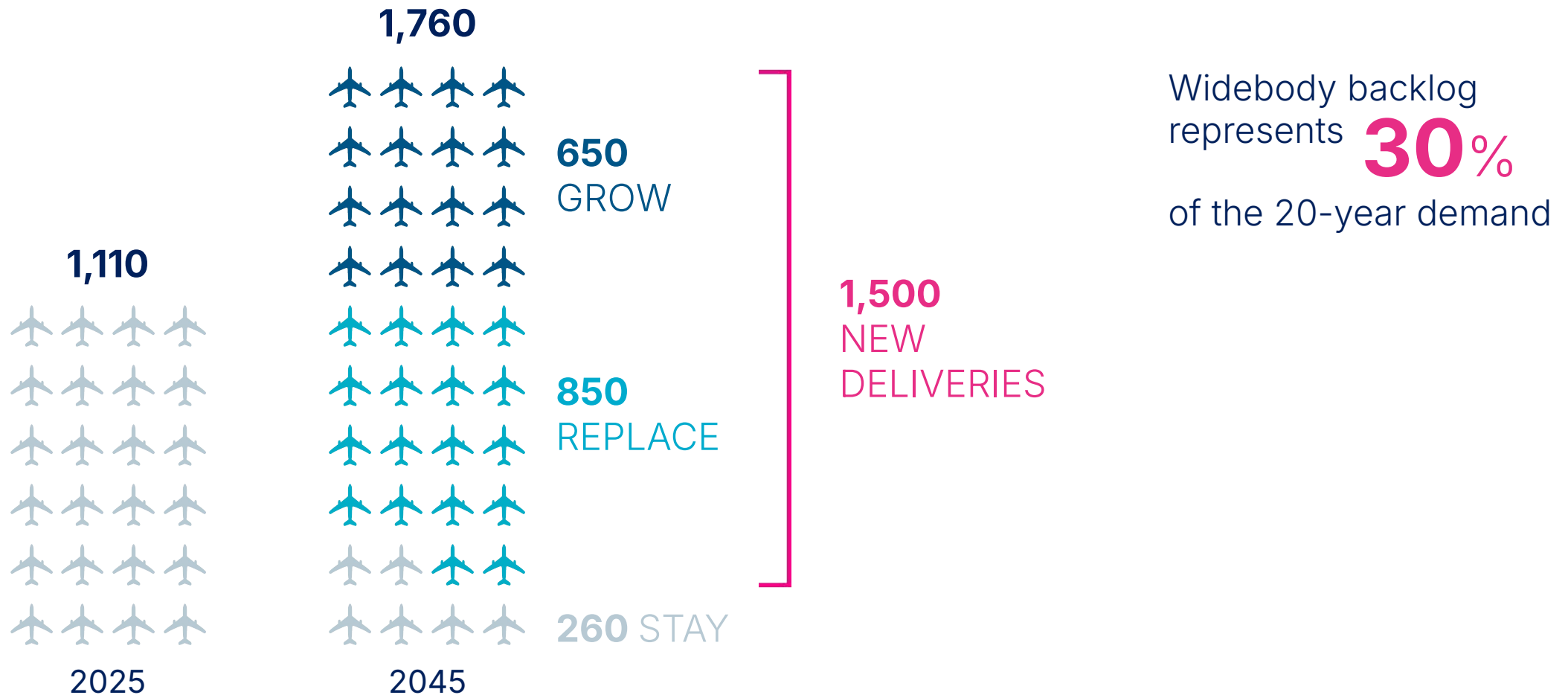
6,690 Single Aisle will be needed in Europe/CIS up to 2045

Fleet in service (# aircraft)



