



Services Market Outlook 2026 - 2045



2026 BOEING SERVICES MARKET OUTLOOK

For more than six decades, Boeing has published an annual Commercial Market Outlook, drawing on a deep understanding of global aviation and a long-term view of industry development. **The Commercial Services Market Outlook** has been integrated with the Commercial Market Outlook for nearly three decades, reflecting the growing strategic importance of services across the commercial aviation ecosystem.

Boeing forecasts that the global commercial aviation services market will reach **\$4.9 trillion** over the next 20 years. This outlook covers the support and services functions that sustain commercial aviation operations, including maintenance, repair, overhaul (MRO) and modifications; parts and supply chain; training and pilot services; and digital solutions and analytics. These markets vary widely in scale, capital intensity, and operating model, but all are increasingly central to airline performance, fleet availability, and long-term value creation.

Aviation services are entering a new phase. Passenger demand has recovered, but the next two decades will be shaped less by traffic growth alone than by constraints on production, labor, parts availability, and operational capacity. Airlines, lessors, maintenance providers, and suppliers are now managing a market in which aircraft are remaining in service longer, fleet renewal is more gradual, and lifecycle optimization is becoming a stronger commercial priority. In this environment, services are no longer viewed simply as support functions. They are becoming a means of preserving asset value, improving efficiency, and sustaining growth in a more constrained operating environment.

The near-term outlook remains affected by uneven supply chain conditions, geopolitical disruption, and logistics bottlenecks. Boeing's long-term baseline assumes gradual normalization, but risks persist in single-source dependencies, specialized commodities, certification-sensitive parts, and labor-intensive repair activity. These constraints are extending aircraft service lives and increasing demand for maintenance, modifications, and component support across the installed fleet.

At the same time, **the industry is becoming more digital**. Aircraft, airports, and operations are generating greater volumes of data, and advances in connectivity, analytics, artificial intelligence, and automation are enabling operators to move from reactive decision-making toward predictive and optimized operations. Digital services are becoming essential to improve reliability, reduce cost, support fleet planning, and enhance the passenger experience.

Sustainability is also broadening in scope. The industry remains focused on emissions reduction, but the services market is increasingly influenced by lifecycle optimization, resource efficiency, component reuse, and circular supply chains. As fleets age and retirements rise later in the forecast period, opportunities will expand across repair, remanufacturing, tear down, recycling, and asset management. These capabilities will play a larger role in how the industry manages scarcity, cost, and environmental performance.

Workforce transformation remains one of aviation's most significant structural challenges. Millions of new pilots, technicians, and cabin crew members will be needed over the next 20 years, while experienced personnel continue to retire and operational complexity increases. The ability to attract, train, develop, and retain talent will remain fundamental to industry growth, safety, and resilience. See the Pilot and Technician Outlook for detailed workforce estimates and segmentation.

The geography of aviation growth is also changing. Emerging markets are expected to account for a larger share of fleet expansion, personnel demand, and services growth over the forecast period. South Asia, Southeast Asia, Africa, the Middle East, and parts of China will become increasingly important to the future aviation ecosystem, while mature markets will continue to drive demand through fleet renewal, efficiency, and lifecycle optimization.

Together, these forces are reshaping how aviation services are delivered and valued. The ability to preserve aircraft availability, leverage data-driven insight, build skilled workforces, and optimize lifecycle performance will distinguish the leaders of the next aviation cycle. The next era of aviation services will belong to organizations that turn constrained capacity into lasting advantage.

Near-term conditions remain shaped by geopolitical disruption, supply chain constraints, and tariff uncertainty, but long-term demand fundamentals remain intact.

AVIATION SERVICES AT A TURNING POINT

Boeing forecasts that the global commercial aviation services market will reach **\$4.9 trillion** over the next 20 years, reflecting the growing importance of maintenance, modifications, digital solutions, training, parts and supply chain, and operational support across the aviation ecosystem.

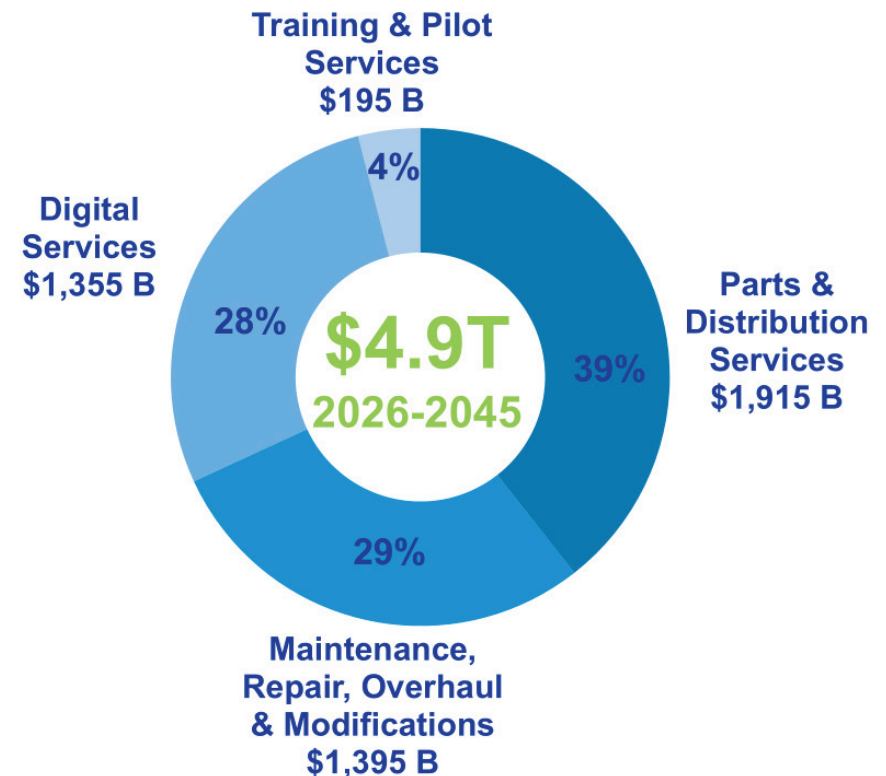
See the Boeing Pilot and Technician Outlook for detailed workforce estimates and segmentation.

The aviation industry is entering a new phase. Passenger demand has recovered, but the constraints shaping the next two decades are no longer centered on traffic alone. Production cadence, skilled labor, parts availability, digital capability, and sustainable end-of-life solutions increasingly determine how quickly airlines and markets grow and how efficiently they operate. The Boeing Services Market Outlook examines how the aviation ecosystem will evolve as the industry adapts to those constraints.

Near-term supply chain conditions remain uneven as airlines, OEMs, and suppliers continue to work through post-pandemic recovery, geopolitical disruption, and logistics bottlenecks. Boeing's long-term baseline assumes gradual normalization, but persistent risks remain in single-source dependencies, specialized commodities, and certification-sensitive parts and tooling.

At the center of this evolution is the need for services that support the **full lifecycle of an aircraft**. For much of the industry's history, services demand was concentrated around new aircraft deliveries and entry-into-service support. That balance is shifting. As fleet aging accelerates, production remains constrained, and aircraft stay in service longer, a greater share of demand is moving to the installed base, including mid-life maintenance, component repair, modernization modifications, and later-life re-purposing.

