

2026 Commercial Fleet & MRO Forecast Outlook

Daniel Williams

Director, Fleet Data Services

February 2026

What's Happened Since MRO Middle East 2025?

Boeing:

- Rate cap lifted, Rate 38 inducted, pushing to rate 42
- 777X certification delay
- MAX 7 and MAX 10 certification due 2026
- 600 aircraft delivered in 2025

Airbus:

- Lowered 2025 delivery forecast (820 to 790) – managed 793
- Blame still placed on CFM (who supply almost 60% of A320neo engines) and Spirit AeroSystems (A220/A350)

Engine OEM:

- P&W GTF aircraft on ground still 'plateauing' – TAT getting quicker, but slowly
- LEAP engine blade issues, however, RBS fix still not yet in place for MAX

Global economic uncertainty:

- Trade Deals/DOGE/Trade Deals/Gold
- Tariffs

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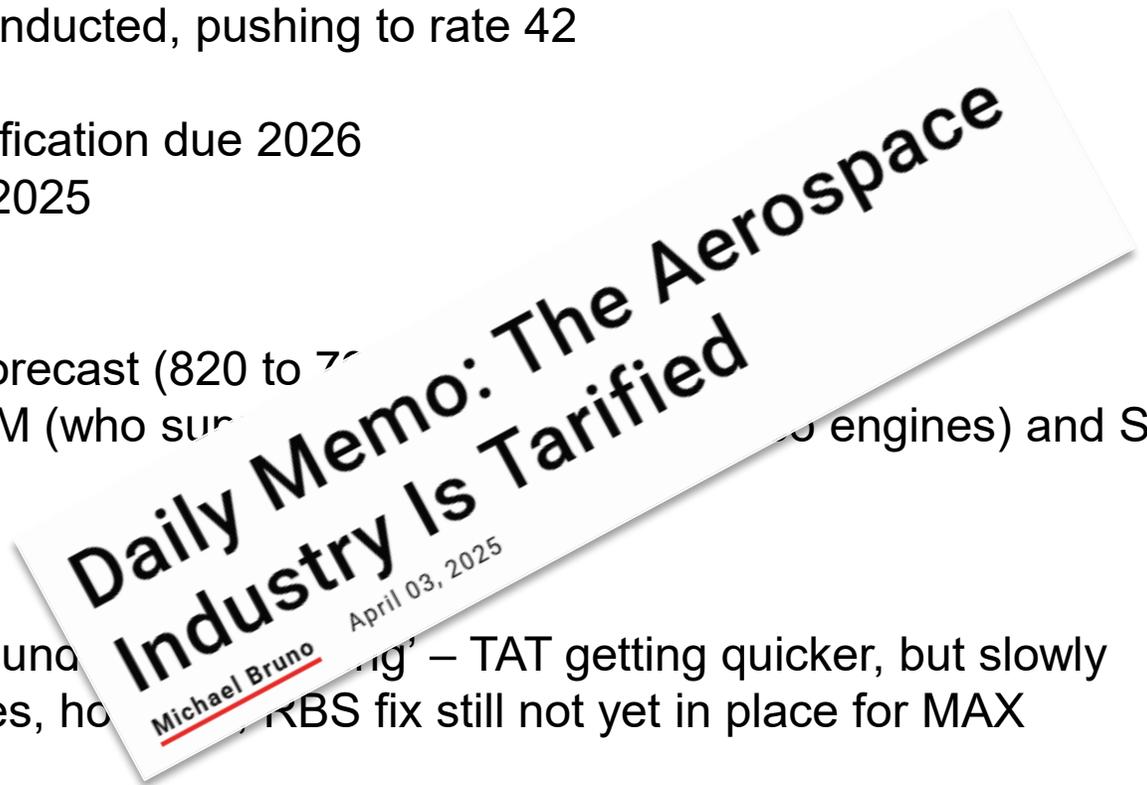
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As Airlines React To Trump Tariffs, Uncertainty Prevails

Christine Boynton Lori Ranson April 04, 2025

Michael Bruno April 03, 2025

AeroSystems

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USM Experts Predict Prolonged Tariff Confusion
Lindsay Bjerregaard April 09, 2025

Industries React To Trump Tariffs, Uncertainty Prevails
Christine Boynton Lori Ranson April 04, 2025

Defense Industry
Michael Bruno April 03, 2025

AeroSystems

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USM Experts Ponder MRO Industry Ponders Prolonged Tariff Impacts
Lindsay Bjerregaard April 09, 2025 James Pozzi April 11, 2025

Tariffs, Uncertainty Prevail
Christine Boynton Lori Ranson April 04, 2025

Industry
Michael Bruno April 03, 2025

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Airbus To Manage Tariff Impact, Assesses Impact On Demand

Jens Flottau April 15, 2025

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Prolonged
Lindsay Bjerregaard April 09, 2025

James Pozzi April 11, 2025

Tariffs, Uncertainty Prevail

Christine Boynton Lori Ranson April 04, 2025

Boeing Ponders Tariff Impacts

Engine OEM:

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Dealing With Industry
Michael Bruno April 03, 2025

Global economic uncertainty:

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What's Happened Since MRO Middle East 2025?

Boeing:

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- MAX 7 and MAX 8
- 600 aircraft delivered

Airbus:

- Lowered 2025 deliveries
- Blame still placed on Boeing (A220/A350)

Engine OEM:

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- LEAP engine

Global economic uncertainty:

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Airbus To Manage Impact, Assess Demand
Jens Flottau April 17, 2025

After Tariffs, Aerospace And Defense Sees Nothing But Uncertainty
Joe Anselmo Bjerregaard Jens Flottau
Michael Bruno Lee Ann Shay Helen Massy-Beresford
Matthew Fulco James Pozzi
Steve Trimble Christine Boynton April 17, 2025

Tariff Impacts Ponders
Lindsay Lori Ranson April 04, 2025

Uncertainty Prevails

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Global economic uncertainty:

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A collage of news headlines related to aerospace and trade. The headlines are tilted and overlapping. Visible text includes: "Airbus To Manage Impact, Assess Demand", "Aerospace And", "No Tariff Turmoil Causes Issues", "For Carriers Amid Global", "Uncertainty", "Airline Impacts", "Tariffs: Losers'", "Outlooks", "May 16, 2025", "CAPA Staff", "May 01,", "Helen Massy-Beresford", "Christine Boynton", "Lori Ranson", "2025", "Michael", "Lee Ann Shay", "Helen Massy-Beresford", "Joe Anselmo", "Bjerregaard", "Jens Flottau", "Deals/Gold".

What's Happened Since MRO Middle East 2025?

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- 777X certification
- MAX 7 and MAX 8
- 600 aircraft deliveries

Airbus:

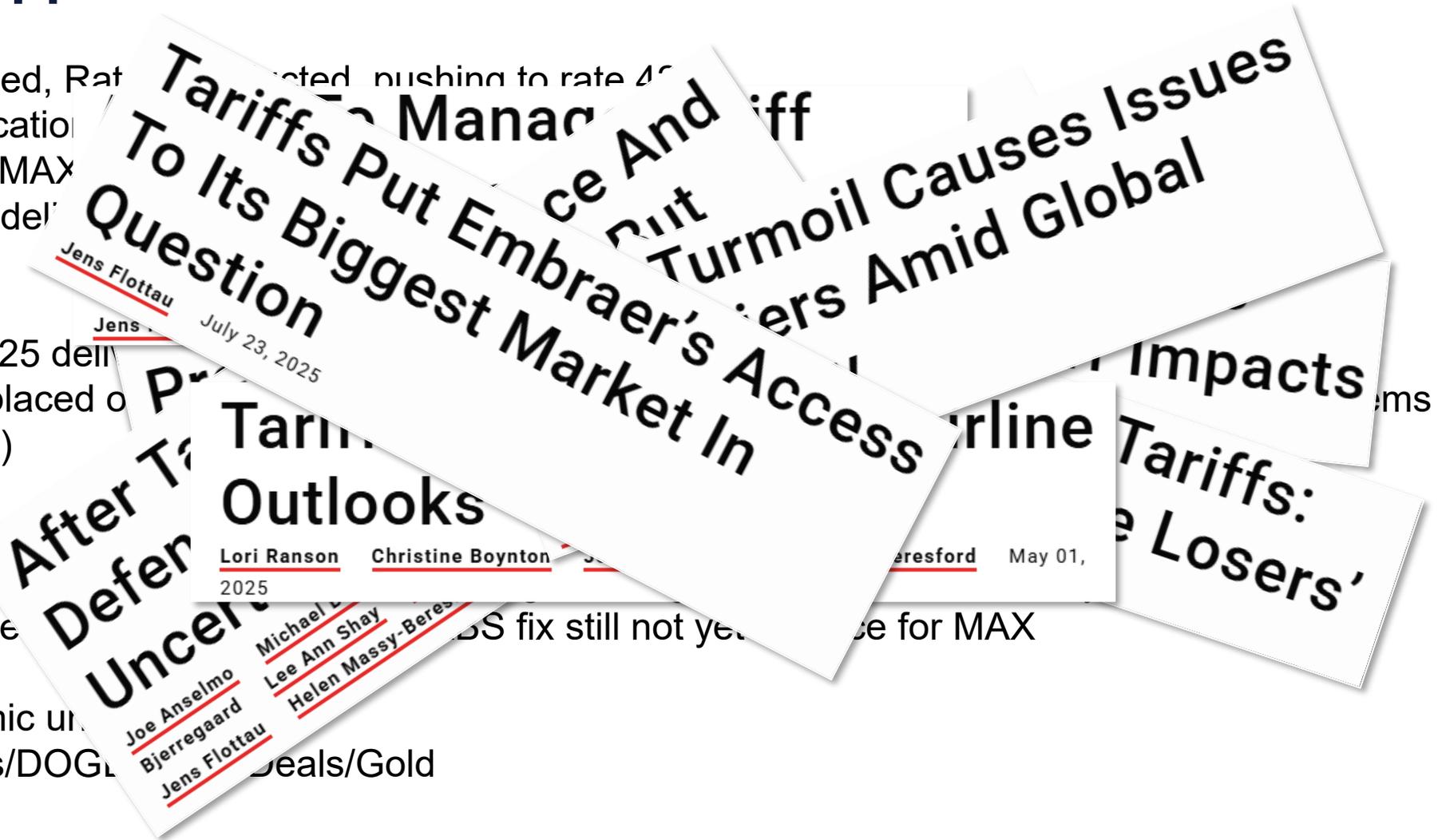
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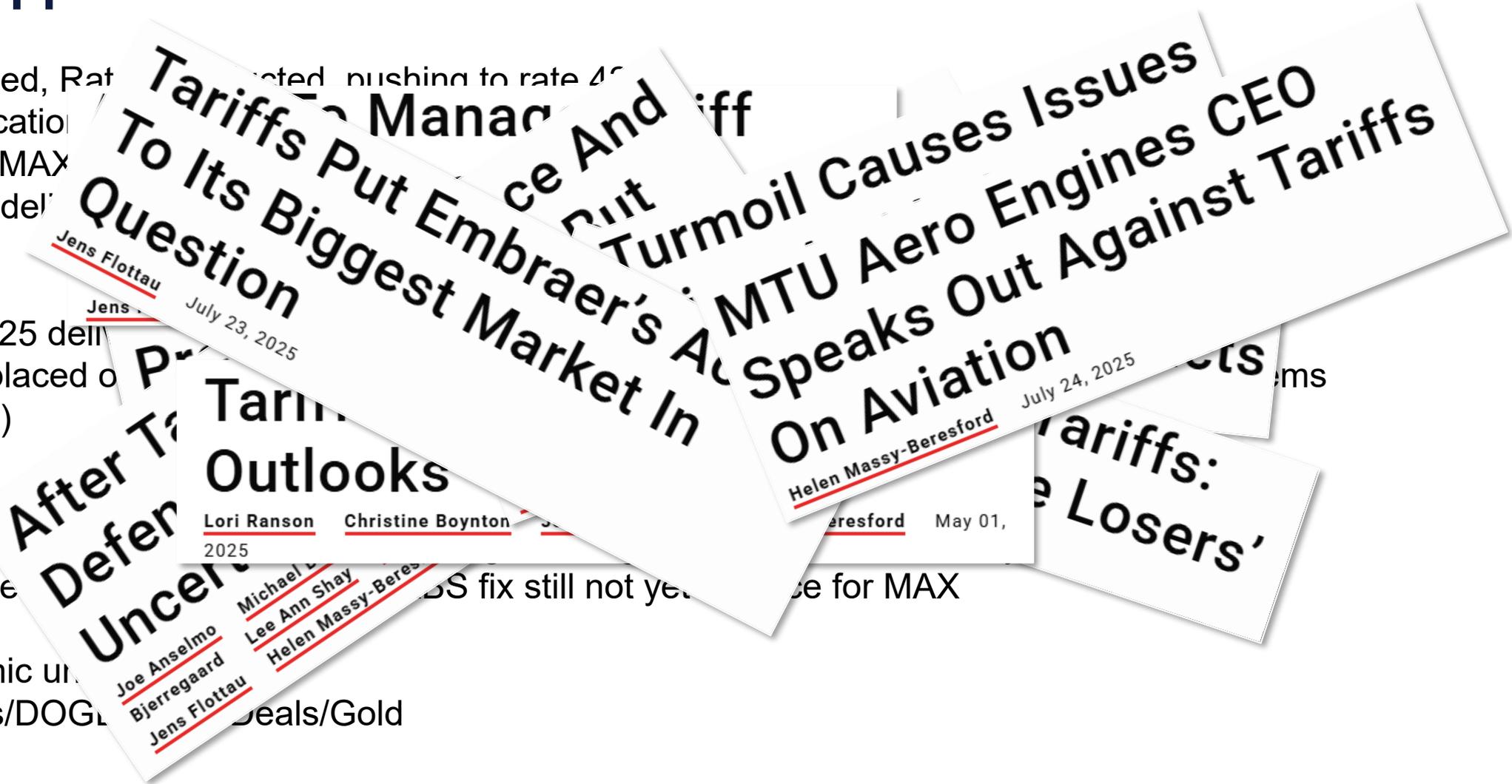
- Lowered 2025 deliveries
- Blame still placed on tariffs (A220/A350)

