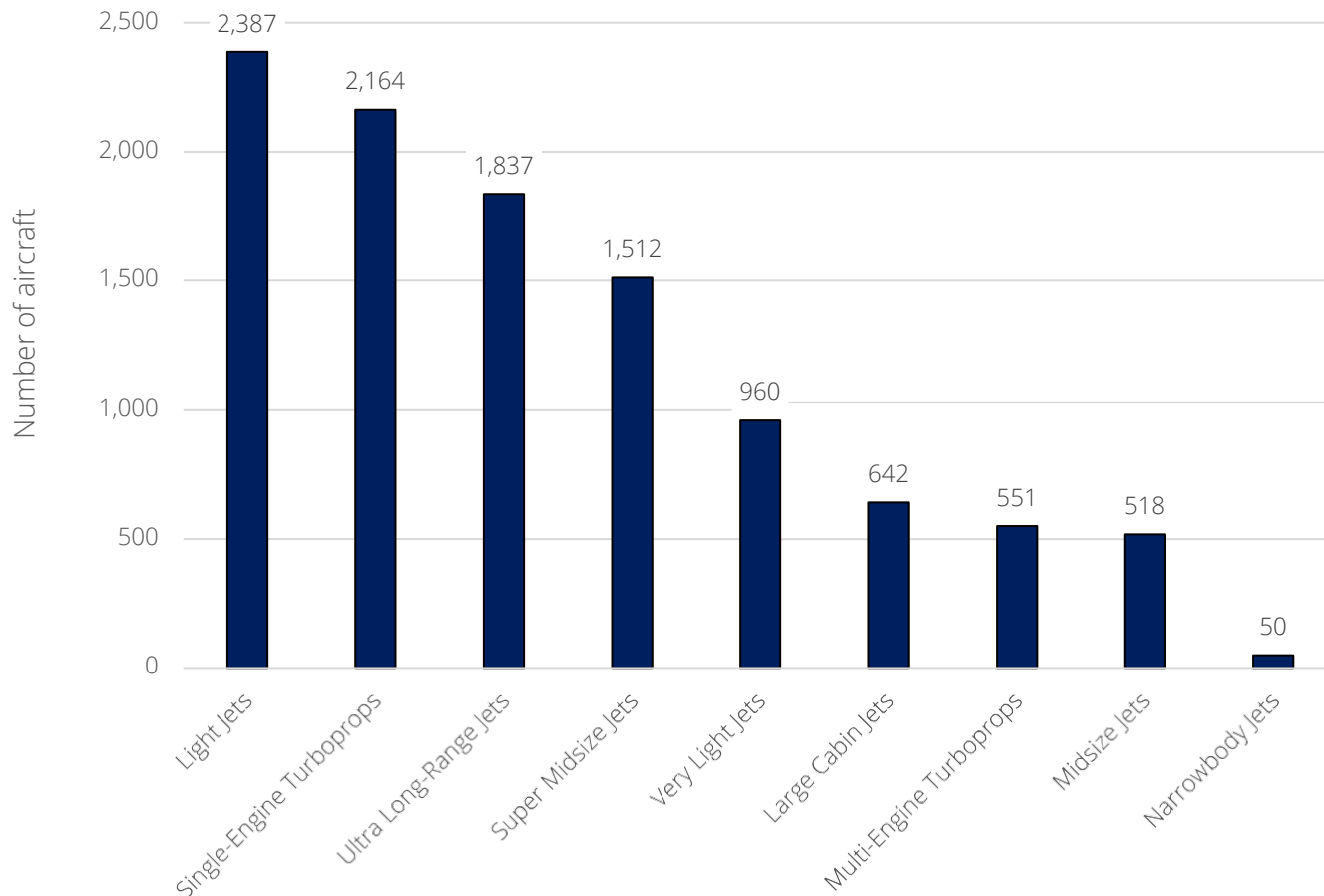




BUSINESS AVIATION FORECAST 10-YEAR OUTLOOK

