AVIATION WEEK
Fleet&MRO
FORECASTS



BUSINESS

2025 MARKET SUMMARY REPORT

AVIATION WEEK
NETWORK

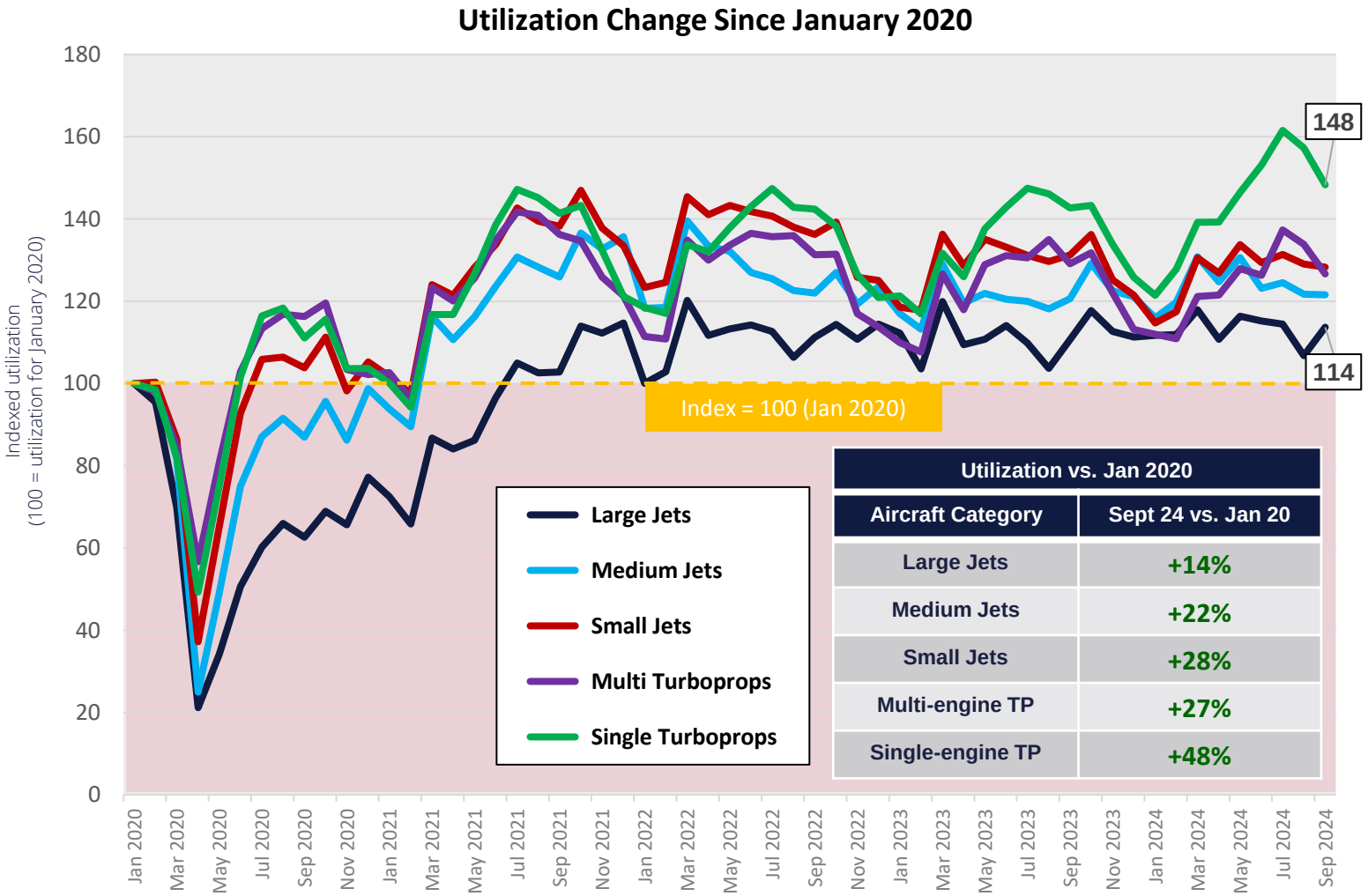
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Foreword: Business Aviation Still Climbing

Brian Kough, Senior Director, Forecasts & Aerospace Insights | Intelligence & Data, Aviation Week Network



Utilization vs. Jan 2020	
Aircraft Category	Sept 24 vs. Jan 20
Large Jets	+14%
Medium Jets	+22%
Small Jets	+28%
Multi-engine TP	+27%
Single-engine TP	+48%

After a giant boost for business aviation's popularity post pandemic, the strong market tailwinds have softened since last year to allow things like the supply chain and used prices to catchup with demand and avoid a bubble. Nearly all categories of aircraft have seen and are expected to continue to see more sustainable market growth given these trends. Normal pre-buy checks, buyer-power influences and more thoughtful purchases are anecdotally making a comeback signaling a more rational market behavior on the used side, but new-build prices have maintained their pricing power given healthy backlogs.

After accounting for fleet growth, business aviation "stickiness" persists at a new, higher normal as witnessed in overall utilization activities. However, shifts in the way users access private aviation are seen in charter and fractional operations jumping ahead at the expense of private ownership and corporate activities. International borders are fully open but environmental concerns persist to weigh down growth in the second key regional market.

Source: Tracked Aircraft Utilization (TAU), Aviation Week Intelligence Network, Copyright 2024.

Foreword: Business Aviation Still Climbing

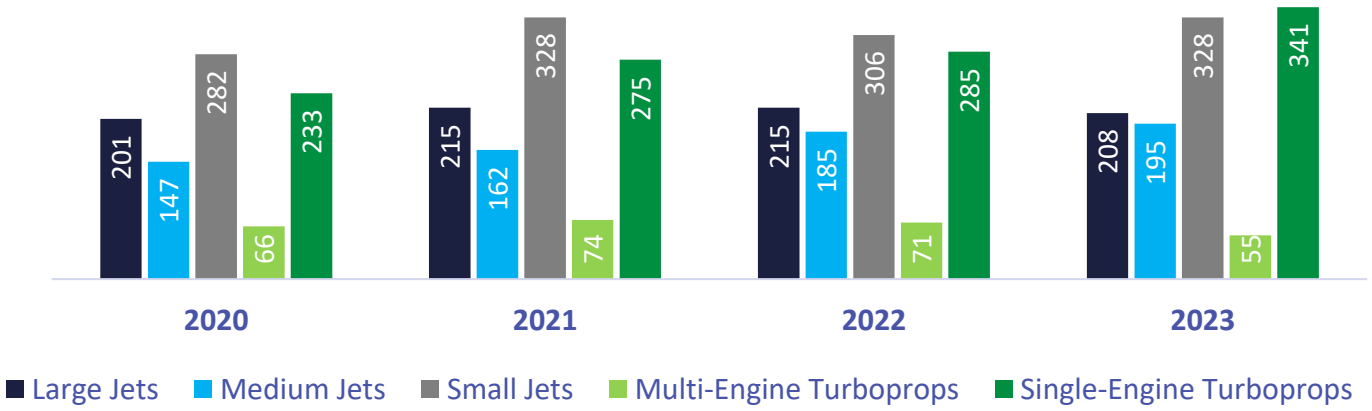
Brian Kough, Senior Director, Forecasts & Aerospace Insights | Intelligence & Data, Aviation Week Network

New aircraft deliveries accelerated meeting the requirements of individual, charter, and fractional operators. For the January-September 2024 period, unit deliveries are up over 200 aircraft compared to 2020, and 80 more aircraft vs. 2021. Primarily driven by small jet and single-engine turboprop category aircraft, the expectations for the future is strong. We feel the delivery market will stabilize on the high side of recent "normal" activity seen over the previous decade at ~900 jets and ~230 turboprops per year on average.

GDP estimates for the major world regions remain positive according to economic prognosticators with Asia Pacific seeing the highest forecasted growth and Europe seeing the lowest. Jet fuel prices are low, but supply constraints are pushing other prices higher.

Annual Deliveries (2020-2023)

2020	2021	2022	2023
929	1,054	1,062	1,127



3-Month Utilization Change
Period: Q3 2024

Operator Class	vs. Same period of 2023	vs. Same period of 2019
Corporate	+1%	+11%
Fractional	+10%	+54%
Charter	+4%	+31%
Private	+1%	+33%

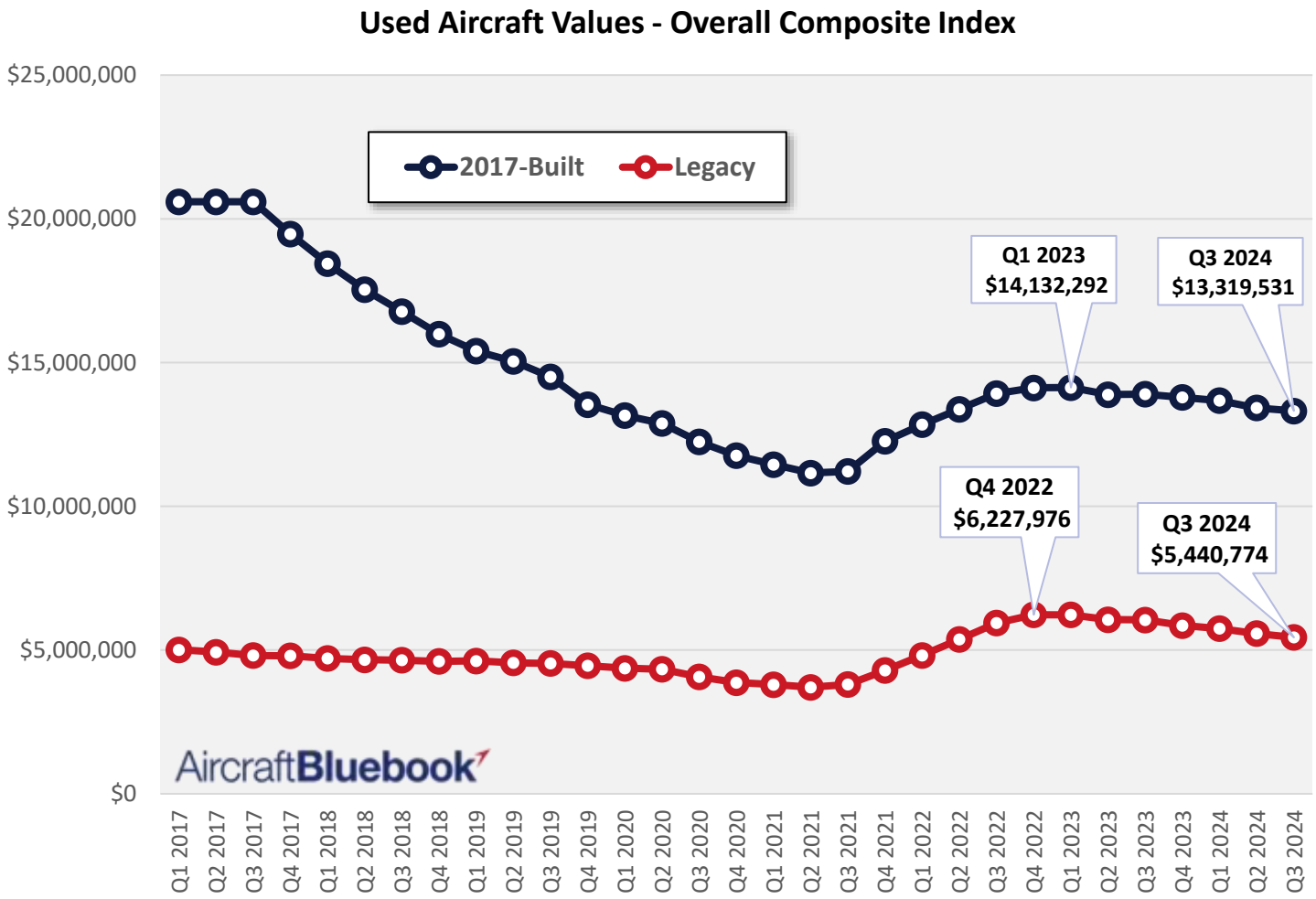
Q1-Q3 Deliveries by Aircraft Category

	2020	2021	2022	2023	2024
Large Jets	129	141	141	125	145
Medium Jets	85	106	117	124	142
Small Jets	166	199	199	212	213
Multi-Engine Turboprops	35	39	49	42	42
Single-Engine Turboprops	130	186	174	222	209
TOTALS	**545**	**671**	**680**	**725**	**751**

Source: Aviation Week Intelligence Network, Aviation Week Network, Copyright 2024.

Foreword: Business Aviation Still Climbing

Brian Kough, Senior Director, Forecasts & Aerospace Insights | Intelligence & Data, Aviation Week Network



The last two year's signs of unsustainable fervor in the new and used markets appear on track to stabilize with sales transactions taking on what we would call more normal activity and transaction precautions.

Aircraft Bluebook reports used aircraft valuations ceased their stellar climbs from 2022/23, and except for turboprops, have seen price decreases as of the 3rd quarter amounting to -10% for 6-10-year-old aircraft and -4% against the previous year.

Concerning factors remain this year. Interest rates are high, and fuel prices have been susceptible to shocks as well as the world's supply chain remains vulnerable. Labor pressures are manifesting at OEMs, suppliers, and with MROs servicing aircraft as well as the security of supply chains themselves. Flashpoints remain around the globe. All these are reasons for caution and monitoring market dynamics. However, the market's strong signals cannot be overlooked, our predictions are favorable for resilient fleet and MRO growth.

Source: Aircraft Bluebook, Aviation Week Network, Copyright 2024.

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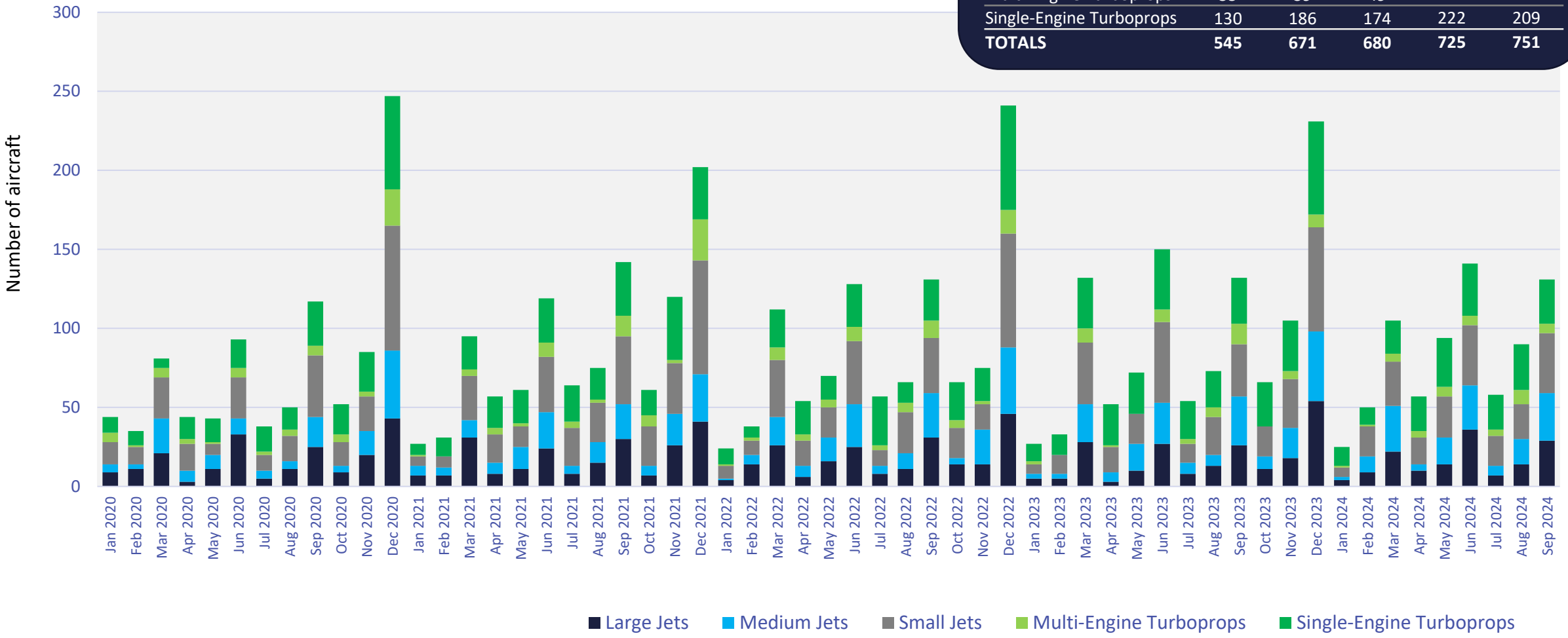
Recent Key Performance Indicators

Recent Aircraft Deliveries

Monthly business aircraft deliveries by category

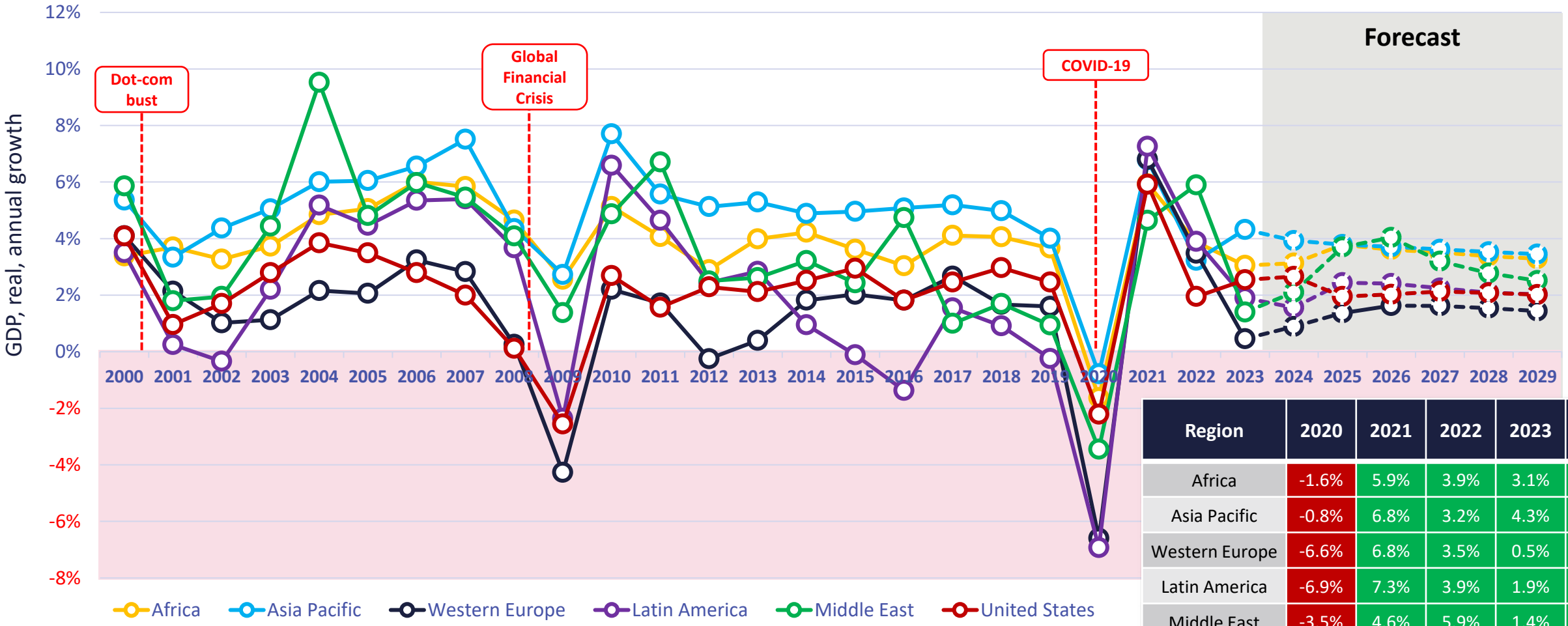
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Source: Fleet Discovery, Aviation Week Intelligence Network, Copyright 2024. Note: Latest month delivery count subject to finalization.

GDP, Recent Economic Shocks & Forecast

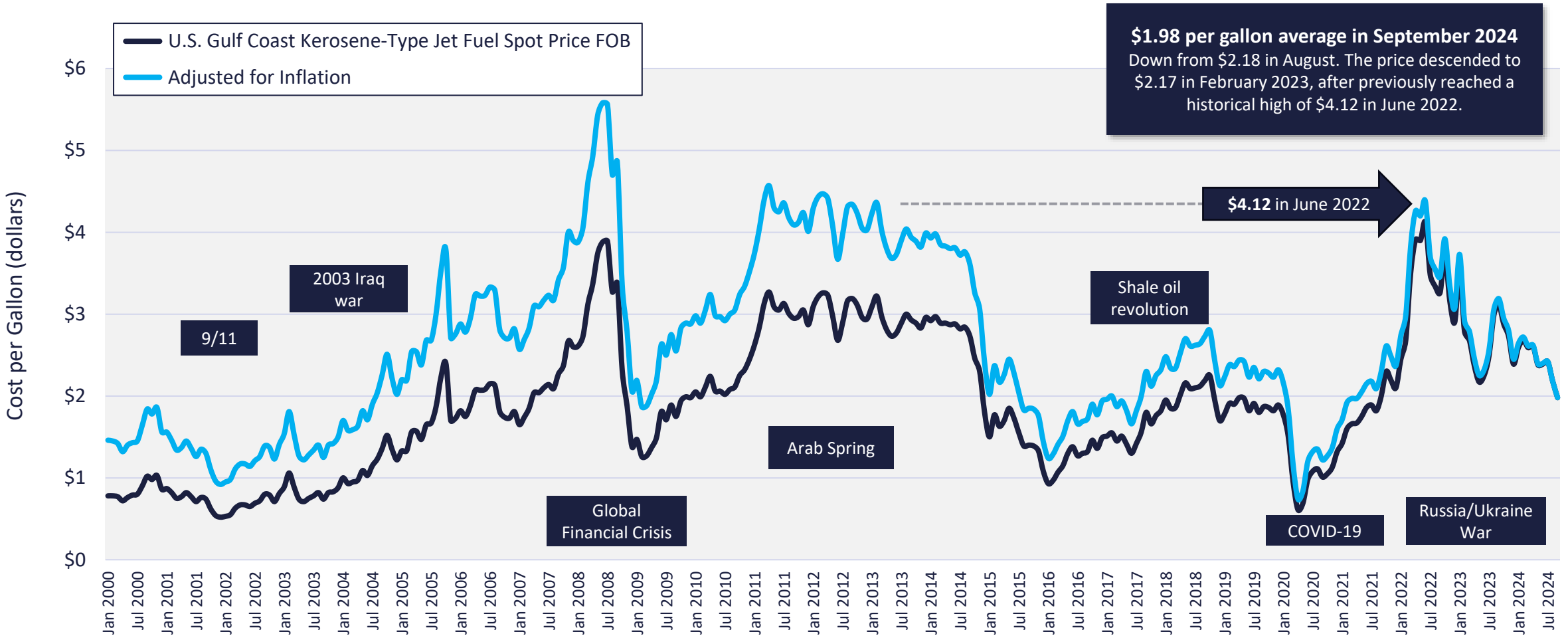


Region	2020	2021	2022	2023	2024 (f)
Africa	-1.6%	5.9%	3.9%	3.1%	3.1%
Asia Pacific	-0.8%	6.8%	3.2%	4.3%	3.9%
Western Europe	-6.6%	6.8%	3.5%	0.5%	0.9%
Latin America	-6.9%	7.3%	3.9%	1.9%	1.6%
Middle East	-3.5%	4.6%	5.9%	1.4%	2.1%
United States	-2.2%	5.9%	2.0%	2.5%	2.7%
World	**-3.1%**	**6.5%**	**3.1%**	**2.7%**	**2.7%**

Source: Oxford Economics Ltd (18 September 2024 update)

Jet Fuel Price and Inflation Adjusted

U.S. CPI-adjusted in latest month's price



Source: US EIA, U.S. Gulf Coast Kerosene-Type Jet Fuel Spot Price FOB and U.S. Bureau of Labor Statistics CPI Index.
Note: Prices adjusted for inflation. Today's dollar value – all monthly prices are monthly averages adjusted for inflation using U.S. CPI data.

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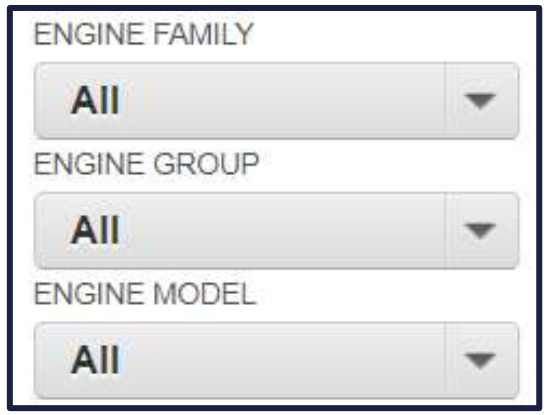
What's New?