Operators are recognizing that support only when needed is increasingly outdated and financially unsustainable. A lifecycle approach can extend fleet life, defer capital spending, improve operating efficiency, and reduce environmental impact. These conditions will reinforce a broader set of structural forces that will shape the services market over the next two decades.



Five structural forces will shape the services market over the next two decades and lifecycle optimization links them all:

- 1** Capacity constraints are reshaping the industry. Aircraft deliveries remain below the level needed to fully meet replacement demand, and labor and supply chain shortages continue to limit throughput. These constraints are extending aircraft service lives, increasing demand for maintenance and modifications, and elevating the importance of operational efficiency.
- 2** Aviation is becoming increasingly digital. Aircraft, airports, and operations are generating more data than ever before, and advances in connectivity, analytics, artificial intelligence, and automation are helping operators move from reactive decision-making toward predictive and optimized operations. Data-driven services are becoming essential to improve reliability, reduce cost, and support fleet planning and enhance the passenger experience.
- 3** Sustainability is expanding beyond emissions reduction. The industry is placing greater emphasis on lifecycle optimization, resource efficiency, component reuse, and circular supply chains. As fleets modernize and aircraft retirements rise later in the forecast period, new opportunities will emerge across repair, recycling, asset management, and sustainable operations.
- 4** Workforce transformation remains one of aviation's most significant challenges. Millions of new pilots, technicians, and cabin crew members will be needed over the next 20 years. At the same time, experienced personnel are retiring and operational complexity continues to increase. The ability to attract, train, develop, and retain talent will remain fundamental to industry growth and resilience.

- 5** The geography of aviation growth continues to shift. Emerging markets are expected to account for a larger share of fleet expansion, personnel demand, and services growth. South Asia, Southeast Asia, Africa, the Middle East, and parts of China will become increasingly important to the future aviation ecosystem, while mature markets will continue to drive demand through fleet renewal, efficiency, and lifecycle optimization.

Together, these forces are changing how aviation services are delivered and valued. Historically, services were viewed as support functions. Now they are seen as a source of competitive advantage. The ability to preserve aircraft availability, leverage data-driven insights, build skilled workforces, and optimize lifecycle performance will differentiate the leaders of the next aviation cycle.



Lifecycle value is becoming central to the future services market.

NEW ECONOMICS OF AVIATION SERVICES

The Service Proposition Shift

Services are no longer just an operating expense. They are a strategic driver of airline economics.

As delivery delays persist and aircraft remain in service longer, lifecycle services are essential to how airlines manage utilization, cost, and flexibility. The service proposition is expanding from maintenance execution toward asset stewardship.

This shift reflects a broader change in market conditions. Airlines are extending aircraft lifecycles because new aircraft are not arriving quickly enough to support replacement plans. Many operators are investing in targeted upgrades, structural programs, and cabin enhancements to preserve competitiveness and improve passenger experience. At the same time, fleet complexity is increasing, making integrated support offerings more attractive. Airlines and lessors increasingly want service partners that can combine maintenance, parts, data, and operational support in a coordinated model.

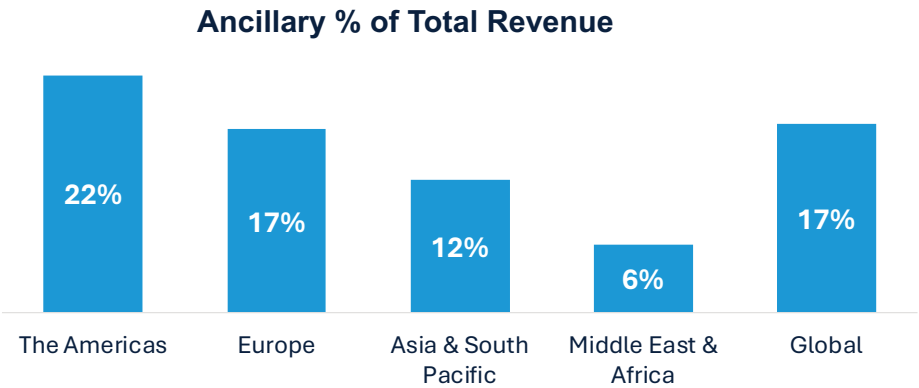
Services as a Revenue Stream

The economics of services are also changing. Historically, services were viewed primarily as a cost of operating aircraft. Now they are shaping how effectively airlines utilize assets, manage disruptions, optimize costs, and generate returns. Operational resilience has become a competitive differentiator, and services now influence a greater share of lifecycle economics than in prior cycles.

In the near term, operators continue to focus on cost control, asset utilization, and service continuity as they navigate capacity constraints and higher complexity. Over the long-term, lifecycle services will increasingly shape profitability, flexibility, and fleet value. This environment is creating new commercial logic for lifecycle-based offerings.

Availability-driven contracts, asset optimization programs, and integrated lifecycle bundles align incentives across operators, lessors, original equipment manufacturers (OEMs), and MRO providers. Predictive maintenance is moving from a competitive advantage to an operational necessity as connectivity, aircraft health monitoring, and artificial intelligence enable operators to identify potential failures earlier, reduce unscheduled maintenance, and improve fleet utilization.

Ancillary revenue remains an important contributor to airline economics, with carriers continuing to refine how they monetize products and services that support revenue diversification and resilience.





The commercial implications extend across all regions. In mature markets such as North America and Europe, operators are focusing on efficiency, sustainability, and lifecycle optimization. In emerging markets, airlines are balancing growth with the need to build local capability. In both cases, services are becoming more strategic to airline performance.

Boeing expects the global commercial aviation services market to reach **\$4.9** trillion over the next 20 years. Much of that growth reflects the increasing importance of maintaining aircraft availability and productivity throughout the operational lifecycle.

\$4.9 TRILLION

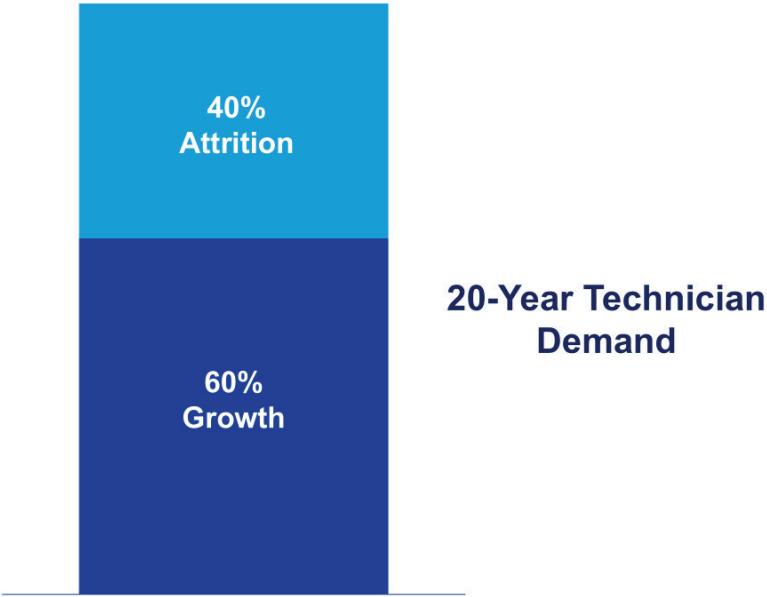


CAPACITY-CONSTRAINED DECADE

The industry’s most important challenge is no longer demand. It is capacity.