Forecast: New Aircraft Deliveries

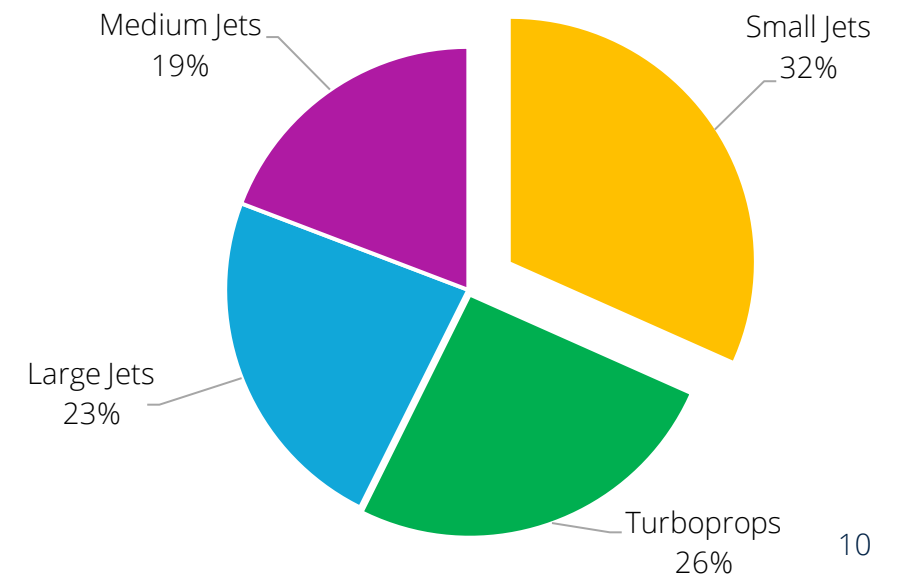
2022-31 Unit Deliveries by Size Category