Engine OEM:

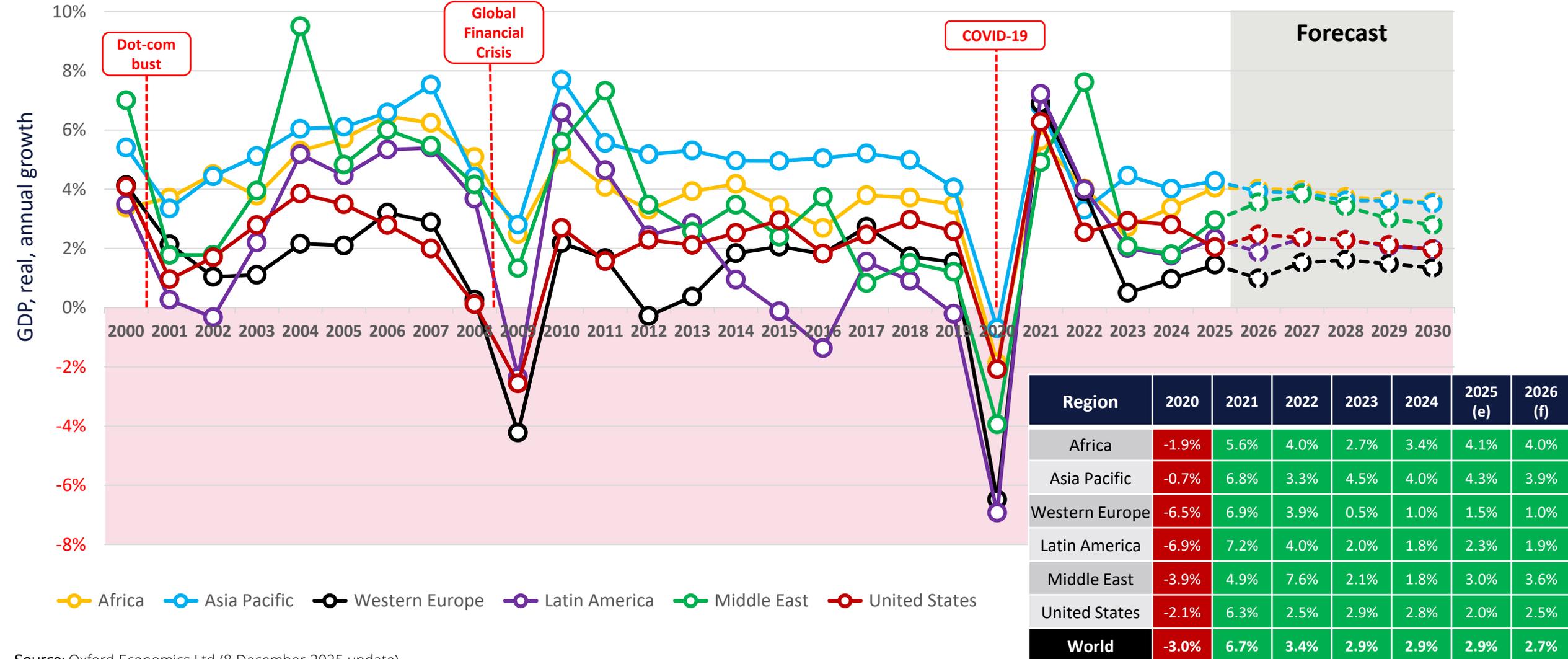
- P&W GTF engine
- LEAP engine
- CFM56 engine
- GE90 engine
- Trent engine
- BS fix still not yet resolved for MAX

Global economic uncertainty:

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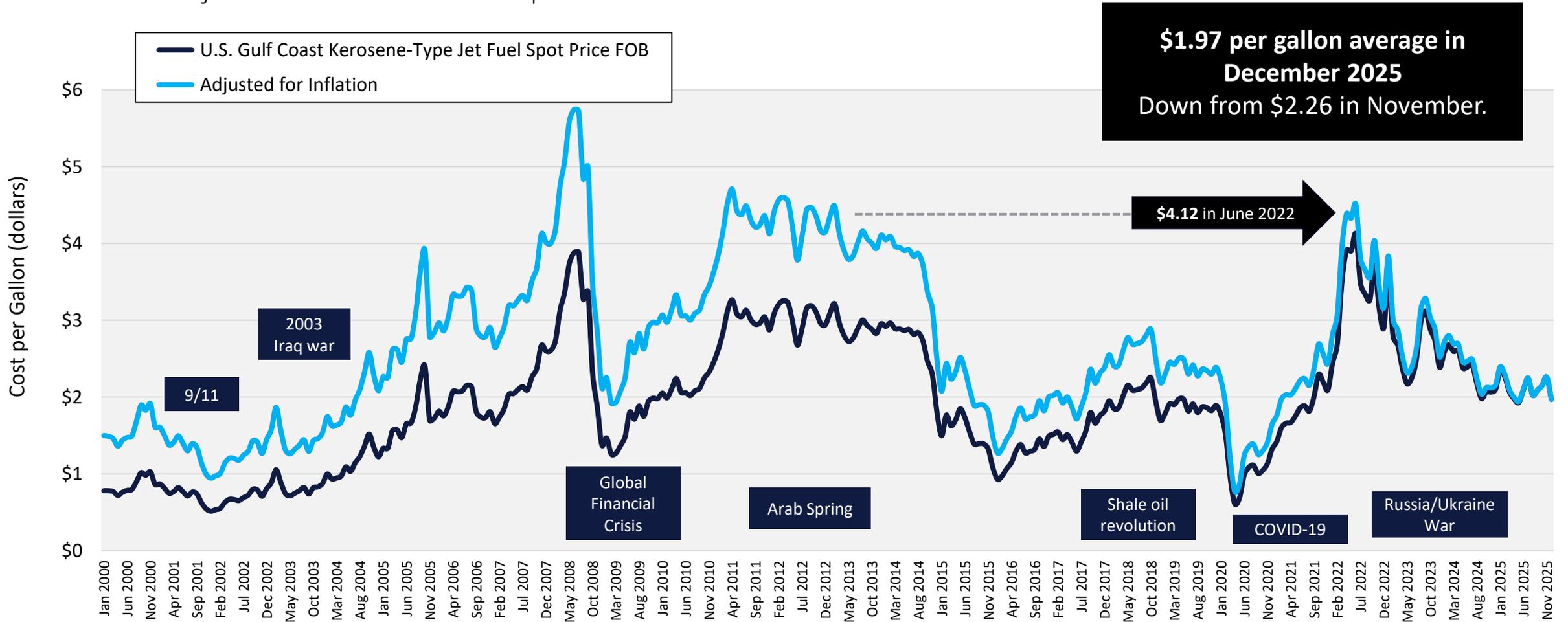


