

Our speakers



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Global Services Forecast

2023 - 2042

WELCOME



Toulouse, France
29th November 2023

AIRBUS

Global Services Forecast

2023 - 2042

29th November 2023, Toulouse



2023

People love to fly

4.35bn

Expected passengers in **2023** | **4.54bn** in 2019

Forecast 2023 vs 2022 yearly average



GDP
+3.0% vs 2022



RPK
+28.3% vs 2022



Load Factor
+2.2%pt vs 2022



2023

Services, today supporting more than 24,000 aircraft

\$130bn **+46%** vs 2022

Estimated global aftermarket value for 2023

| MAINTAIN

Unprecedented demand for MRO slots.

Critical part availability amidst supply chain bottlenecks.

| TRAIN & OPERATE

Scaling resources at the right level and right competency.

Digital acceleration requirements for new profiles.

| ENHANCE

Supporting airlines by optimising cabin layout and providing state of the art on board connectivity.

GMF 2023 - 2042



17,170 aircraft to be replaced in the next 20 years.

95% of the fleet will be new generation aircraft in 2042.

46,560 aircraft in service in 2042





2023 - 2042

17,000+ aircraft replaced: significant potential to reuse, repair and recycle

CUMULATIVE OVER THE NEXT 20 YEARS*



\$17bn*

Pax to freighter conversions value.



\$45bn*

Used Serviceable Material available for exchange⁽¹⁾



92%

Total weight of an aircraft is recyclable.

REUSE

Reuse resources to better serve the growing freighter demand.

REPAIR

An industry more and more receptive to the use of Used Serviceable Material.

RECYCLE

Circular economy adoption is a unique opportunity to innovate for the best second life of our products.



2023 - 2042

Connected ecosystem leads to a step change



GROUND OPERATIONS



FLIGHT OPERATIONS



TECHNICAL OPERATIONS



PASSENGER EXPERIENCE

A connected ecosystem enabled by digitalisation can

- Optimise fleet utilisation
- Facilitate aircraft fleet transitions
- Enhance passenger experience

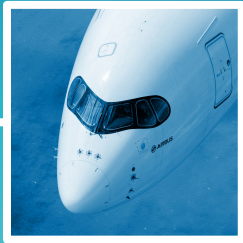


44,000+
connected aircraft by 2042



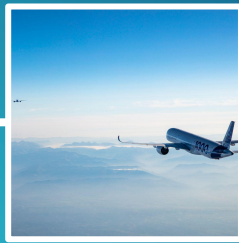
2023 - 2042

Airbus is **strongly committed** to aviation decarbonisation



LATEST GENERATION AIRCRAFT

Fleet replacement could yield 20-30% CO₂ savings.



OPERATIONS & INFRASTRUCTURES

Operational optimisation solutions can save up to 10% CO₂.



SUSTAINABLE AVIATION FUELS

SAF can reduce emissions by up to 80% on average during its full lifecycle.



CARBON OFFSETTING & REMOVAL

We are supporting CORSIA & high quality carbon removal solutions.



DISRUPTIVE TECHNOLOGIES

Our ambition is to bring to market a hydrogen-powered aircraft by 2035.