Highlights

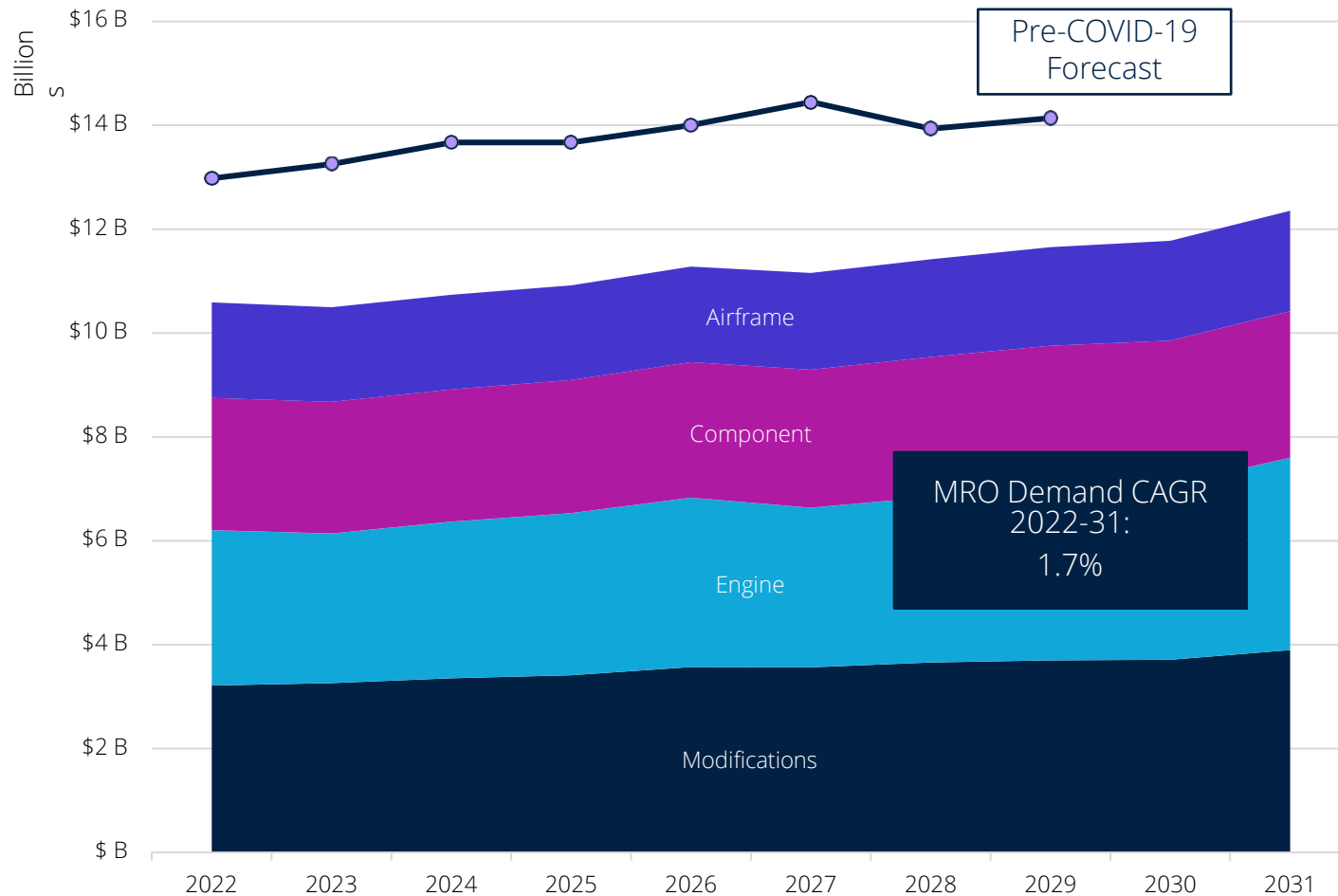
- 10,600 total deliveries over 10 years.
- Deliveries 6% higher than previous expectations over decade.
- 7,900 business jets / 2,700 turboprops
- “Light jets” lead recovery efforts, 30% share of jets/ 22% share overall by size category.
- Turbos remain strong with 26% overall by category.
- \$241B retail delivery value over 10 years.

2022-31 Share of Unit Deliveries by Segment



Forecast: MRO Demand

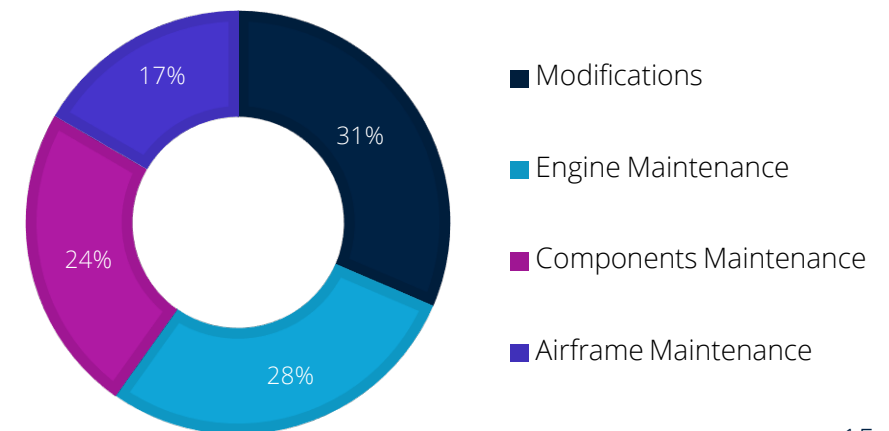
MRO aftermarket analysis and the impacts from the pandemic