GDP, Recent Economic Shocks & Forecast



Jet Fuel Price and Inflation Adjusted

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

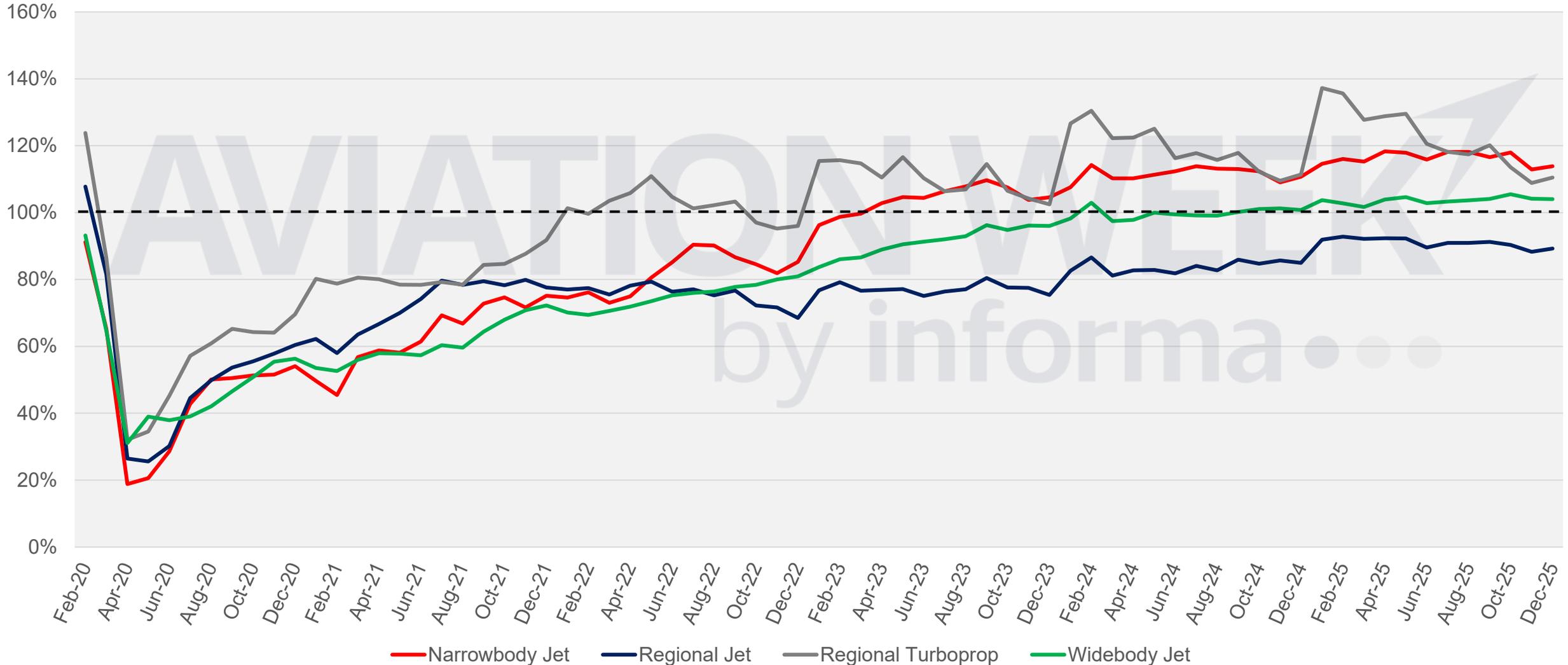


Source: US EIA, U.S. Gulf Coast Kerosene-Type Jet Fuel Spot Price FOB and U.S. Bureau of Labor Statistics CPI Index.

Note: Prices adjusted for inflation. Today's dollar value – all monthly prices are monthly averages adjusted for inflation using U.S. CPI data.

Utilization Change – Aircraft Class

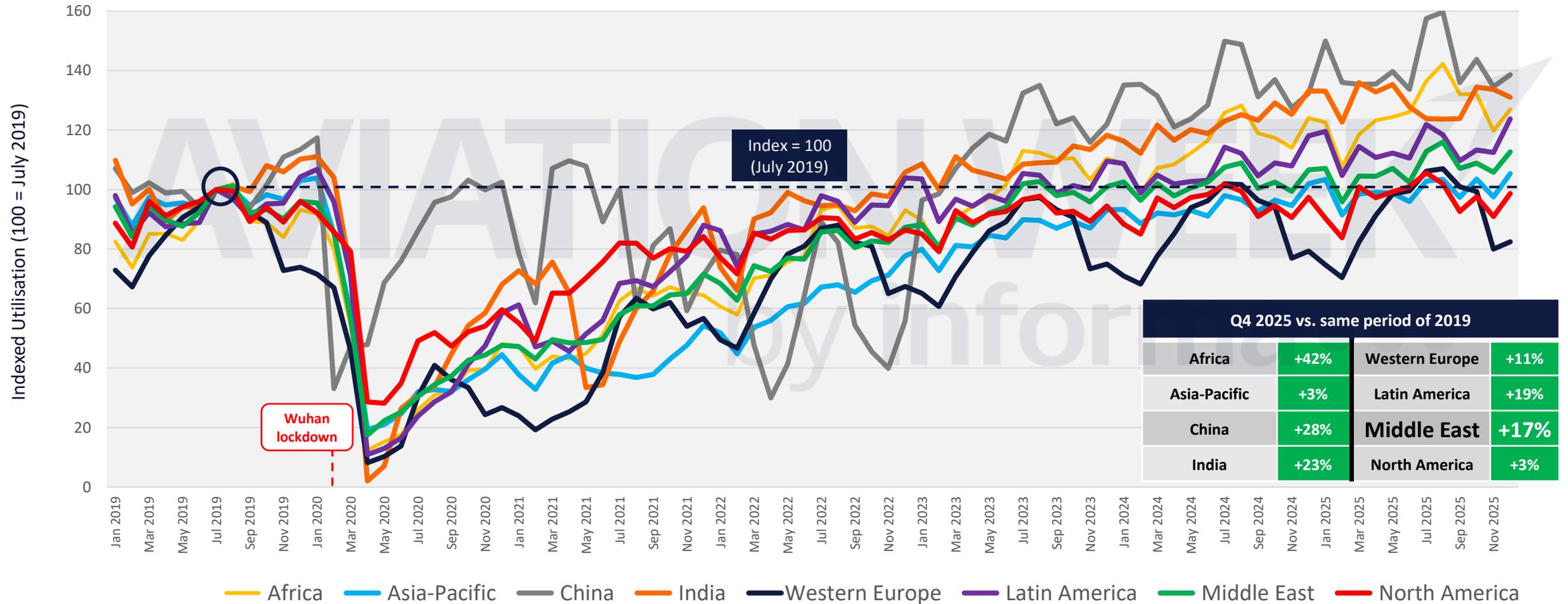
Indexed flight hour utilization for commercial aircraft size segments vs. equivalent month 2019



Source: Tracked Aircraft Utilization (TAU), Aviation Week, Copyright 2026.

Utilization Change – Regions

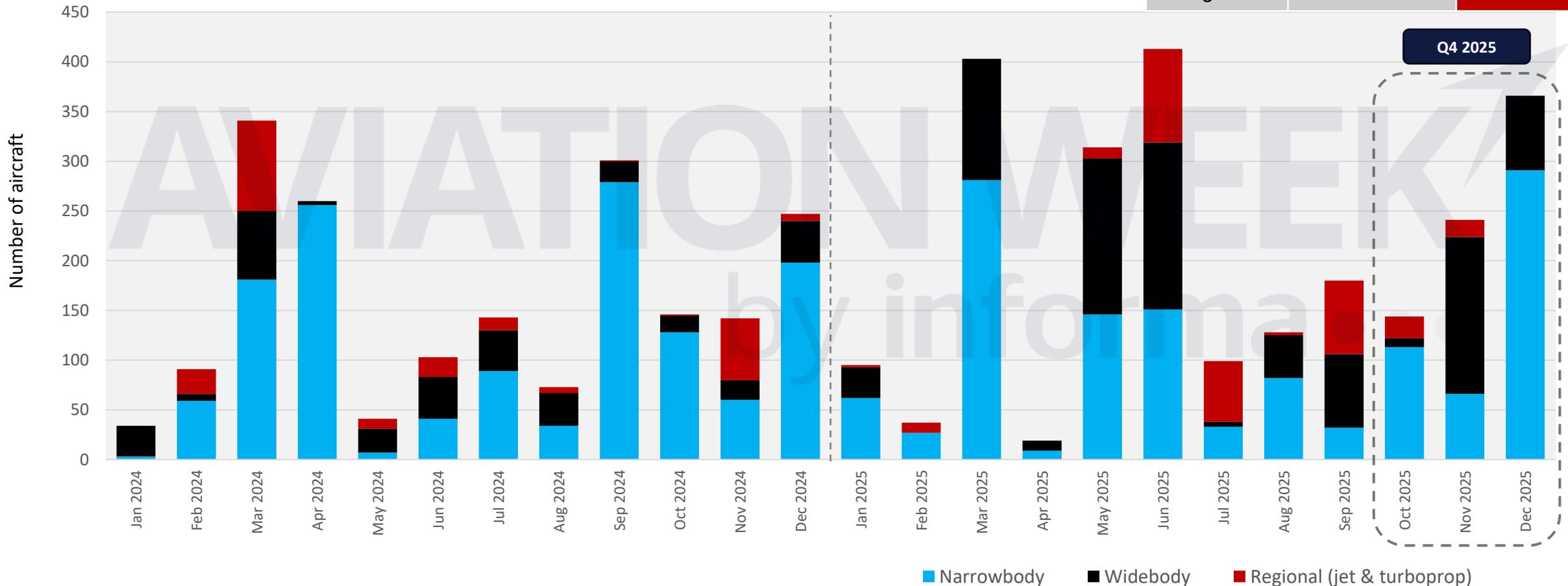
Indexed flight hour utilization for commercial aircraft fleets by operator region vs. July 2019



Orders – Commercial Aircraft by Category

Monthly gross firm orders of commercial aircraft

Category	Orders Q4 2025	vs. Same period of 2024
Narrowbody	470	+84
Widebody	242	+163
Regional	39	-31

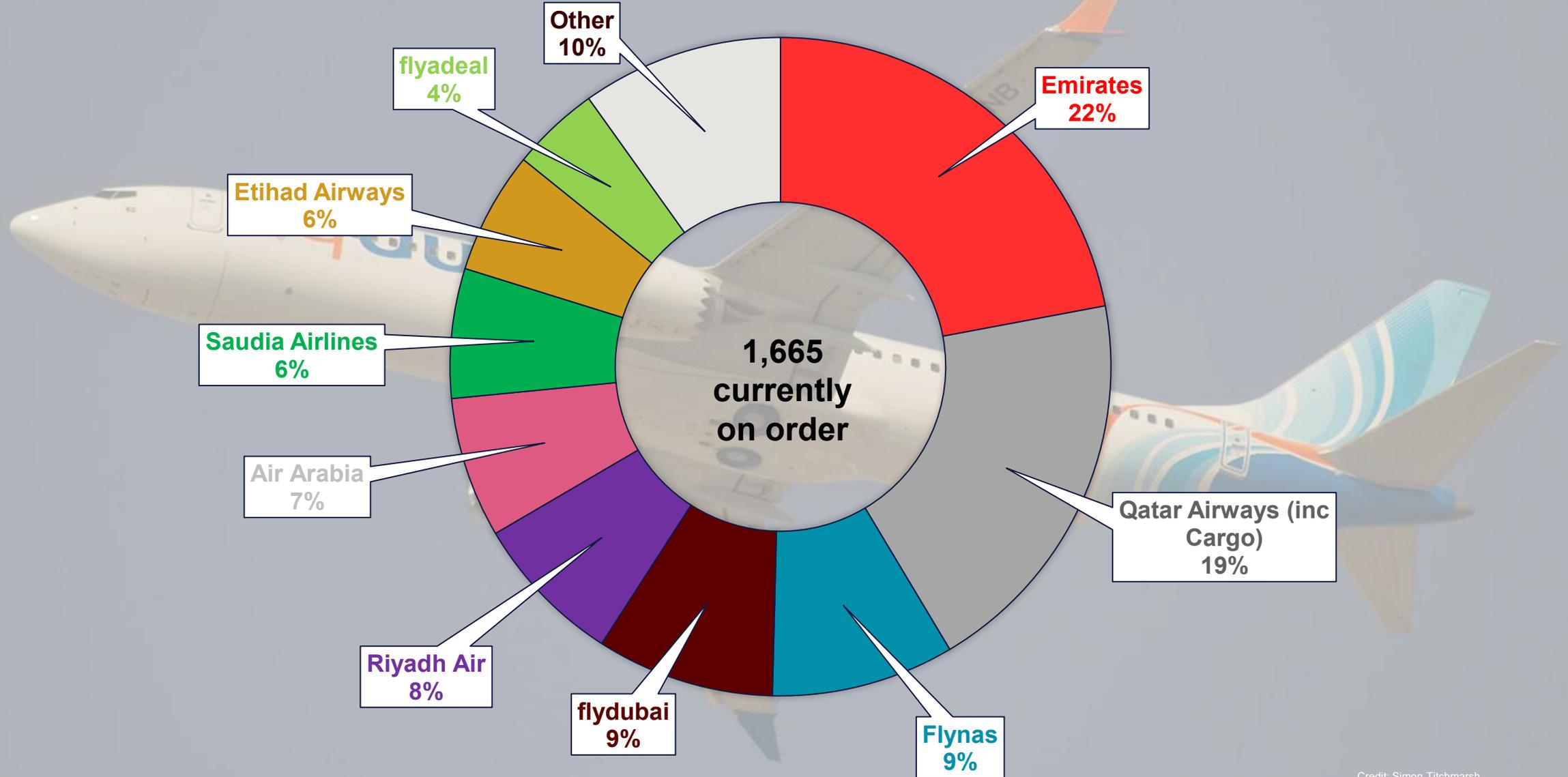


Source: Fleet Discovery, Aviation Week, Copyright 2026; Airbus, Boeing.

