



# Global Services Forecast

2022 ▶ 2041

**Commercial Aviation**

It takes millions of people  
to keep you flying



**AIRBUS** Amber

**Airbus**

Toulouse, October 6th 2022

**AIRBUS**

# Our speakers



**Philippe Mhun**

Executive Vice President Programmes & Services



**Amaya Rodriguez Gonzalez**

Vice President Aftermarket Strategy



**Stan Shparberg**

Senior Vice President & Head of Marketing

## GLOBAL SERVICES FORECAST

2022 ▶ 2041



Toulouse,  
October 6th 2022

**AIRBUS**

Since the 2020 pandemic outbreak

## Services supporting our industry through two years of turbulence



### Maintain

From high demand for parking & storage services

To robust operations restart



### Train & Operate

Maintain key competencies with agility and distance learning

More flexibility in fleet utilisation combining cargo & cabin



### Enhance

Optional upgrades largely delayed

Demand for Passenger to Freighter conversions

Accelerated Digitalisation

Everyday in 2022

More than 11 million skilled people\*  
are working hard to keep more than  
23,500 aircraft\*\* flying.

Did you know that each  
new aircraft which enters  
into service, creates as  
many new jobs as a  
mid-size company?

2022

People want and need to travel again.  
Services play a crucial role to safely  
fulfil the demand.

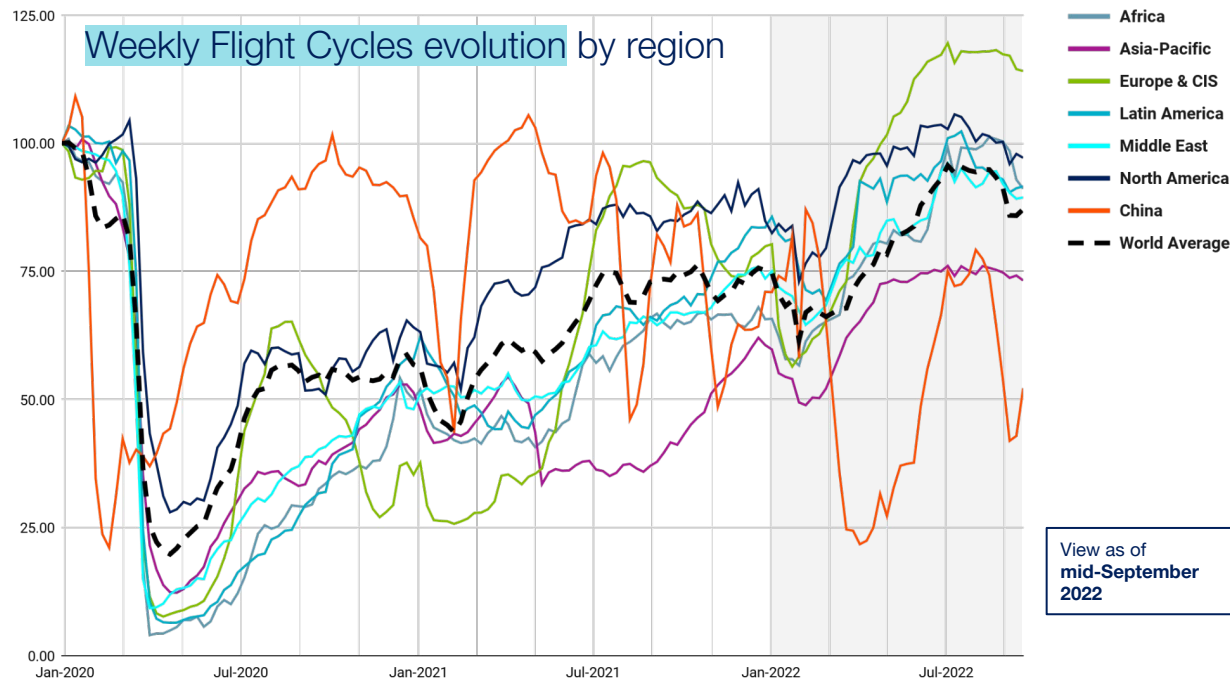
3.3 Bn

Expected passengers in **2022**  
(+43% vs 2021 - EoY forecast)\*



# A continuous recovery, with regional disparities

base 100 at Jan-2020



During the summer, global flight cycles had reached an unprecedented **95% of 2019 levels**, confirming the expected seasonal boost.