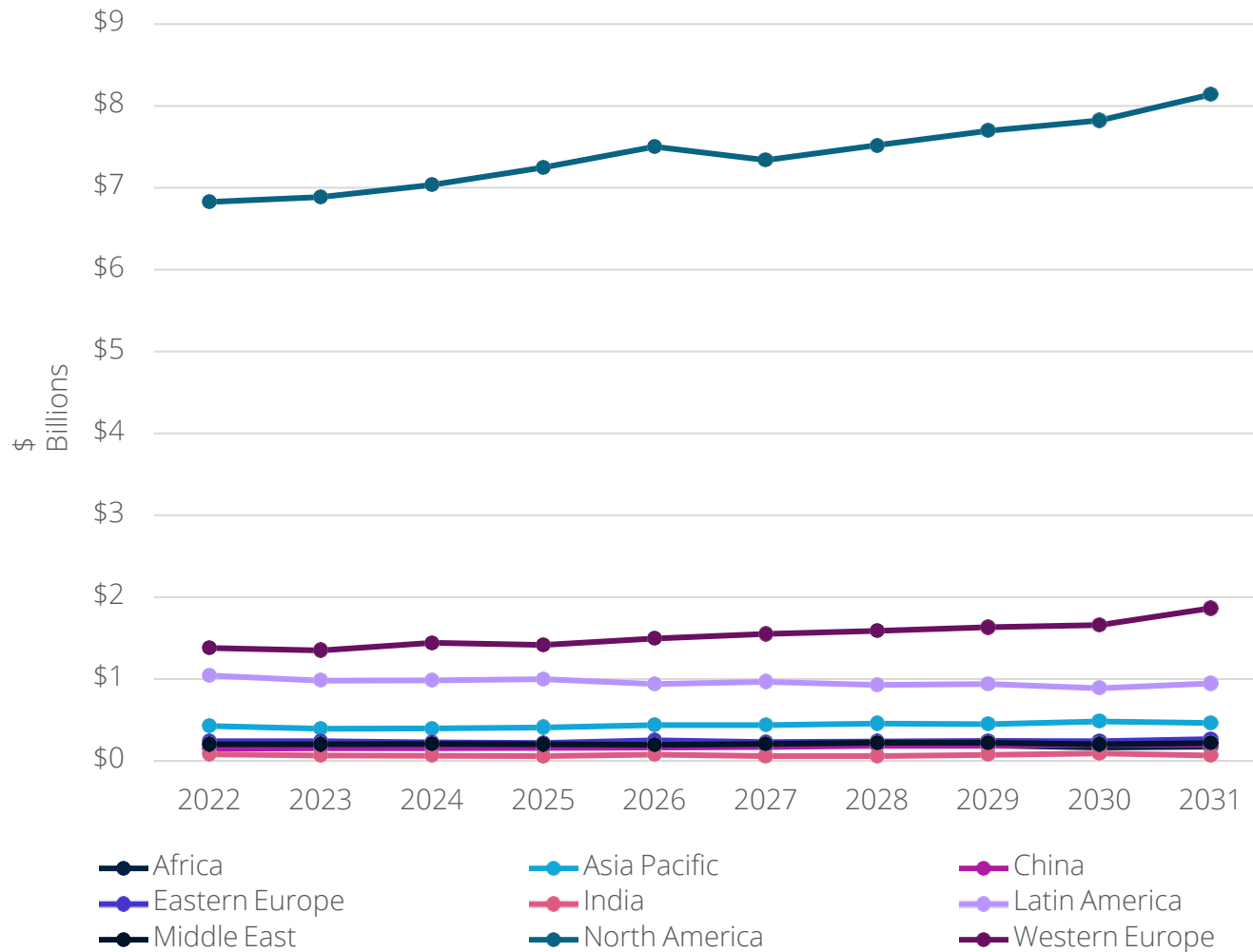
Highlights

- \$112 billion MRO, grows at 1.7% CAGR 2022-31.
- Modifications demand grows at 2.2% CAGR, \$35 billion demand.
- Over 58k major engine MRO events are expected during the 10-year forecast.
- Engine MRO demand is \$32 billion over the decade and grows the fastest at 2.4% CAGR.