Product Changes

Engine Hierarchy
The business aviation forecast in this release includes three levels of engine hierarchy to allow both precise or high-level views of engine fleet metrics, like new deliveries, in-service fleet and MRO breakouts for detailed analysis and projections. Detailed reports leverage the new taxonomy providing greater details.

New engine charting and reporting incorporates the new hierarchies and provides in most cases a more granular view of this market projection. The engine naming and taxonomy was revised to capture the most recent updates but also to make the descriptions and deciphering of various groups and models easier to navigate.

Another benefit is better matching of fleet types across products, so users of Fleet Discovery will be able to match aircraft and engines at various levels to the forecast product.



		Year	2025	2026	2027	2028	2029
Engine Family	Engine Group	Engine Model	Engine Deliveries	Engine Deliveries	Engine Deliveries	Engine Deliveries	Engine Deliveries
PT6	PT6A LARGE	PT6A-64	0	0	0	0	0
		PT6A-66	0	0	0	0	0
		PT6A-66B	4	0	4	2	10
		PT6A-66D	0	0	0	0	0
		PT6A-67A	25	29	27	34	31
		PT6A-67B	0	0	0	0	0

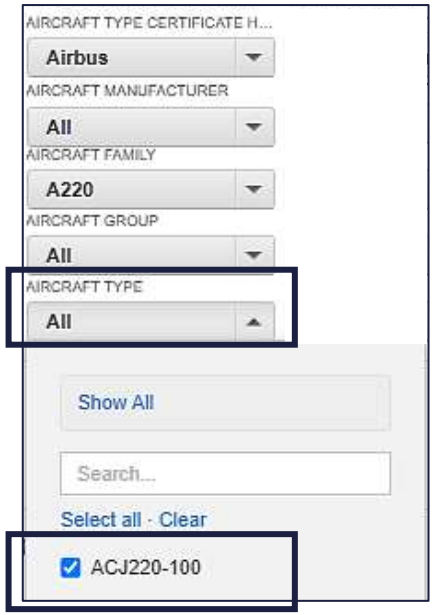
Full details are available via filters in the online dashboard tool. Please see the methodology section for further details.

Product Changes

Aircraft Fleet - Hierarchy

Added this year, Aircraft "Type" changes aircraft *model* used previously. The scope divides three-levels of hierarchy, **Family, Group, Type**, allowing both high-level and precise navigation across fleets or MRO reporting. Above these levels, both the Type Certificate Holder (TCH) or the original manufacturer can be used to filter results to zero-in on desired parameters.

The Aircraft Type field matches across product lines including Fleet Discovery.



		Year	2025	2026	2027	2028
Aircraft Family	Aircraft Group	Aircraft Type	In-Service Aircraft	In-Service Aircraft	In-Service Aircraft	In-Service Aircraft
Citation	Citation CJ1	Citation 525	614	610	605	597
	Citation CJ2	Citation 525A	454	454	453	453
	Citation CJ3	Citation 525B	731	767	804	833
	Citation CJ4	Citation 525C	494	524	553	579
	Citation Excel	Citation Excel	349	349	347	343
		Citation XLS	322	322	322	322
	Citation I	Citation I	326	295	263	230
	Citation II	Citation Bravo	310	308	303	296
		Citation II	451	425	395	362
		Citation SII	120	108	96	81
	Citation III	Citation III	137	125	110	93

Full details are available via filters in the online dashboard tool. Please see the methodology section for further details.

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Market Outlook

Market Outlook

Molly McMillin, Editor-in-Chief | The Weekly of Business Aviation, Aviation Week Network



Molly McMillin

The COVID-19 pandemic initiated an explosion in the way business aviation is used – one that continues today.

New entrants to the industry are staying, which is critical to the industry moving forward, experts say.

Before the pandemic, the rate of first-time business aircraft buyers was in the 9%-12% range. From 2020 until the end of 2022 during the pandemic, that increased to nearly 40%, Michael Amalfitano said recently. Sales are now normalizing, however.

“We’re coming off a huge high,” Amalfitano said during the recent JetNet Summit in New York City. “It’s still a growth that the industry hasn’t seen in a decade.”

Industry experts expect the market to stabilize in the coming years.

“While new aircraft deliveries and used aircraft sales are seeing unusually high demand and price increases lately, we feel that the delivery market will stabilize on the high side of normal activity we’ve seen over the previous decade,” says Brian Kough, Aviation Week Network senior director of forecasts and aerospace insights.

Aviation Week’s newly released Business Aviation Fleet & MRO forecast projects deliveries of more than 9,000 new business jets and nearly 2,800 turboprops valued at $298 billion during the 10 year-period from 2025 through 2034.

Unit deliveries are projected to be led by light jets, with 27% of all jet deliveries, followed by ultra-long range business jets, super midsize jets, very light jets, large jets and midsize jets.

Over the 10-year period, the forecast projects close to 6,600 legacy business jets and turboprops to be retired, with yearly retirements peaking in 2031 at 744 aircraft. Top models projected to be retired include the Cessna Citation, Hawker 800, King Air 90 and Learjet model aircraft.



Embraer Phenom 300E

Credit: Nigel Prevett, Aviation Week Network

On the maintenance, repair and overhaul side, growth is expected to see more than a 3.2% compound annual growth rate overall and $146 billion in demand, of which 27% is aircraft engine requirements.

At Cirrus Aircraft, new entrants to aircraft ownership rose to about 40% of all customers during the pandemic. That number has declined, but still about 25% of Vision Jet customers are new to aviation, officials say.

While the market is now normalizing, across the industry only 8% of those first-time buyers got rid of their aircraft during the first year, studies show, Amalfitano says. “The stickiness is there.” Of those who decided to sell their aircraft, the majority are upgrading to another one.

The industry made some adjustments for the new entrants.

“Everybody thinks the first-time buyer is someone who can’t afford the airplane, and they don’t really know what they’re doing,” Amalfitano said during the Summit. “But that’s not where the buyers are. The buyers are people who know they need the airplane; they’ve always known they needed the airplane and could afford the airplane. And guess what COVID did? Gave them a reason [to buy] that nobody questioned – safety, privacy, security, time management. My business is more important; my family is more important. It gave them camouflage.”

It wasn’t just COVID that did that, Don Dwyer, Guardian Jet co-managing partner, said during the panel discussion. “It was COVID on the end of a 12-year bull run. It might be the greatest creation of wealth in the creation of the planet.”

That kind of demand drained the pre-owned inventory levels, adds Dassault Falcon Jet CEO Thierry Betbeze. “This has reset the market,” Betbeze said.

Since then, growth in the fractional market, which focuses on customer service, has been “off the charts,” Amalfitano said.

Corporate flight departments and others, for example, are using fractional providers for incremental or supplemental lift rather than adding or buying another aircraft. Growth in the aviation management sector has been “extraordinary,” although new entrants into the charter industry has receded, Dwyer adds.

“All sectors are strong,” Amalfitano says. “You’re getting corporate flight departments, high-worth individuals, billionaires, owner-pilots, fractional, fleet – all buying. And that’s not always the case. There are usually variabilities in those places, but you’re seeing growth in all those sectors. That’s important.”

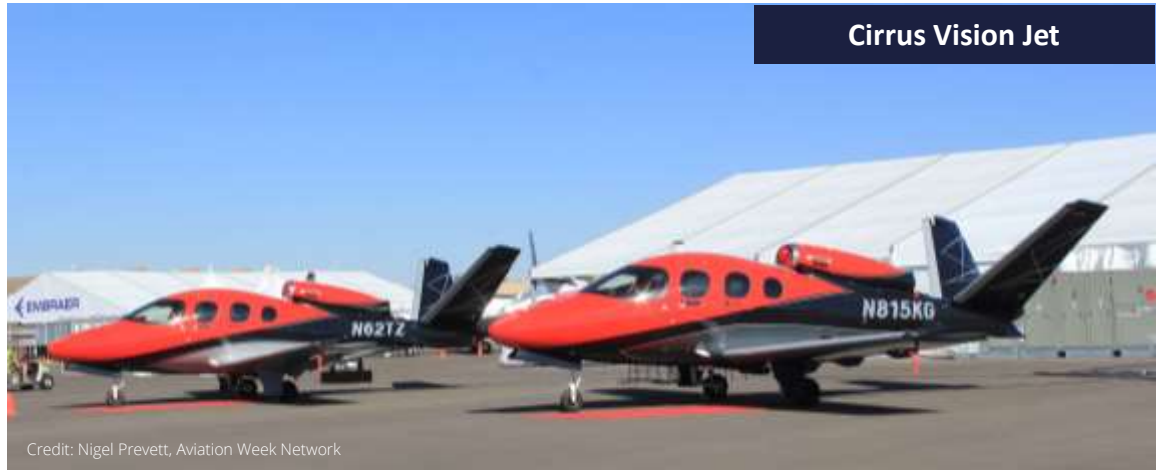
Business jet manufacturers have strong backlogs with about two years of demand, although that has been exacerbated by lingering supply chain constraints. The dynamic, however, gives manufacturers stability and opportunities for improved pricing and profitability, they note.

At the same time, the economy is sound, the banking industry is strong, pre-owned aircraft inventory levels remain below historical averages, access to capital is plentiful for the right profiles and the in-service fleet is aging, which spurs replacements, Amalfitano says.

At the same time, there are concerning trends.

Low interest rates are a thing of the past, fuel prices have been vulnerable, labor pressures continue and aggressive GDP recovery predictions around the world seem unachievable.

“However, the needs and wants of business owners and operators cannot be mistaken, especially given the most recent rise of business aviation activities,” Kough says. “Therefore, our predictions are favorable for continued fleet and MRO demand.”



Credit: Nigel Prevett, Aviation Week Network

Dassault's Betbeze agrees, saying he expects the 2025 market to be similar to that in 2024. "As long as we have this level of pre-owned market inventory, we are in a situation where things are balanced. We have strong backlogs. We don't see those backlogs as speculation, which is something we saw in 2007, 2008. We should be good for the next 12 months."

Large order backlogs mean manufacturers must work to keep customers engaged and manage expectations as they wait for their aircraft.

"You heard about the anticipation phase that they're all excited about their airplane, but the first thing you have to tell them is 'Yeah, but it's going to come later than we had hoped, and here are the reasons why," Amalfitano says. "What you have to show is what are you doing to solve it."

The recovering supply chain has been struggling to keep pace.

Much of it evolves around a skilled labor shortage, which has led to part delays, impacting items such as engines, compressors, AP units, windshields and other products. Labor shortages include those with the craftsmanship associated with specific skills, such as creating bespoke aircraft interiors, Amalfitano says.

The supply chain lost talent during the pandemic. For example, some $80,000 a year skilled cabinet makers took jobs as truck drivers making $200,000 during the peak time of the "Great Resignation," he says.

To help, Embraer has sent hundreds of its own technicians, specialists and skilled labor around the world to suppliers to help address problems firsthand and help ramp up production, Amalfitano says.
Betbeze said Dassault Falcon Jet is also sending employees to subcontractors to help, either that or "you buy the subcontractor."

"One thing is clear; quality and safety are nonnegotiable," Betbeze says.

"You heard about the anticipation phase that they're all excited about their airplane, but the first thing you have to tell them is 'Yeah, but it's going to come later than we had hoped, and here are the reasons why,'" Amalfitano says. "What you have to show is what are you doing to solve it."

To address the spike in new buyers, Cirrus is offering by-the-hour maintenance, built-in type rating training and "lift" as they wait for deliveries. The company also is offering everything from pilots, aircraft management, maintenance, subscriptions, hangar space and other services, says Todd Simmons, Cirrus Aircraft president of customer experience.

"It's the entire piece," Simmons says. "In this case, the customer is often not a pilot – they may be at some point ... That person is defining his or her flight experience on the airplane. He or she just might not be doing it from the front left seat, and they may never do it from the front left seat, but yet they've got that capability with the airplane."

Their expectations are not being set within the aviation industry, Simmons says. "They are set by all the other experiences in their life that they're capable of accessing, and because of that, that's forcing us to raise that bar even higher."

An influx of new entrants to the industry has led to Embraer making significant investments in its design team and adding new technology, says Steve Friedrich, Embraer Executive Jets chief commercial officer.

"We've brought a lot of that intellectual property in house now, and our design team has done a fantastic job of curating the customer experience when you come in," Friedrich says. "When you come in to learn about the product, when you come in to purchase the product and when you come in to specify that product... And that has really transformed our efficiency as well. The customer has a better experience, and we are much more efficient and productive in terms of being able to put together that aircraft and get it into the production line."

Business jets and turboprops are time machines, Friedrich says. "We continually see these being used for productivity reasons ... COVID, I think. initiated an entire explosion – expansion of the way business aviation has been used, and that has continued to grow, and that's only going to continue to grow as we go forward."


Cessna Citation Longitude
Credit: Nigel Prevett, Aviation Week Network

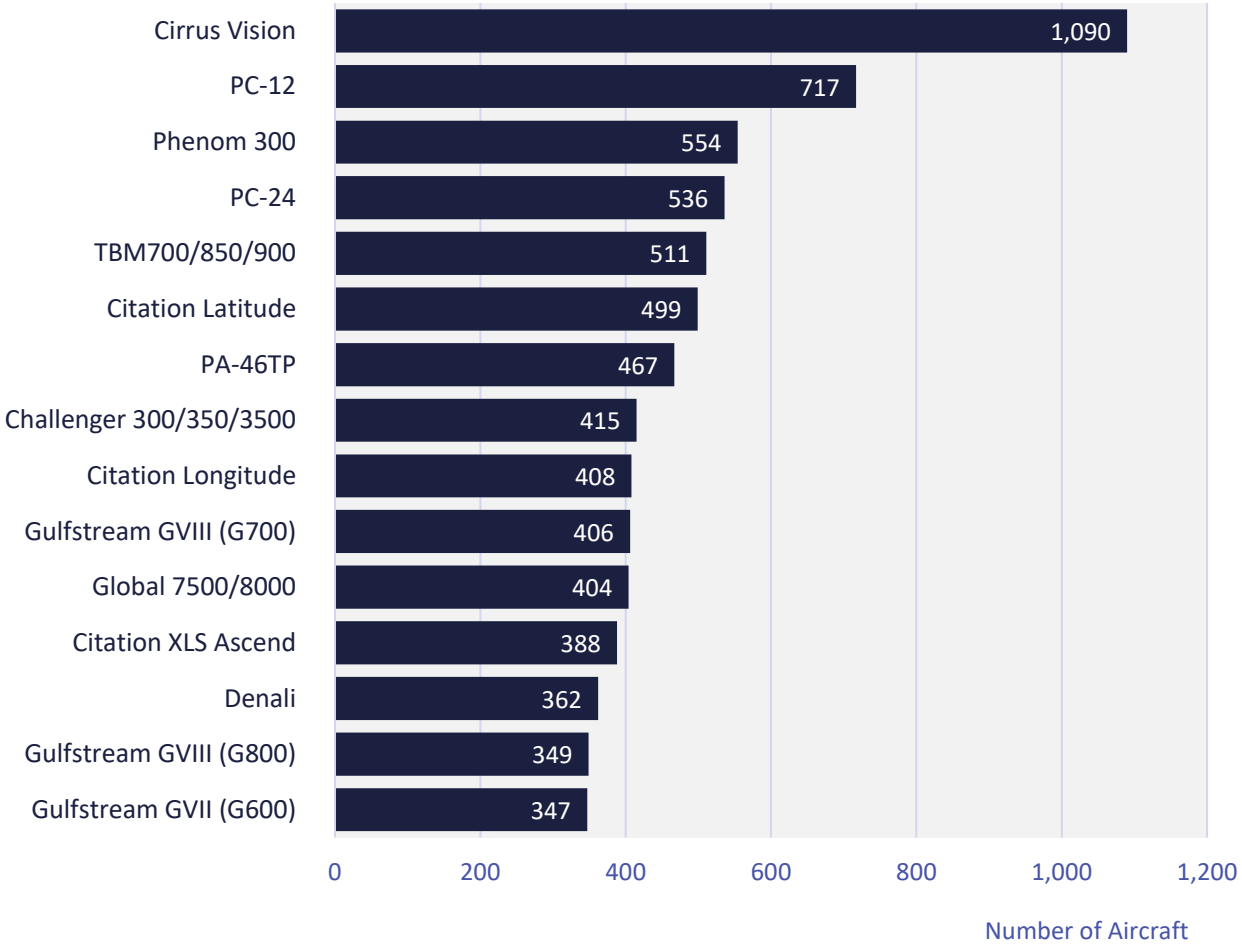
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Fleet Forecast & Trends

Forecast Aircraft Deliveries

By Aircraft Group



Highlights

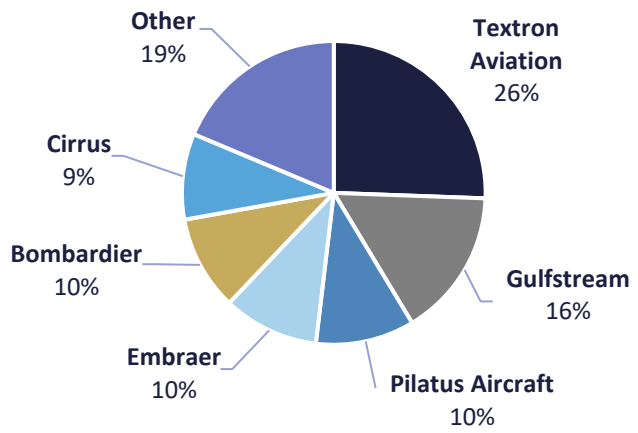
- 11,906 total deliveries over 10 years; 9,086 business jets / 2,820 turboprops.
- $298 billion retail delivery value over 10 years.

The Cirrus Vision Jet, Pilatus PC-12 and Phenom 300 are expected to see the highest number of unit deliveries of new build aircraft in the 2025-34 forecast period. The Citation product line alone will account for 2,243 units, or 19% of the total. All models of Gulfstream's line up will account for 1,880 (16%), while Cirrus' lone, single-engine turbofan type, the Vision SF50, will account for 1,090 (9%). The vast majority of both unit-counts and delivery values will occur in North America, with Western Europe trailing in a distant second place, $188 billion vs. $50 billion, respectively.

By manufacturer, Textron continues its leading product line-up position and is expected to deliver the most aircraft over the period at 3,045 aircraft, or 26% of total deliveries with leading programs of the Citation Latitude/Longitude/Ascend as well as the King Airs.

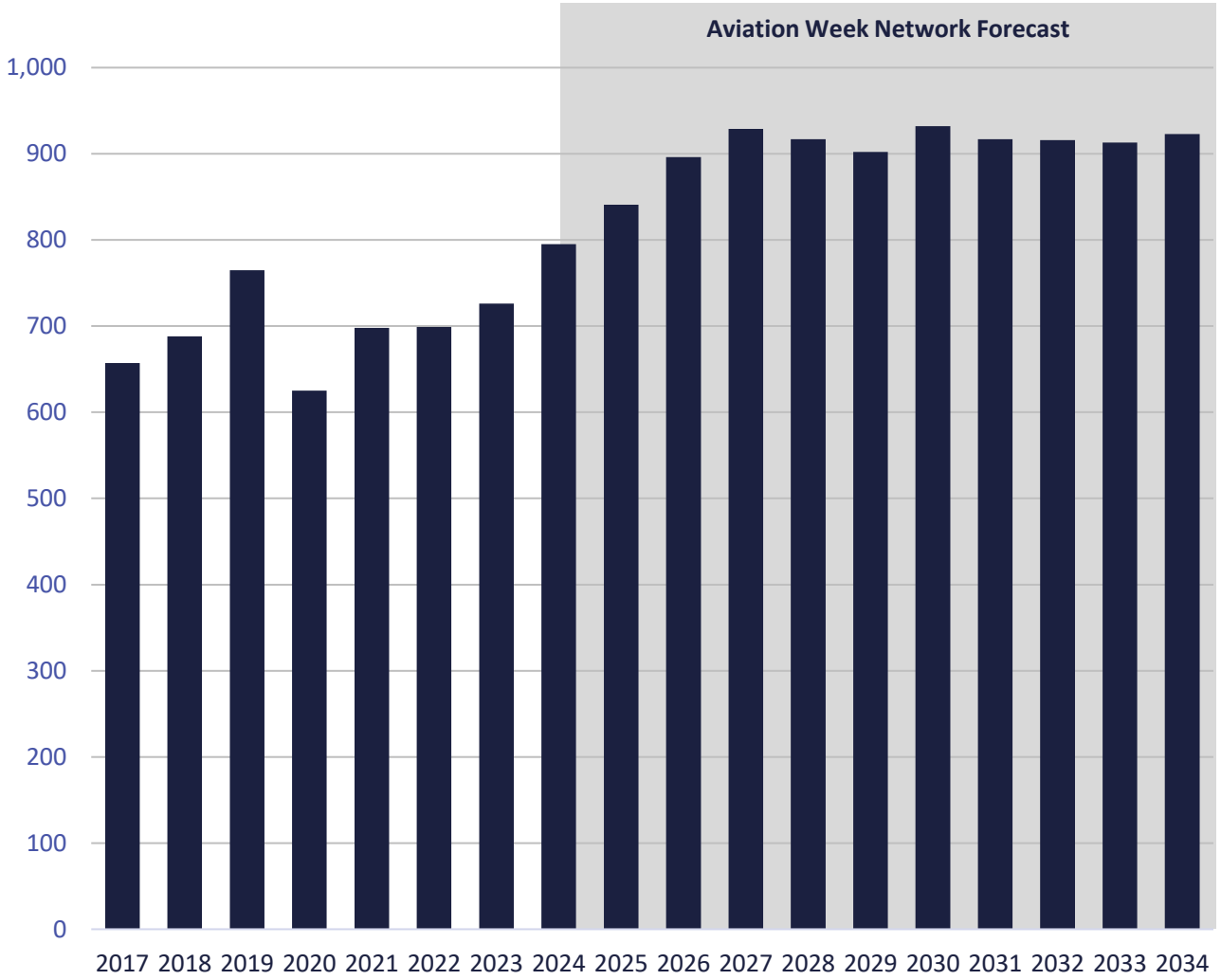
Gulfstream (1,880), Pilatus (1,253), Embraer (1,215), Bombardier (1,200), and Cirrus (1,090) are the other leading manufactures with a share of 9% or greater of overall deliveries.

Deliveries By Manufacturer



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Historical & Forecast Aircraft Deliveries – Jets



Highlights

- 9,086 business jet (turbofan) deliveries over the 2025-34 period.
- 76% of all business aircraft deliveries will be turbofan powered during the 10-year period, with small jets accounting for most units delivered.
- 900-unit annual average predicted for business jet deliveries during the period.