**Flight Hours / Flight Cycles** power the services demand.

2022

Services, powering up now.

\$95Bn +21% vs 2021

Estimated global aftermarket value for 2022

Maintenance and Training markets leading recovery, strongly enabled by accelerated digitalisation

Increasing opportunities for end-of-life services, USM\* trading and digital/fleet efficiency solutions

Upgrades recovery thanks to high market confidence

The future of commercial aviation will be shaped by

# Sustainability



Short term



Mid term



Long Term

**Act** on carbon, waste & noise emissions, and **introduce** alternative fuels (SAF\*)

**Renew** the operated fleet and **engage** further on decarbonisation innovation

**Care** for a cleaner way to fly with carbon neutral operations

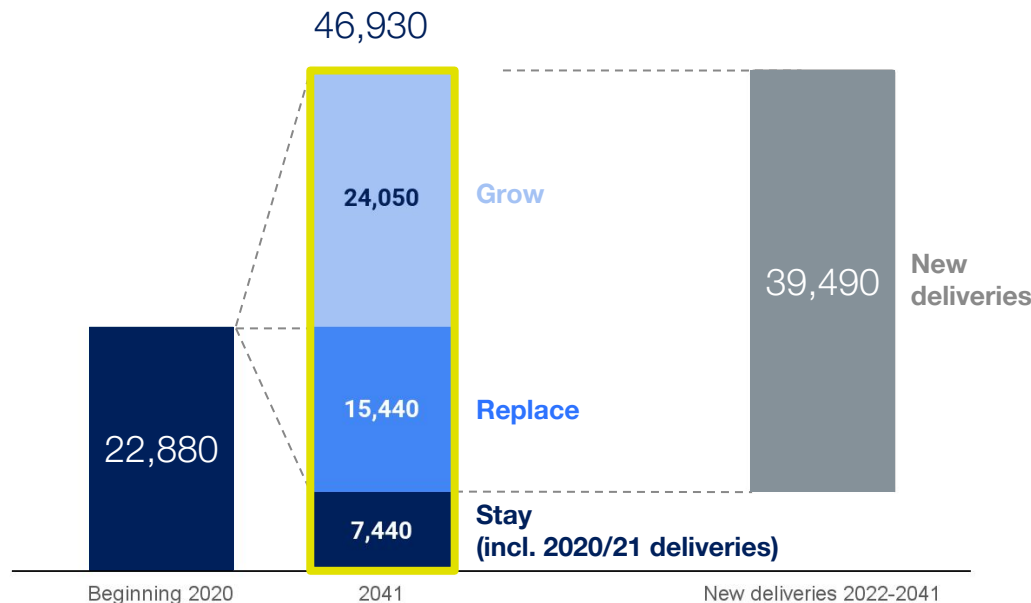
Today, services are key for customers wishing to **reduce their carbon footprint, waste & noise emissions**

# Almost 47,000 in service aircraft in 2041

Source: Airbus GMF

Notes: Passenger aircraft above 100 seats &amp; freighters with a payload above 10t