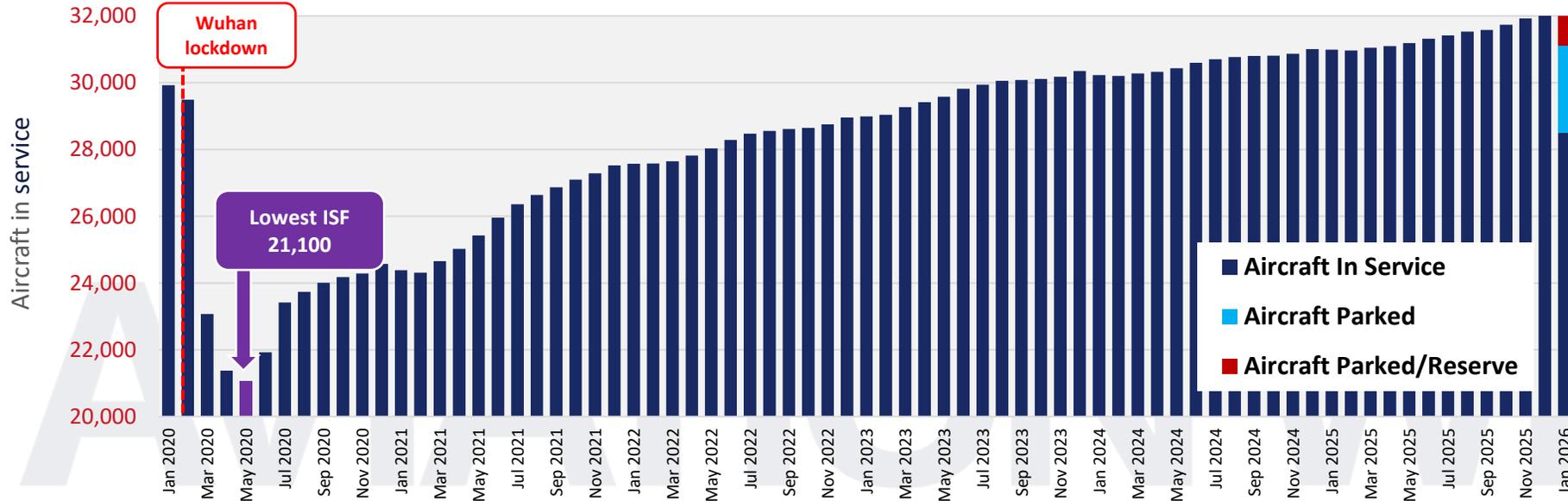
<https://aviationweek.com/products/fleet-discovery-civil>

Note: Last month's data as announced by Airbus and Boeing.

Current Orderbook – Middle East

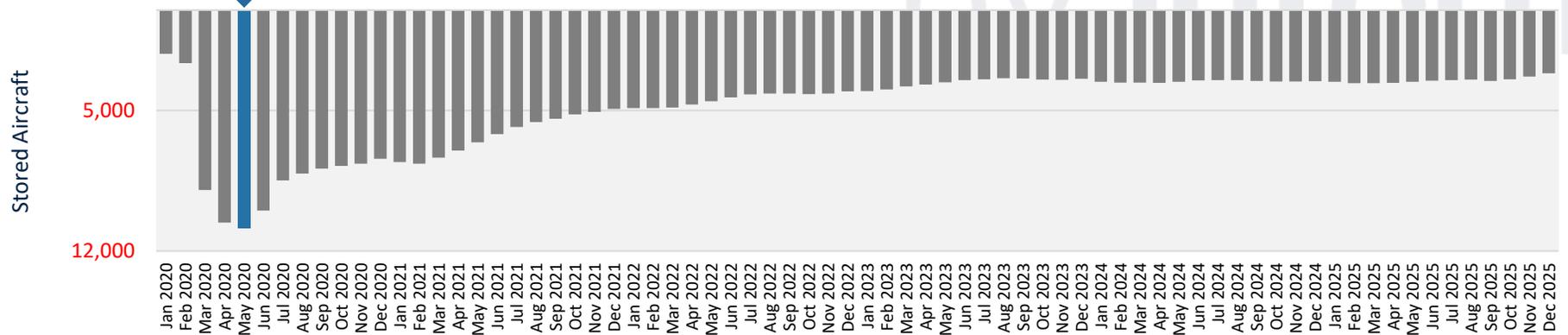


Global Historic Trends: Storage & In-Service Fleet



Commercial Fleet of ~32,250 in January 2026

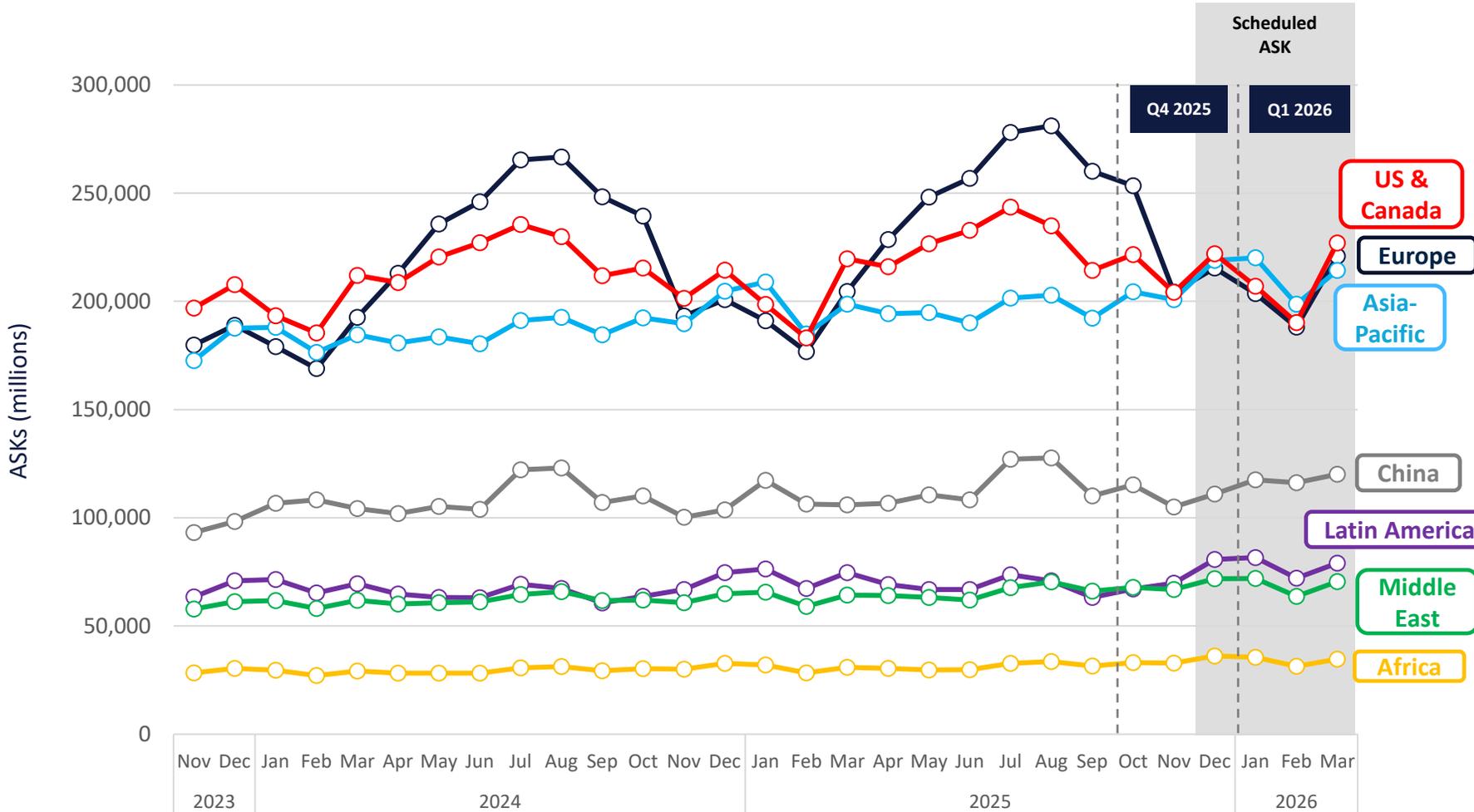
~11 aircraft stored in May 2020



Source: Fleet Discovery, Aviation Week, Copyright 2026.