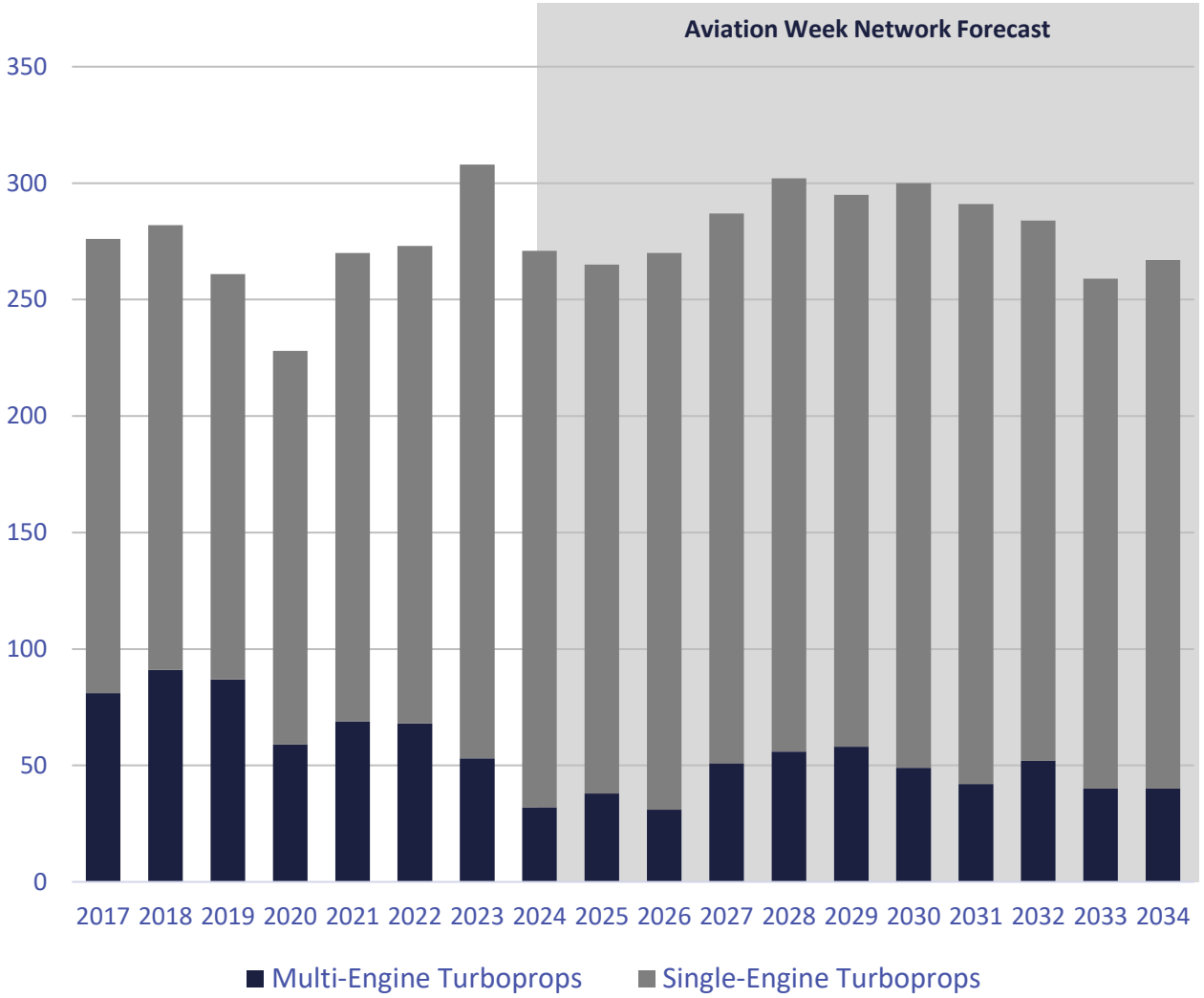


Gulfstream G400

Credit: Christian Albertson, Aviation Week Network

Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Historical & Forecast Aircraft Deliveries – Turboprops



Highlights

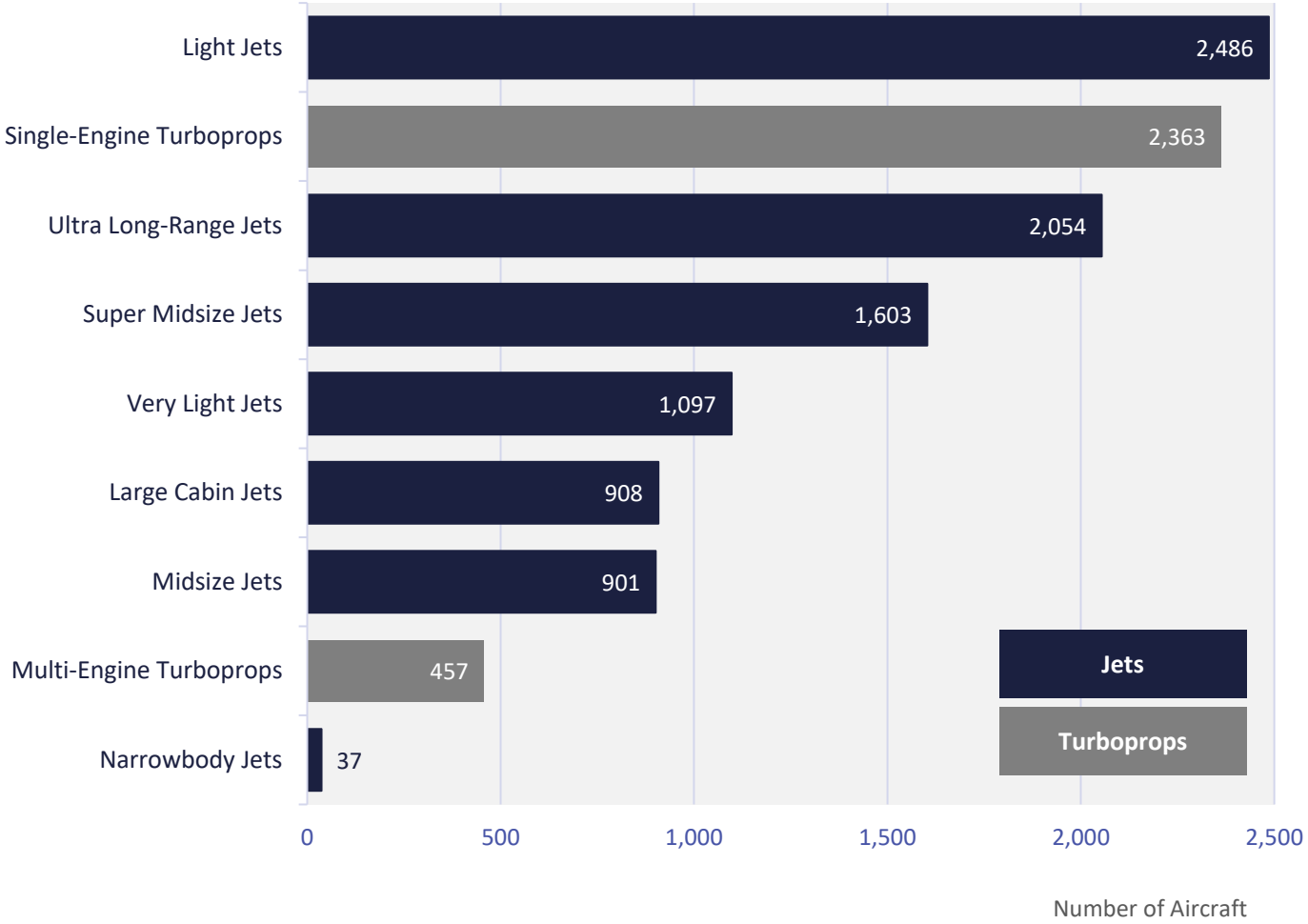
- 2,820 turboprop deliveries over period .
- 2,363 single-engine (SE) turboprop deliveries over 2025-34 period.
- 24% - Turboprops share of all business aircraft deliveries.
- ~235 yearly average units for SE business turboprop deliveries for next 10 years.
- Single-engine in-service fleet grows at above average 4.2% CAGR replacing multi-engine configured aircraft shares.



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

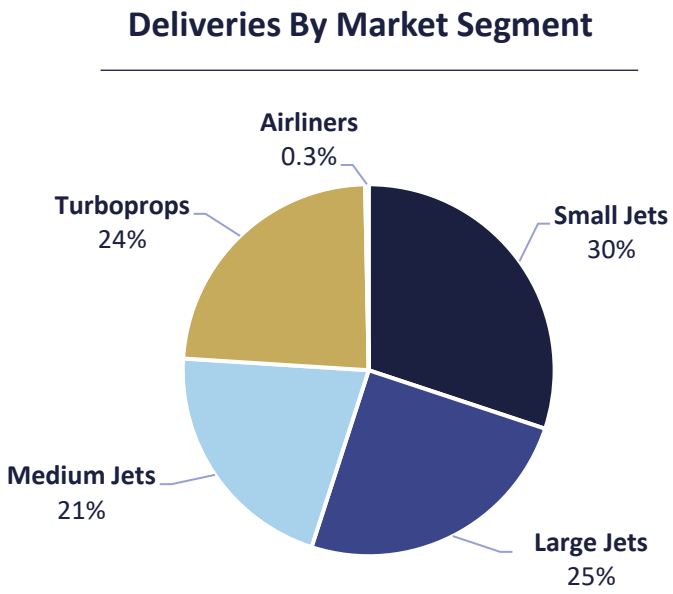
Forecast Deliveries – Size Category & Propulsion

2025-34 Unit Deliveries by Size Category



In terms of business aircraft size, light jets and single-engine turboprops are expected to see the largest number of deliveries between 2025 and 2034 with these two categories alone accounting for 4,849 deliveries, equivalent to 41% of the total over the forecast.

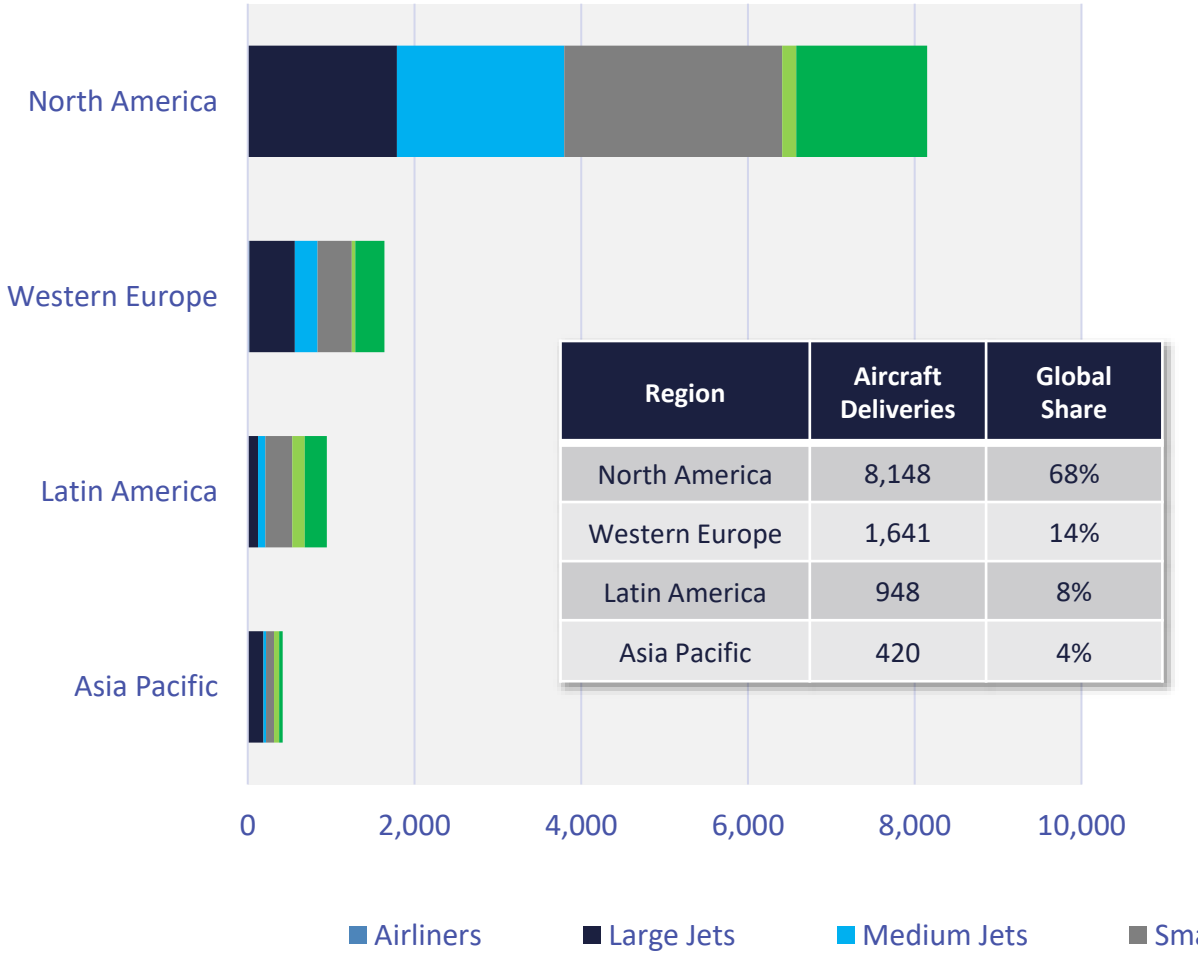
At the next higher, market segment level, small jets account for 30% of all business aircraft deliveries over the period, with Large Jets accounting for a further 25%. This means that these two categories account for 55% of deliveries in the forecast, despite accounting for just 46% of the 2025 in-service fleet.



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

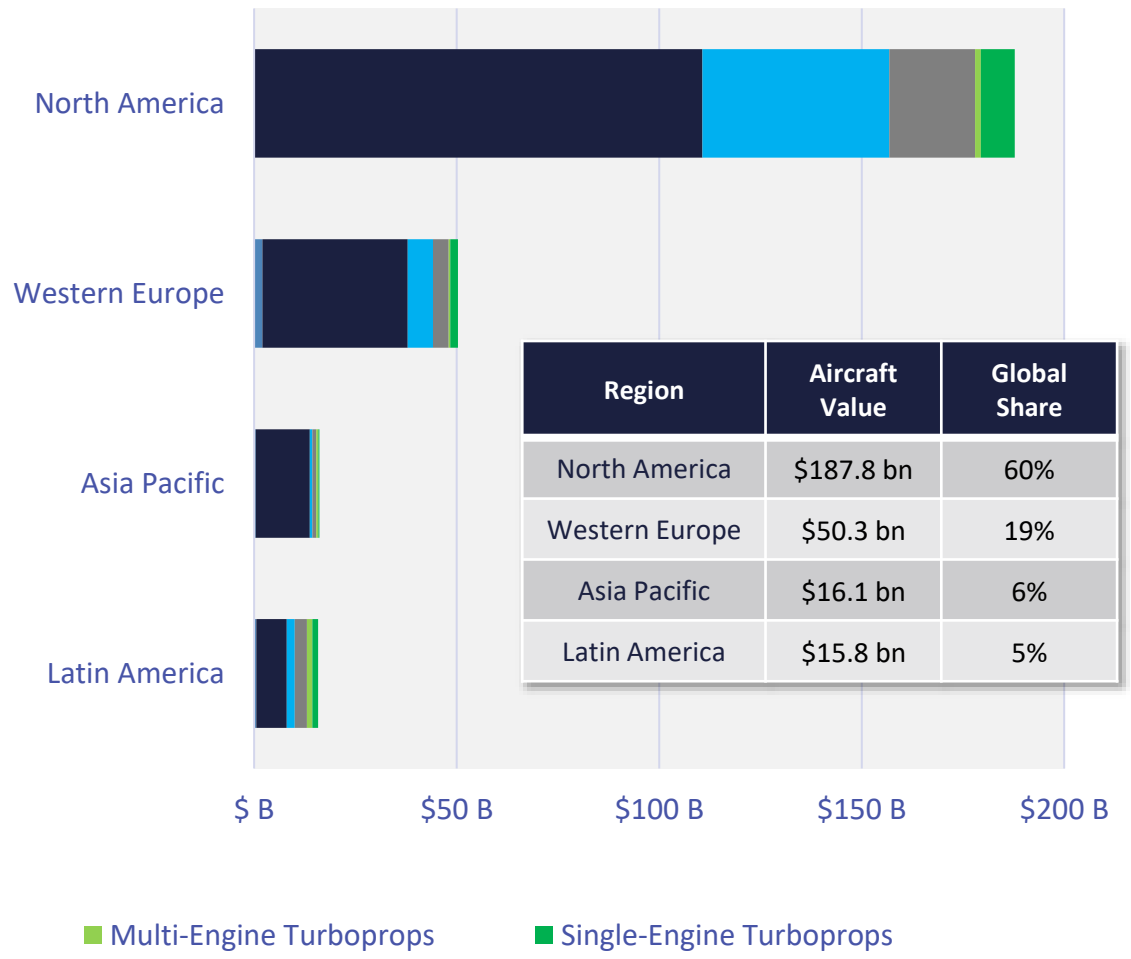
Aircraft Deliveries and Value by Region

Aircraft Units



Region	Aircraft Deliveries	Global Share
North America	8,148	68%
Western Europe	1,641	14%
Latin America	948	8%
Asia Pacific	420	4%

$ Value of Deliveries (Retail)

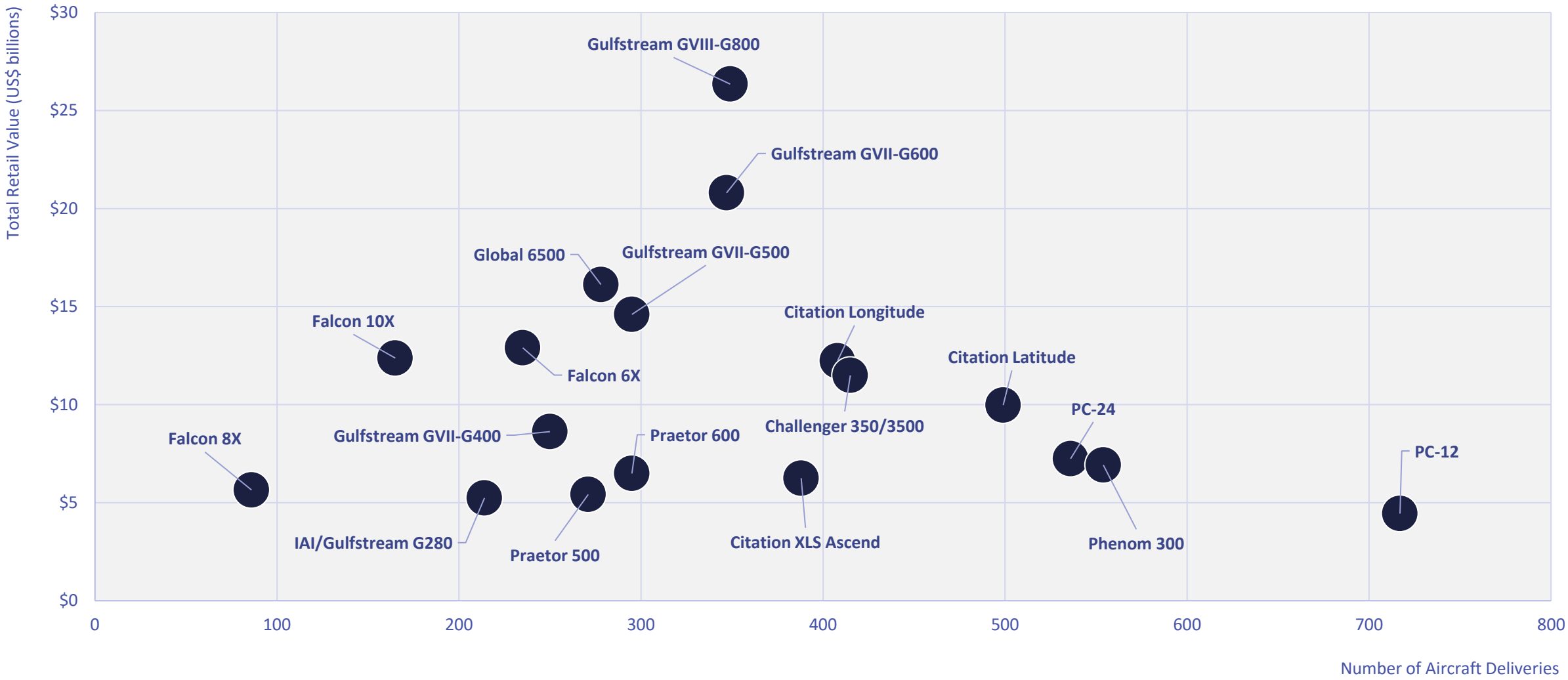


Region	Aircraft Value	Global Share
North America	$187.8 bn	60%
Western Europe	$50.3 bn	19%
Asia Pacific	$16.1 bn	6%
Latin America	$15.8 bn	5%

Airliners | Large Jets | Medium Jets | Small Jets | Multi-Engine Turboprops | Single-Engine Turboprops

Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

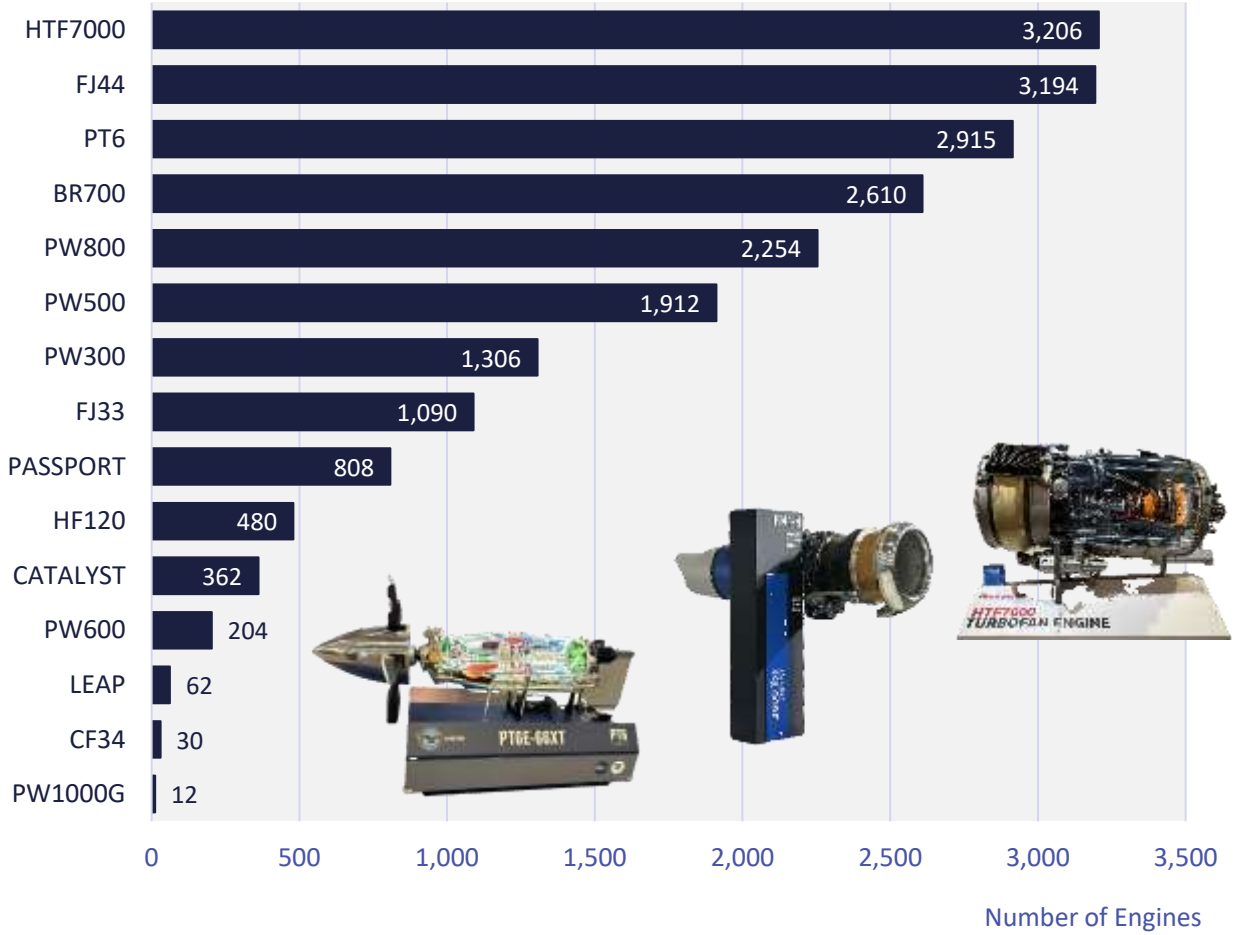
Aircraft Deliveries – Top 20 Models by Value



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Forecast Engine Deliveries

By Engine Family

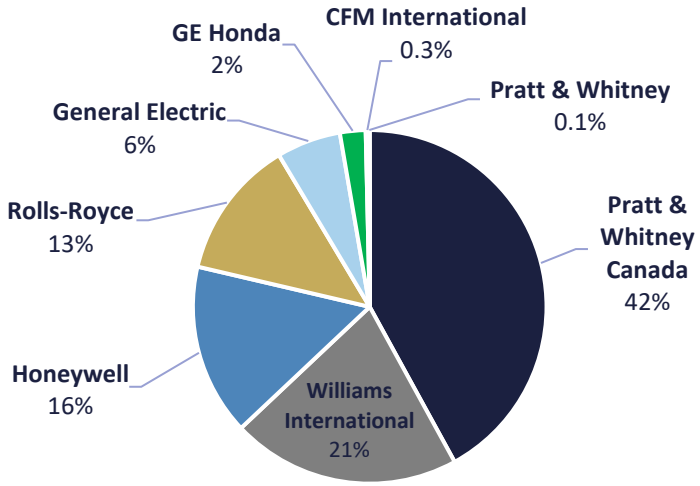


The Honeywell HTF7000, Williams International FJ44 and Pratt & Whitney Canada PT6 series of engines are expected to lead deliveries over the forecast period, with these three engine families each taking an equal 15% share, accounting for 46% of all business engine deliveries between 2025 and 2034. Deliveries of the Rolls-Royce BR700 series are expected to account for a further 13%.