## Number of aircraft



**22,880 aircraft in-service beginning of 2020:**

**33%** will stay in-service  
(including 2020 & 2021 deliveries)  
**67%** will be replaced

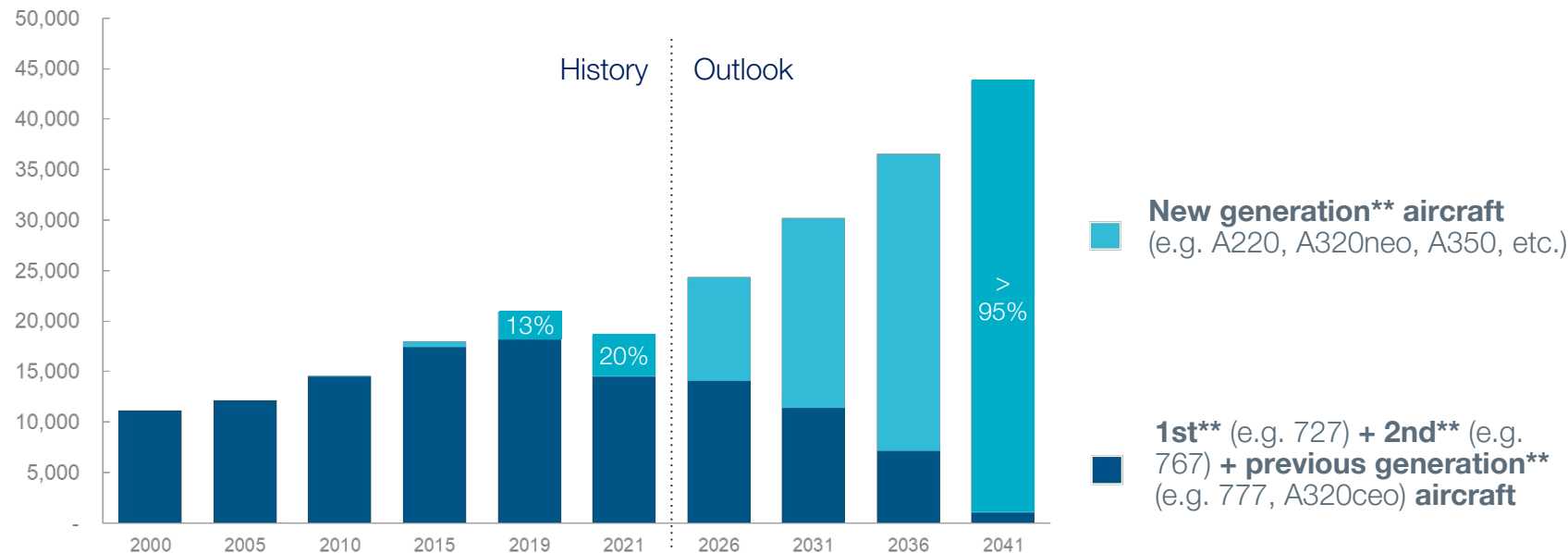
**39,490 new deliveries 2022-2041:**

**60%** for growth  
**40%** for replacement

By 2041, new generation passenger aircraft will represent **>95%** of the fleet

Source: Cirium, Airbus GMF

### Number of passenger aircraft in service\*



\* Western built passenger aircraft above 100 seats – pax aircraft only / \*\*1st generation: A300, DC 9, DC10, 707, 727, 737, 747 / 2nd generation: A310, MD11, MD80, MD90, 737, 747, 757, 767, F100  
Previous generation: A320 Fam., A330, A340, 717, 737NG, 747, 777 / New generation: A220, A320neo Fam., A330neo, A350, A380, 737Max, 777X, 787 & new programs

Digitalisation is shaping the services of tomorrow.

A world where mechanics and data scientists work together, where technology alleviates repetitive work.