Workforce constraints – particularly technician scarcity and rising juniority – are a central cause of capacity limits and material drivers of MRO throughput and shop congestion. Aircraft demand remains strong, but production recovery is gradual, retirements are being deferred, and the average age of the global fleet continues to rise. These conditions are increasing the need for MRO services and modifications across the installed base. They are also extending the period in which airlines must operate older aircraft, often with higher maintenance intensity and tighter supply chains. Factors influencing this shift include aging fleets, engine maintenance, on-shore or off-shore labor, heavy maintenance demand, and used serviceable material (USM).

**New Technician Personnel
728,000**





Shifting from Demand to Capacity

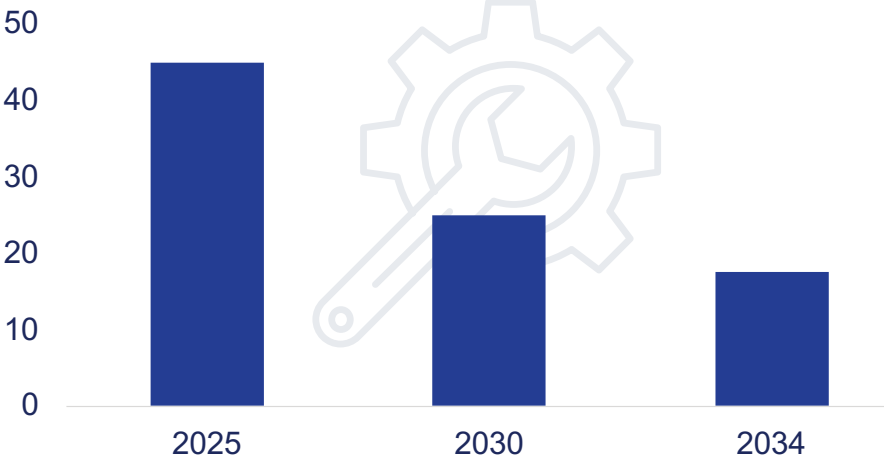
For much of aviation history, airlines focused on stimulating demand. Today, demand exists. The challenge is providing sufficient capacity to meet it. Delivery delays and constrained production are making it a necessity to extend the lives of existing aircraft and shifting investment from replacement to lifecycle actions that preserve service capacity and delay capital expenditure.

Supply Chain Outlook

Acute COVID-era disruptions and episodic geopolitical events have tightened parts, materials, and logistics capacity across the aviation ecosystem. While many production and transportation bottlenecks are easing as suppliers ramp output and inventories rebuild, structural vulnerabilities remain. These include single-source dependencies, long-lead critical components, and specialized tooling and certification pathways.

The outlook assumes continued operational constraints in the near term, shaped by workforce juniority, limited digital integration, and the need to scale circular supply models such as USM, remanufacturing, and digital traceability. These factors will support resilience, but they will not remove near-term pressure on availability, turnaround time, and maintenance planning.

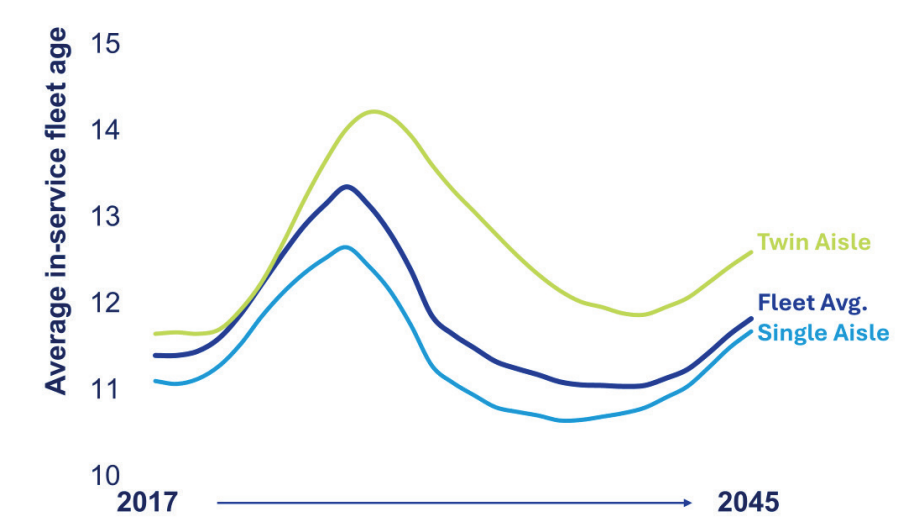
Projected Parts Lead-Time Reduction Over the Next Decade





Aging Fleets

Aging fleet trends are reinforcing this shift. Older fleets require more maintenance, more component replacement activity, and greater investment in reliability programs. In North America, this contributes to higher engine shop activity, increased use of USM, and selective in-sourcing by airlines seeking greater control over cost and turnaround time. In Latin America and Africa, aging fleets are increasing reliance on outsourced heavy maintenance and creating demand for additional regional capacity. In the Middle East and parts of Asia, fleet growth is forcing investment in new maintenance infrastructure to support a larger installed base.



Shop Throughput

	Current		Target
Narrowbody	~100 days	➡	~70 days
Widebody	~130-180 days	➡	~90 days

Next-gen shop visits are set to grow from ~1,000 to ~2,500 by 2030

Engine Maintenance and Turnaround

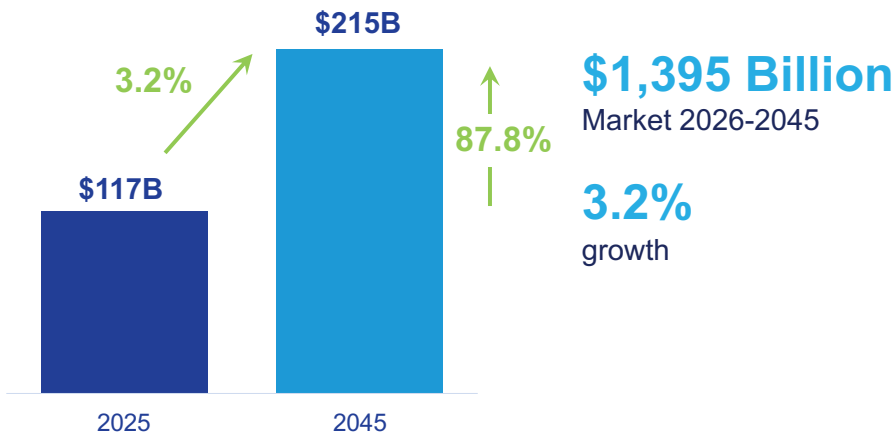
Engine maintenance remains a particular pressure point. Shop turnaround times have lengthened for many engine types, while removal rates and shop demand have remained elevated. In constrained supply environments, operators are increasingly using green-time leasing, asset pooling, and targeted shop capacity agreements to preserve operational continuity. Parts availability and material flow constraints continue to add variability to shop throughput, particularly for long-lead components and specialized repair activity. These conditions are likely to keep engine services under strain throughout much of the decade.

Technician shortages and experience loss increase engine shop turnaround risk and support greater use of green-time leasing, asset pooling, and outsourced engine capacity.

Heavy Maintenance Demand

Heavy maintenance demand is also expected to remain elevated. As aircraft stay in service longer, operators will face growing requirements for major inspections, structural repairs, and overhaul events. Airlines will continue to balance growth ambitions with aircraft availability constraints, making maintenance planning and shop throughput more critical to fleet performance.