Turbofans will dominate the market with 17,168 deliveries over the period, equivalent to 84% of the total. By comparison, a total of 3,277 turboprop engines will be delivered over the course of the forecast.

The strong performance of the PT6 and PW800 engine families mean that Pratt & Whitney Canada will account for the largest share of deliveries over the forecast, at 42% of the total. Williams International will account for a further 21%, Honeywell 16% and Rolls-Royce 13%.

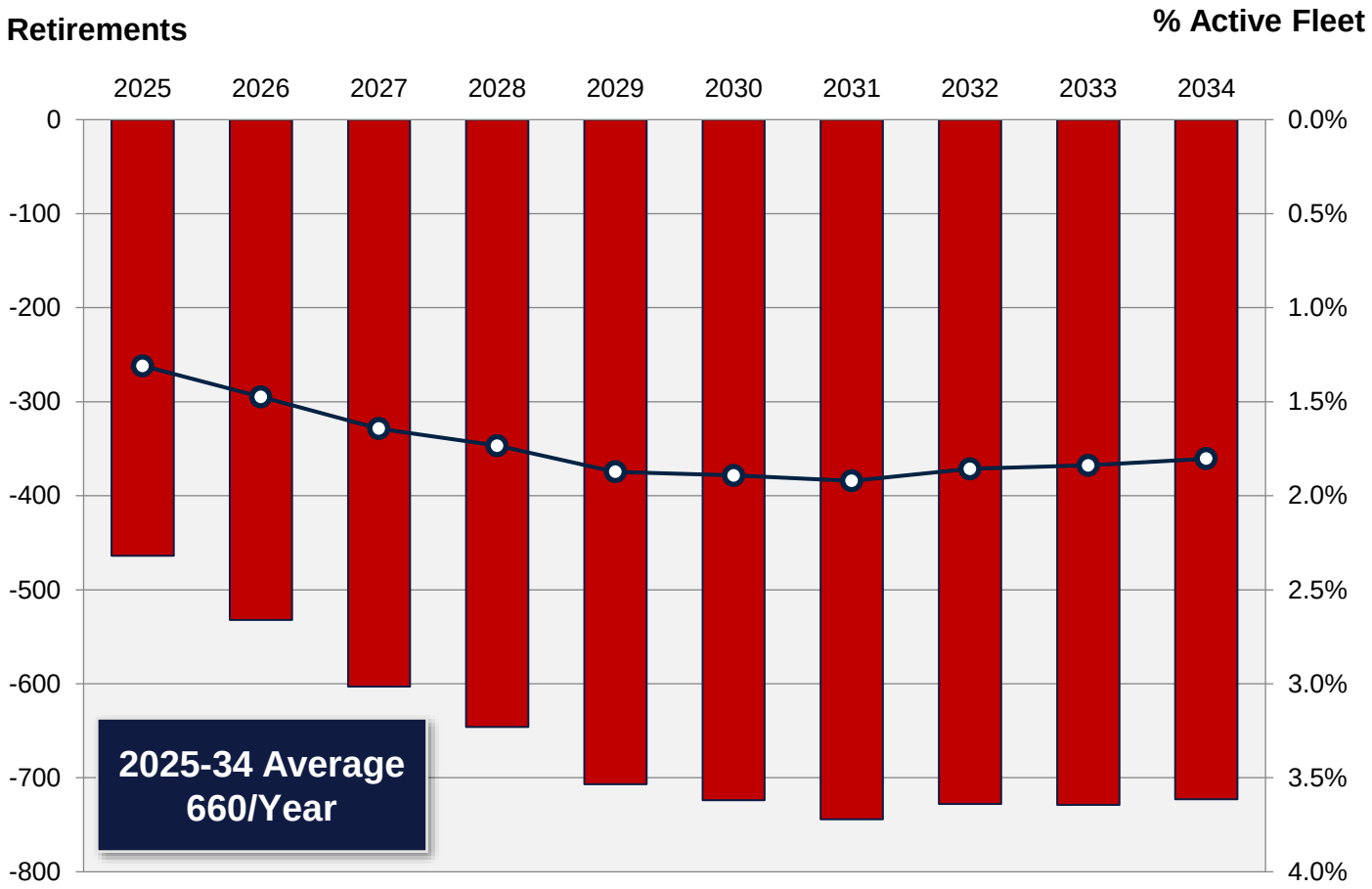
Deliveries by Manufacturer



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Aircraft Retirements – Trends

Annual forecasted aircraft retirements and % of active fleet



Highlights

- Retirements peak in 2031 at 744.
- Historic rise of percentage of fleet rates dominate the decade.
- Top retirees include Cessna Citations, Learjet (31, 35, 60, etc.), King Air 90s.
- Age-based retirements.

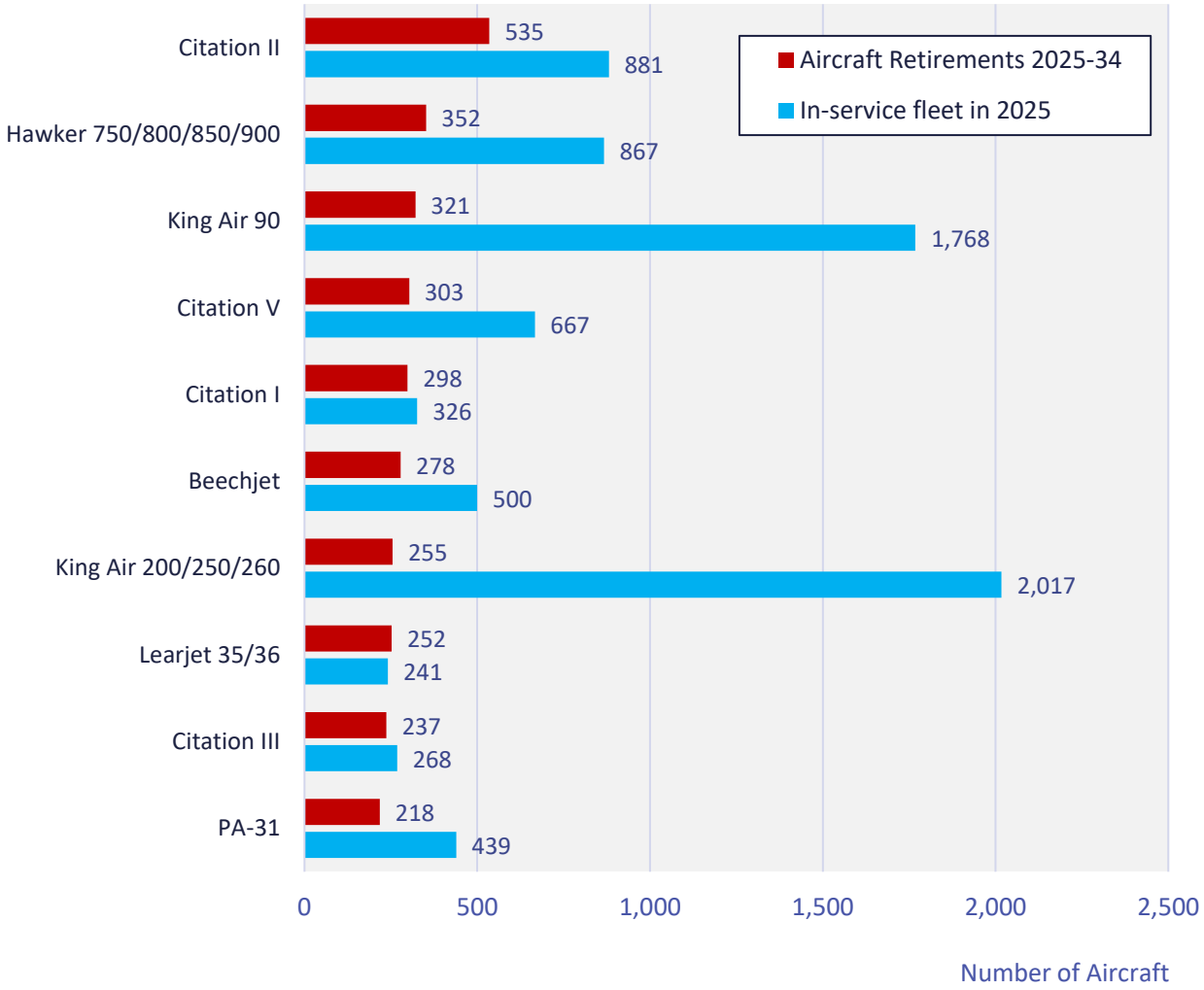


Credit: Nigel Prevett, Aviation Week Network

~6,600 aircraft retirements over the 10-year forecast

Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Aircraft Retirements – Analysis



At the group level, the Citation II is expected to see the highest number of retirements at 535, followed by the Hawker 750/800/850/900 at 352 aircraft. At the wider family level, Citation aircraft account for 1,784 units and 27% of total retirements in the forecast.

Nevertheless, despite the large number of aircraft leaving service, the number of retirements represents just 23% of the total in-service Citation line in the year 2025.

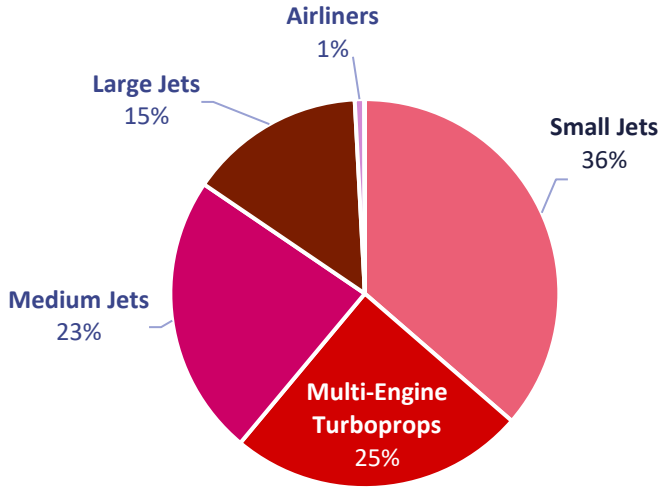
Considerable numbers of King Air 90 (332), Citation V (303), Citation I (298) and Beechjet (278) aircraft will also be withdrawn from service.

Substantial fleets which are expected to see almost complete withdrawal from service over the decade include the Citation I and the Learjet 35/36.

At the market segment level, retirements are dominated by Small Jets which account for 36% of all retirements in the period.

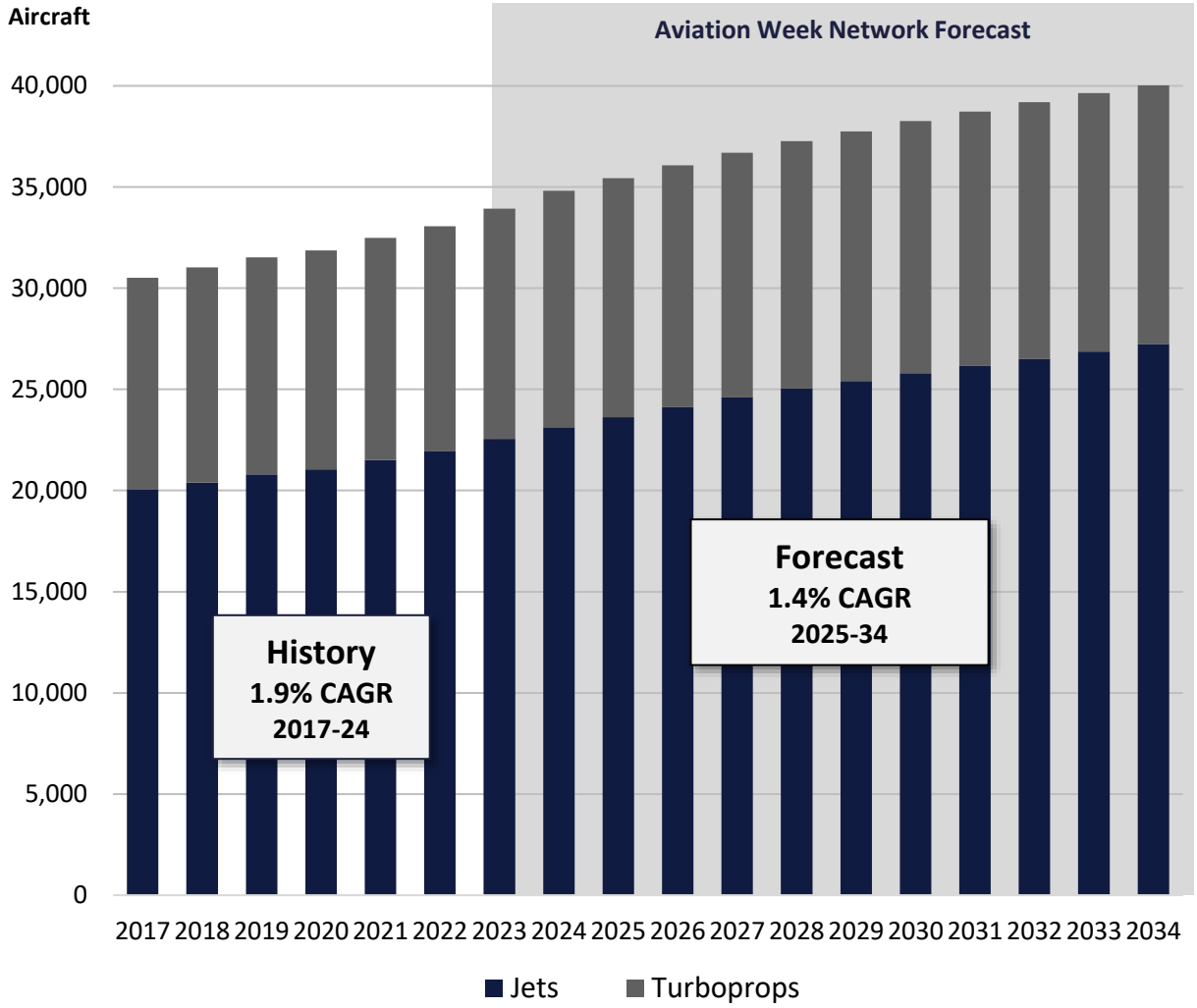
Multi-Engine Turboprops account for the next largest share at 25%, closely followed by Medium Jets at 23%.

Retirements by Market Segment



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

In-Service Aircraft Fleet



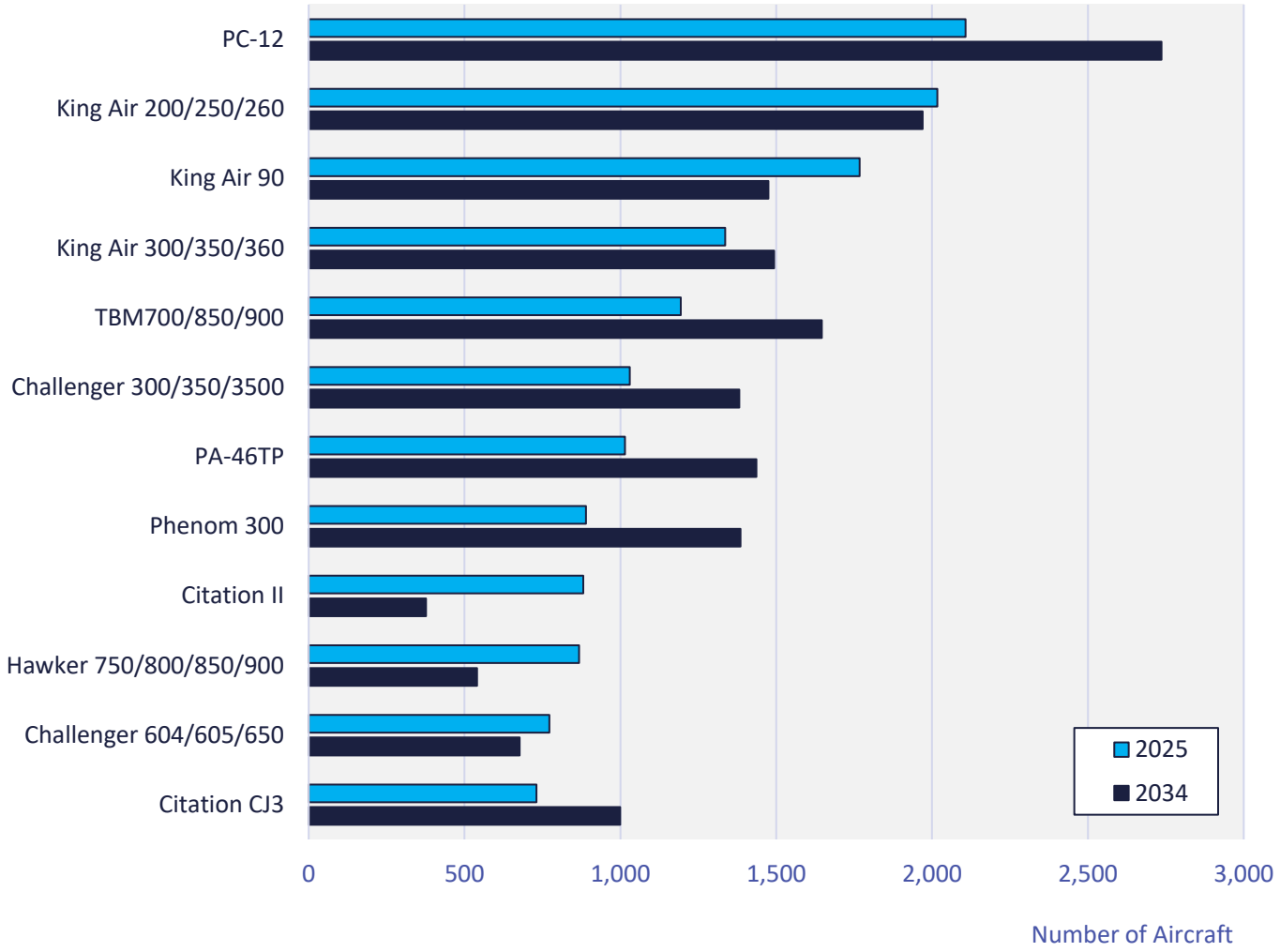
Highlights

- 1.4% future CAGR expected after 1.9% historical (2017-24) CAGR fleet growth.
- 40,107 global business aircraft fleet by the end of 2034.
- 1.6% CAGR for turbofan-powered aircraft.
- 0.9% CAGR for turboprop-powered aircraft.
- Large Jets gain the most share overall, while single-engine turboprops gain market share at the expense of multi-engine turboprops.



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

In-Service Fleet – Aircraft Share Over Time



The resultant shifts in the active, in-service fleet from new deliveries and retirements, plays out at various levels of analysis.

At the aircraft group level, depicted at left, the PC-12 fleet is expected to remain as the largest in-service type during the 10-year period. The multi-engine turboprop King Air 200/250/260 group is expected to remain the second largest fleet. The King Air 90 aircraft group is forecast to decline, going from third place in 2025 to fifth on the last year of the forecast.

The Citation family, all Citation lines, retains its position as the largest in-service *family* over the decade with more than 7,500 aircraft expected to be in operation throughout the 10 years of the forecast. The reduction in the older Citation I (-83%) and II (-57%), will be offset by growth in the Citation Longitude (+216%), Latitude (+97%) and Ascend models.

At the category level, Ultra Long-Range Jets (+64%), Very Light Jets (+64%), and Single-Engine Turboprops (+45%) are expected to see the greatest growth of in-service fleets. The numbers of Multi-Engine Turboprops (-15%) and Midsize Jets (-7%) in service globally are projected to fall significantly over the course of the forecast.

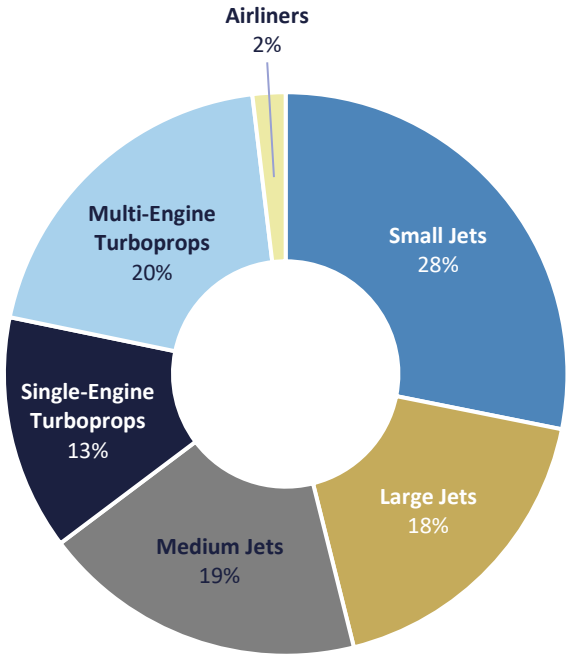
Aircraft fleets that are expected to see rapid growth over the course of the forecast include the Pilatus PC-24 (+143%), Global 7500/8000 (+142%), Cirrus Vision SF50 (+138%) and Legacy 500/Praetor 600 (+122%).

Those expected to experience a significant decline in fleet strength include the Learjet 35/36 (-92%), King Air 100 (-76%), Falcon 900 (-75%) and Falcon 50 (-73%).