Progressive shift to **data-driven** and integrated digital services



Arrival of **new aircraft** with disruptive technology



**Sustainability** will influence the entire aftermarket



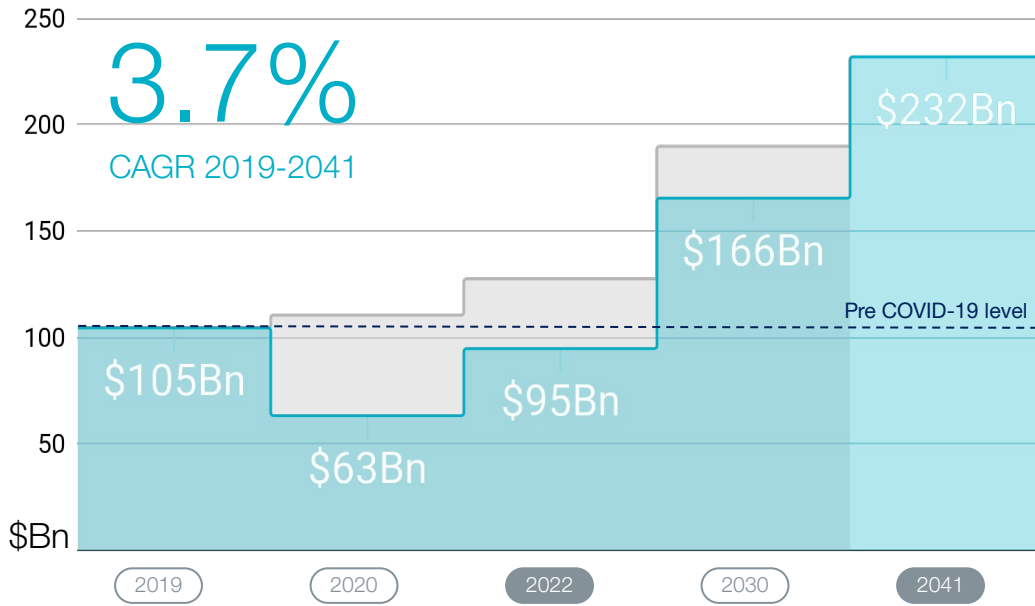
Services innovation will require **new skills**

2022 - 2041

## Services market to more than double in value by 2041



■ Pre-COVID forecast ■ 2022 forecast



Aftermarket value **back to 2019 levels in 2023**. Market shifting from cash intensive solutions to asset free solutions.

Sustainability, digitalisation, increased aircraft productivity, maintenance optimisation, and seamless passenger experience are all driving the long-term growth.

Source: Airbus Global Services Forecast 2022-2041  
Note: Passenger aircraft above 100 seats & freighters with a payload above 10t  
CAGR: Compound Annual Growth Rate

**AIRBUS**

2022 - 2041

# 3 services streams addressing the needs of commercial aviation



CAGR\* 2019-2041 ▲

+4.6% CAGR

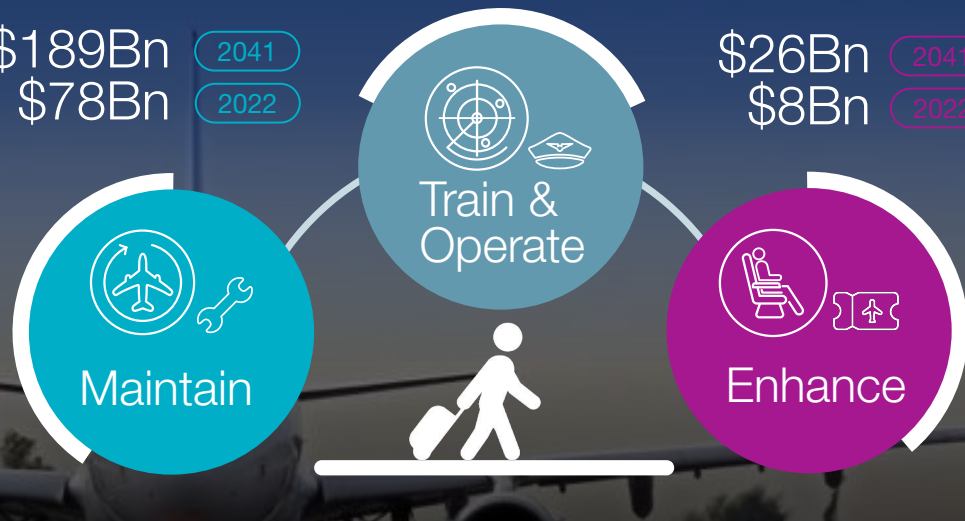
\$17Bn (2041)  
\$9Bn (2022)