MRO DEMAND 2022-31 \$112.4 BILLION

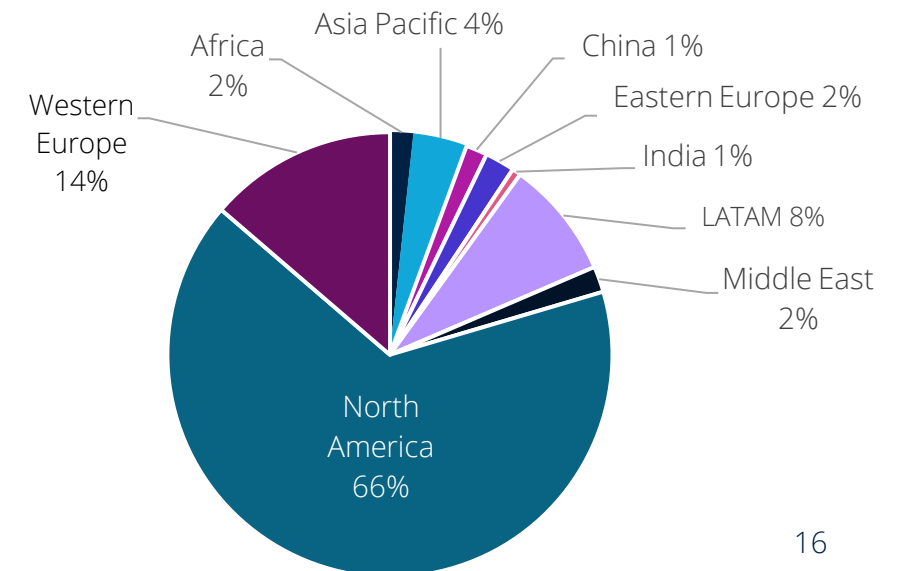


Forecast: MRO Demand – By Region

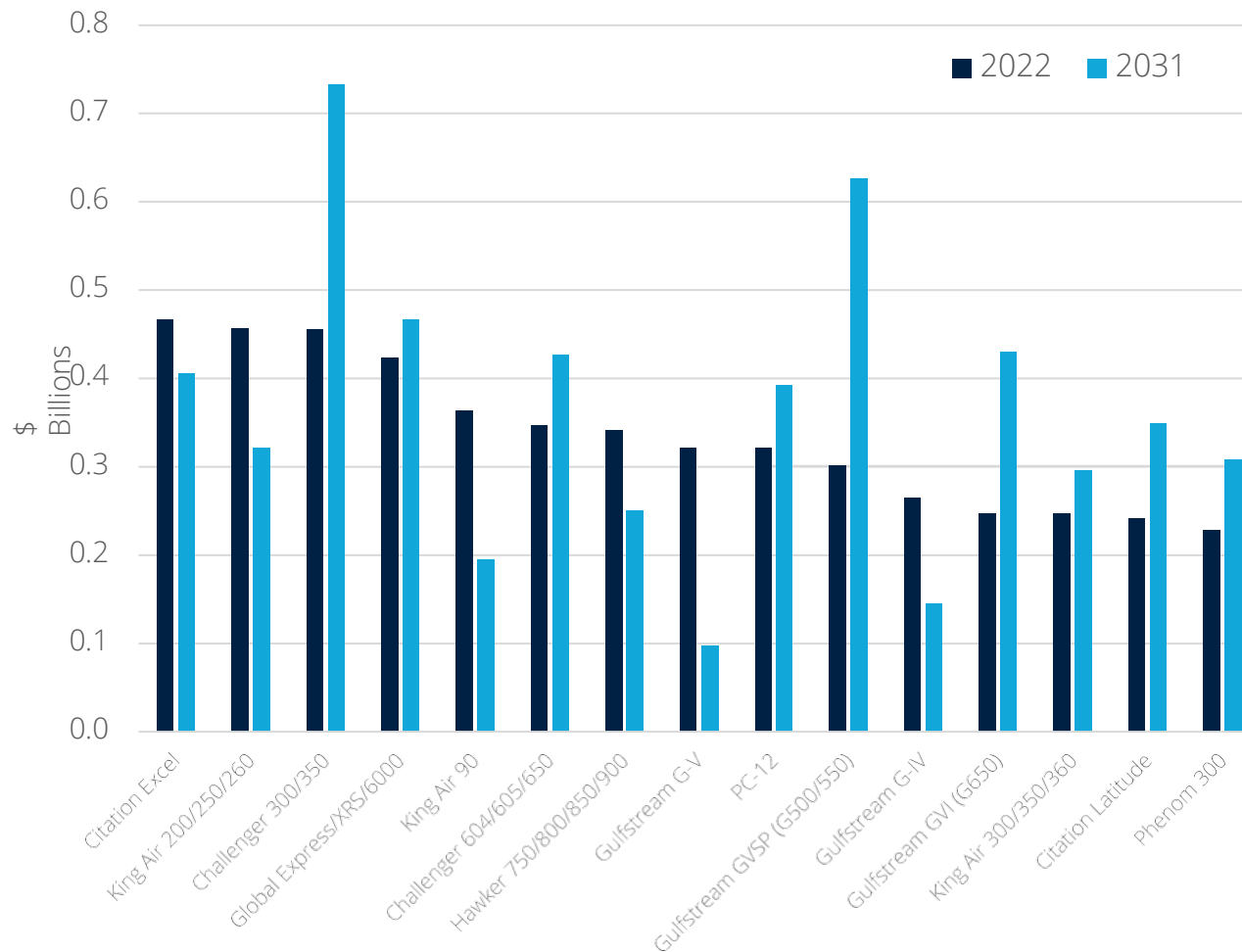


Highlights

- North American accounts for 66% of MRO Demand during the 2022-31 period, with \$74 billion.
- MRO Demand growth in North America at 2.0% CAGR.
- Eastern and Western Europe combined will generate \$18 billion in demand over the period, accounting for around 16% of total MRO spend.
- Combined European demand will also increase at a robust 3.1% 10-year CAGR.