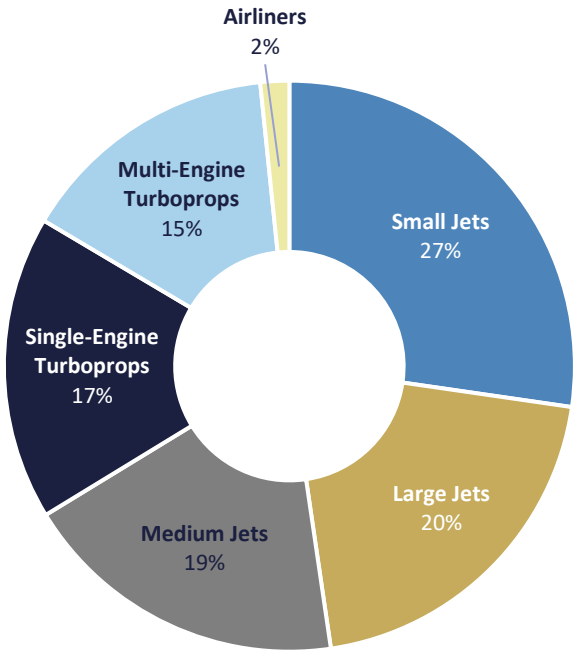
Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

In-Service Fleet Share

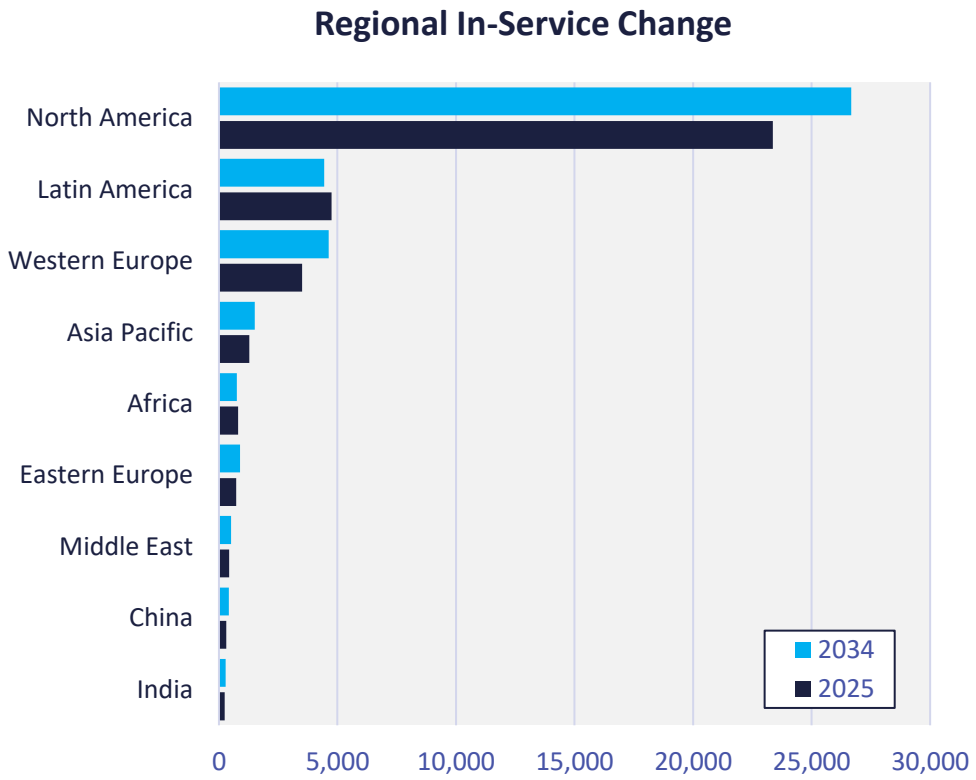
Fleet expands 13% 2025-34; grows at 1.4% CAGR over 10 years



2025 Fleet
35,443 Aircraft

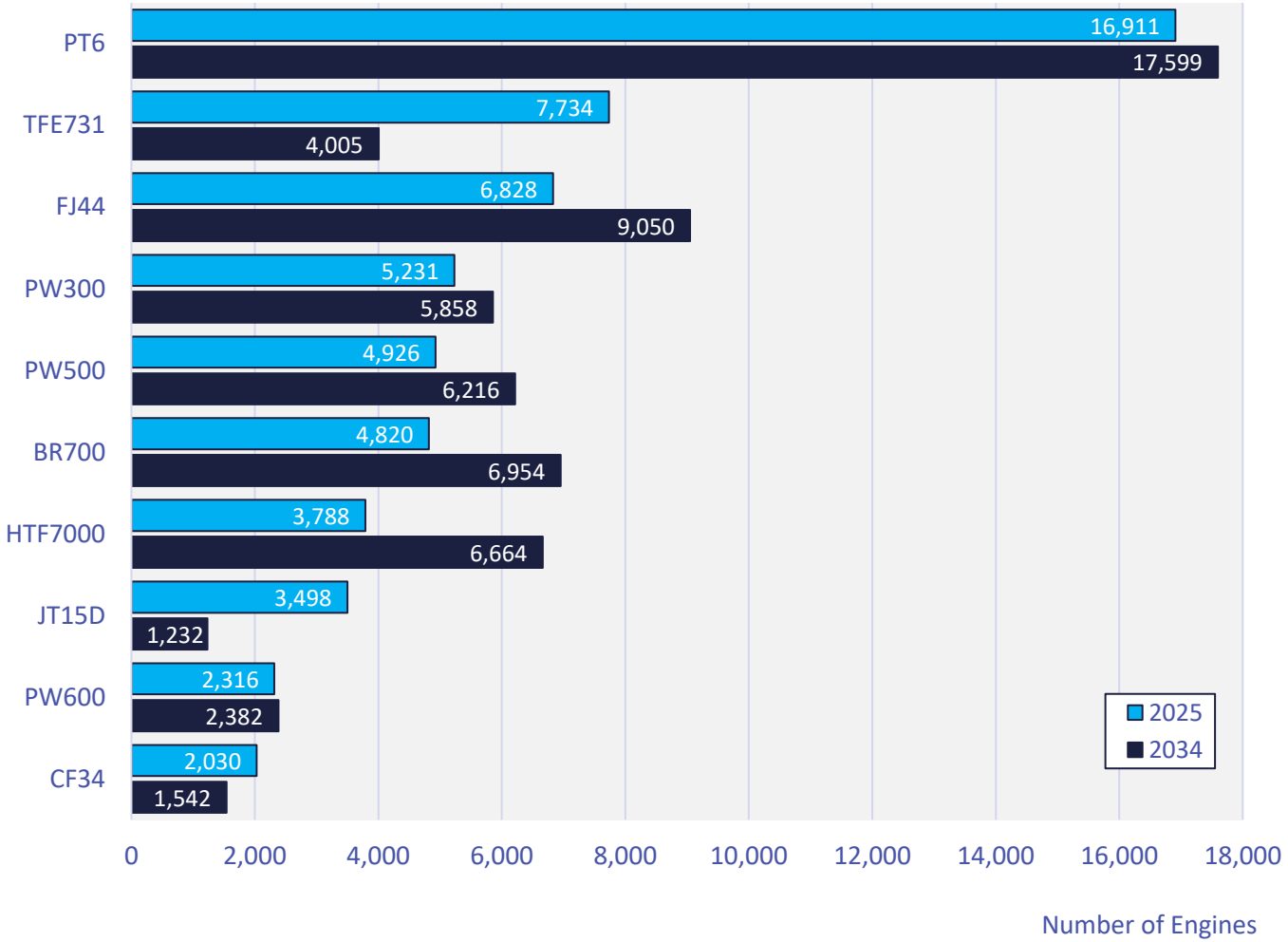


2034 Fleet
40,107 Aircraft



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

In-Service Fleet – Engine Family Share Over Time



The number of turbofan and turboprop engines in service globally is forecast to grow at 0.9% CAGR, from 66,615 units in 2025 to 72,527 by 2034. With 14 original engine manufacturers and 39 engine family types, the business engine fleet is a highly segmented market.

The Pratt & Whitney Canada PT6 engine family dominates the forecast in terms of the fleet. As of 2025, the number of PT6 engines in operation globally and powering single-engine and multi-engine turboprop aircraft comes to 16,911 units, the largest number of any powerplant representing 25% of the total. The PT6 family's end strength will grow but its fleet share will drop by a percentage point of the total engine count by 2034.

The current, second most popular engine family, the Honeywell TFE731 powering Hawkers, Learjets, and Falcon 900s will see a declining fleet as these aircraft and their engines are replaced with newer generation engines in the future. The TFE731 numbers projected to decline by 48% over the decade, falling from 7,734 engines in 2025 to 4,005 by 2034.

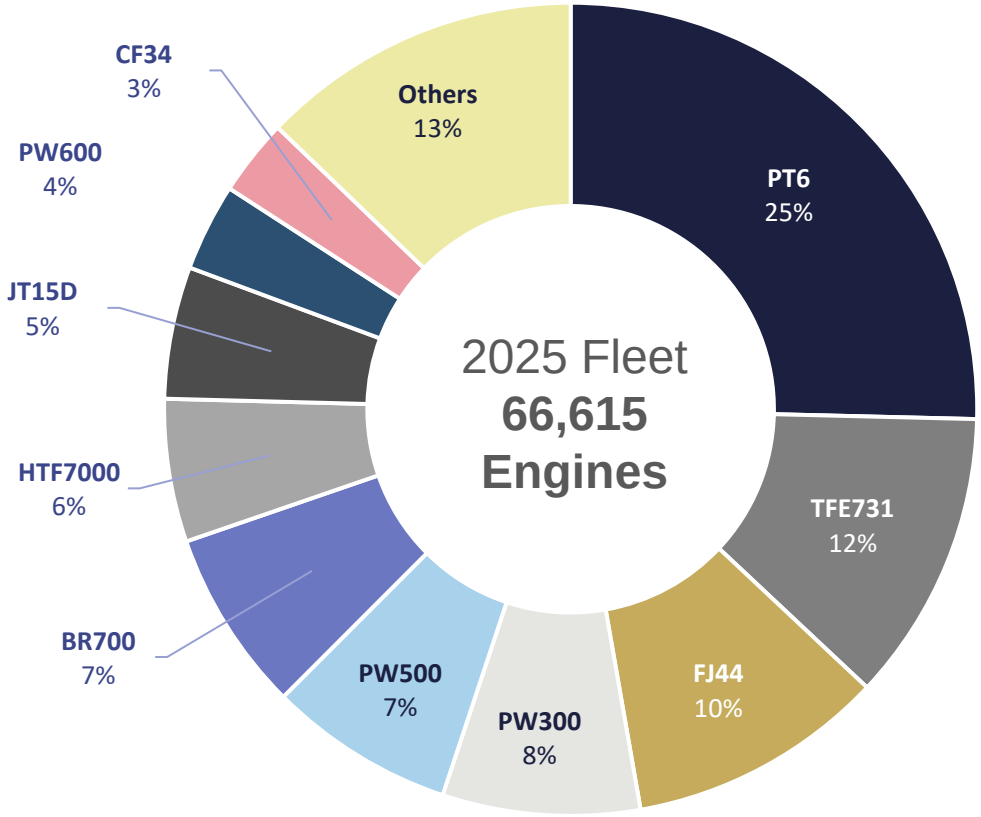
The FJ44 engine family, the third most popular engine with a long history of powering early Cessna Citations, will be given a breath of life by powering newer aircraft, namely the Pilatus PC-24 and the HondaJet Echelon (2600).

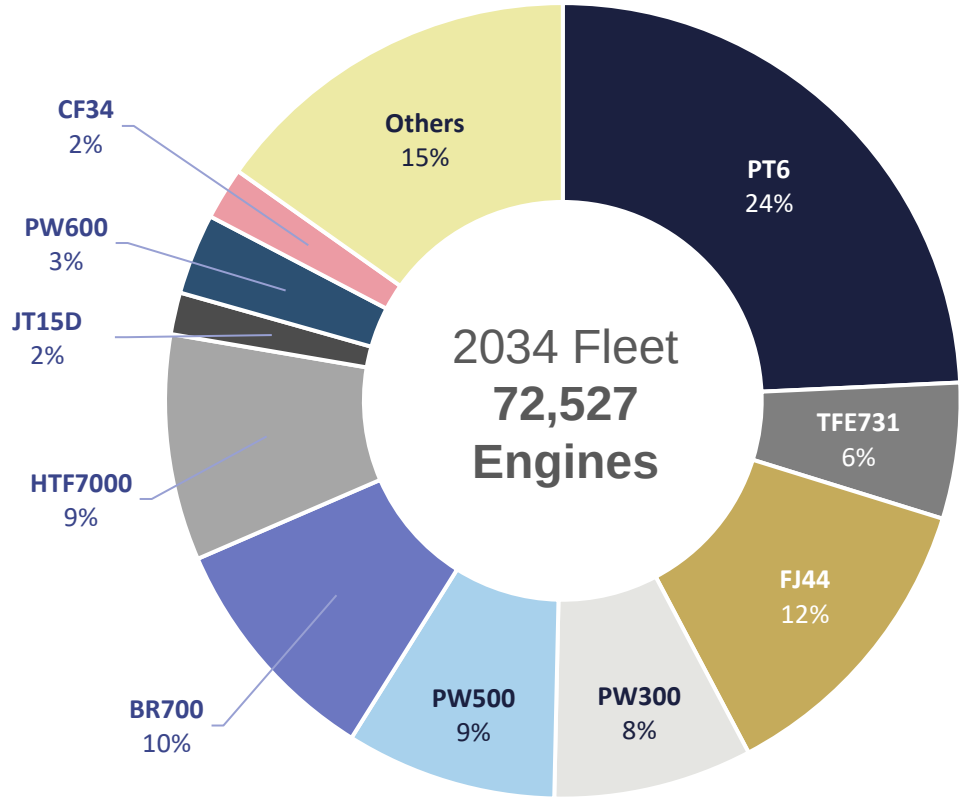
The fastest growing in service fleets of engines over the period will include the PW800 (+265%), Passport (+142%), FJ33 (+138%), HF120 (+76%) and the HTF7000 series (+76%).

Among the engine fleets that are expected to see the biggest decline over the forecast are the JT15D (-65%) and TPE331 (-56%).

Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Engines – In-Service Fleet Trends





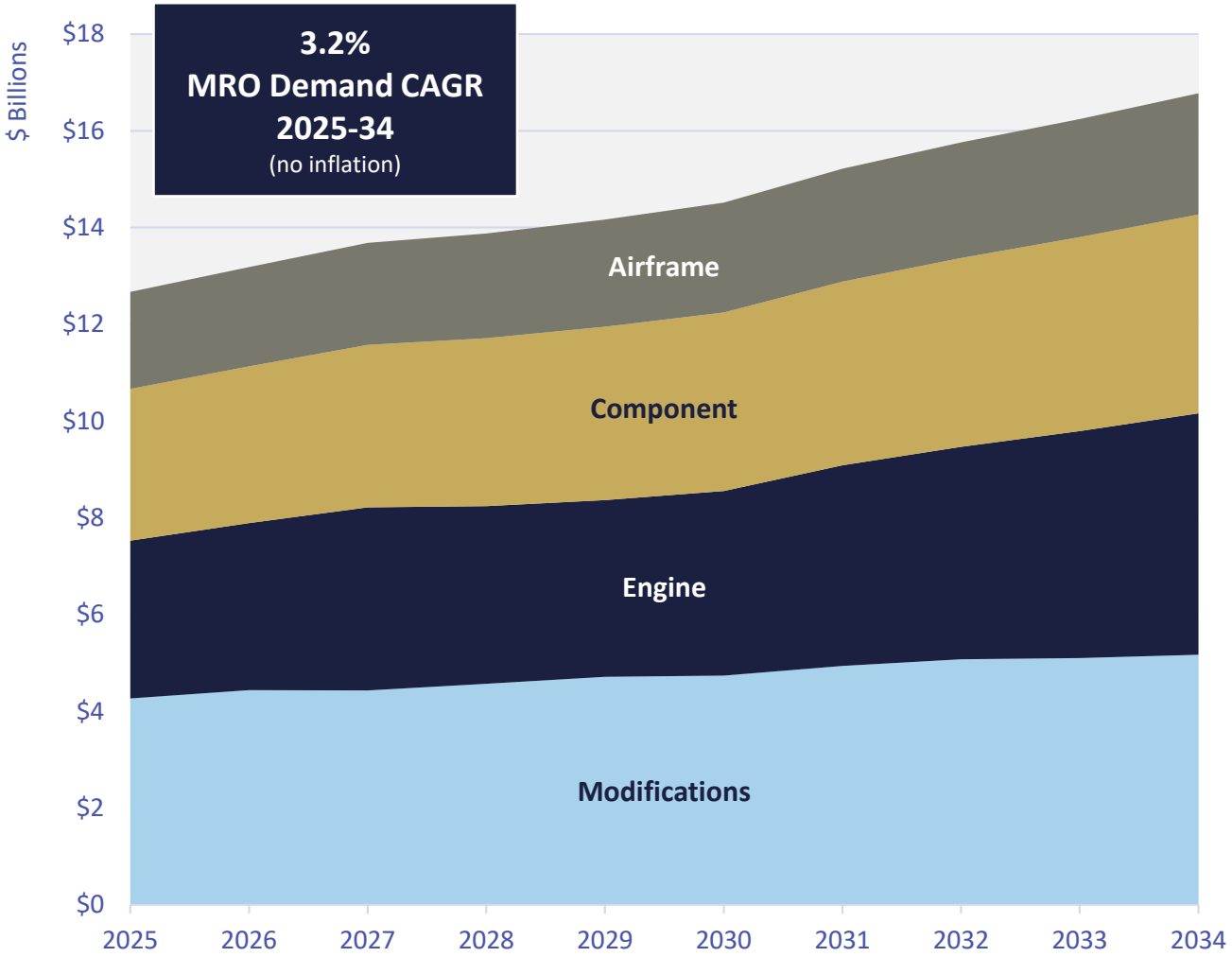
Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

BUSINESS

MARKET SUMMARY REPORT

MRO Demand Forecast & Trends

MRO Demand - Forecast

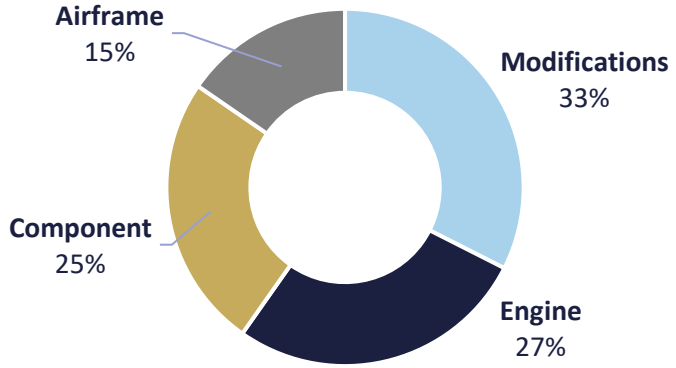


Highlights

- $146 billion in aftermarket requirements over the decade.
- $47.4 billion in modifications demand, the largest MRO category grows at 2.2% CAGR.
- $39 billion in engine MRO demand grows the fastest at 4.8% CAGR.
- +49k major engine MRO events expected on 39 engine family types.

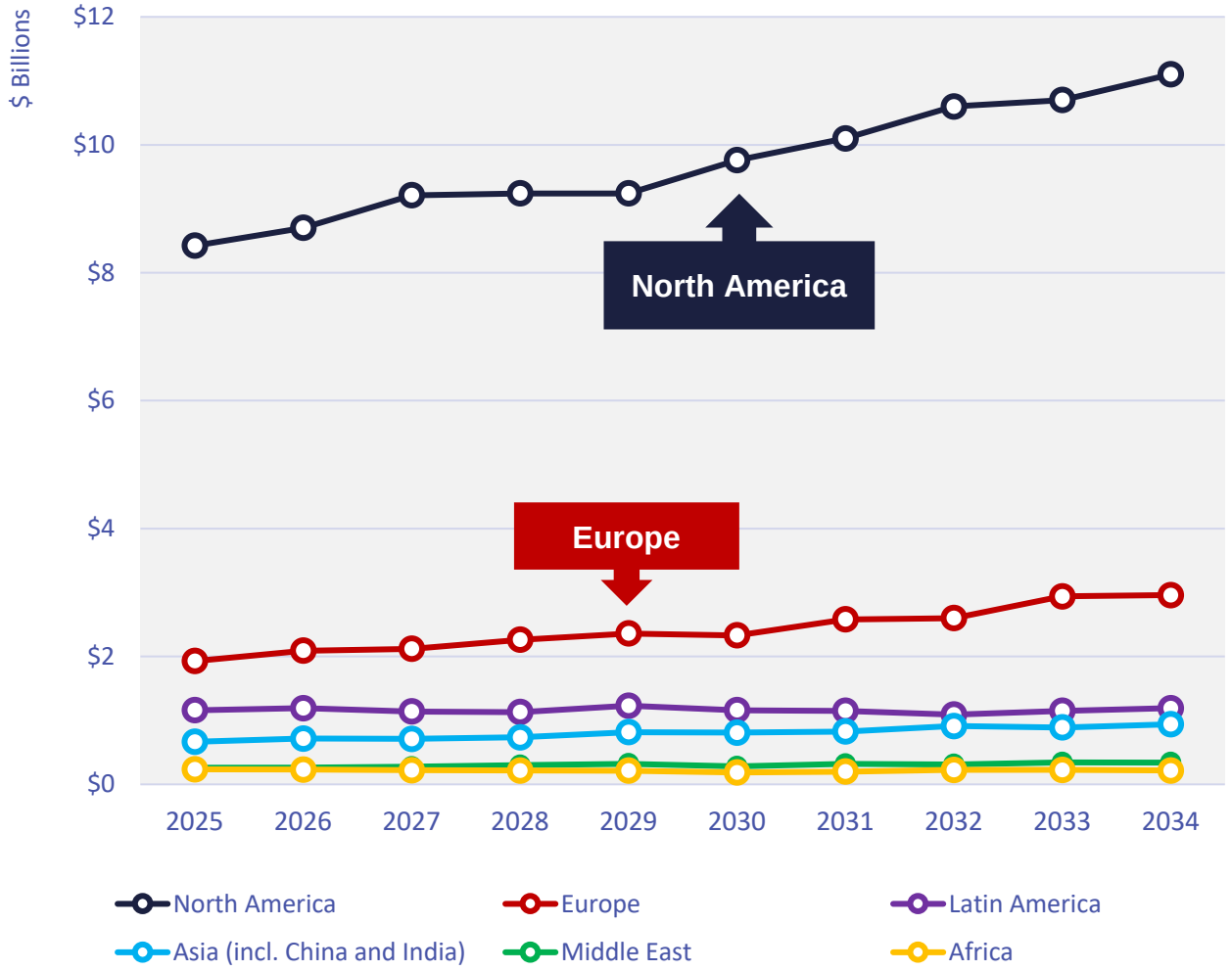
MRO Demand is expected to increase in line with both the size of the in-service fleet and projected utilization. Just over $146 billion in requirements is expected during the 10-year period, growing at a 3.2% CAGR. Modifications maintenance which includes paint, cabin upgrades and avionics, is expected to generate the largest amount of demand at $47.4 billion, or 33% of total MRO demand in the forecast.

Engine maintenance will account for a further $39.9B, or 27% of demand, and will grow the fastest. Components, which includes APUs, landing gear, and wheels and brakes, tallies to $36.3B, or 25% of the total, while airframe maintenance composes the remaining $22.5 billion – 15% over the decade. At the aircraft segment level, Large Cabin Jets will account for the biggest share of MRO demand (38%), despite their smaller unit values.



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

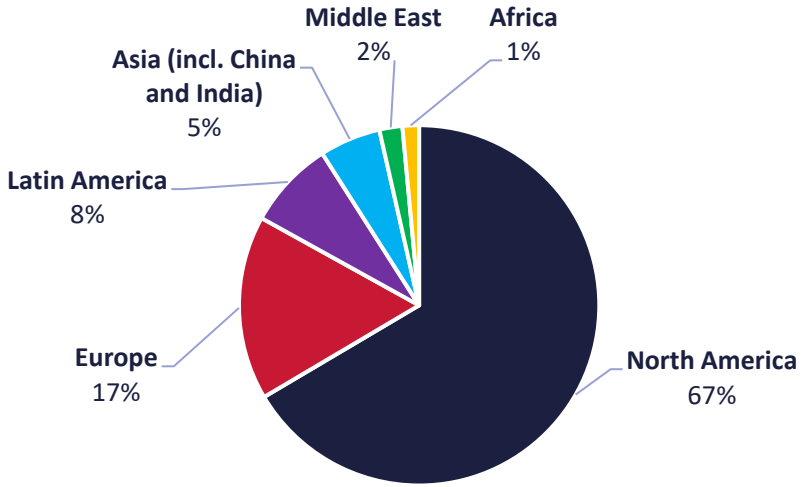
MRO Demand – Regions



Operators in North America continue to generate by far the largest amount of MRO demand throughout the forecast period given its fleet strength. Just over two thirds of all MRO expenses are generated here alone with demand continuing to increase at a healthy 3.2% CAGR over the decade.

Eastern and Western Europe combined generates $24.2 billion in demand over the period, accounting for 17% of total MRO. Combined European demand also increases at a robust 4.9% 10-year CAGR – the highest of any region.

Demand in Asia (including Asia Pacific, China and India) will experience significant growth, albeit from a low base. In China alone, MRO spend increases by 41% over the decade. However, even with this growth, demand in China will remain limited to around $210 million in 2034. The Asia-Pacific region sees growth of 45% over the period, with demand reaching $600 million by 2034.