Historic & Scheduled Available Seat Kilometres – By Region

Scheduled airline capacity (updated 9 January 2026)



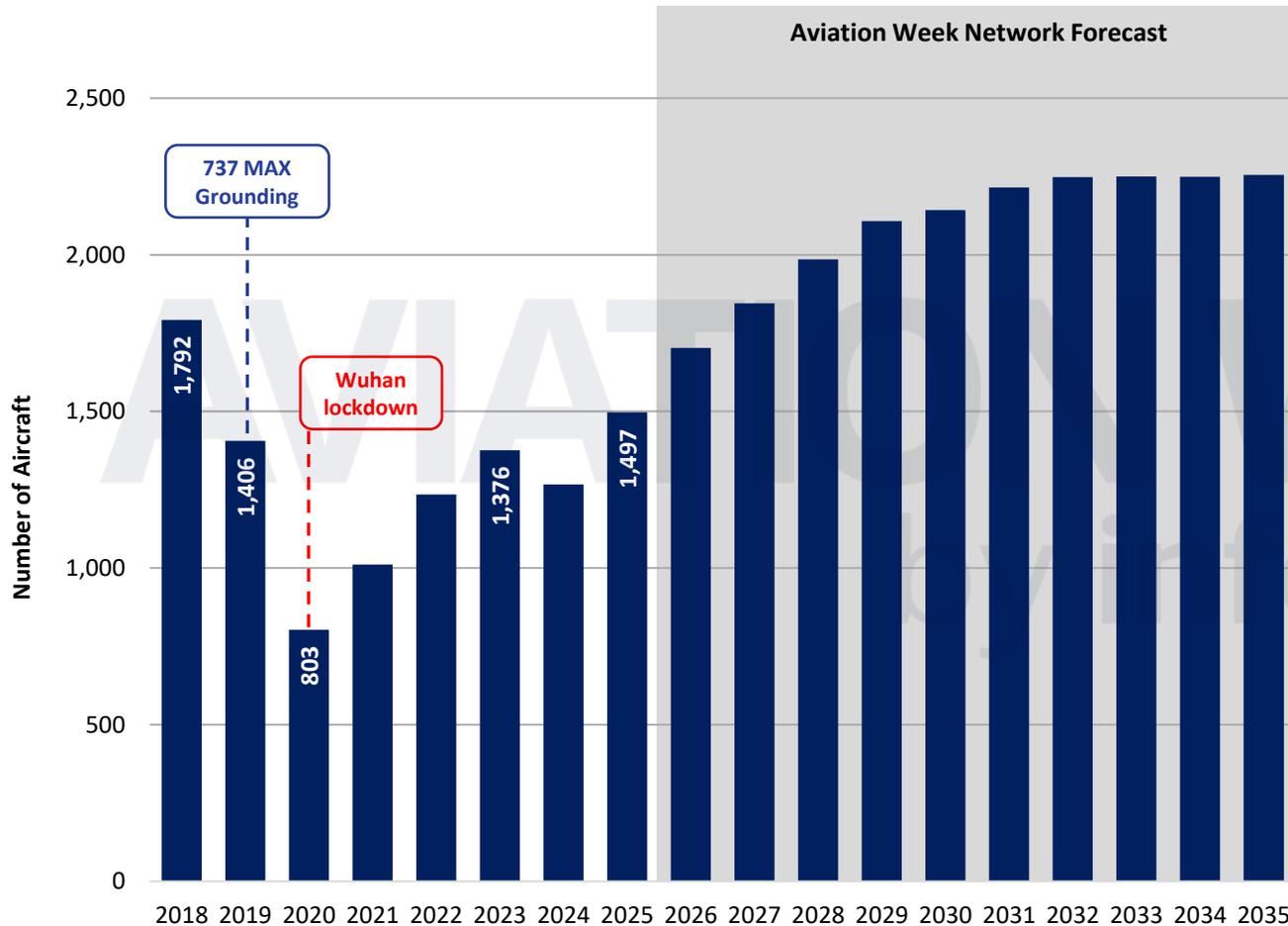
Region (Departing Flights)	2025 vs. 2024 % Change	Q1 2026 YoY % Change
Europe	+6%	+7%
U.S. & Canada	+2%	+4%
Asia-Pacific	+6%	+7%
China	+4%	+7%
Latin America	+6%	+7%
Middle East	+6%	+9%
Africa	+7%	+11%

COMMERCIAL
2026
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OUTLOOK

Fleet Forecast

Historical & Forecast Commercial Deliveries

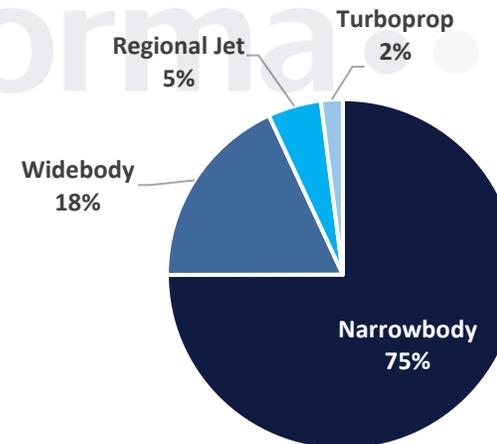
Annual new deliveries, historical & forecasted



Highlights

- +21K (Middle East ~2,000) new deliveries 2026-35
- Over 2,000 annual deliveries from 2029 onwards
- Narrowbodies lead all size categories - Airbus A320 outpaces Boeing 737
- Narrowbody share is 75% vs.18% share for widebodies

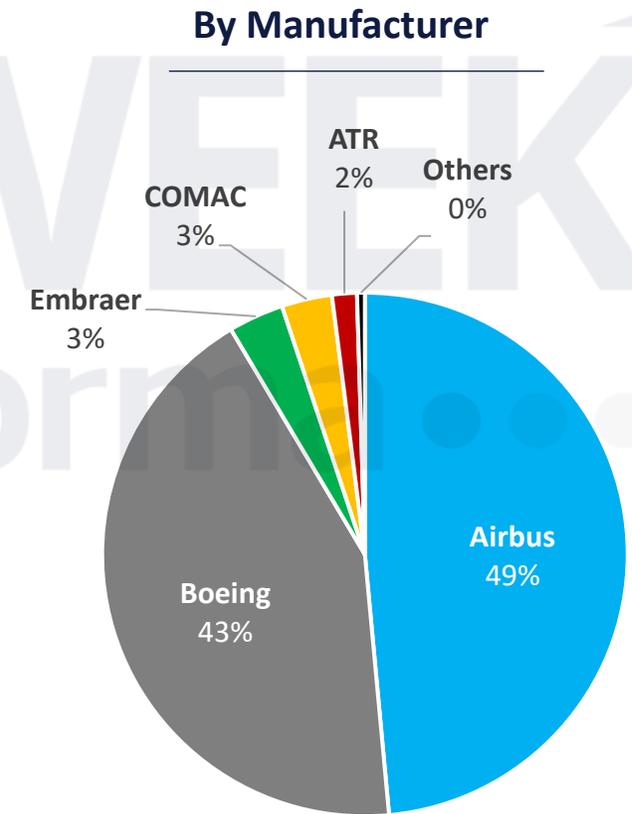
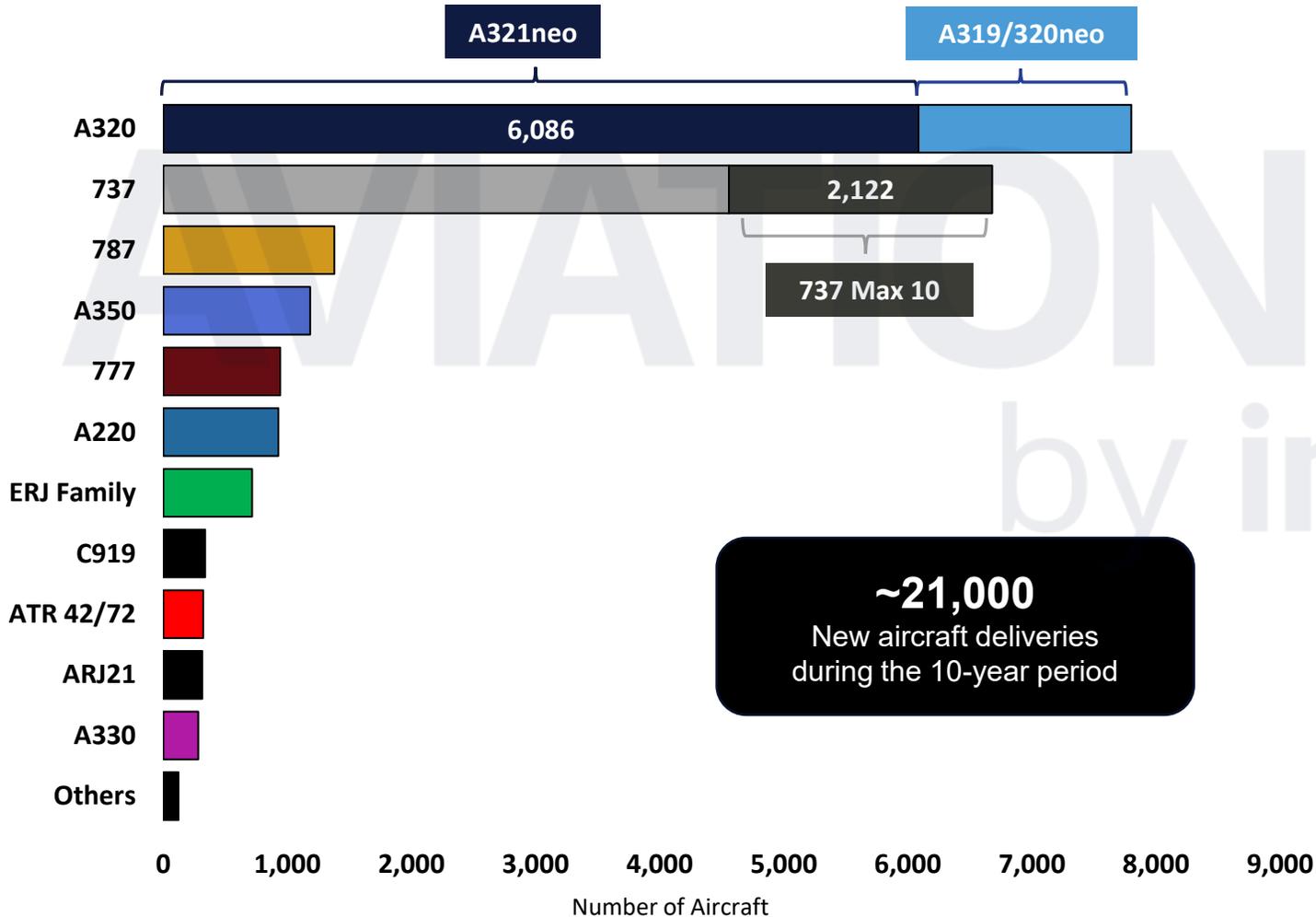
2026-35 Share of Deliveries