Maintenance, Repair, Overhaul and Modifications



On-Shore / Off-Shore Labor

On-shoring, near-shoring, and off-shoring are becoming deliberate network decisions as airlines balance cost, capability, and turnaround time. Labor remains the largest variable in maintenance economics, particularly in heavy structural checks and engine work, where technician content is high and shop capacity is constrained. In mature markets, on-shore maintenance supports proximity, control, and operational continuity. In North America and Europe, this often favors line maintenance, quick-turn events, and strategically important repair activity close to fleet bases.

At the same time, near-shore and off-shore capacity continue to play an important role in labor-intensive heavy maintenance. Airlines are using regional hubs in Latin America and Asia to access lower cost structures, larger labor pools, and purpose-built facilities. These models can improve economics, but they also depend on ferry time, parts availability, regulatory approvals, and stable logistics networks. As supply chain disruption and shop congestion persist, the advantage increasingly shifts toward locations that can combine cost efficiency with faster turnaround and stronger inventory access.

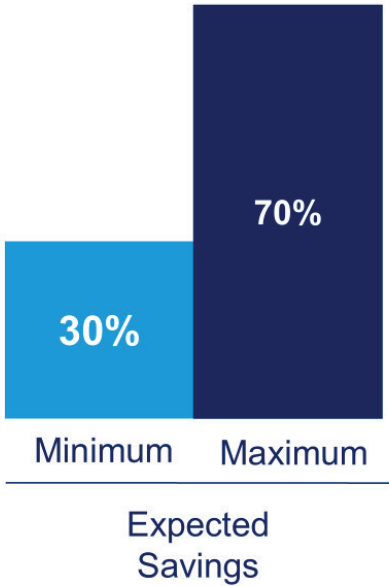
The long-term trend is not a full shift toward either on-shoring or off-shoring. It is a more segmented operating model. Airlines will continue to keep time-critical work close to operations, while directing larger structural checks, engine overhauls, and selected component work to regional and global centers with the scale and certification needed to deliver consistent output. In this environment, maintenance geography will reflect a balance of resilience, cost, and availability rather than cost alone.

Market growth will depend on how effectively the industry preserves aircraft availability in a more constrained operating environment.

Used Serviceable Material (USM)

These same market dynamics are strengthening the role of USM. For some MRO shops, USM parts cover as much as 30% of total part demand. As tear-down activity increases later in the forecast period, USM will become an increasingly important source of lower-cost, certificated parts. For operators and MROs, that offers cost and lead-time advantages. USM also helps offset near-term supply chain pressure by improving parts availability and reducing dependence on constrained material flows. For the broader market, it improves resilience and helps offset some of the pressure created by parts scarcity.

USM Cost Savings



Lifecycle strategy is the practical response to these conditions. Aircraft that remain in service longer require targeted investments that preserve availability and value. Mid-life upgrades, structural life-extension programs, remanufacturing, and asset optimization are essential tools for managing capacity constraints while delaying capital replacement.

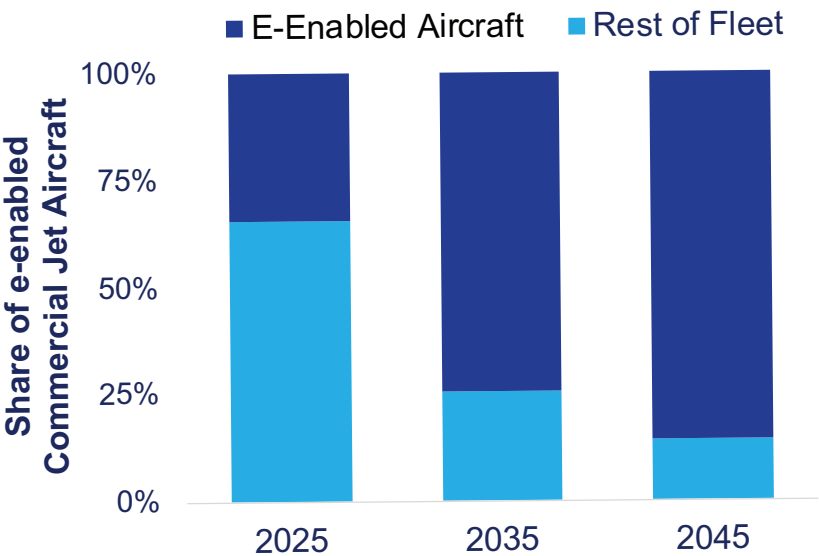
USM yields substantial cost savings



CONNECTED AIRCRAFT ERA

Every aircraft is becoming a data platform.

By 2045, nearly 90% of the global fleet is expected to be e-enabled, creating a strong foundation for digital services that can convert data into decision support. Connectivity, cloud infrastructure, and artificial intelligence are changing how the industry monitors fleets, manages maintenance, and makes operational decisions. As connected fleets continue to expand, the volume and value of operational data will increase significantly.



Aircraft generate enormous volumes of operational data, but historically much of that information hasn't been used. Advances in connectivity, cloud computing, and analytics are enabling operators to move from reactive maintenance toward predictive maintenance and optimized operations. Real-time data is transforming how airlines manage reliability, plan maintenance, and respond to disruption. Predictive maintenance is becoming mainstream as operators use aircraft health data to identify issues earlier, reduce unscheduled maintenance, and improve fleet utilization.

The Advance of AI in Aviation

Artificial intelligence is accelerating that shift. Maintenance organizations are increasingly deploying AI tools to support fault diagnosis, troubleshooting, technical records analysis, and maintenance planning. These capabilities are improving both decision quality and execution speed. Digital twins are also moving from pilots to practice, enabling operators to simulate scenarios, forecast remaining useful life, and evaluate repair, retrofit and replacement options with greater confidence. Digital services will only reach full potential if workforce capability evolves in parallel; technicians and operational crews will need stronger digital, analytical, and systems skills to operationalize predictive maintenance and digital twins. Training modernization and instructor readiness are therefore prerequisites for scaled digital value.