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

MRO Demand – Regional Trends

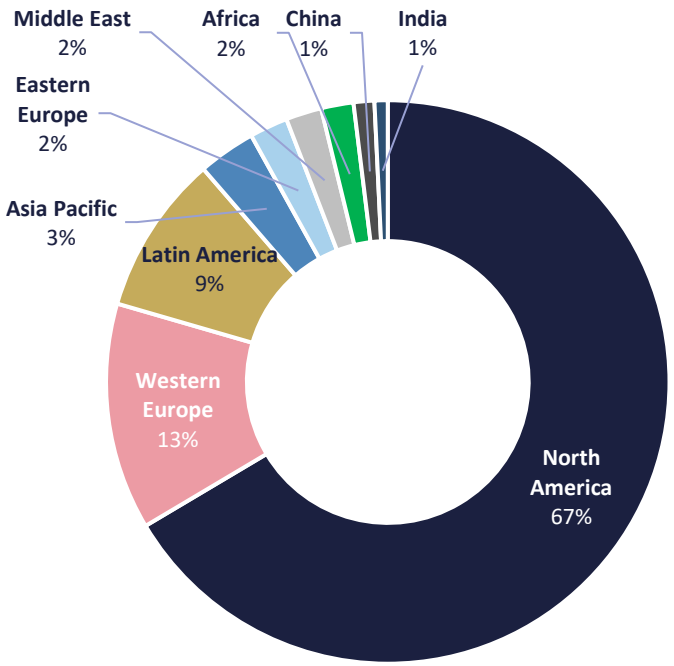
North America dominates MRO demand accounting for 67% of global maintenance requirements



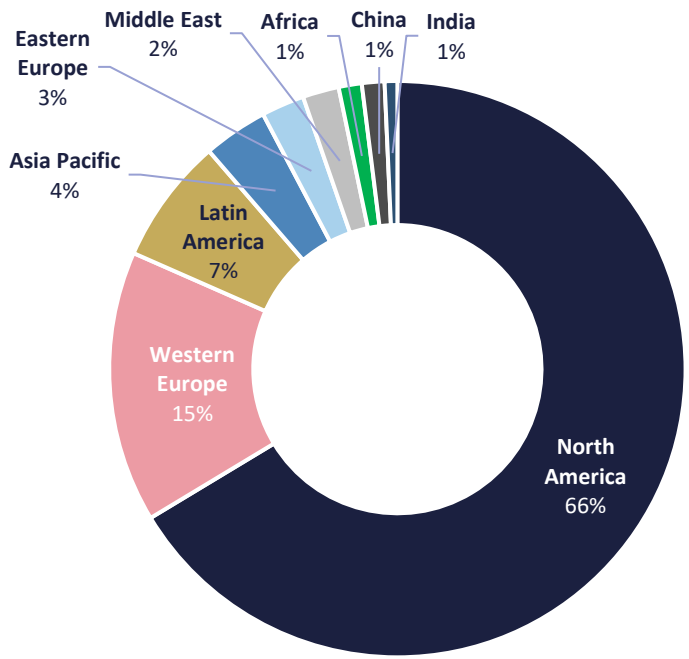
Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

MRO Share by Region

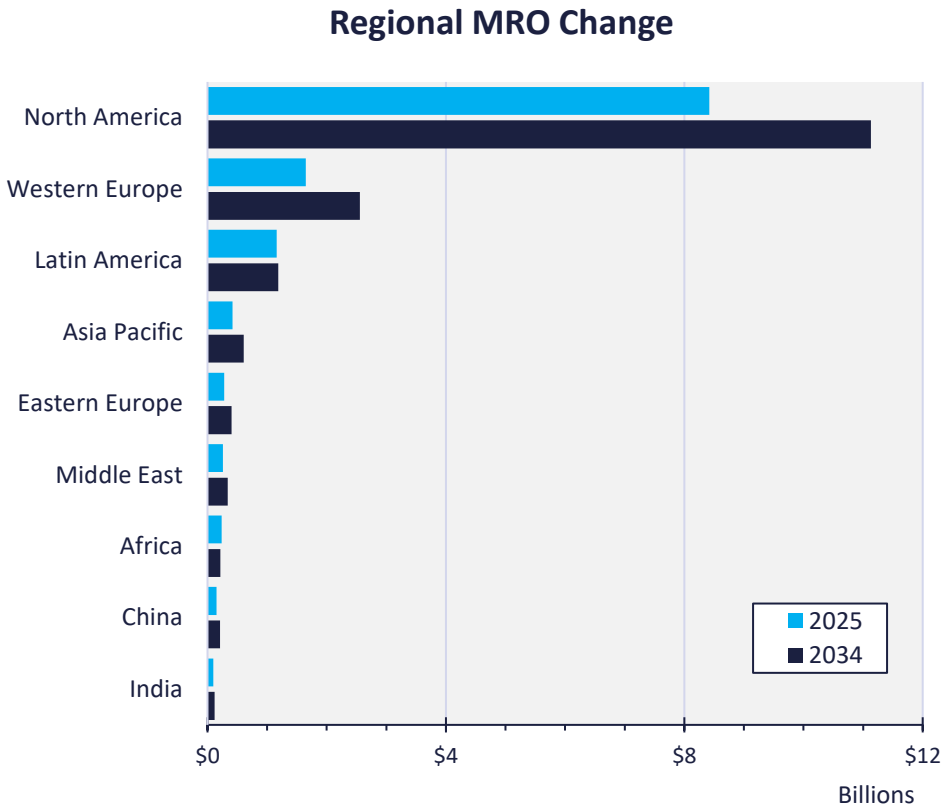
MRO increases 32% 2025-34; grows at 2.9% CAGR over 10 years (non inflation basis)



$12.6 Billion
2025 MRO Demand

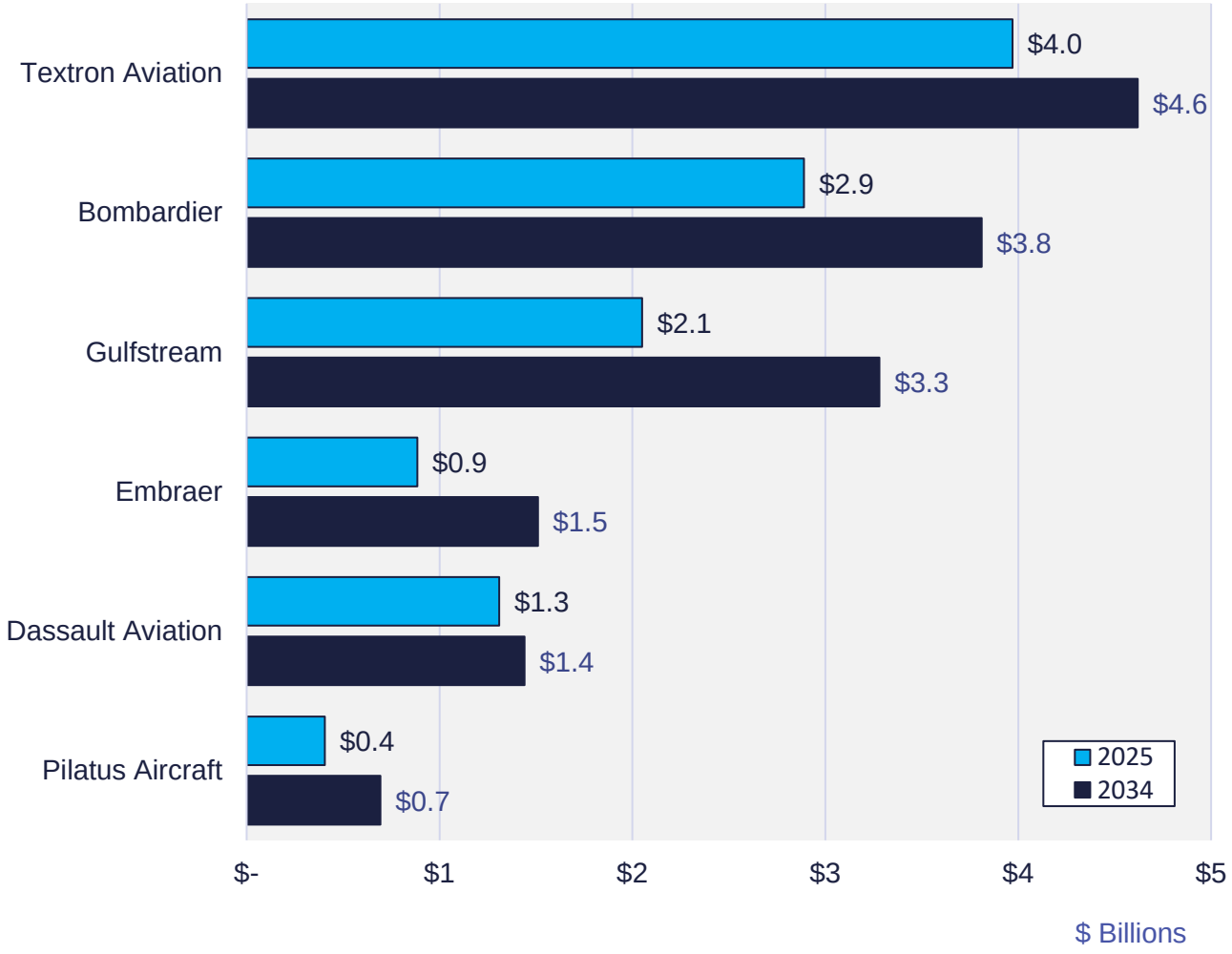


$16.7 Billion
2034 MRO Demand



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

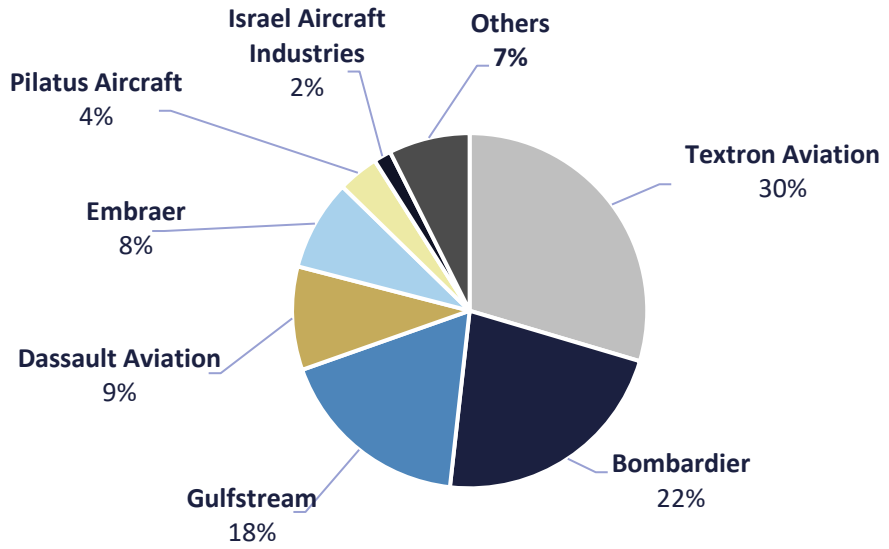
MRO Demand Change – Aircraft Type Certificate Holders



Textron aircraft accounts for the largest share of MRO Demand during the forecast period, with 30% or a value exceeding $43 billion over 10-years. The Citation family of aircraft will account for over 70% of Textron's MRO expenditures. Over the forecast period, Textron will grow at a 1.68% CAGR over the forecast period.

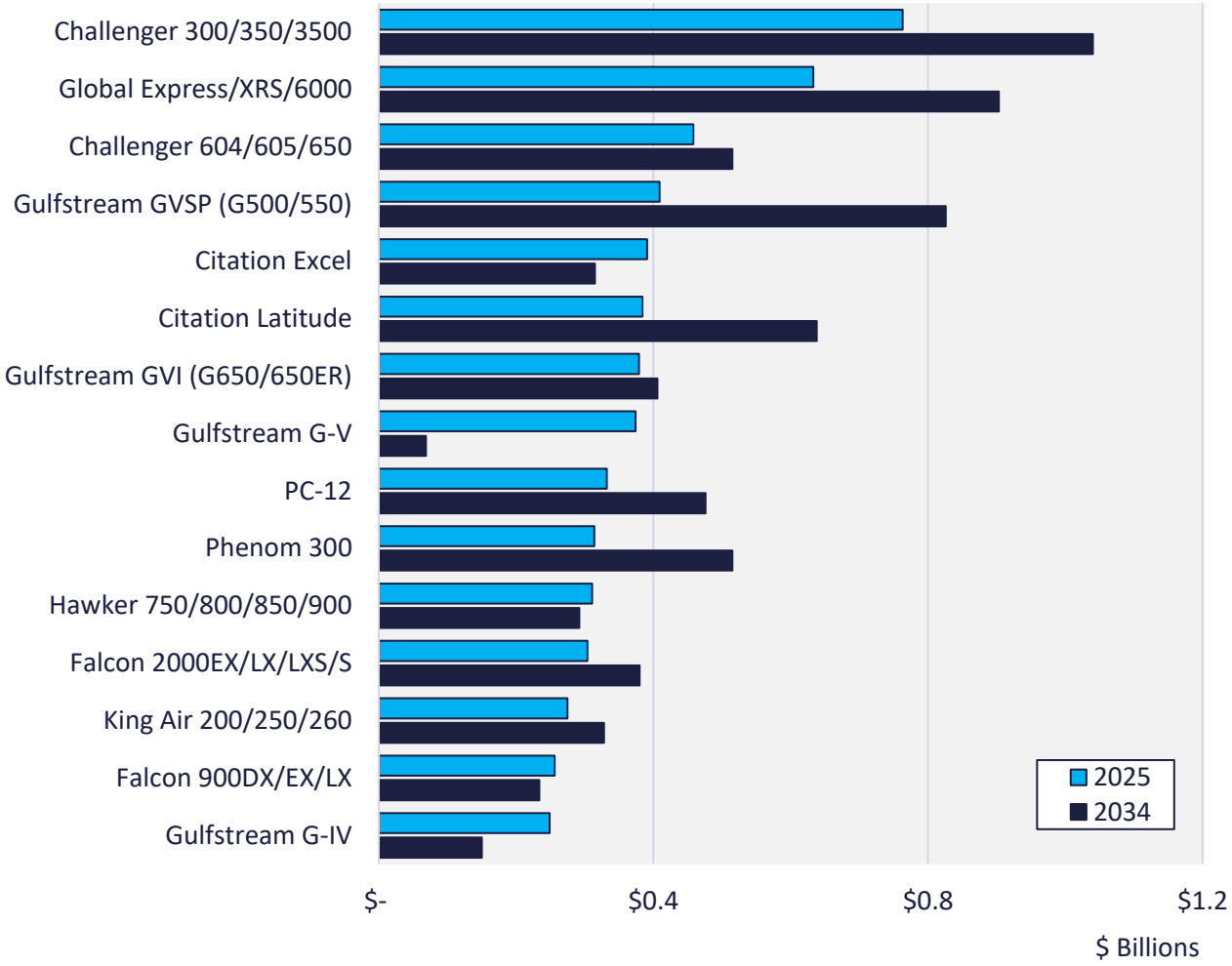
Bombardier and Gulfstream follow with shares of 22% and 18%, respectively. In 2034 alone, MRO Demand for Bombardier will account for $3.8 billion while Gulfstream will account for over $2.6 billion.

Pilatus Aircraft and Embraer will both experience a growth of over 70% – the largest increase for any of the leading aircraft type certificate holders.



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

MRO Demand Change – Aircraft Programs

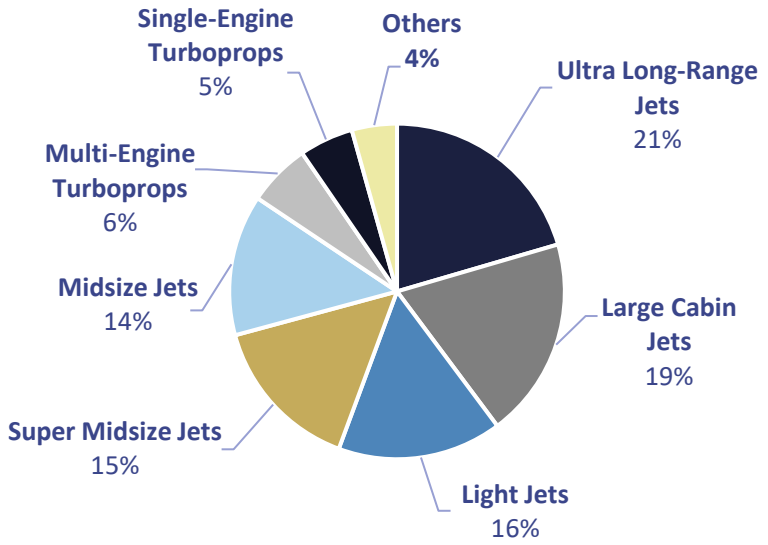


Textron Aviation aircraft lead all other manufacturers in generating MRO demand over the forecast with over $43 billion in dollar demand. Beginning in 2025, the Bombardier Challenger 300/350/3500 lineup and Global Express/XRS/6000 groups represent the two leading programs in terms of dollar demand generated at the aircraft group level. This share/position trend continues over the course of the decade. Ranking third initially, the Challenger 604/605/650 series [$458 million in 2025] loses its place to the Gulfstream GVSP (G500/550) [$826 million in 2034].

At the lowest size segmentation level, Ultra Long-Range Jets account for the largest share of MRO demand at 21%. Along with the Large Cabin Jets, the two categories account for nearly 40% of all demand generated, while representing about 20% of the global in-service fleet.

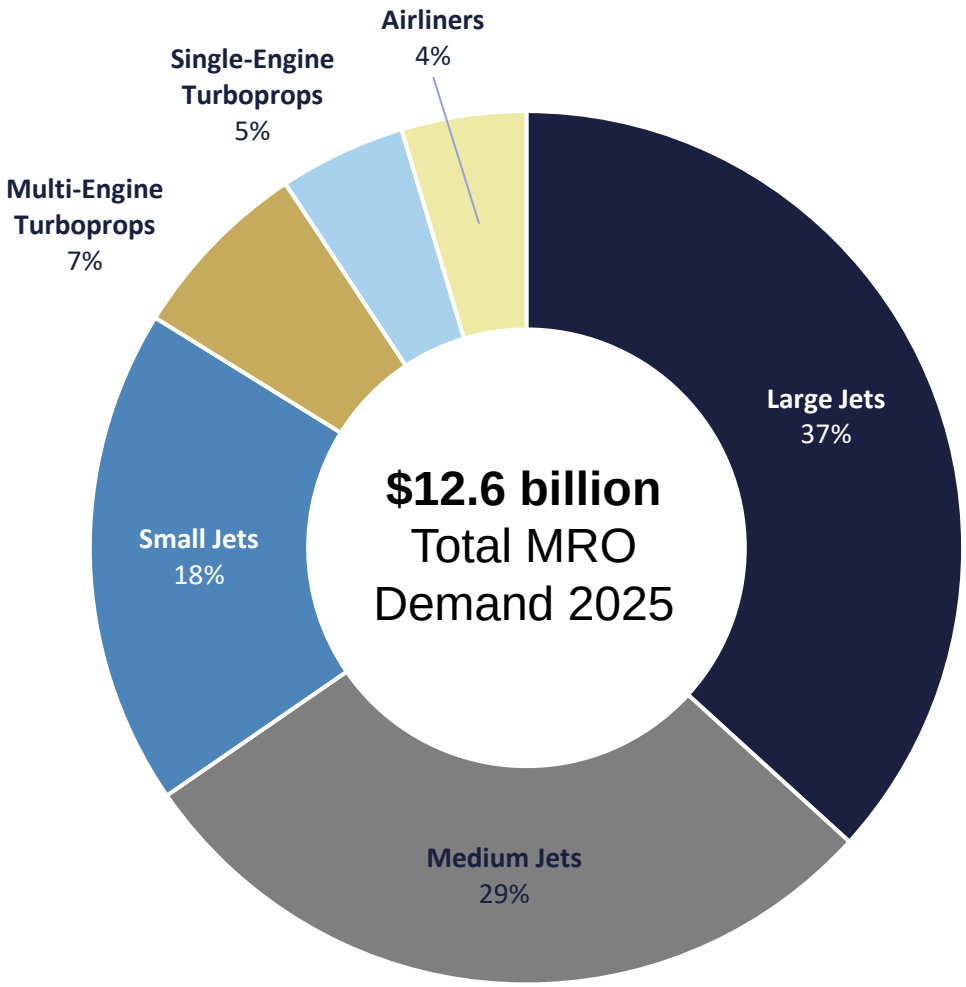
The vast Citation series is expected to generate $30.5 billion in demand, equivalent to 21% of all MRO activity over the decade. While the popular Gulfstream lineup is expected to generate $23.9 billion, representing a further 16% of the total.

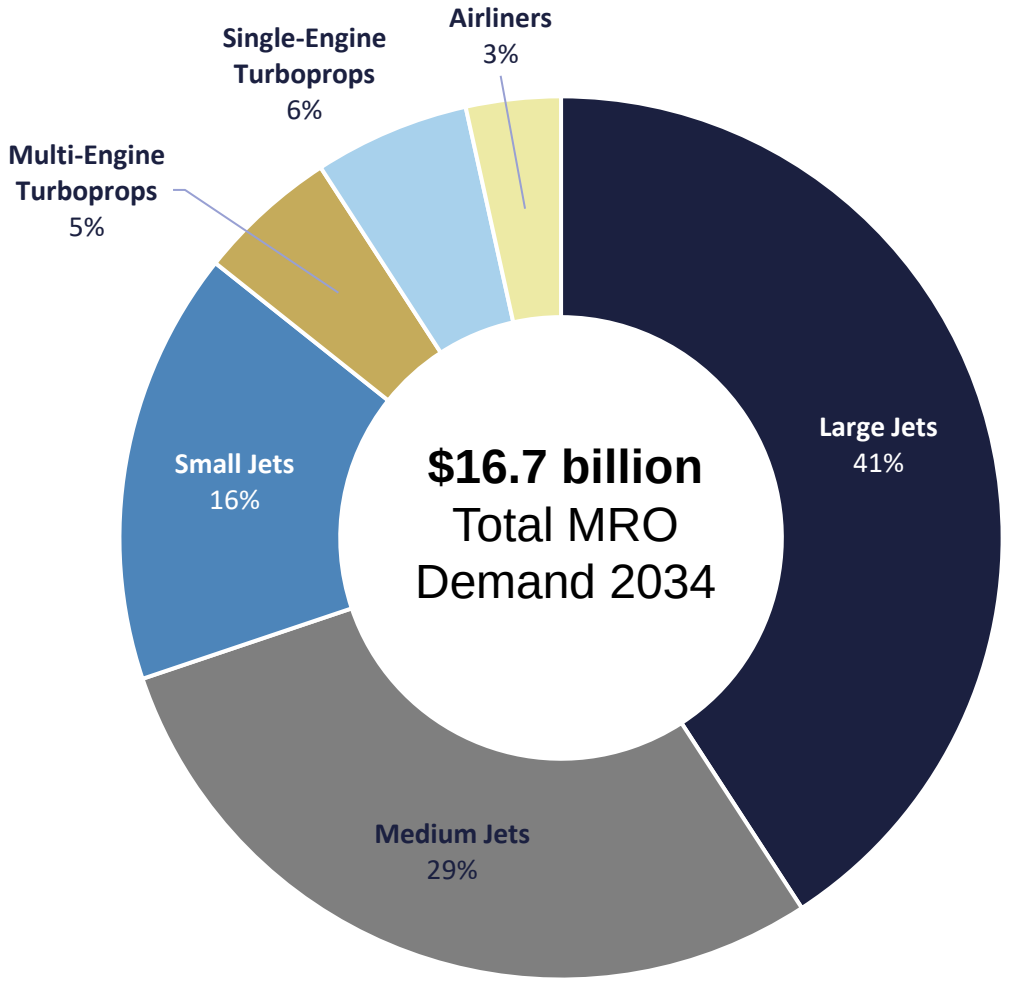
Demand by Size Category



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

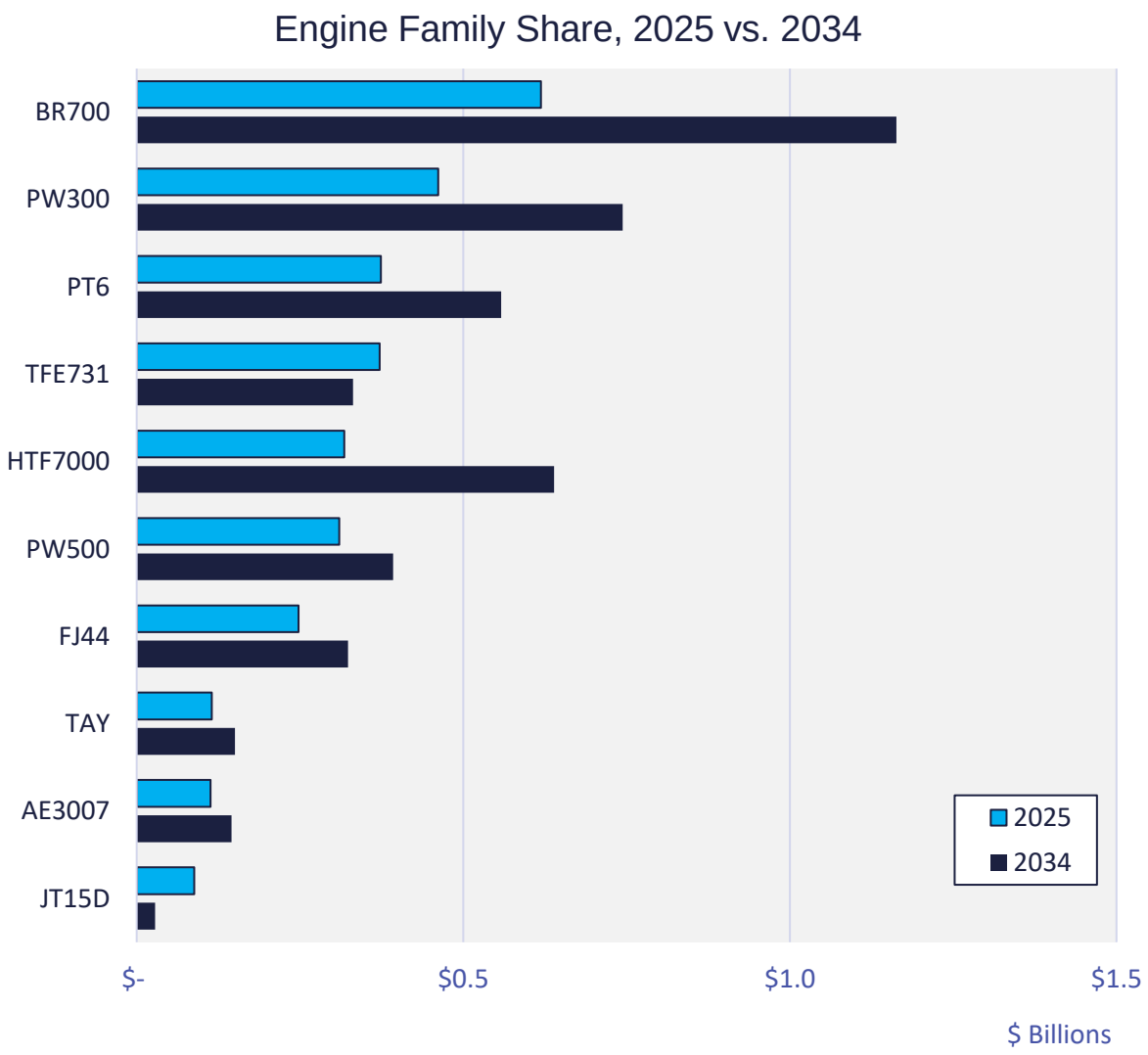
MRO Demand – Aircraft Size Segment Share 2025 vs. 2034





Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

MRO Demand Change – Engines



Engine maintenance generates $39.9B in MRO dollar demand over the decade, equivalent to 27% of overall maintenance. Growth in engine MRO demand outpaces other maintenance categories achieving a 3.7% CAGR over the decade.