+3.5% CAGR

\$189Bn (2041)  
\$78Bn (2022)

+4.2% CAGR

\$26Bn (2041)  
\$8Bn (2022)

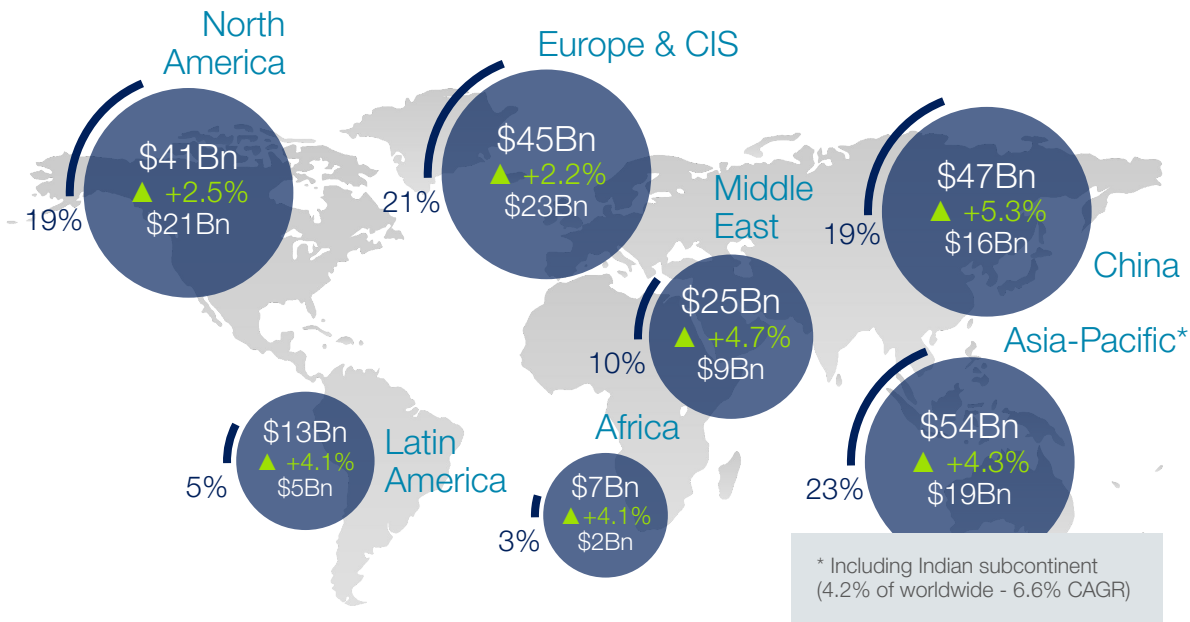
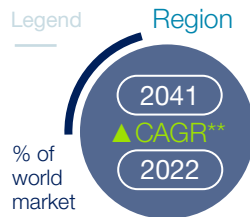


Keep aircraft in operational condition and manage its end of life in a sustainable way

Train staff and operate the aircraft efficiently

Differentiate and enhance the overall passenger experience

# Aftermarket demand evolution per region



**Asia-Pacific** (with India) will become the largest market for services by 2041

Steady growth for mature markets

In **2041**, the commercial services demand in some figures...