Boeing 737-8

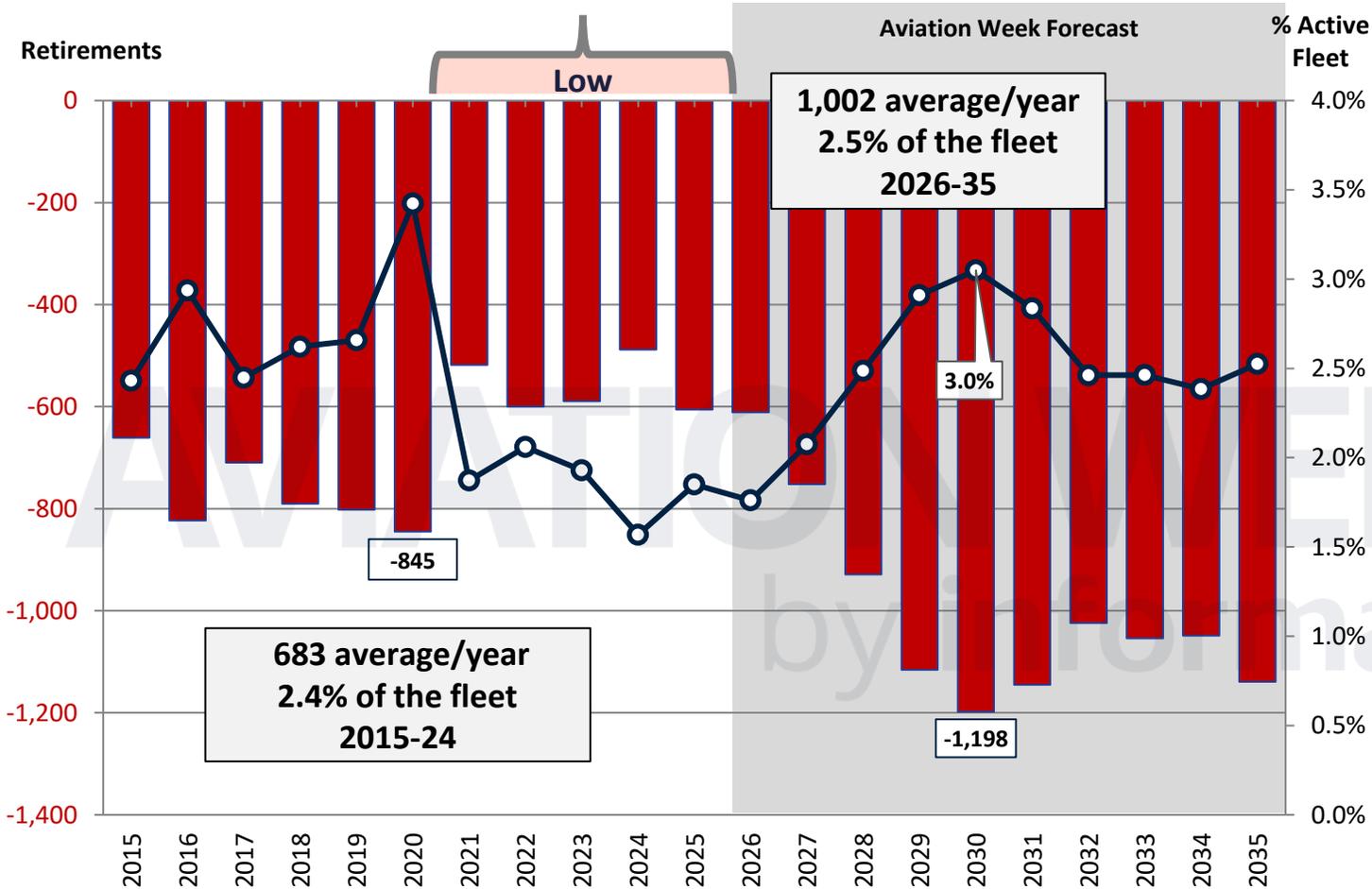


New Build Aircraft Deliveries by Family 2026-35



Forecast Trends in Aircraft Retirements

Annual retirements historical & forecasted, % of in-service fleet



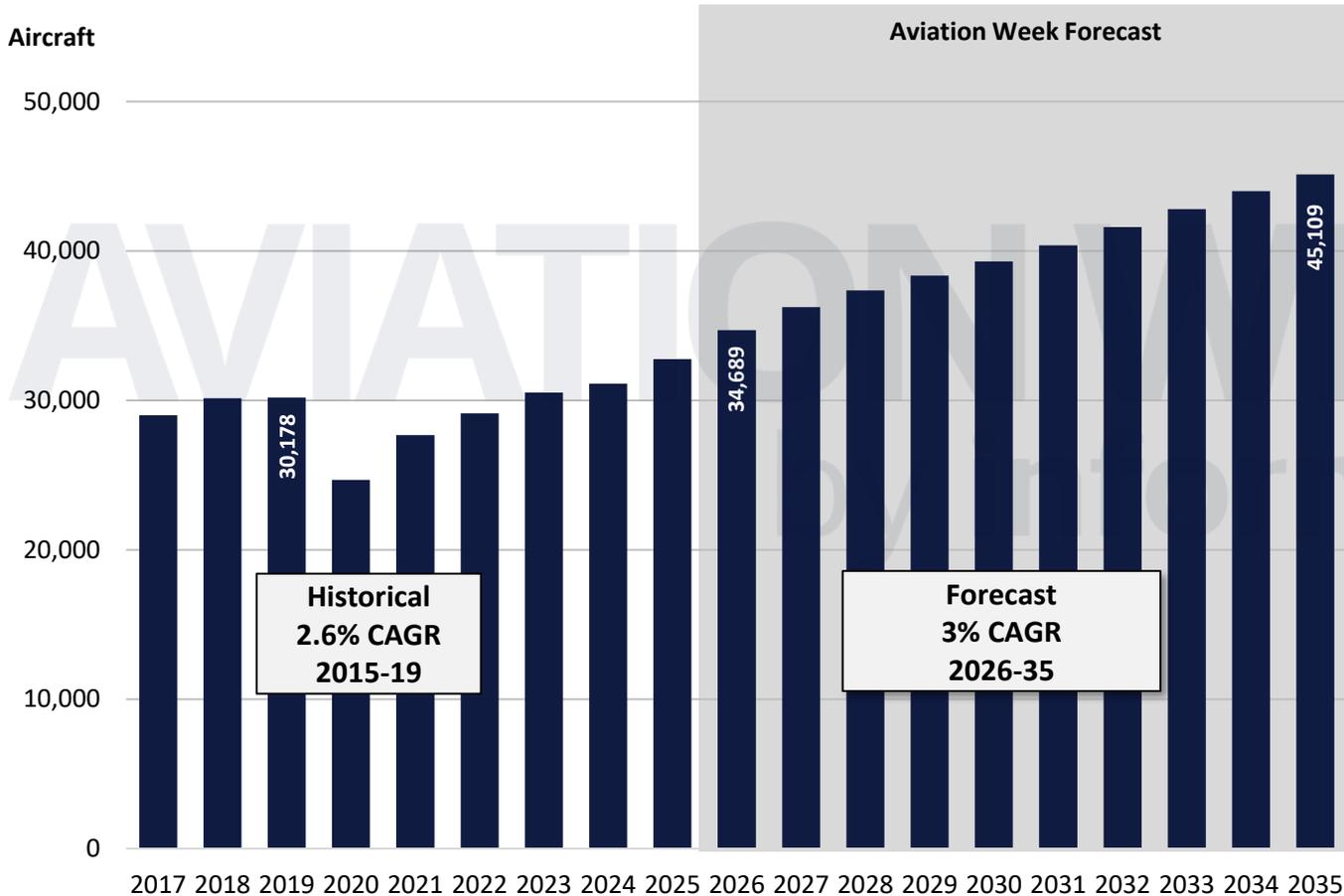
Highlights

- ~10,000 retirements over 10-year forecast period.
- 460 in Middle East
- +700 PTF conversions (not included in adjacent figures).
- Retirement projections peak in year 2030.



Forecast In-Service Commercial Aircraft Fleet

Annual count of active commercial aircraft, historical & forecasted



Highlights

- 3% future CAGR expected for the 2026-35 period
- Seat counts grow at 4.6% CAGR.
- Narrowbodies are key growth driver over decade

Airbus A350

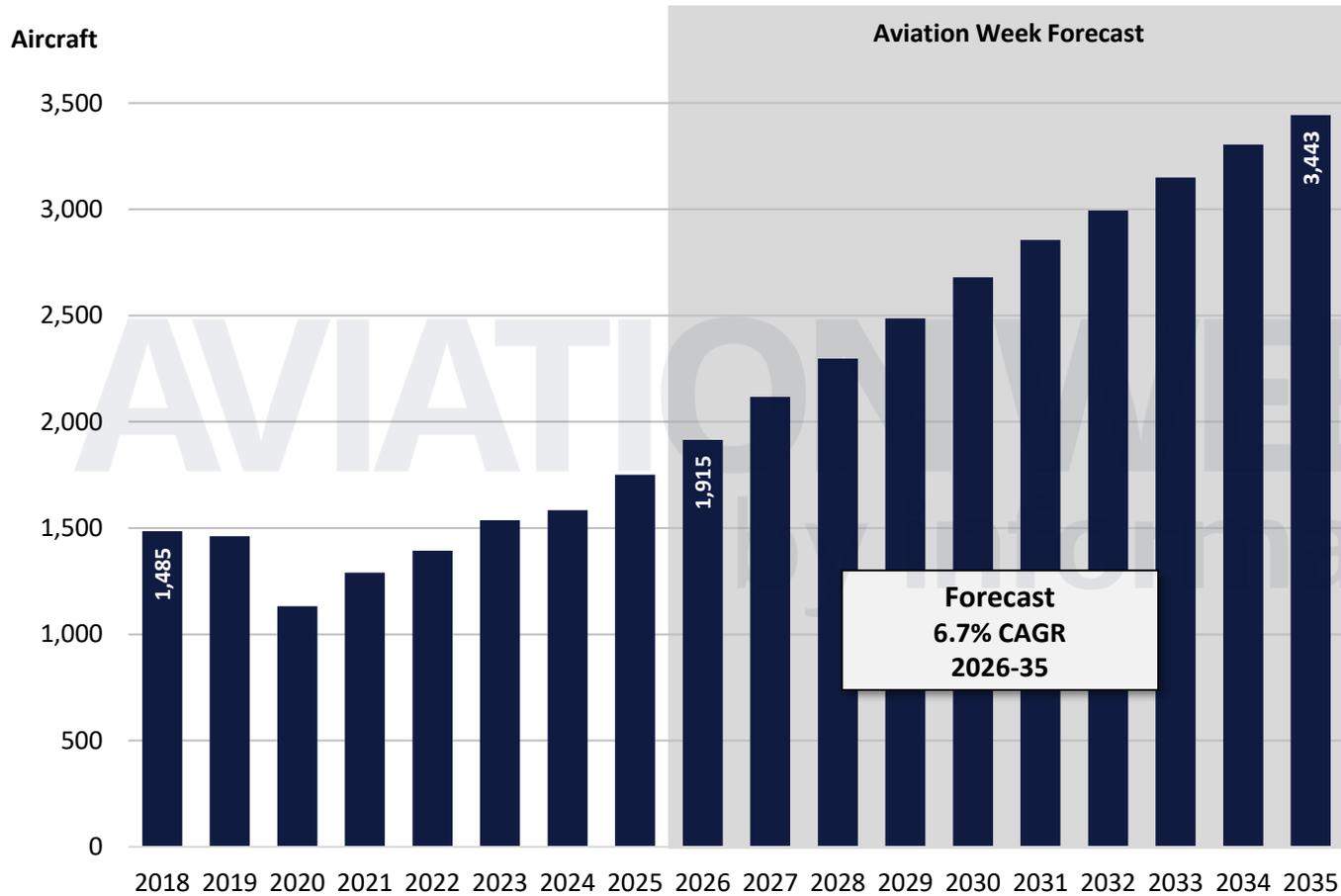
Credit: Andy Edge

Active fleet increases ~34,700 in 2026 to >45,000 in 2035

~At end of 2035, 36% of the fleet will be from the A320 family

Forecast In-Service Commercial Aircraft Fleet – Middle East

Annual count of active commercial aircraft, historical & forecasted



Highlights

- ↗ 6.7% future CAGR expected 2026-35
- ↗ Since 2023, in-service fleet exceeded 2018 levels
- ↗ >1,600 aircraft on order by ME operators