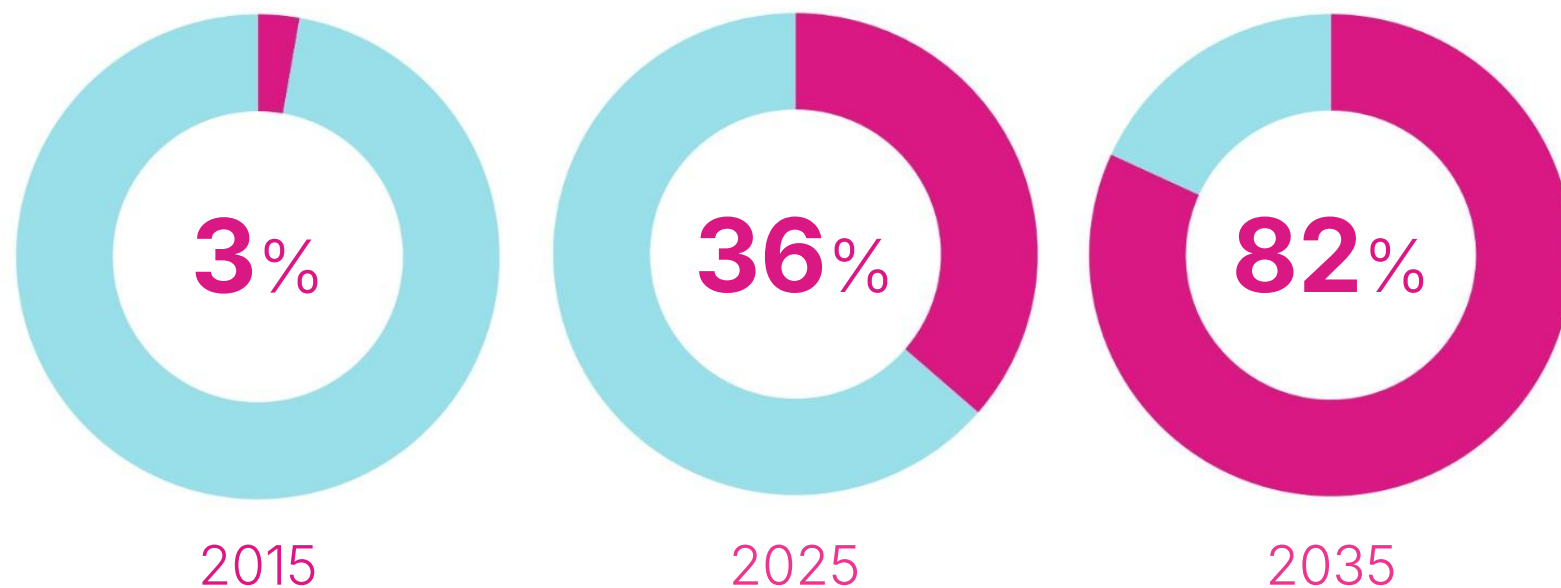
1,500 Widebodies will be needed in Europe/CIS up to 2045

Fleet in service (# aircraft)



Progressing toward an “all new-gen” fleet

Share of new-gen aircraft*



In-service **new generation** aircraft will **more than double** in the next 10 years



Türkiye GMF 2026

Istanbul becomes the #1 connecting hub

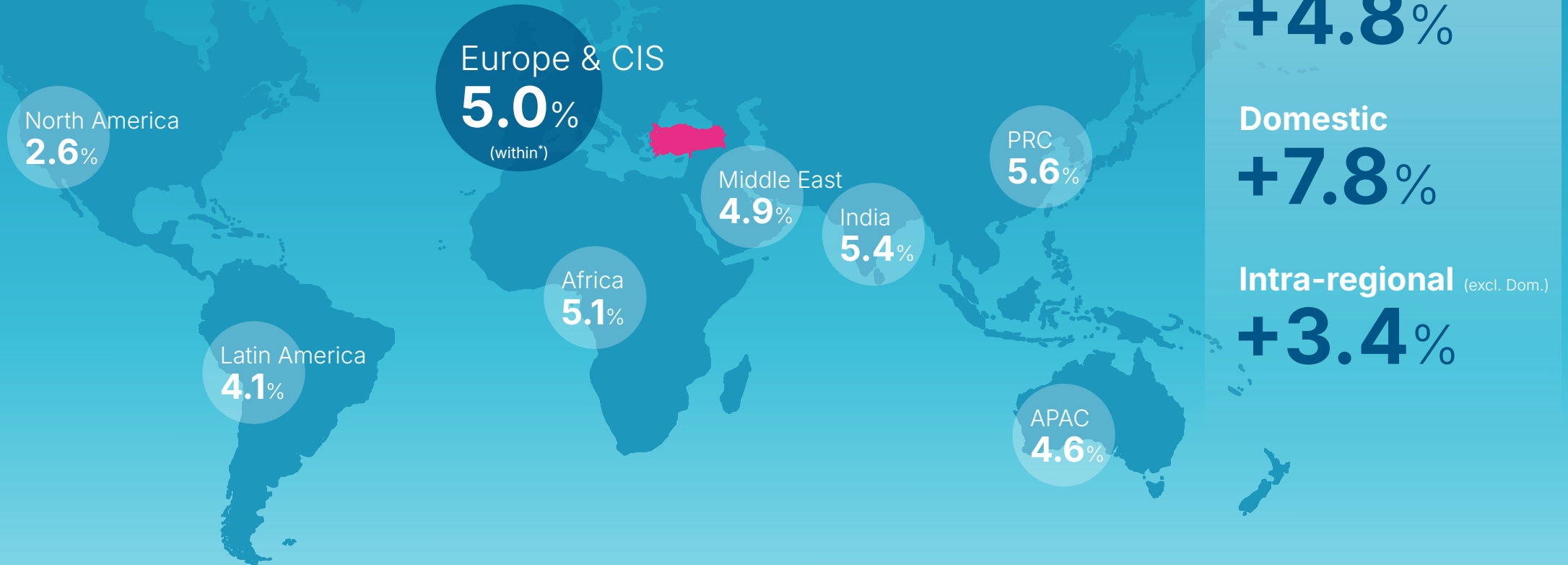
Top 10 cities by connecting traffic on Africa-Europe/CIS flow