**Aviation IT investments
reach record levels**

\$50B

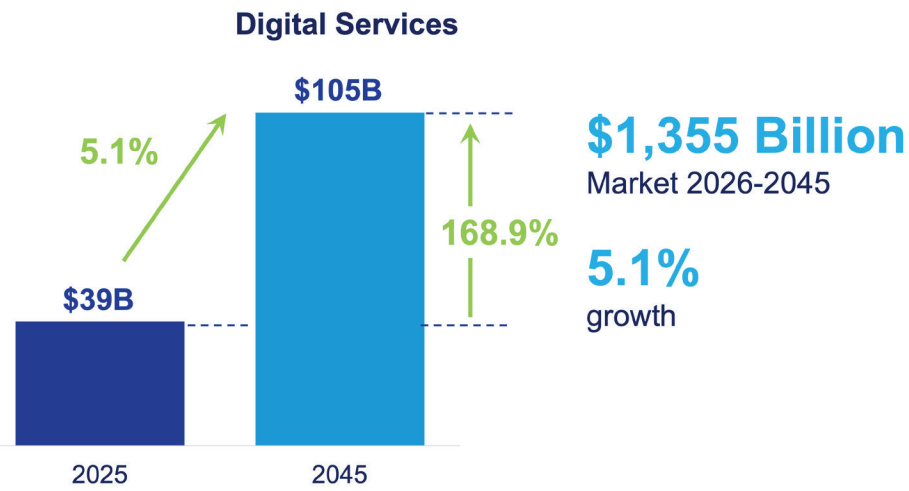
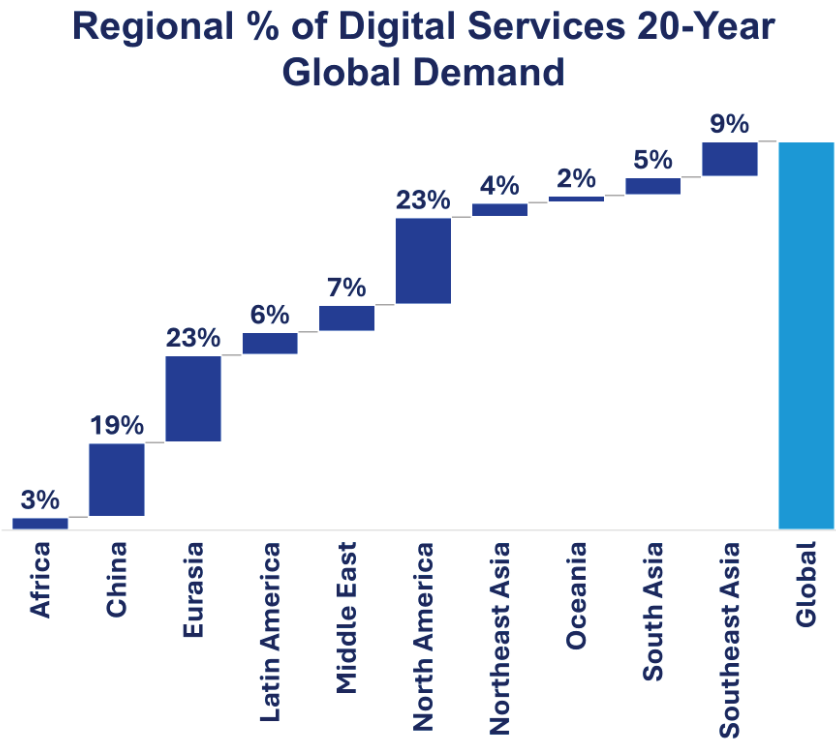
Source SITA

Capturing this capability requires an enterprise digital architecture that connects aircraft data, maintenance records, parts traceability, and operational workflows beyond onboard sensors and standalone applications. Cloud migration, secure APIs, open data models, and cross-domain interoperability are becoming prerequisites for scaling digital value across fleets. Buyers increasingly expect audit-able chains of custody for parts and work cards, secure workflows, and regulator-ready implementations. Cybersecurity and data governance are now operational imperatives.

Regions Matter in the Digital Movement

Regional adoption will differ. China is advancing smart airport infrastructure, AI, cloud, and 5G enabled operations. Northeast Asia is using digital tools to support training and workforce efficiency. North America is applying analytics to predictive maintenance and scheduling. Europe is pairing digital workflows with compliance and sustainability requirements.

Across all regions, the commercial value is clear: operators that can translate data into action will improve reliability, reduce disruption, and strengthen operating economics.



By 2045, connected and intelligent systems will influence most operational decisions across the aviation ecosystem.



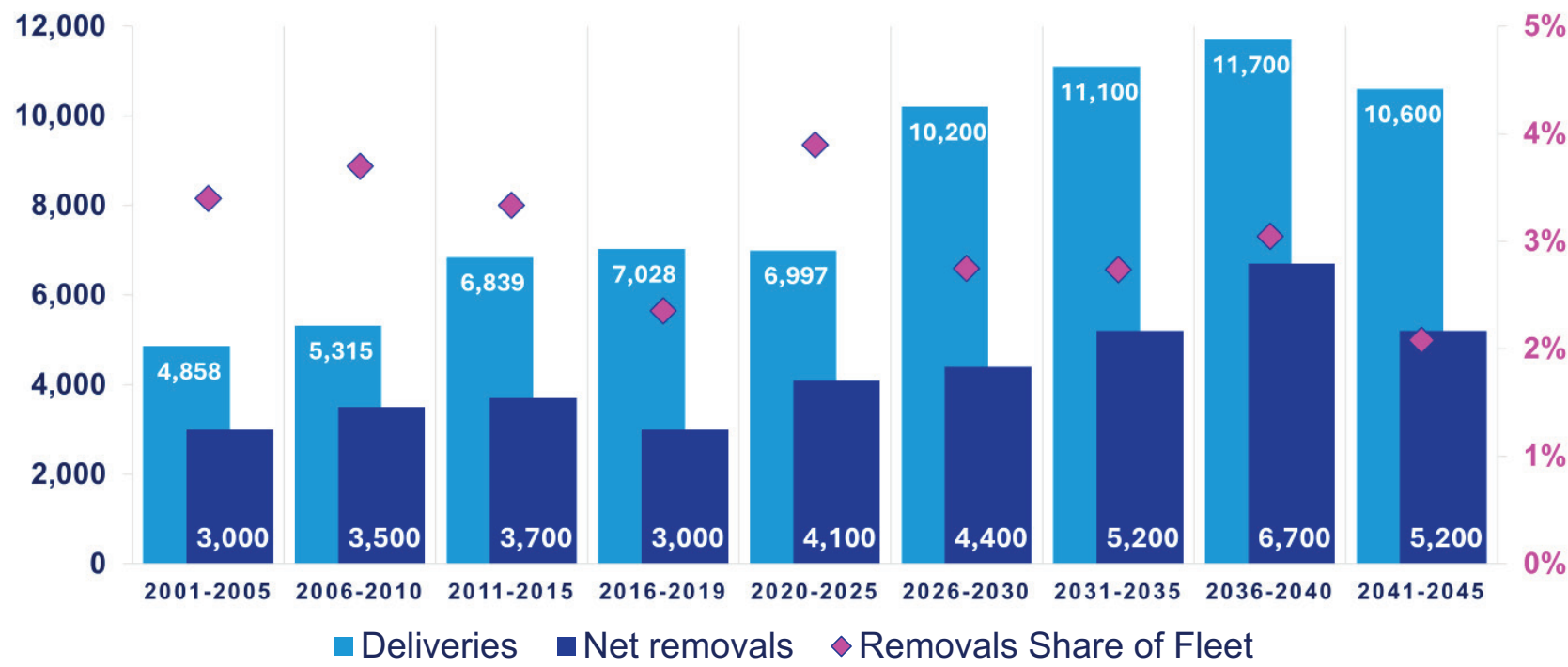
CIRCULAR AVIATION ECONOMY

Sustainability in aviation is expanding beyond carbon emissions. It is increasingly about lifecycle optimization, resource efficiency, reuse, and circularity.

As fleets remain in service longer and retirements begin to accelerate later in the forecast period, teardown activity will increase. That will create new opportunities to recover value from end-of-life aircraft and feed certified material back into the supply chain. USM, remanufacturing, repair innovations, and recycling will all play a larger role in how the industry manages scarce resources and supports fleet availability.

The market for certified USM is expected to expand as more aircraft reach retirement age, and operators seek lower-cost alternatives to new components. However, growth will depend not only on feedstock availability, but also on trust. Traceability, certification quality, and digital chain-of-custody records will be essential to broader adoption. Digital recordkeeping can shorten lead times, improve confidence, and reduce regulatory friction.