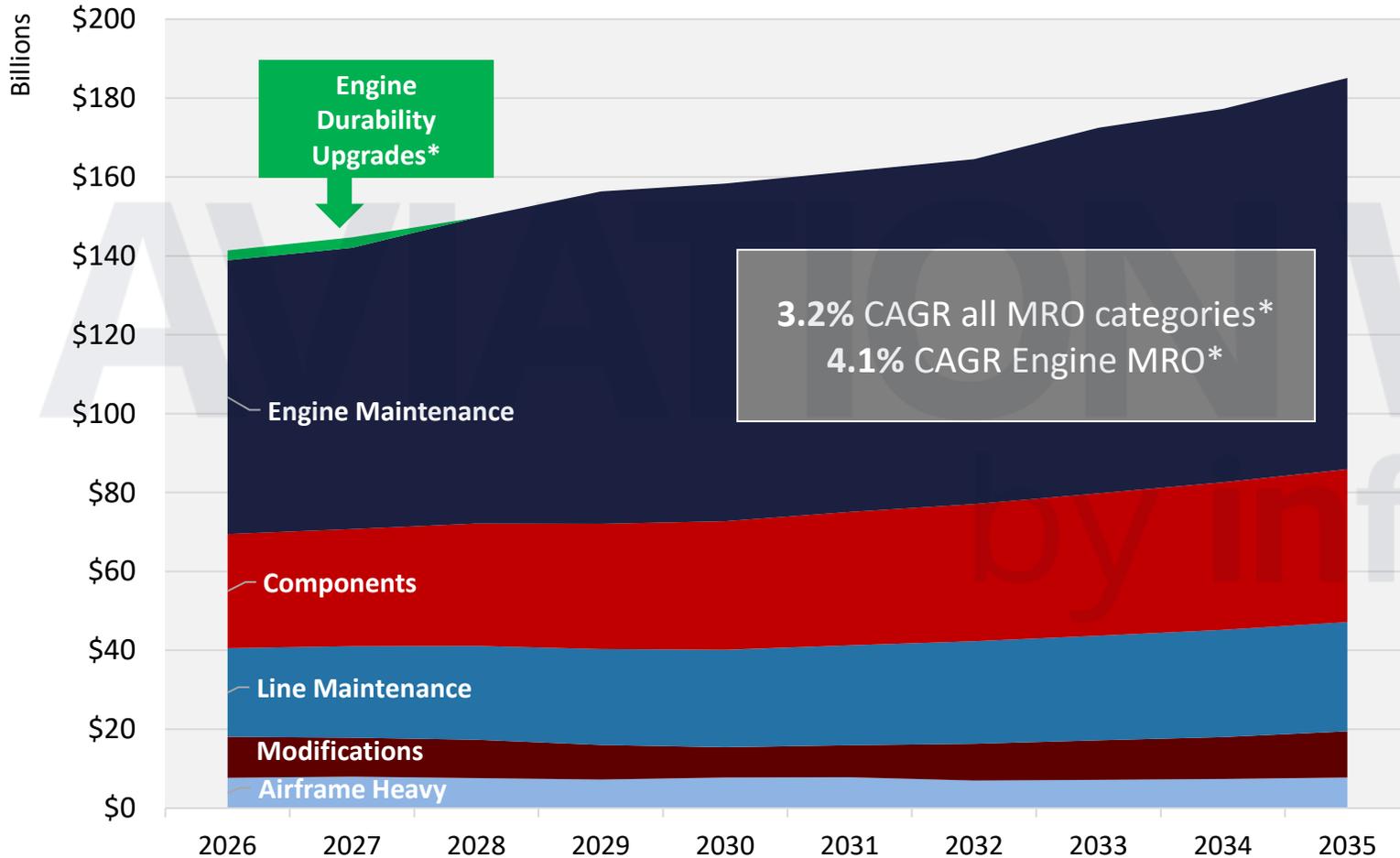


COMMERCIAL
2026
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OUTLOOK

MRO Demand

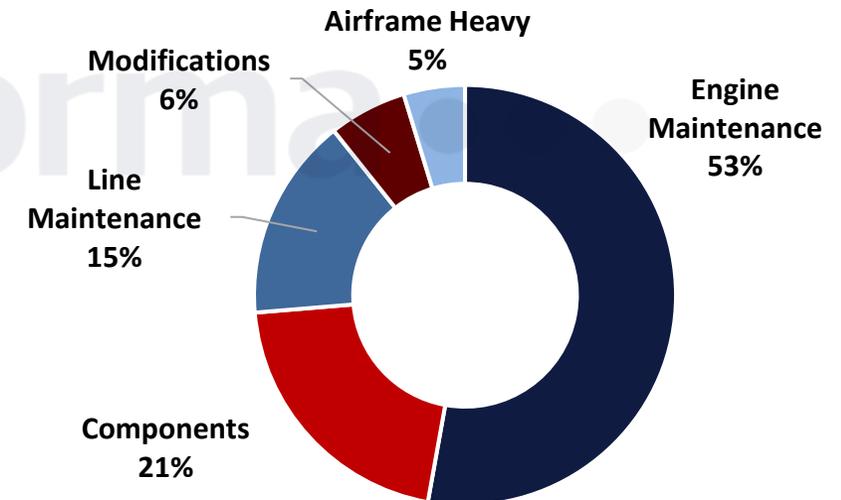
Forecast: MRO Demand Overview

Global MRO aftermarket by category, constant US dollars 2026-35



Highlights

- \$1.6T* over the 10-year forecast period – excludes the 2025/2026 LEAP/GTF update
- Over 107,000 engine shop visits worth \$676.6 bn
- Almost 125,000 heavy airframe checks (C and D checks)



Source: 2026 Commercial Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week, Copyright 2025.
Note: *2026 and 2027 engine technical upgrade events not included in CAGR calculation.

Narrowbody Engine Durability Issues

Unscheduled MRO aftermarket impacts for Pratt & Whitney GTF & CFM LEAP

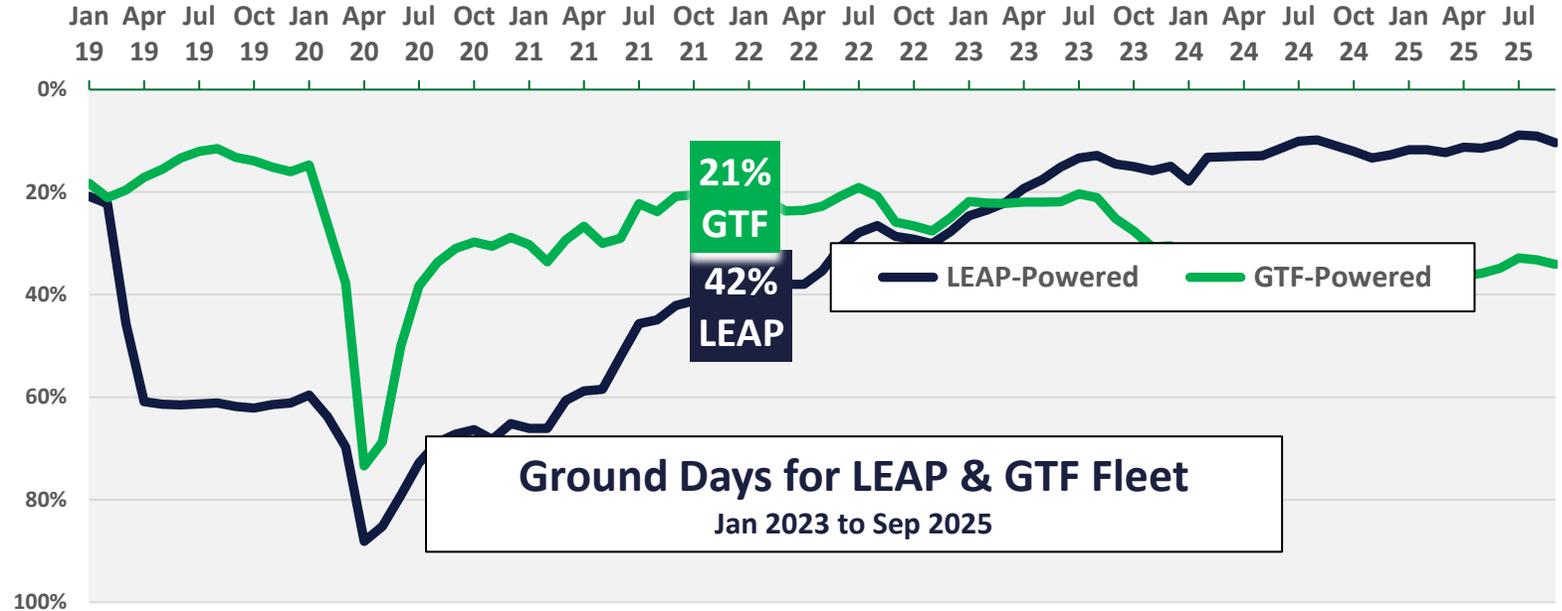
\$5.1 billion

Durability Aftermarket Impacts

- GTF - combustion/heat exchanger.
- GTF - HPT #1 and #2, HPC.
- LEAP - fuel nozzles, R.B.S.

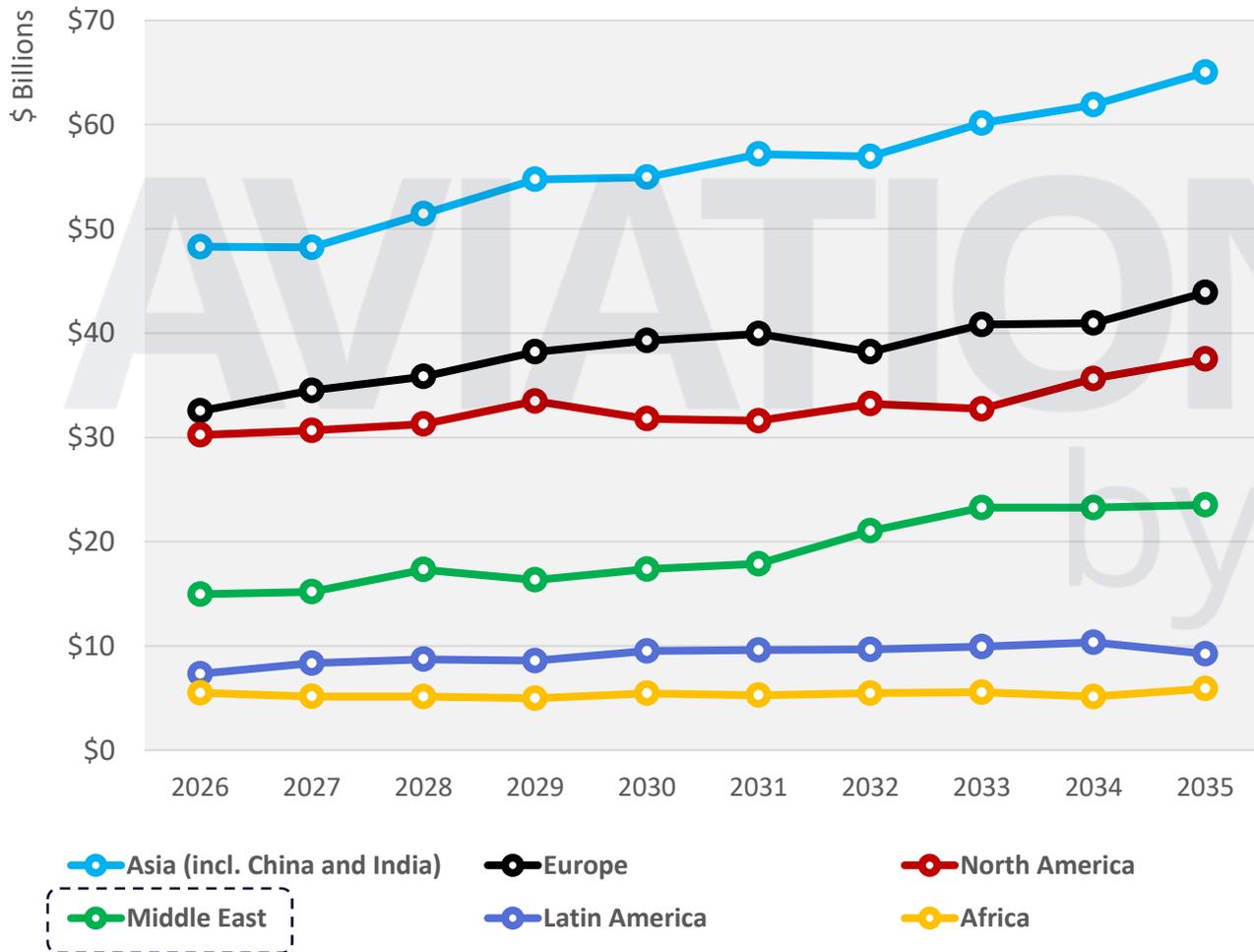
New "GTF Advantage" Engine

- FAA certified, pending EASA.
- Starts prod. 2026, full-rate by 2028.
- New hot section, combustor, air flow, LLPs to 27k cycles, +40% T.O.W.
- Multi legacy engine upgrades planned. None for A220/ERJs...