**1,100+**

DISMANTLED  
& RECYCLED  
AIRCRAFT



**5,000+**  
HEAVY CHECKS

& 7,000+ Engines checks



**440,000**

Daily **FLIGHT HOURS**



**8,000,000**

Hours required  
**IN SIMULATORS**



**\$125Bn**  
Material



**46,900+**

The number of aircraft to support  
**>95% new generation pax aircraft**



**2,200 CABINS** UPGRADED  
OR REFURBISHED

75% Single Aisle | 25% Wide Body



**4 times more** aircraft with  
**INFLIGHT CONNECTIVITY**  
for passengers



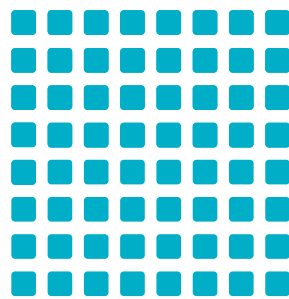
2 million+

Additional workforce  
needed over  
the next 20 years



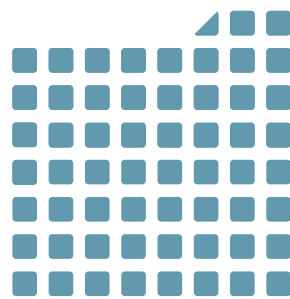
2022-2041 **cumulative workforce needs**

640,000  
New technicians



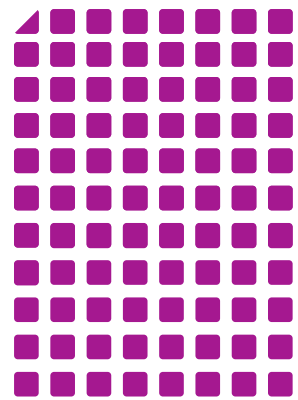
**88**  
new technicians  
required every day  
on average

585,000  
New pilots



**80**  
new pilots  
required every day  
on average

875,000  
New cabin crews



**120**  
new cabin crew  
required every day  
on average

**Source:** Airbus 2022 Global Services Forecast  
Note: Passenger aircraft above 100 seats & freighters with a payload above 10t

# Building a stronger future for Commercial Aviation

## Resilience

2022 is a year of transition for Services, the industry is finding its feet again. (+21% in value vs 2021)

## Anticipation

Moving from demand to supply-constrained. Adjust the overall supply chain and reinforce capabilities to adapt services to meet new levels.

## Sustainable Growth

Services market expected to more than double in 20 years (+3.7% CAGR), boosted by digitalisation and disruptive innovation to change the way we fly.



GSF 2022 - 2041

It takes  
millions of people  
to keep you flying

**Disclaimer**

All content shared in this document consider Airbus' views and markets forecast modelling as of first half of 2022. This view is subject to changes based on the rapidly evolving situation and mid-term uncertainty. Airbus forecasts the aftermarket recovery and long-term services growth using its models, latest traffic observations and other industry sources benchmark.

**Millions of skilled people** are working hard to **operate, maintain** and **enhance** more than 23,500 aircraft and keep staff **trained**.

**Services**, a business worth **\$95Bn today**, over **\$230Bn in 2041**  
Market more than **doubling by 2041** (+3.7% CAGR).

An additional **+21%** spend expected in **2022** (vs 2021)

**Recovery to pre-crisis levels in 2023**,  
Maintenance and Training leading the recovery, **strongly enabled by digitalization**.

New services to **enhance fleet efficiency**, supporting the industry's CO2 net zero ambitions.

Demand for highly skilled labour to increase by **more than 2 million people** (pilots, technicians, cabin crews) over the next 20 years.

The background of the slide is a photograph of the nose and cockpit of a white Airbus aircraft against a clear blue sky. Two people are in the foreground, seen from behind. The person on the left is wearing a dark cap and a high-visibility yellow vest over a dark jacket, pointing their right index finger towards the aircraft. The person on the right is wearing a dark cap and a grey jacket, pointing their left index finger towards the aircraft. The word 'AIRBUS' is partially visible on the side of the fuselage below the cockpit.

Replay on [aircraft.com/newsroom](https://aircraft.com/newsroom)

Airbus Global Services Forecast 2022-2041

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