Near-term USM availability remains constrained by delayed retirements and limited teardown feedstock. Over time, higher retirement volumes will support a more mature circular supply chain. Workforce skillset for teardown, remanufacturing, certification, and digital traceability will be essential to scale circular supply chains and realize USM value. and artificial intelligence are changing how the industry monitors fleets, manages maintenance, and makes operational decisions. As connected fleets continue to expand, the volume and value of operational data will increase significantly.



MRO Material Source Estimated Change 2025 → 2035



Teardown and Repair Impact Component Availability

Aircraft teardown markets are becoming more important as a source of parts supply and lifecycle value. A growing number of retirements will create opportunities for teardown providers to recover high-value components from end-of-life aircraft, supporting both economic and sustainability objectives. At the same time, more localized teardown and remanufacturing activity will help shorten supply chains and improve resilience.

Repair technologies are also evolving. Additive manufacturing, materials science, and advanced engineering processes are enabling more components to be repaired rather than replaced. These capabilities help reduce costs, shorten turnaround times, and extend asset life. In mature markets such as North America and Europe, circular supply chains are becoming more established. In growth markets, they are emerging as part of a broader localization strategy.

Rise of the Circular Supply Chain

The industry is gradually moving away from linear supply chains toward more circular models that emphasize reuse, repair, refurbishment, and recycling. In this environment, lifecycle supply chains will become increasingly important. Certified USM inventories, remanufacturing centers connected to operator needs, and materials recovery systems tied to asset value will reduce costs, shorten lead times, and improve environmental performance across the aircraft lifecycle.

The aviation ecosystem will increasingly emphasize asset reuse, repair, recycling, and lifecycle optimization.



WORKFORCE TRANSFORMATION

People remain aviation's most strategic asset.

As the fleet grows and becomes more complex, the industry will need millions of new pilots, technicians, and cabin crew members over the next 20 years. At the same time, retirement and attrition are reducing experience levels across the workforce. The result is a structural challenge, not a temporary one. Aviation must not only replace departing personnel, but also prepare a new generation for different technologies, operating models, and lifecycle responsibilities.

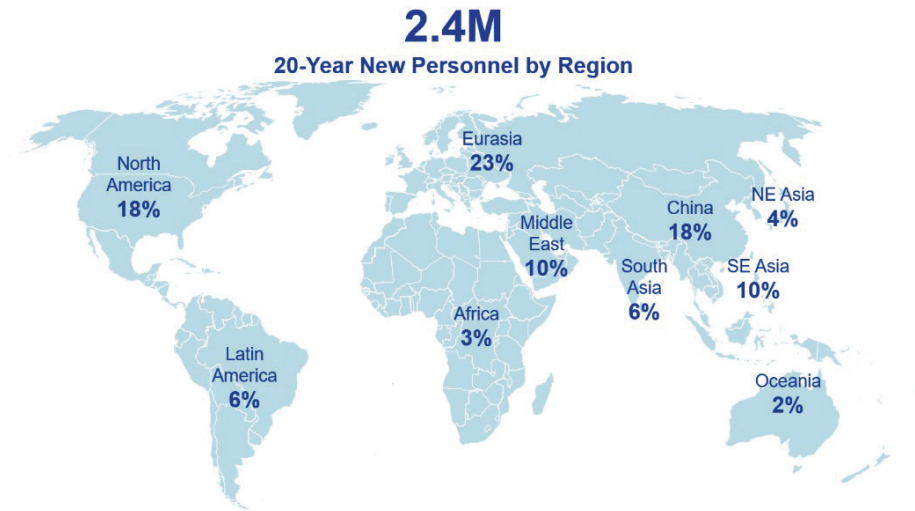
The next generation of aviation professionals will need stronger digital, analytical, and systems-based skills, particularly in maintenance and operations support. New aircraft, connected

systems, and data-rich maintenance environments are changing the role of the technician and the broader workforce. Technology will transform aviation, but people will continue to enable it.

In the near term, labor shortages and workforce juniority will continue to challenge productivity across airlines, MROs, and training organizations. Over the long term, training modernization and local talent pipelines will be essential to sustaining growth.

Regional workforce development is becoming more important as aviation growth shifts toward emerging markets. In Northeast Asia, aging populations are reducing the available labor pool. In South Asia and Southeast Asia, airlines and training providers are building capacity to support rapid fleet growth. In Africa and the

Middle East, local training ecosystems are being developed to reduce reliance on external labor and support localization goals. Competency-based and AI-assisted training will help with closing technician and instructor shortfalls, while hybrid lifecycle skills will ensure the workforce can support not only today's fleet, but also the next generation of service.



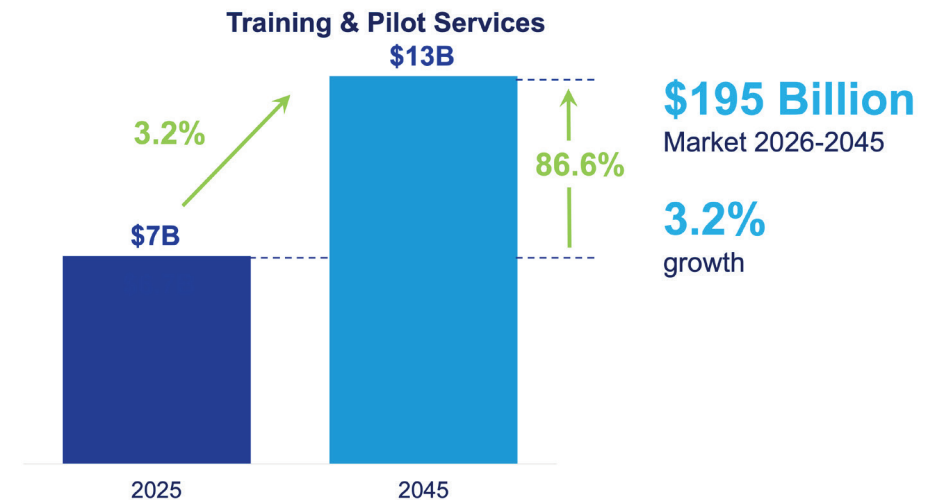
Workforce Strategy That Supports Lifecycle Service

For airlines and MROs, workforce strategy is increasingly tied to operational performance and lifecycle execution. The industry will need technicians and instructors, but it will also need professionals with new hybrid skills in predictive maintenance, lifecycle forecasting, teardown engineering, remanufacturing, and circular logistics. Workforce development must therefore evolve beyond traditional task proficiency. It must support the full scope of lifecycle service delivery.

The commercial implications are clear. In a capacity-constrained environment, workforce capability is directly linked to operational continuity, service quality, and growth.



The industry's ability to recruit, train, and retain talent will remain one of the most important determinants of future growth.