Turbofans generate $33.6 billion in MRO spend accounting for 88% of the total after growing at a 4.8% CAGR over the decade. Turboprops generate $4.9 billion in engine maintenance requirements and after a 4.8% CAGR.

Rolls Royce BR700 engines accelerate their lead in the top position over the forecast. Powering Gulfstream, Bombardier, and Dassault aircraft, and with new entrants including the Pearl 15 and Pearl 700 models, they generate the largest annual MRO demand of any family. Projected growth in the forecast of 7.3% CAGR arrives at $1.16 billion in 2034 alone. The Pratt & Whitney Canada PW300 series powering Dassault, Cessna, and Bombardier aircraft account for $744 million in demand in 2034, equivalent to 15% of the total global engine maintenance spend that year. Aside from the BR700 and PW300 rapid growth, the PT6's MRO demand is expected to increase at a 4.5% CAGR over the decade, reaching $558 million in 2034.

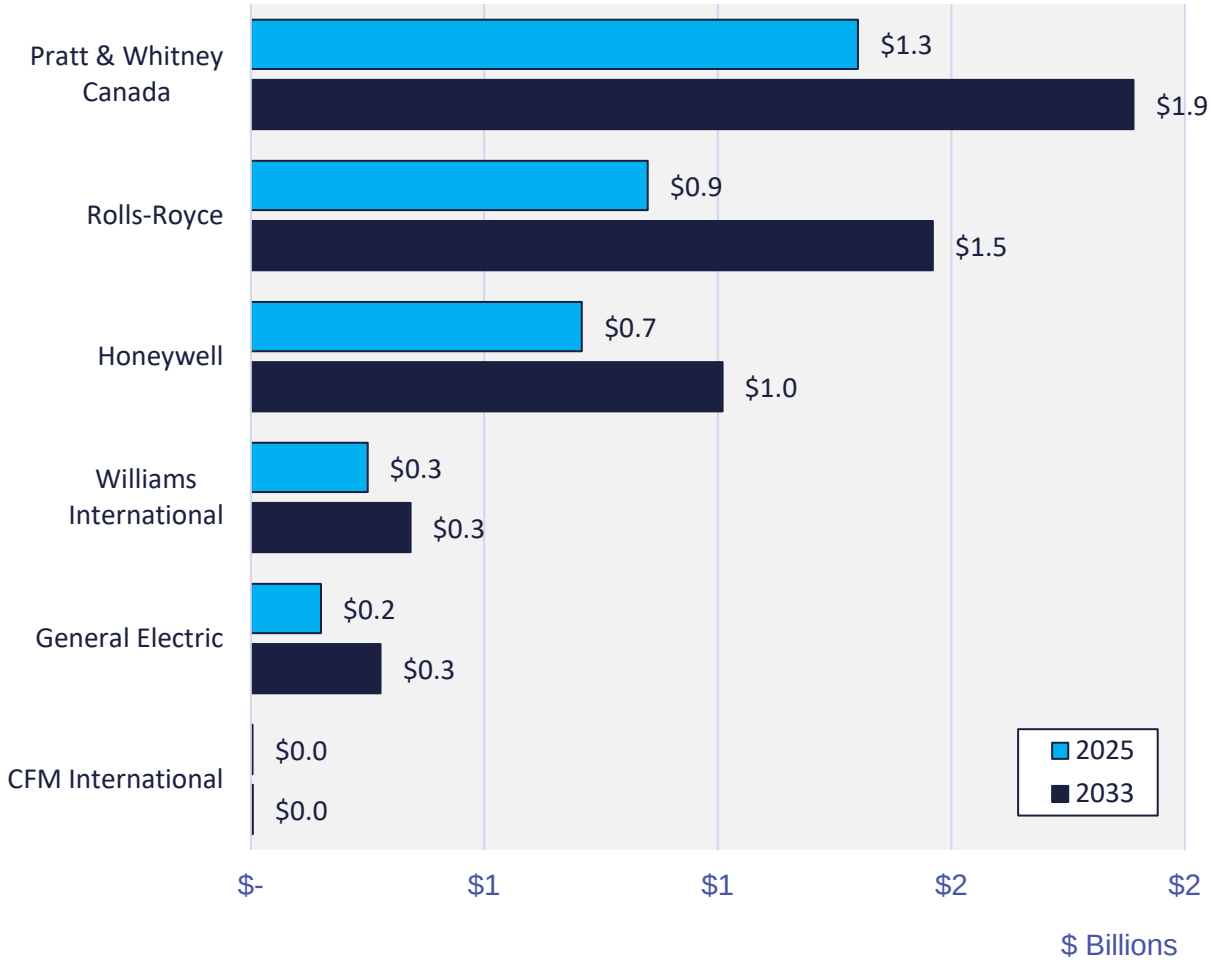
Meanwhile, the TFE731 is the only engine family in the top five to show a decrease in demand, with a -1.3% CAGR.





Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

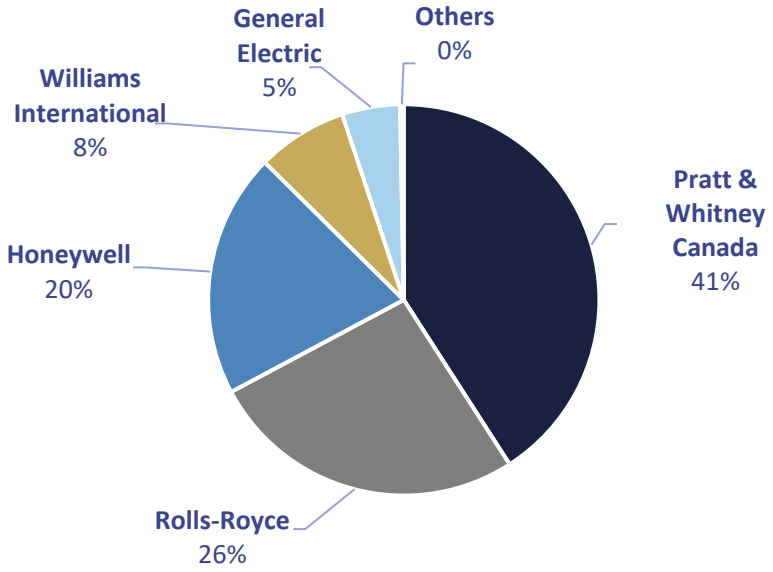
MRO Demand Change – Engine Type Certificate Holders



Pratt & Whitney Canada engines account for the largest share of MRO demand, at 40% during the 2025-34 period. Rolls-Royce at 26% and Honeywell at 20% follow.

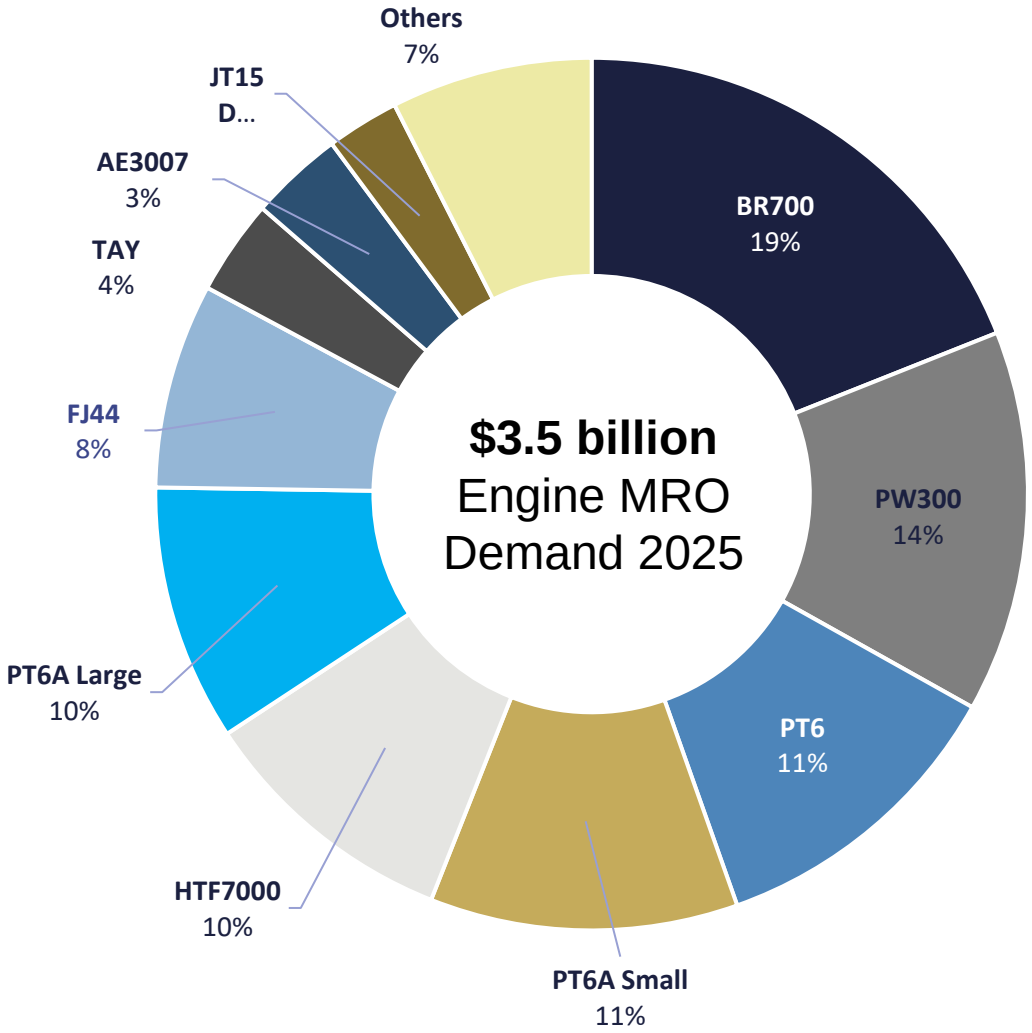
Rolls Royce engines on the Gulfstream family of aircraft make up the largest individual percentage of MRO expenditure. However, the number Pratt and Whitney Canada engines and associated MRO expenditures on the Citation, Phenom, Falcon and additional aircraft families place Pratt and Whitney Canada as the largest engine TCH by MRO expenditure.

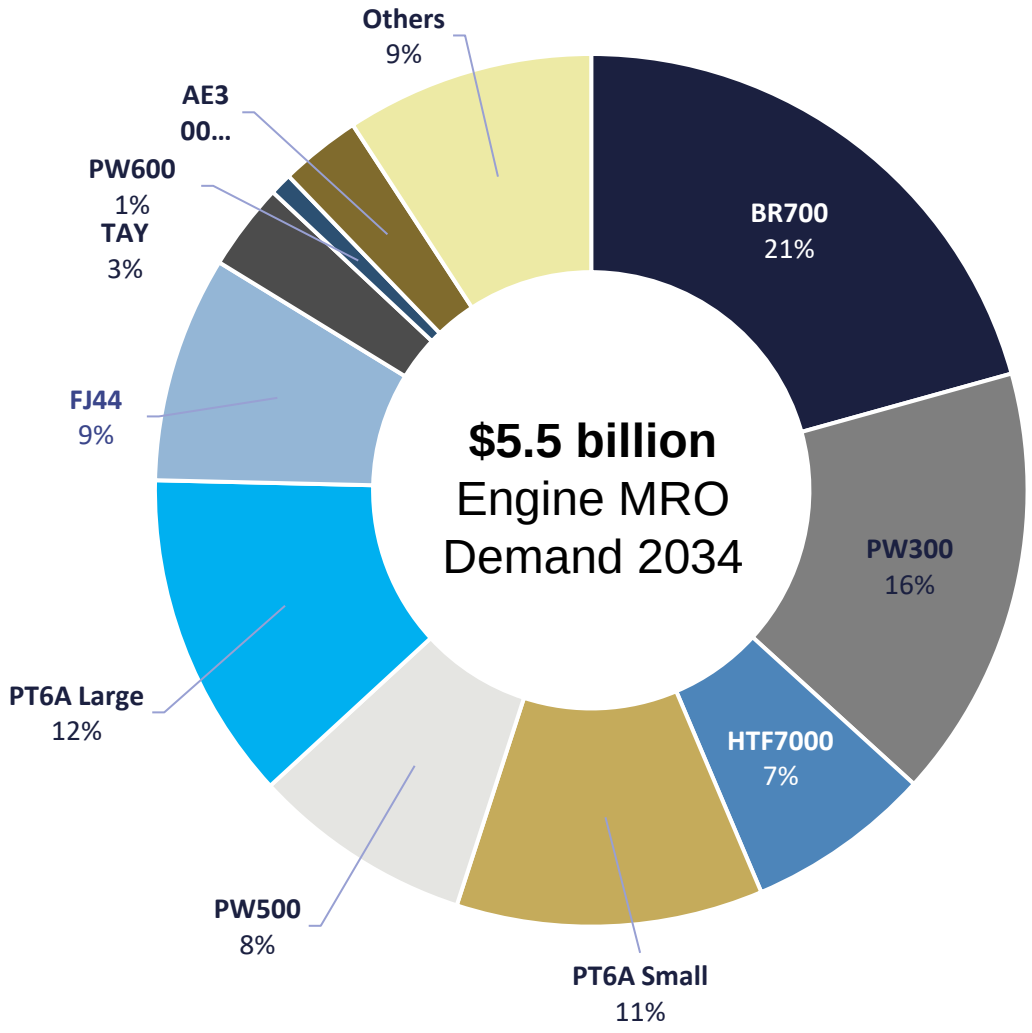
By 2034, the leading three type certificate holders generating the most demand will remain Pratt & Whitney Canada ($1.9bn), Rolls-Royce ($1.4bn) and Honeywell ($1.0bn).



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

MRO Demand Change – Engine Family Share 2025 vs. 2034

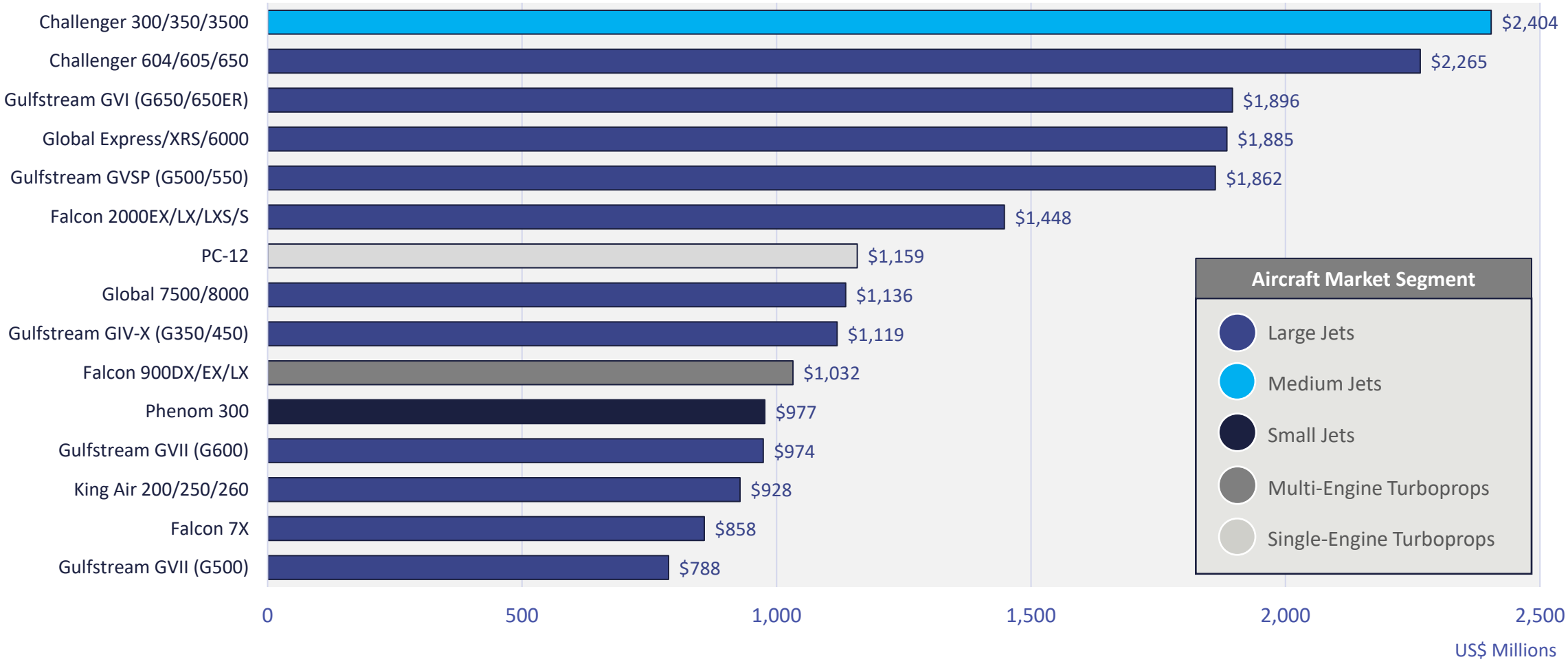




Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Modification MRO Demand – 2025-34

Large Jets account for 46% of all modifications



Source: 2025 Business Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Methodology

- Scope
- Modeling
- Assumptions

Methodology & Assumptions

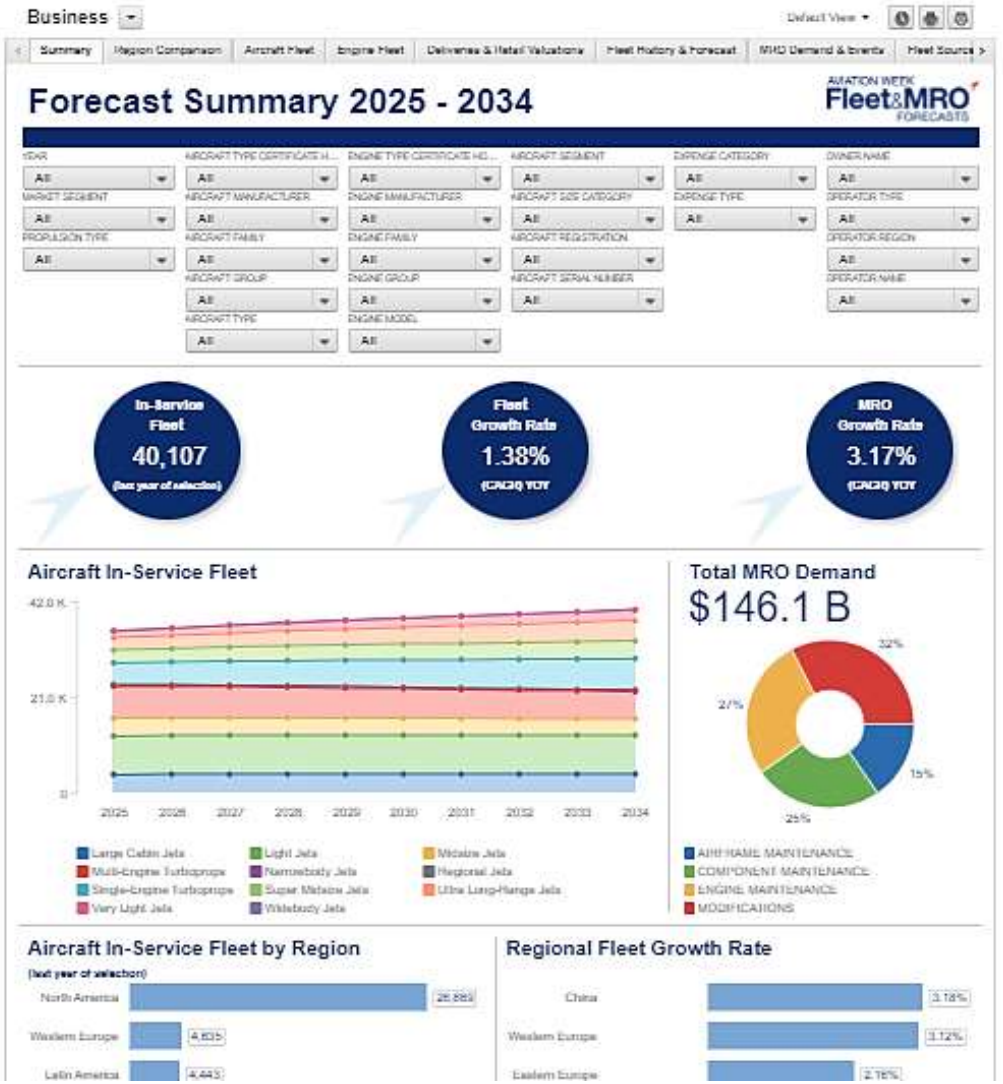
Overview

The comprehensive forecast dataset is available via an online business-information (BI) tool interface. The summation of an extensive dataset of fleet and MRO information is compiled in-house by Aviation Week Network, Intelligence & Data Services. Users may customize the tool by filtering through aircraft and various categories—aircraft family/group/model/category, geographic regions, OEMs, engines and operators, as well as MRO expense categories or expense types—to yield customized data, graphs and table displays for any segment of the fleet and MRO projections. Information contained in the dedicated summary, regional, fleet, engine and MRO tabs provides users with the most sought-after data for strategic planning.

Projections by the Aviation Week Fleet & MRO Forecast business-aviation segment are predicated on data for estimated aircraft production, deliveries, retirements and resultant in-service fleets, as well as projections for maintenance requirements based on trends, aircraft operating economics, regional variations and ownership types.

This independent industry effort combines Aviation Week's fleet database information with projected utilization rates and OEM hour-and-cycle MRO intervals along with cost assumptions at an aircraft-group/operator type level to develop an MRO forecast for strategic decisionmakers and analysts. Its dedicated research team, with more than 160 combined years' industry experience, acquires first-hand information and developments from industry surveys and OEM data feeds, as well as guidance from advisory board contributors representing top-tier OEMs, MRO providers, consultants and independent analysts.

Forecast Dashboard Tool



Methodology & Assumptions

Scope

The forecast examines the projected 10-year, 2025-34, market for business aircraft and allocates new deliveries and retirements across nine geographic regions (see Appendices). The in-service aircraft, aftermarket cost assumptions and utilization projections are combined to create a model of potential MRO demand at the aircraft, engine, operator, country, regional, and other levels.

Business aircraft in this study are defined broadly as civil turboprop- and turbofan-powered, Western-built units whose original designs were for the business and/or executive market, plus other aircraft operated in an executive/business role. Included are aircraft operated under Part 91 or similar international standards for owner-operators, under Part 135 or similar international standards for charter/on-demand and freight certificates, fractional arrangements, corporate flight departments and most civil-government operations.

Government-operated aircraft have roles for executive transport or flight-inspection services, particularly those whose airframes share a common, civil business-aircraft heritage. (In-scope aircraft family listings are found in the Appendices).

Nine world geographic regions are represented and are used to associate both future aircraft fleets and future MRO demand. Countries are allocated to regions where common market characteristics are represented and may not conform to popular associations.