Since 2010, Istanbul
has increased
eightfold
the number of
connecting passengers

O&D passenger traffic in Türkiye

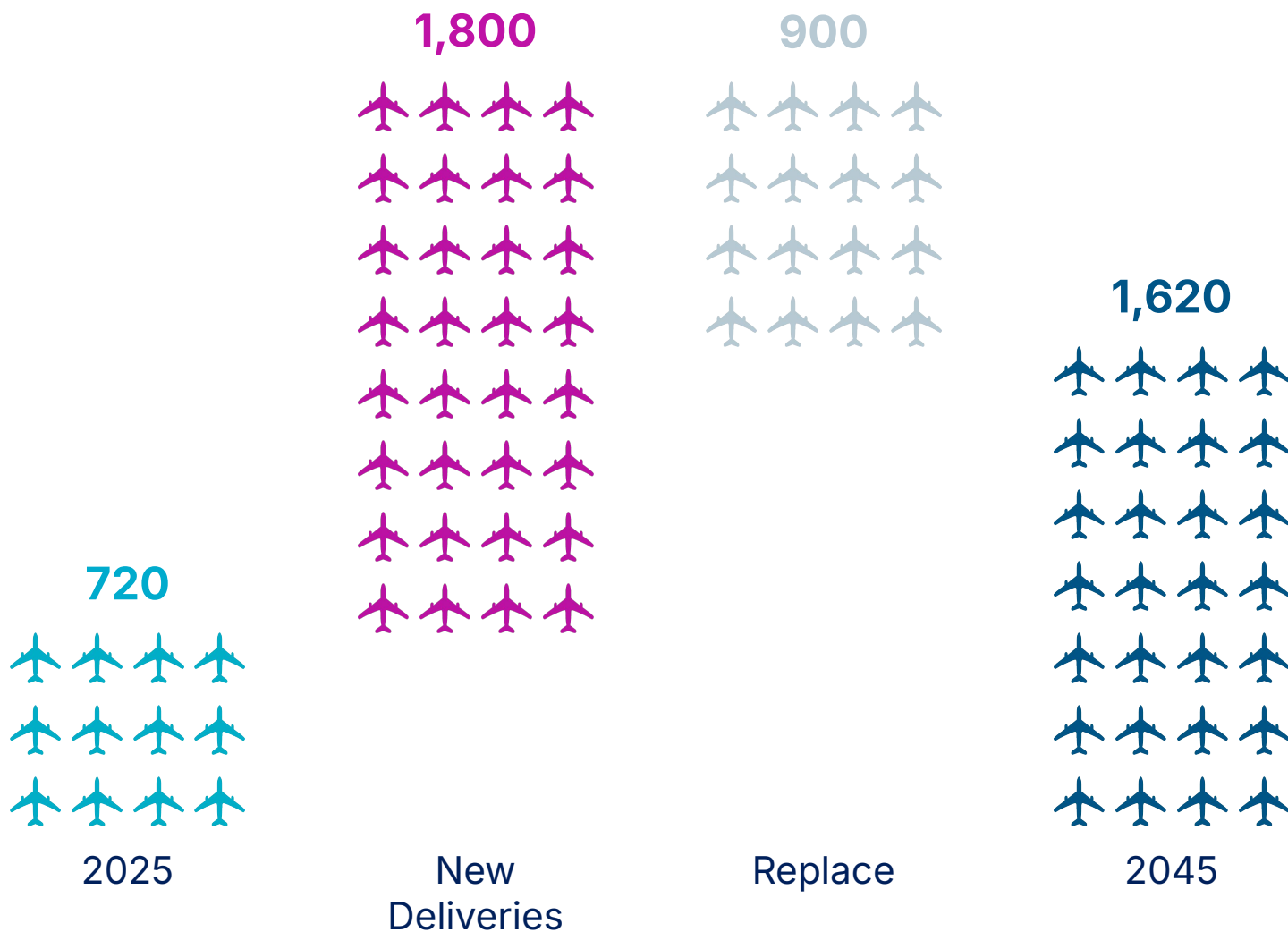
to increase almost threefold over 2026-2045

O&D** passenger traffic forecast from/to/within Türkiye



1,800 new passenger aircraft will be needed up to 2045

Fleet in service (# aircraft)



Takeaways - Türkiye GMF 2026

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

Europe/CIS is a leading market for new
aircraft accounting for **20%** of global demand

Türkiye represents **more than one fifth of the
total demand** for aircraft in the region

Istanbul consolidates itself as a **world-class
connecting hub**

Aviation brings **important social benefits**

Passenger Traffic 2025-2045

3.9%	Global
2.9%	Europe/CIS
4.5%	Türkiye

New Deliveries 2026-2045

42,160 aircraft	Global
8,190 aircraft	Europe/CIS
1,800 aircraft	Türkiye

Thank you

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