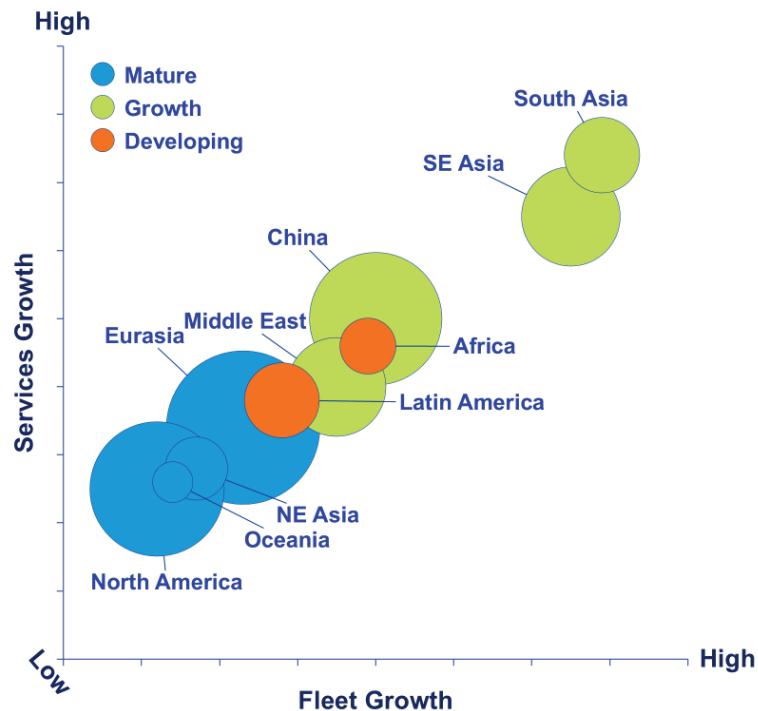


THE RISE OF NEW AVIATION CENTERS

Growth in aviation is shifting toward emerging markets, and with it, the geography of services is changing.

Regional workforce development and localization are the primary determinants of how much services value remains in-market as fleet growth shifts geographically.

Localization is also changing the shape of the global aftermarket. As aviation growth shifts toward South Asia, Southeast Asia, the Middle East, and Africa, airlines and MRO providers are investing in regional maintenance, training, and component support capacity. This reduces transit time, lowers exposure to logistics disruption, and helps operators retain more lifecycle value in-market. Regional hubs are becoming more important not only for labor arbitrage, but also for proximity to demand, fleet support, and workforce development.



This trend supports a more distributed services network. Mature markets will continue to anchor high-value engineering, specialized repairs, and advanced digital capabilities, while growth markets will expand heavy maintenance, line support, and end-of-life activity. Over time, the strongest services ecosystems will be those that combine local capability with global scale.

South Asia, Southeast Asia, Africa, and the Middle East are expected to account for a growing share of fleet growth, personnel demand, and services activity over the next two decades. These regions are benefiting from expanding middle classes, infrastructure investment, stronger connectivity, and increasing demand for air travel. They are also becoming more important centers for maintenance, training, and lifecycle support.

In many of these markets, local capability is becoming a strategic priority. Governments, airlines, and investors are seeking to localize maintenance capacity, develop training ecosystems, and reduce dependence on long-distance supply chains. That is creating opportunities for regional MRO expansion, teardown and remanufacturing hubs, and more integrated lifecycle platforms that can support operator's needs more efficiently.

Near-term growth will be influenced by infrastructure constraints, supply chain disruption, and geopolitical risk. Over the long term, localized capability will determine how much services value remains in-market.

Emerging markets Southeast and South Asia have the highest growth potential.

Mature
Stable, Established

Global services hubs that take high-value work, stabilize capacity, and set industry standards.

Growth
Dynamic, Rising

Relieves global capacity constraints, provides lower-cost/nearshore alternatives, and transitions toward higher-value work.

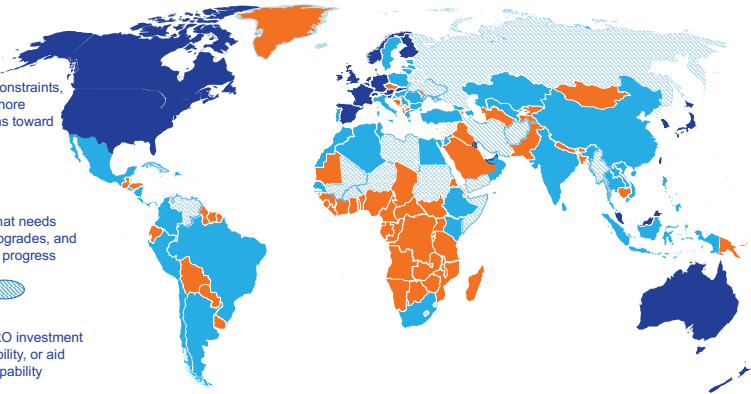
Emerging
Foundational, Potential

Potential future capacity that needs investment, certification upgrades, and workforce development to progress

Excluded Zones
Blocked, Potential

Not viable for 3rd party MRO investment today; requires policy, stability, or aid interventions to restore capability

Global MRO Market Maturity Map & Strategic Positioning



The Middle East

The Middle East remains a global aviation hub, supported by rapid fleet growth, fleet modernization, and major infrastructure investment. Localization in component repair, heavy maintenance, and training is expanding as airlines and governments seek greater control over cost, capability, and turnaround time. At the same time, regional conflict and airspace restrictions continue to add near-term complexity to flight operations and logistics across the Middle East.

South and Southeast Asia

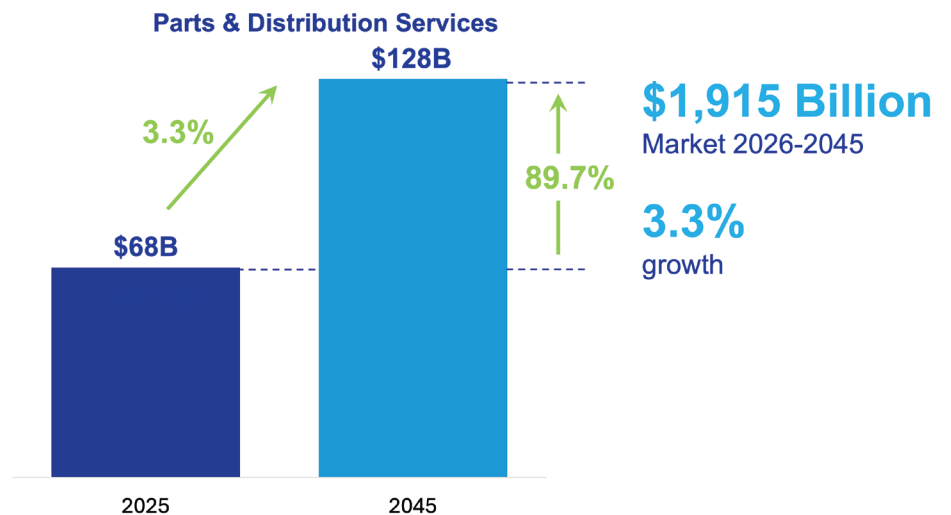
South Asia is emerging as one of the fastest-growing aviation markets, led by strong fleet growth and expanding domestic traffic. That growth will drive demand across maintenance, training, and digital services, while increasing pressure to build local industrial capability. Southeast Asia is following a similar path, with fleet expansion and growing airline complexity supporting new MRO investment and workforce development.

Africa

Africa continues to represent a significant long-term opportunity. Aging fleets, limited in-region heavy maintenance capacity, and high logistics costs are sustaining demand for outsourced support today, while also creating the case for longer-term regional capability development. In North America and Europe, by contrast, mature markets remain centered on efficiency, fleet renewal, sustainability, and lifecycle optimization.