2023 - 2042

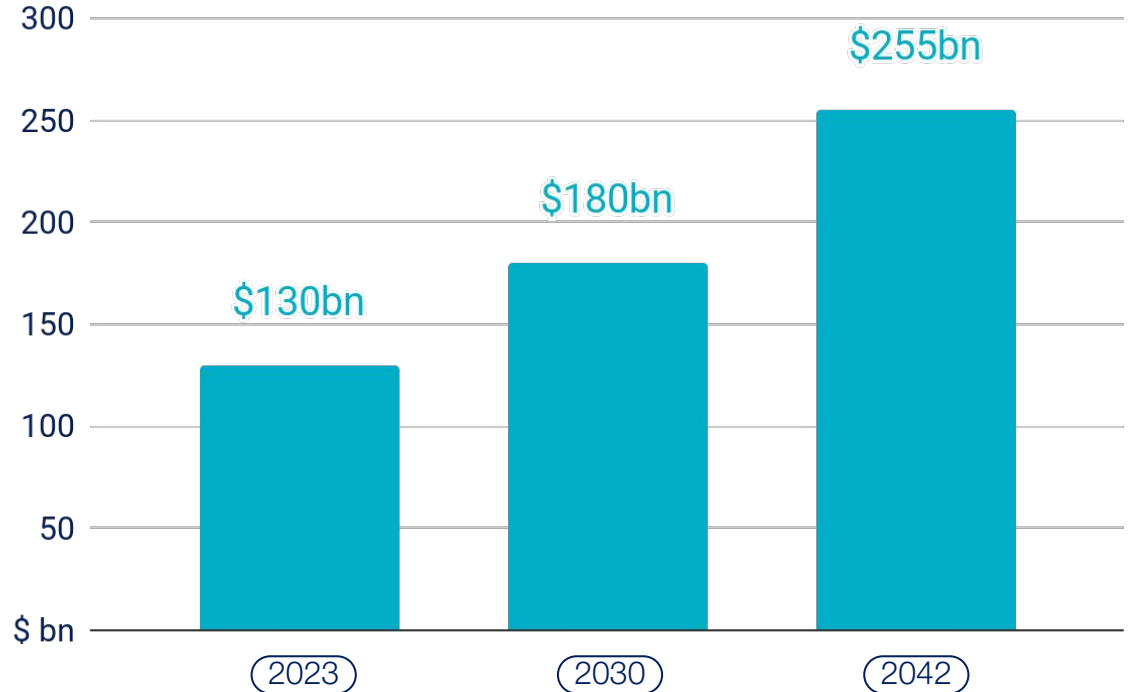


Driven by traffic recovery and fleet composition

▲ CAGR 3.6% 2023-2042

Source: Airbus Global Services Forecast 2023-2042
Note: Passenger aircraft above 100 seats & freighters with a payload above 10t
Figures in 2022 constant dollars
CAGR: Compound Annual Growth Rate

Services market to reach \$255bn in 2042



AIRBUS

2023 - 2042



3 streams addressing the needs of commercial aviation

▲ CAGR 3.6% 2023-2042

Source: Airbus Global Services Forecast 2023-2042
Note: Passenger aircraft above 100 seats & freighters with a payload above 10t
Figures in 2022 constant dollars
CAGR: Compound Annual Growth Rate

+3.5% CAGR ▲
2042 \$210bn
2023 \$108bn



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



+2.0% CAGR ▲
2042 \$17bn
2023 \$11bn

Train staff and operate the aircraft efficiently

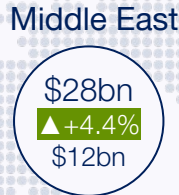
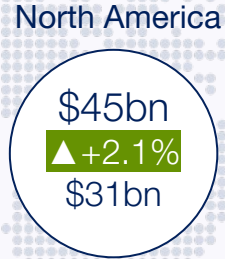
+5.1% CAGR ▲
2042 \$28bn
2023 \$11bn



Differentiate and enhance the overall passenger experience

Services demand evolution per region

2023 - 2042



Legend



Services will have the fastest growth in China, South Asia and the Middle East.

China will become the largest market for services by 2042.

Source: Airbus Global Services Forecast 2023-2042

Note: Passenger aircraft above 100 seats & freighters with a payload above 10t

Figures in 2022 constant dollars

2023 - 2042



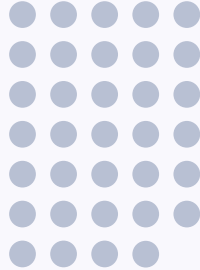
2.2 million

Cumulative
new workforce needed
over the next 20 years
to make it fly.

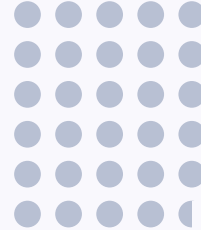
Cumulative workforce 2023-2042



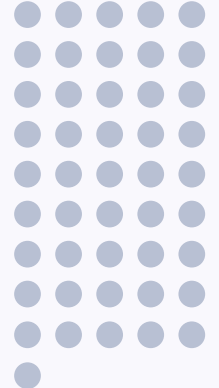
680,000
new technicians



590,000
new pilots



920,000
new cabin crew



Source: Airbus 2023 Global Services Forecast
Note: Passenger aircraft above 100 seats & freighters with a payload above 10t

AIRBUS

Global Services Forecast

2023 - 2042

Key Takeaways

Commercial aviation services players are working harder than ever to safely and sustainably enable the rise in traffic demand.

Commercial aviation services demand is estimated to reach \$130bn in 2023.

- **Workforce demand to grow by 2.2 million** over the next 20 years with digital competencies being the focus.
- **Reuse, repair and recycle** - 17,000+ Aircraft will retire over the next 20 years offering huge opportunity to stimulate our circular economy.
- **The connected ecosystem** will showcase the power of digitalisation, improving utilisation of the fleet, easing aircraft transitions and enhancing passenger experience.
- **Services market is estimated to reach \$255bn** in 2042.

Airbus serves and accompanies our customers today and prepares the future, to pioneer sustainable aerospace for a safe and united world.

A photograph of two people wearing dark caps and jackets, seen from behind, pointing their fingers towards the nose of a white Airbus aircraft. The aircraft is set against a clear blue sky. The word "AIRBUS" is visible on the fuselage. A white horizontal line is positioned below the main text.

Find out more on aircraft.airbus.com

Airbus Global Services Forecast 2023-2042

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