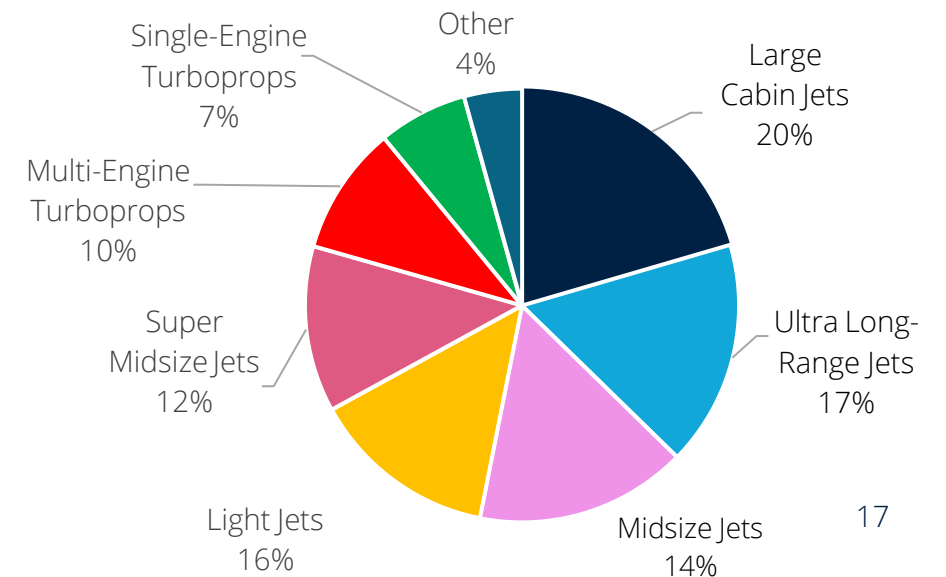


Forecast: MRO Demand – By Aircraft Family



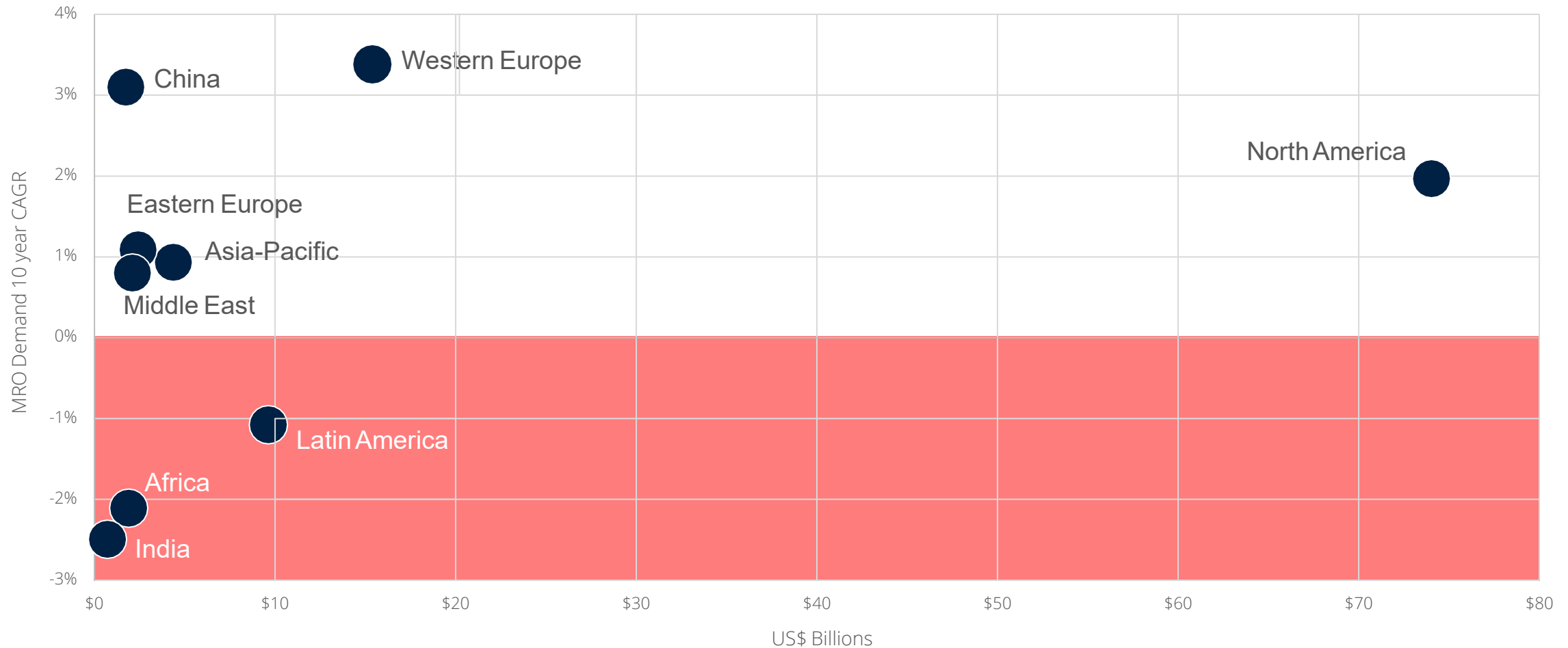
Highlights

- Large cabin jets will account for the largest share of MRO demand at 20%.
- As of 2022, the Citation Excel and King Air 200/250/260 represent the two biggest programs in terms of demand generated.
- By 2031, the aircraft groups generating the most demand are expected to be the Challenger 300/350, Gulfstream GVSP and Global Express/XRS/6000.



MRO Demand – Regional Trends

North America will continue to dominate MRO demand accounting for 66% of global maintenance spending



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Fleets, trends and
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Predictive view of
market share



Future MRO
Demand

2022
2031

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