The strongest regional strategies will combine infrastructure investment with workforce development and lifecycle ecosystem build out. Regions that can support maintenance, training, and end-of-life recovery locally will capture more of the value created by fleet growth while improving resilience and supply continuity.

The geography of aviation services will continue to evolve with shifts in global economic activity and fleet growth.





CLOSING

The commercial aviation services market is entering a new phase defined by longer asset lives, tighter capacity, and greater operational complexity.

Near-term volatility will continue to affect operations, but the long-term direction of the market remains clear. In that environment, lifecycle strategy will be essential to preserving availability, managing cost, and creating value across the full aircraft life. Services that integrate digital insight, workforce capability, and circular supply chains will help operators improve resilience, extend asset utility, and support growth more efficiently.

The next era of aviation services will belong to organizations that move beyond transactional support and build integrated lifecycle capabilities. Operationalizing the advantage depends on aligning lifecycle strategy with an investment-led approach to workforce pipelines, training modernization, and regional capability building (see PTO for workforce detail). Those that can turn data into decisions, develop the skills to execute across the fleet, and recover value through certified material flows will be best positioned to lead in a more constrained and connected market.

Residual supply chain exposure will remain a near-term risk, particularly where the industry depends on single suppliers, critical commodities, or regulatory bottlenecks that can delay material flow and affect aircraft availability.

The next era of aviation services will belong to those that turn constrained capacity into lasting advantage.

FORECAST ON A PAGE

Boeing Commercial Services Market Outlook 2026 -2045

	Africa	China	Eurasia	Latin America	Middle East	North America	Northeast Asia	Oceania	South Asia	Southeast Asia	World
Airline Traffic Growth (RPK) (2025-2045)	5.8%	5.0%	2.8%	4.1%	4.3%	2.7%	2.1%	2.8%	6.8%	6.7%	4.0%
Airline Fleet Growth (2025-2045)	3.9%	4.0%	2.3%	2.8%	3.5%	1.2%	1.7%	1.4%	6.9%	6.5%	3.0%
Aircraft Deliveries (2026-2045)											
Regional Jet	40	405	90	5	0	810	25	10	25	25	1,435
Single Aisle	870	7,215	6,920	2,160	1,505	6,350	825	565	3,055	4,080	33,545
Widebody	240	1,460	1,405	230	1,370	945	635	185	390	855	7,715
Freighter	15	160	175	10	120	300	100	5	20	25	930
Total	1,165	9,240	8,590	2,405	2,995	8,405	1,585	765	3,490	4,985	43,625
Services (2026-2045 \$B)											
Information Services	\$45	\$260	\$305	\$80	\$95	\$305	\$50	\$25	\$65	\$125	\$1,355
Maintenance, Repair, Overhaul & Modifications	\$40	\$250	\$350	\$70	\$150	\$270	\$60	\$25	\$60	\$120	\$1,395
Parts & Distribution Services	\$50	\$325	\$485	\$100	\$215	\$380	\$80	\$30	\$80	\$170	\$1,915
Training & Pilot Services	\$5	\$40	\$45	\$10	\$15	\$40	\$10	\$5	\$15	\$10	\$195
Total	\$140	\$875	\$1,185	\$260	\$475	\$995	\$200	\$85	\$220	\$425	\$4,860
Services Growth (USD 2025-2045)	4.6%	5.0%	3.4%	3.8%	4.0%	2.5%	2.8%	2.6%	7.4%	6.5%	3.7%
New Personnel (2026-2045)											
Pilots	22,000	123,000	153,000	38,000	67,000	122,000	24,000	11,000	48,000	66,000	674,000
Technicians	25,000	131,000	169,000	42,000	65,000	125,000	28,000	12,000	48,000	83,000	728,000
Cabin Crew	28,000	171,000	249,000	56,000	104,000	191,000	43,000	18,000	54,000	109,000	1,023,000
Total	75,000	425,000	571,000	136,000	236,000	438,000	95,000	41,000	150,000	258,000	2,425,000

2026 – 2045 Services Market Outlook

20-Year growth 3.7%

\$4.9T

\$1,395B

Maintenance, Repair,
Overhaul and Mods

\$1,915B

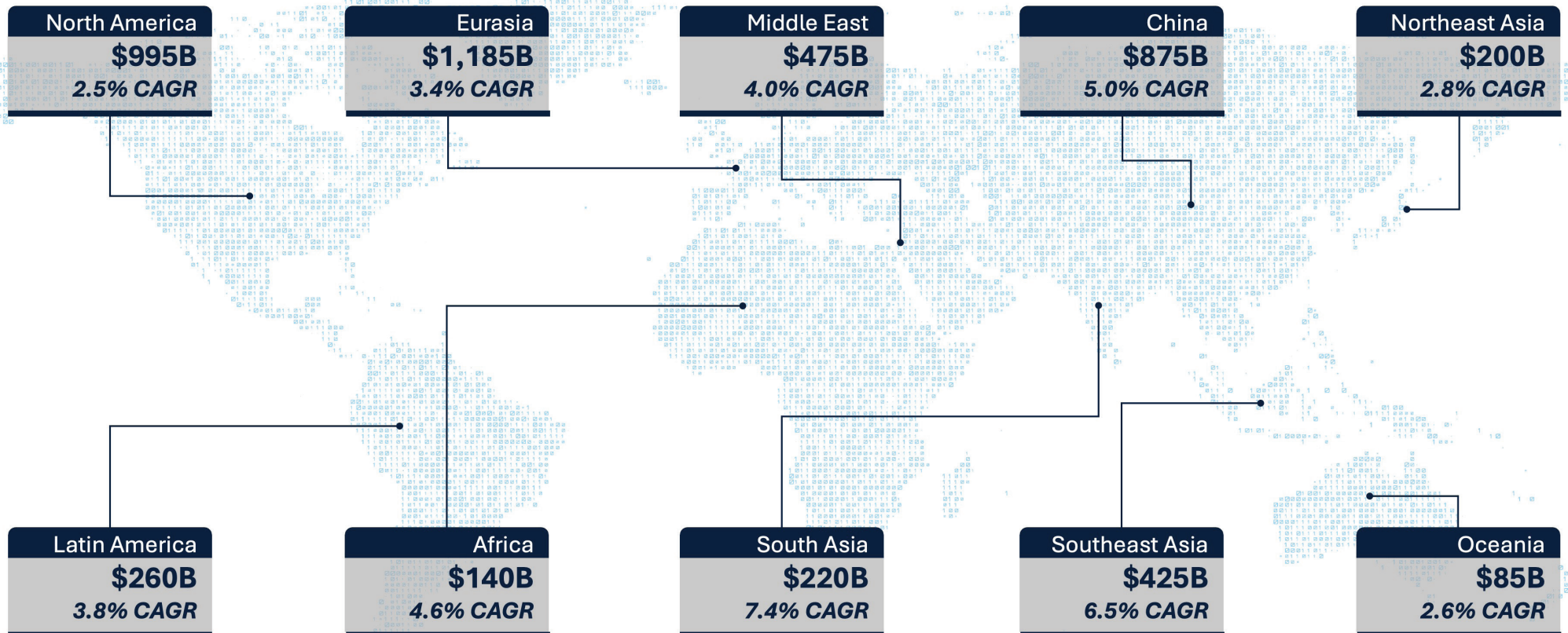
Parts and Distribution
Services

\$195B

Training and Pilot
Services

\$1,355B

Digital
Services





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