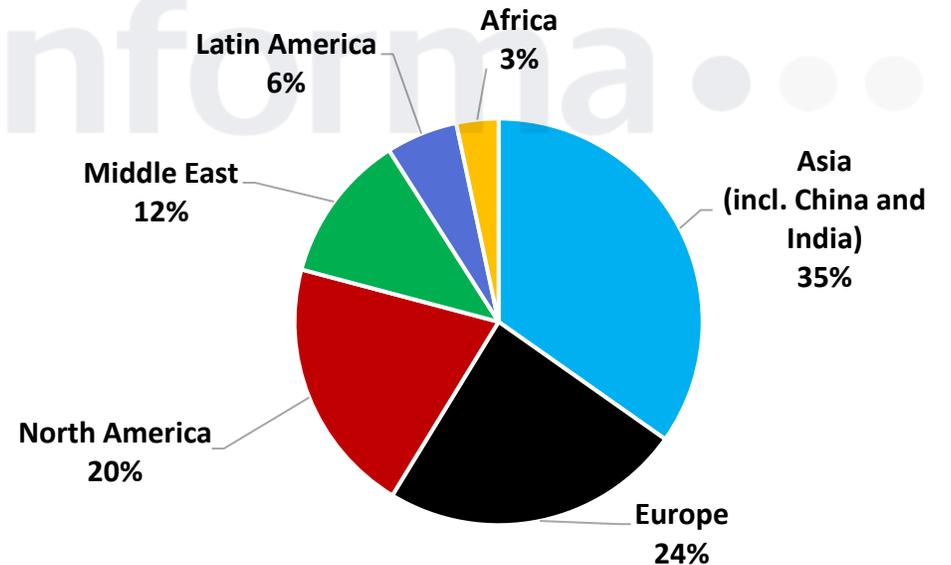


Forecast: MRO Demand by Major Region

Regional trends, constant US dollars

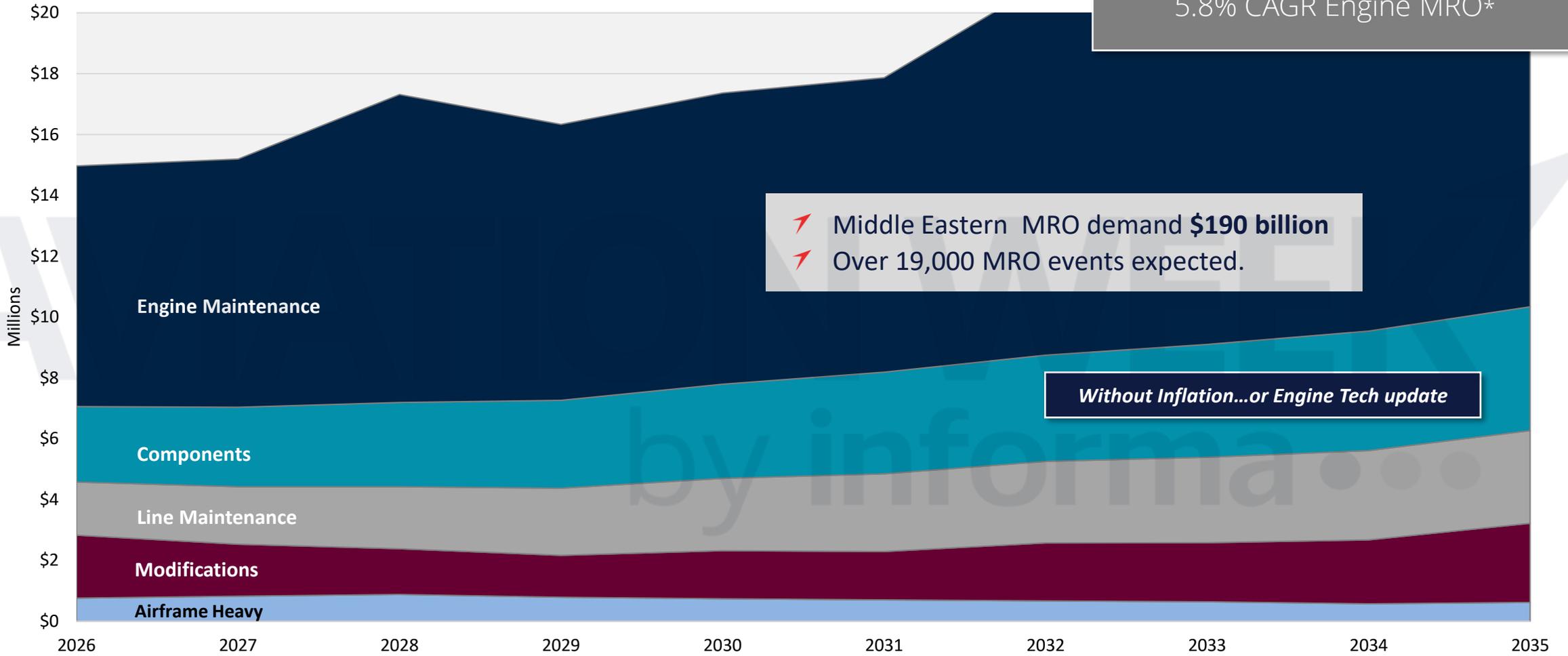


- Asia at large is expected to generate \$559+ billion of MRO demand.
- \$190 billion MRO demand in Middle East
- The fastest MRO demand rate of growth is India at 11.7% followed by the Middle East at 5.2% CAGR.
- \$17.6 billion future MRO lost to Russia-Ukraine war...



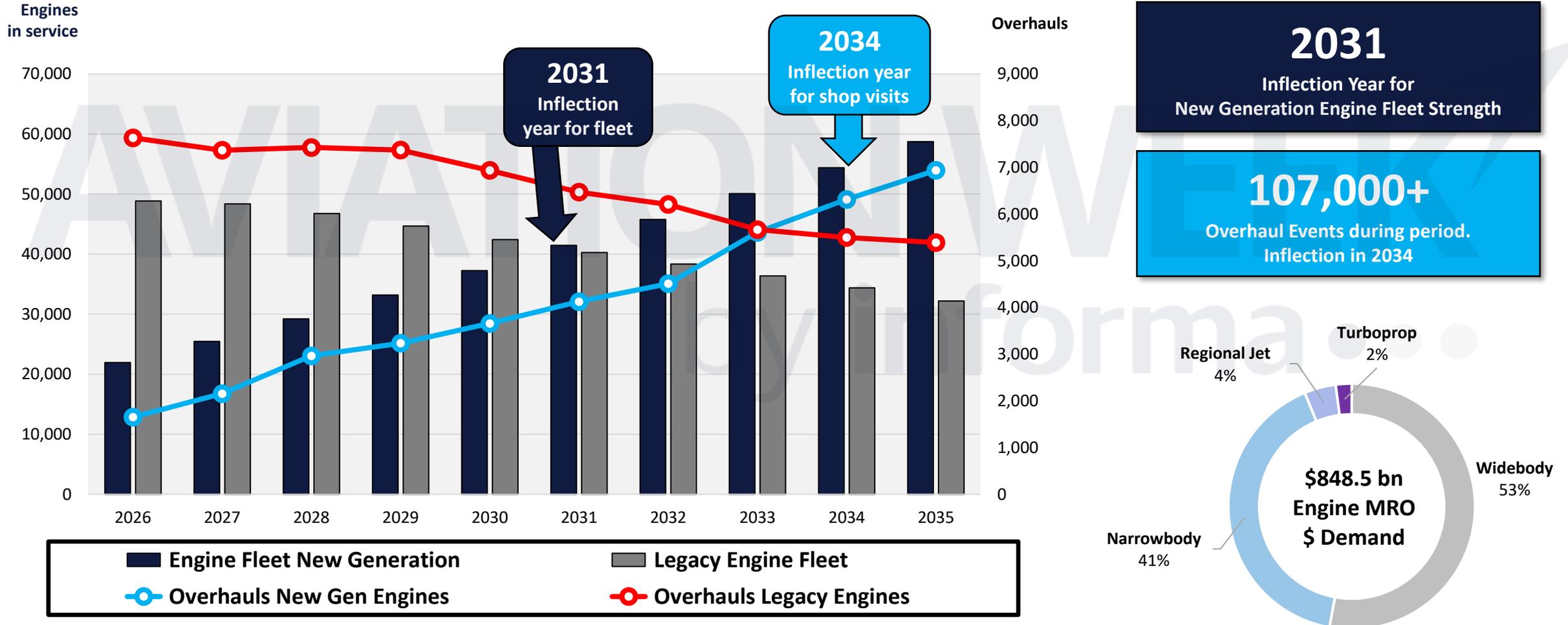
MRO Demand – Middle East Region

MRO Demand 2025-34
 5.2% CAGR all MRO categories*
 5.8% CAGR Engine MRO*



Global Engine Fleet & Overhaul Events

New generation vs. legacy fleet share & overhaul event forecast



Source: 2026 Commercial Aviation Fleet & MRO Forecast, Aviation Week, Copyright 2025.

Notes: LLPs and 2026/2027 engine technical upgrade events not included. New generation engines include LEAP, PW1000G, GENX, GE9X and Trent 1000/7000/XWB.

WHAT'S NEXT?



Minimize Risk and Maximize Revenue
with a 10-Year Outlook

For more information, visit
aviationweek.com/fleetforecasts

or call Melissa Crum at +1 913 284-2951
melissa.crum@aviationweek.com



Fleets, Trends
and Projections



MRO Future
Demand



Predictive View
of Market Share

2026 Fleet & MRO
Forecast **NOW AVAILABLE!**