Forecast World Regions – See also Appendices



Hierarchies/Typology

Aircraft Hierarchy (Arranged from highest to lowest level)	MRO Major Categories & Expense Types
Family	See Appendices
Group	
Type (unused)	
Model	

Methodology & Assumptions

Fleet Forecast, Models & Assumptions

The forecast begins with an initial extract from Fleet Discovery, Aviation Week's in-house database where aircraft are tracked at the serial-number level from manufacture, ownership, storage, and disposal.

The fleet elements are updated continuously with specific operator, owner and registration information throughout the preceding years and months. The effects on fleet totals of parked, stored or destroyed aircraft are calculated to determine annual active in-service fleet values until extracted for use in the forecast. The total in-service fleet (ISF) is calculated for each forecast year by factoring in annual retirements and deliveries. The basic in-service fleet formula used is:



Deliveries

Forecast delivery projections are based on an analysis combining macroeconomic conditions, regional economic factors, historical averages, production capacity and known orders. Annual delivery estimates are created for a period beginning with the first entry into service either announced by OEMs or assessed by analysts—by year and model. Expected deliveries are estimated given anticipated economic conditions, projected economics-driven demand trends and production capacity evaluated by analyst assessments. The expected deliveries are then allocated to regions, operator types, and engine types, but not to individual operators or countries unless known at the time of the forecast.

Retirements

Initial retirement assumptions are assigned, based on age of the airframe, to project retirements. Since retirements are based on individual decisions and most are not announced or even officially recorded, they are notoriously difficult to predict. Projections initially are assigned among candidates in a specified age/airframe category, then evaluated by group/model and holistically by industry experts for consensus and final adjustments. Retirement curves are recalibrated throughout the analytical process enabling the forecast to incorporate the latest retirement data. These retirement trends are applied to the various target fleet segments once the selection criteria have been finalised.

Methodology & Assumptions

AircraftBluebook

Retail Price-based Valuations

In the online dashboard, Aviation Week examines the value of new deliveries over the 10-year period in constant 2024 U.S. dollars. The study uses Aircraft Bluebook advertised, averaged equipped retail prices but does not adjust for discounts that a manufacturer may provide for multiple purchases or other contract concessions. The examination includes regional distribution by year, aircraft-size classes, aircraft families, manufacturers and roles, etc. to predict new delivery market trends by value. The range of filterable elements are hosted in the online tool.

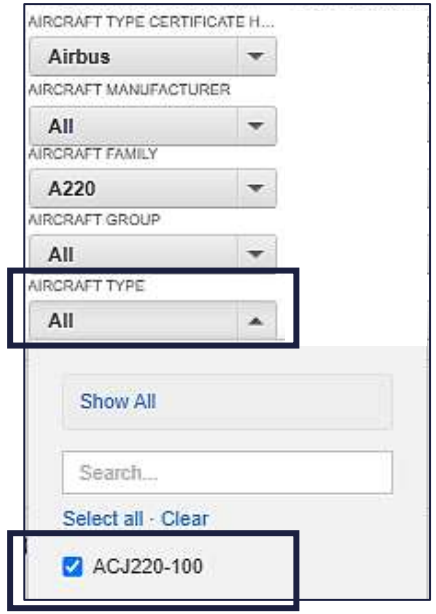
MRO Model

The model's predictive algorithms use a life-cycle analysis to model aircraft MRO aftermarket demand based on groups/models, size categories, engine families and operator types; and evaluate each model by age, region and projected average annual utilization during the forecast period. Average MRO expenses by group/model are modelled across the projected in-service fleets.

The goal is to derive a potential MRO demand across each aircraft model for its unique situation (operator type/region/age). Data outputs include projected dollar demand for airframe, engine, component and modification categories. Expense categories are further assigned within a number of related categories such as OEM, type certificate holder, operator type (fractionals, corporate, charters, etc.) and region. Further, 20 individual *expense types* are calculated as subcategories such as avionics, landing gear, flight controls, hard and soft goods. (See the Appendices for a complete table listing.)



Methodology & Assumptions



Aircraft Fleet - Hierarchy

Added this year, Aircraft "Type" changes aircraft *model* used previously. The scope divides three-levels of hierarchy, Family, Group, Type, allowing both high-level and precise navigation across fleets or MRO reporting. Above these levels, both the Type Certificate Holder (TCH) or the original manufacturer can be used to filter results to zero-in on desired parameters.

In the example of the Airbus ACJ TwoTwenty, the TCH is followed by the original manufacturer and three-levels of hierarchy. See Appendices for complete outline.

Airbus ACJ Two Twenty



Credit: Brian Kough, Aviation Week Network

PWC GTF Engine



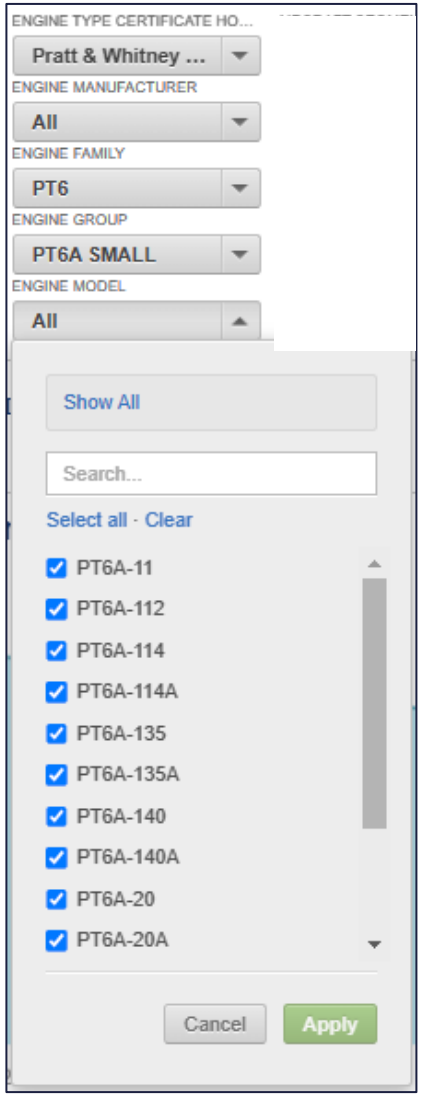
Engine Fleet - Hierarchy

New this year, the business aviation forecast includes three-levels of engine naming hierarchy: Family, Group and Model. This allows both high-level and precise views of engine fleet metrics when applying to the desired data segmentation allowing unique views for new deliveries, in-service fleet and MRO breakouts.

The engine reporting and charting incorporates this hierarchy and provides a granular view of market projections. The engine naming and taxonomy captures the most recent updates to make the descriptions and deciphering of various groups and models easier to navigate.

The three-level engine hierarchy allows matching of fleet types across products, so that users of Fleet Discovery will be able to match aircraft and engines at various levels to the forecast product.

The PT6 engine family is one example of the improvements to the engine hierarchy. Below the family-level, the group-level segments engines into Small, Medium and Large categories per Pratt & Whitney Canada's outline. Further at the model-level, the detailed engine designation is provided.



Methodology & Assumptions

Engine Methodology

Engine Service Event Scope

Major maintenance service events (overhauls and hot section inspections) usually occur at engine repair facilities. It is assumed engines will be overhauled to manufacturers' type-certificate specifications. On-condition and life-limited component parts are inspected and/or replaced as necessary and accounted for in overhaul cost assumptions.

The business model assumes engines have events/costs at set cycle intervals for each of two major events: overhauls and hot-section inspections, with unique costs for each. An engine-unique hourly "unscheduled maintenance" rate factor also is applied and allocated based on projected utilization rates. Tech inserts, unscheduled engine removals, airworthiness-directive (AD)/service-bulletin (SB) compliance and dilution rates for spare engines are not assumed as unique events, but compliance costs for ADs and SBs are incorporated into major service events.


Credit: Antoine Fafard, Aviation Week Network

Engine Service Event Modeling

Engine events are forecast based upon the following parameters:

- Current aircraft utilization (flight cycles accumulated).
- Projected utilization (flight cycles per forecast year).
- Engine service intervals (average engine cycle intervals derived from surveys of OEMs and MROs) triggered for each powerplant by projected utilization.

The servicing algorithm connects engines continuously to aircraft within the forecast model. Roughly speaking, the algorithms make the following calculations: Engine utilization history + projected utilization in Year 1 + projected utilization in Year 2 = total utilization for year 2. The algorithms then follow the formula for subsequent years. Utilization event-trigger algorithms are used to note when an event should occur, a service event is counted, and the corresponding expenses are recorded. Utilization is informed by in-house flight tracking sources.

By nature of the modelling and the online dashboard, costs are associated with the operator, aircraft types, aircraft categories, country, region, OEM, type-certificate holder and multiple other connections. No factors are applied for a particular operator's harsh environmental conditions or for proprietary engine maintenance practices/schedules assumed under their certification authority.

Engine Count Modeling

Aircraft deliveries and retirements provide a collective proxy for engine counts in the forecasts. For example, when an Embraer Phenom 300 is delivered, the model adds two Pratt & Whitney Canada PW535E engines to the engine in-service count. The utilization rate starts accruing for the aircraft/engine combinations and anticipated MRO spending builds on event triggers; turboprop engines now follow the same modeling as turbofans – cycle-based intervals for overhaul determination. An engine hourly rate factor is applied. As an aircraft is retired, so are the corresponding engines. The forecast does not account for spare engines.

Methodology & Assumptions

MARKET SITUATION

The pandemic aftermath is the overarching influence of this market. Its ramifications were abrupt and severe but the new normal is characterized by continuing tail winds in utilization and new orders, especially in North America and in Europe. The welcome newfound demands being placed on the business aviation market to fulfil high-end commercial passenger's demands, as well as robust business travel rebounds, gives reasons for optimism in this market. What we've seen is that swings may occur in this market, but passenger demand seems abundant with new users enjoying the benefits of business aviation.

Economic, manufacturing and financial factors influenced this forecast. Debt levels and inflation is high in the Americas and Europe. Fuel costs are relatively high impacting corporate margins. Capital costs are rapidly increasing, while the US dollar lower, but still near all time highs. Manufacturing issues include supply chain problems and labor shortages/costs. The potential for continued economic softening in many regions, including inflation and recessions, could all potentially conspire to impact the market negatively.

GENERAL ASSUMPTIONS

OEM production estimates are derived from corporate announcements, one-on-one discussions, internal staff research, and are evaluated against external and internal sources during the buildup to the forecast release. GDP predictions from major sources are used to estimate overall economic conditions over the forecast period and shape the end results.

Model assumptions reflect internal projections for utilization rates that influence service intervals as well as average costs at the airframe, engine, modification, and component-maintenance levels, which are based on survey data and other primary research.

The forecast does not model characteristics of individual operators nor their unique maintenance programs; however, it provides valuable trend information for strategic investment, planning, and decisions.

Constant U.S. 2024 dollars, without further adjustments for future inflation or escalation, are used in all cost figures. Additionally, material costs and regional labor rates are not escalated in MRO assumptions, but costs are adjusted for inflation in each annual release of the forecast.

Future global, regional recessions and/or major geopolitical economic shocks cannot be predicted and are not accounted for in the forecast; however, current global risks and trends are accounted for to shape the forecast results.



Bombardier Global 7500, GE Passport 20 Engines

Credit: Nigel Prevett, Aviation Week Network

Appendices - Scope

- MRO Expense Categories/Expense Types
- Region-Country Assignments
- Aircraft Type Certificate Holder/Group/Size Category

Appendix 1 –
MRO Expense Categories/Expense Types

Expense Category	Expense Type
AIRFRAME HEAVY	AIRFRAME
COMPONENT MAINTENANCE	APU
	CABIN SYSTEMS
	COCKPIT AVIONICS
	ELECTRICAL
	FLIGHT CONTROLS
	FUEL SYSTEMS
	HYDRAULIC POWER & UTILITY SYSTEMS
	LANDING GEAR
	OTHER CATEGORIES
	THRUST REVERSERS
	WHEELS & BRAKES
ENGINE MAINTENANCE	HOT SECTION INSPECTION (HSI)
	OVERHAUL (OH)
	UNSCHEDULED ENGINE
MODIFICATIONS	AVIONICS
	CABIN ELECTRONICS
	HARD GOODS
	PAINT
	SOFT GOODS

Appendix 2 – Region-Country Assignments



Africa			
Algeria	Egypt	Madagascar	Senegal
Angola	Equatorial Guinea	Malawi	Seychelles
Botswana	Ethiopia	Mali	Somalia
Burkina Faso	Gabon	Mauritania	South Africa
Burundi	Gambia	Mauritius	Sudan
Cameroon	Ghana	Morocco	Tanzania
Central African Republic	Guinea	Mozambique	Togo
Chad	Ivory Coast	Namibia	Tunisia
Congo (Brazzaville)	Kenya	Niger	Uganda
Congo (Democratic Republic)	Lesotho	Nigeria	Zambia
Djibouti	Libya	Reunion	Zimbabwe

Asia-Pacific			
Australia	Indonesia	New Zealand	Thailand
Bangladesh	Japan	Pakistan	Tuvalu
Brunei	Kiribati	Papua New Guinea	Vanuatu
Cambodia	Laos	Philippines	Vietnam
Cook Islands	Macau	Samoa	
Fiji	Malaysia	Singapore	
French Polynesia	Marshall Islands	South Korea	
Hong Kong	New Caledonia	Taiwan	

China
China

Appendix 2 – Region-Country Assignments



Eastern Europe			
Armenia	Estonia	Montenegro	Slovenia
Azerbaijan	Georgia	North Macedonia	Tajikistan
Belarus	Hungary	Poland	Turkmenistan
Bosnia & Herzegovina	Kazakhstan	Romania	Ukraine
Bulgaria	Kyrgyzstan	Russia	Uzbekistan
Croatia	Latvia	Serbia	
Czech Republic	Lithuania	Slovakia	

India
India

Latin America			
Anguilla	Cayman Islands	Haiti	St. Maarten
Argentina	Chile	Honduras	St. Vincent & The Grenadines
Aruba	Colombia	Jamaica	Suriname
Bahamas	Costa Rica	Mexico	Trinidad & Tobago
Barbados	Curacao	Panama	Turks & Caicos
Belize	Dominican Republic	Paraguay	Uruguay
Bermuda	Ecuador	Peru	Venezuela
Bolivia	El Salvador	St. Barthelemy	
Brazil	Guadeloupe	St. Kitts & Nevis	
British Virgin Islands	Guatemala	St. Lucia	

Appendix 2 – Region-Country Assignments



Middle East		
Bahrain	Jordan	Qatar
Iran	Kuwait	Saudi Arabia
Iraq	Lebanon	Syria
Israel	Oman	United Arab Emirates

North America	
Canada	United States

Western Europe			
Andorra	Greece	Liechtenstein	Spain
Austria	Greenland	Luxembourg	Sweden
Belgium	Guernsey	Malta	Switzerland
Cyprus	Iceland	Monaco	Turkey
Denmark	Ireland	Netherlands	United Kingdom
Finland	Isle Of Man	Norway	
France	Italy	Portugal	
Germany	Jersey	San Marino	

Appendix 3 –
Aircraft Type Certificate Holder/Group/Size Category



Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
328 Support Services	Dornier 328Jet	Regional Jets	Airliners
Airbus	A310	Widebody Jets	Airliners
Airbus	A319	Narrowbody Jets	Airliners
Airbus	A320	Narrowbody Jets	Airliners
Airbus	A330	Widebody Jets	Airliners
Airbus	A340	Widebody Jets	Airliners
Airbus	ACJ220	Narrowbody Jets	Airliners
Airbus	ACJ318	Narrowbody Jets	Airliners
Airbus	ACJ319	Narrowbody Jets	Airliners
Airbus	ACJ319neo	Narrowbody Jets	Airliners
Airbus	ACJ320	Narrowbody Jets	Airliners
Airbus	ACJ320neo	Narrowbody Jets	Airliners
Airbus	ACJ321	Narrowbody Jets	Airliners
Airbus	ACJ330	Widebody Jets	Airliners
Airbus	ACJ340	Widebody Jets	Airliners
Airbus	ACJ350	Widebody Jets	Airliners

Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Boeing	727	Narrowbody Jets	Airliners
Boeing	737 Classic	Narrowbody Jets	Airliners
Boeing	737-200	Narrowbody Jets	Airliners
Boeing	737MAX / BBJ	Narrowbody Jets	Airliners
Boeing	737NG / BBJ	Narrowbody Jets	Airliners
Boeing	747 Classic	Widebody Jets	Airliners
Boeing	747-400	Widebody Jets	Airliners
Boeing	747-8	Widebody Jets	Airliners
Boeing	757	Narrowbody Jets	Airliners
Boeing	767	Widebody Jets	Airliners
Boeing	777	Widebody Jets	Airliners
Boeing	787	Widebody Jets	Airliners
Bombardier	Challenger 300/350/3500	Super Midsize Jets	Medium Jets
Bombardier	Challenger 600	Large Cabin Jets	Large Jets
Bombardier	Challenger 601	Large Cabin Jets	Large Jets
Bombardier	Challenger 604/605/650	Large Cabin Jets	Large Jets
Bombardier	Global 5000	Large Cabin Jets	Large Jets

Appendix 3 –
Aircraft Type Certificate Holder/Group/Size Category



Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Bombardier	Global 5500	Large Cabin Jets	Large Jets
Bombardier	Global 6500	Ultra Long-Range Jets	Large Jets
Bombardier	Global 7500/8000	Ultra Long-Range Jets	Large Jets
Bombardier	Global Express/XRS/6000	Ultra Long-Range Jets	Large Jets
Bombardier	Learjet 23-29	Light Jets	Small Jets
Bombardier	Learjet 31	Light Jets	Small Jets
Bombardier	Learjet 35/36	Light Jets	Small Jets
Bombardier	Learjet 40/45	Light Jets	Small Jets
Bombardier	Learjet 55	Midsize Jets	Small Jets
Bombardier	Learjet 60	Midsize Jets	Medium Jets
Bombardier	Learjet 70/75	Light Jets	Small Jets
Cirrus	Cirrus Vision	Very Light Jets	Small Jets
COMAC	ARJ21	Regional Jets	Airliners
Daher	Kodiak	Single-Engine Turboprops	Single-Engine Turboprops
Daher	TBM700/850/900	Single-Engine Turboprops	Single-Engine Turboprops

Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Dassault Aviation	Falcon 10/100	Light Jets	Small Jets
Dassault Aviation	Falcon 10X	Ultra Long-Range Jets	Large Jets
Dassault Aviation	Falcon 20/200	Midsize Jets	Medium Jets
Dassault Aviation	Falcon 2000	Large Cabin Jets	Large Jets
Dassault Aviation	Falcon 2000EX/LX/LXS/S	Large Cabin Jets	Large Jets
Dassault Aviation	Falcon 50	Super Midsize Jets	Medium Jets
Dassault Aviation	Falcon 6X	Large Cabin Jets	Large Jets
Dassault Aviation	Falcon 7X	Large Cabin Jets	Large Jets
Dassault Aviation	Falcon 8X	Ultra Long-Range Jets	Large Jets
Dassault Aviation	Falcon 900	Large Cabin Jets	Large Jets
Dassault Aviation	Falcon 900DX/EX/LX	Large Cabin Jets	Large Jets
Eclipse Aerospace	Eclipse 500/550	Very Light Jets	Small Jets
Embraer	Legacy 450/Praetor 500	Super Midsize Jets	Medium Jets
Embraer	Legacy 500/Praetor 600	Super Midsize Jets	Medium Jets
Embraer	Legacy 600/650	Large Cabin Jets	Airliners
Embraer	Lineage 1000	Regional Jets	Airliners
Embraer	Phenom 100	Light Jets	Small Jets
Embraer	Phenom 300	Light Jets	Small Jets

Appendix 3 –
Aircraft Type Certificate Holder/Group/Size Category



Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Epic	Epic E1000	Single-Engine Turboprops	Single-Engine Turboprops
Fokker	F28	Regional Jets	Airliners
Gulfstream	Gulfstream G-II	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream G-III	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream G-IV	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream G-IV (G300/400)	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream G-V	Ultra Long-Range Jets	Large Jets
Gulfstream	Gulfstream G280	Super Midsize Jets	Medium Jets
Gulfstream	Gulfstream GIV-X (G350/450)	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream GVI (G650/650ER)	Ultra Long-Range Jets	Large Jets
Gulfstream	Gulfstream GVII (G400)	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream GVII (G500)	Large Cabin Jets	Large Jets
Gulfstream	Gulfstream GVII (G600)	Ultra Long-Range Jets	Large Jets
Gulfstream	Gulfstream GVIII (G700)	Ultra Long-Range Jets	Large Jets
Gulfstream	Gulfstream GVIII (G800)	Ultra Long-Range Jets	Large Jets
Gulfstream	Gulfstream GVSP (G500/550)	Ultra Long-Range Jets	Large Jets

Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Honda Aircraft Company	HondaJet	Light Jets	Small Jets
Honda Aircraft Company	HondaJet 2600	Light Jets	Small Jets
Israel Aircraft Industries	Gulfstream G100	Midsize Jets	Medium Jets
Israel Aircraft Industries	Gulfstream G150	Midsize Jets	Medium Jets
Israel Aircraft Industries	Gulfstream G200	Super Midsize Jets	Medium Jets
Israel Aircraft Industries	Westwind	Midsize Jets	Medium Jets
Mitsubishi	Challenger 850/Execliner	Regional Jets	Airliners
Mitsubishi	CRJ700/900/1000	Regional Jets	Airliners
Mitsubishi	Mu-2	Multi-Engine Turboprops	Multi-Engine Turboprops
Ontic Engineering & Manufacturing	Merlin	Multi-Engine Turboprops	Multi-Engine Turboprops
Piaggio Aerospace	P.180 Avanti	Multi-Engine Turboprops	Multi-Engine Turboprops
Pilatus Aircraft	PC-12	Single-Engine Turboprops	Single-Engine Turboprops
Pilatus Aircraft	PC-24	Light Jets	Small Jets
Piper	PA-31	Multi-Engine Turboprops	Multi-Engine Turboprops
Piper	PA-42	Multi-Engine Turboprops	Multi-Engine Turboprops
Piper	PA-46TP	Single-Engine Turboprops	Single-Engine Turboprops
Sabreliner Aviation	Sabre	Midsize Jets	Medium Jets

Appendix 3 –
Aircraft Type Certificate Holder/Group/Size Category



Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Syberjet Aircraft	SJ30	Light Jets	Small Jets
Textron Aviation	Beech 2000	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	Beechjet	Light Jets	Small Jets
Textron Aviation	Caravan	Single-Engine Turboprops	Single-Engine Turboprops
Textron Aviation	Citation CJ1	Light Jets	Small Jets
Textron Aviation	Citation CJ2	Light Jets	Small Jets
Textron Aviation	Citation CJ3	Light Jets	Small Jets
Textron Aviation	Citation CJ4	Light Jets	Small Jets
Textron Aviation	Citation Excel	Midsize Jets	Medium Jets
Textron Aviation	Citation I	Light Jets	Small Jets
Textron Aviation	Citation II	Light Jets	Small Jets
Textron Aviation	Citation III	Midsize Jets	Medium Jets
Textron Aviation	Citation Latitude	Midsize Jets	Medium Jets
Textron Aviation	Citation Longitude	Super Midsize Jets	Medium Jets
Textron Aviation	Citation M2	Light Jets	Small Jets
Textron Aviation	Citation Mustang	Very Light Jets	Small Jets
Textron Aviation	Citation Sovereign	Midsize Jets	Medium Jets

Type Certificate Holder	Aircraft Group	Aircraft Size Category	Aircraft Size Segment
Textron Aviation	Citation V	Light Jets	Small Jets
Textron Aviation	Citation X	Super Midsize Jets	Medium Jets
Textron Aviation	Citation XLS Ascend	Midsize Jets	Medium Jets
Textron Aviation	Citation XLS+/Gen2	Midsize Jets	Medium Jets
Textron Aviation	Conquest1	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	Conquest2	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	Denali	Single-Engine Turboprops	Single-Engine Turboprops
Textron Aviation	Hawker 4000	Super Midsize Jets	Medium Jets
Textron Aviation	Hawker 750/800/850/900	Midsize Jets	Medium Jets
Textron Aviation	HS125	Midsize Jets	Medium Jets
Textron Aviation	King Air 100	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	King Air 200/250/260	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	King Air 300/350/360	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	King Air 90	Multi-Engine Turboprops	Multi-Engine Turboprops
Textron Aviation	Mu300	Light Jets	Small Jets
Textron Aviation	Premier I/IA	Light Jets	Small Jets
Twin Commander Aircraft	Turbo Commander	Multi-Engine Turboprops	Multi-Engine Turboprops

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