44,040 World Deliveries
2038 Total Fleet: 50,660

3.4% Fleet Growth
2.7% GDP Growth
4.6% Traffic Growth
4.1% Service Growth

$6,810B Airplane Market Value
$9,100B Services Market Value

Executive Summary
2019–2038

2,240 Deliveries
$105 Billion
Regional Jet

32,420 Deliveries
$3,775 Billion
Single Aisle

8,340 Deliveries
$2,630 Billion
Widebody

1,040 Deliveries
$300 Billion
Freighter

North America
9,130 Deliveries
2038 Total Fleet: 10,930
Service Market Value: $1,865B

Europe
8,990 Deliveries
2038 Total Fleet: 9,340
Service Market Value: $1,980B

Russia and Central Asia
1,280 Deliveries
2038 Total Fleet: 1,940
Service Market Value: $270B

North America
9,130 Deliveries
2038 Total Fleet: 10,930
Service Market Value: $1,865B

Europe
8,990 Deliveries
2038 Total Fleet: 9,340
Service Market Value: $1,980B

Russia and Central Asia
1,280 Deliveries
2038 Total Fleet: 1,940
Service Market Value: $270B

Latin America
2,960 Deliveries
2038 Total Fleet: 3,380
Service Market Value: $500B

Africa
1,160 Deliveries
2038 Total Fleet: 1,620
Service Market Value: $215B

Middle East
3,130 Deliveries
2038 Total Fleet: 4,030
Service Market Value: $790B

Asia-Pacific
17,390 Deliveries
2038 Total Fleet: 19,420
Service Market Value: $3,480B
### Forecast on a Page

**Regional Economic Growth (GDP)**
- Asia-Pacific: 3.9%
- North America: 1.9%
- Europe: 1.6%
- Middle East: 3.2%
- Latin America: 2.9%
- Russia & Central Asia: 2.0%
- Africa: 3.4%
- World: 2.7%

**Airline Traffic Growth (RPK)**
- Asia-Pacific: 5.5%
- North America: 3.2%
- Europe: 3.6%
- Middle East: 5.1%
- Latin America: 5.9%
- Russia & Central Asia: 3.3%
- Africa: 5.9%
- World: 4.6%

**Airline Fleet Growth**
- Asia-Pacific: 4.6%
- North America: 1.9%
- Europe: 2.9%
- Middle East: 4.9%
- Latin America: 3.9%
- Russia & Central Asia: 2.1%
- Africa: 4.0%
- World: 3.4%

### MARKET SIZE

<table>
<thead>
<tr>
<th>Market</th>
<th>Asia-Pacific</th>
<th>North America</th>
<th>Europe</th>
<th>Middle East</th>
<th>Latin America</th>
<th>Russia &amp; Central Asia</th>
<th>Africa</th>
<th>World</th>
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</thead>
<tbody>
<tr>
<td>Deliveries</td>
<td>17,390</td>
<td>9,130</td>
<td>8,990</td>
<td>3,130</td>
<td>2,960</td>
<td>1,280</td>
<td>1,160</td>
<td>44,040</td>
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<tr>
<td>Market value ($B)</td>
<td>2,830</td>
<td>1,155</td>
<td>1,370</td>
<td>725</td>
<td>395</td>
<td>160</td>
<td>175</td>
<td>6,810</td>
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<tr>
<td>Average value ($M)</td>
<td>160</td>
<td>130</td>
<td>150</td>
<td>230</td>
<td>130</td>
<td>130</td>
<td>150</td>
<td>150</td>
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<tr>
<td>Unit share</td>
<td>39%</td>
<td>21%</td>
<td>20%</td>
<td>7%</td>
<td>7%</td>
<td>3%</td>
<td>3%</td>
<td>100%</td>
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<tr>
<td>Value share</td>
<td>42%</td>
<td>17%</td>
<td>20%</td>
<td>11%</td>
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<td>3%</td>
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### DELIVERIES

<table>
<thead>
<tr>
<th>Aircraft Type</th>
<th>2018 Deliveries</th>
<th>2038 Deliveries</th>
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<tbody>
<tr>
<td>Regional Jet</td>
<td>210</td>
<td>260</td>
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<tr>
<td>Single Aisle</td>
<td>13,030</td>
<td>13,950</td>
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<tr>
<td>Widebody</td>
<td>3,810</td>
<td>5,680</td>
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<tr>
<td>Freighter</td>
<td>340</td>
<td>1,130</td>
</tr>
<tr>
<td>Total</td>
<td>17,390</td>
<td>19,420</td>
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### MARKET VALUE ($B)

<table>
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<tr>
<th>Aircraft Type</th>
<th>2018 Market Value</th>
<th>2038 Market Value</th>
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</thead>
<tbody>
<tr>
<td>Regional Jet</td>
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<td>5</td>
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<tr>
<td>Single Aisle</td>
<td>1,535</td>
<td>5,680</td>
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<tr>
<td>Widebody</td>
<td>1,180</td>
<td>5,680</td>
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<tr>
<td>Freighter</td>
<td>340</td>
<td>5</td>
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<tr>
<td>Total</td>
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### 2018 FLEET

<table>
<thead>
<tr>
<th>Aircraft Type</th>
<th>2018 Fleet</th>
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<th>2058 Fleet</th>
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<tr>
<td>Regional Jet</td>
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<td>950</td>
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<tr>
<td>Total</td>
<td>7,880</td>
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### 2038 FLEET

<table>
<thead>
<tr>
<th>Aircraft Type</th>
<th>2038 Fleet</th>
<th>2058 Fleet</th>
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</thead>
<tbody>
<tr>
<td>Regional Jet</td>
<td>260</td>
<td>2,500</td>
</tr>
<tr>
<td>Single Aisle</td>
<td>13,950</td>
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<td>Widebody</td>
<td>4,080</td>
<td>9,560</td>
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<tr>
<td>Freighter</td>
<td>1,130</td>
<td>3,400</td>
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<tr>
<td>Total</td>
<td>19,420</td>
<td>50,660</td>
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