

Airbus Market Review

Strong fundamentals remain in place

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COMMERCIAL AIRCRAFT

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AIRLINE ECONOMICS.

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Today’s outline

Market landscape

Discussion panel



Traffic fundamentals remain strong

Current trend and forecast show growth

Source: IATA / Airbus
EIA US Gulf Coast Kerosene Jet Fuel Spot Price
**full year forecast, IATA

	Energy Jet A1 price (August average*)	Traffic Passenger growth YOY RPK full year (%)	Airlines Net profit, USD billion	Orders Annual, to end August (Airbus)
2025	$2.02 USD/g	5.3%	$45bn	600
2026	$3.60 USD/g	2.1%**	$23bn**	1,157
	Higher input costs	**Expected positive full year RPK growth**	**Positive aggregate profitability remains**	**x2 orders vs. same time last year**

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Traffic and Airlines

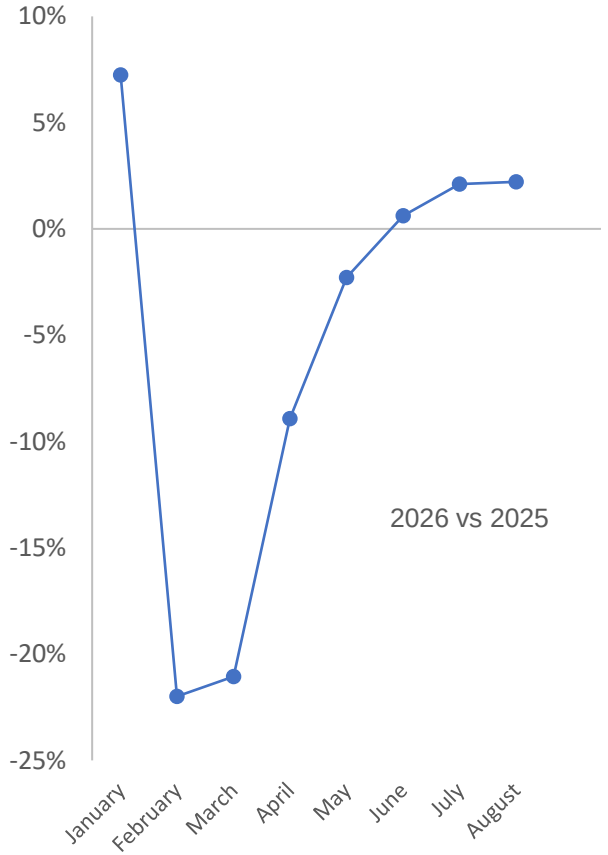
Global and regional view

Source: IATA Monthly
Cirium, in service passenger fleet

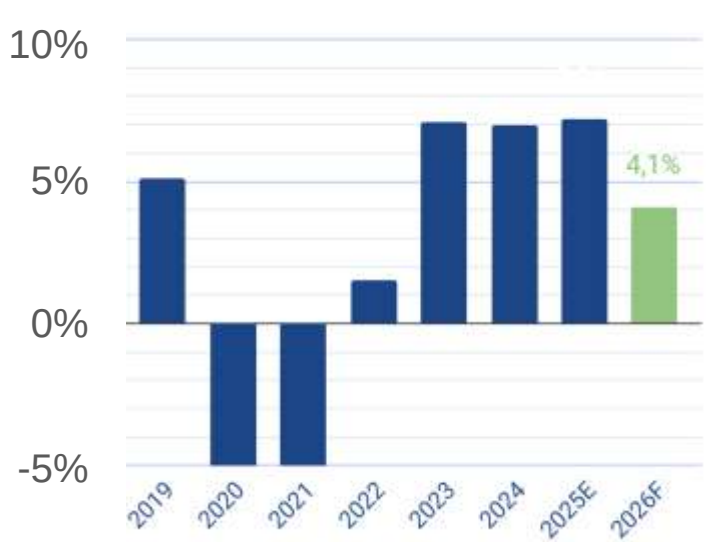
Realised travel



In service fleet in ME



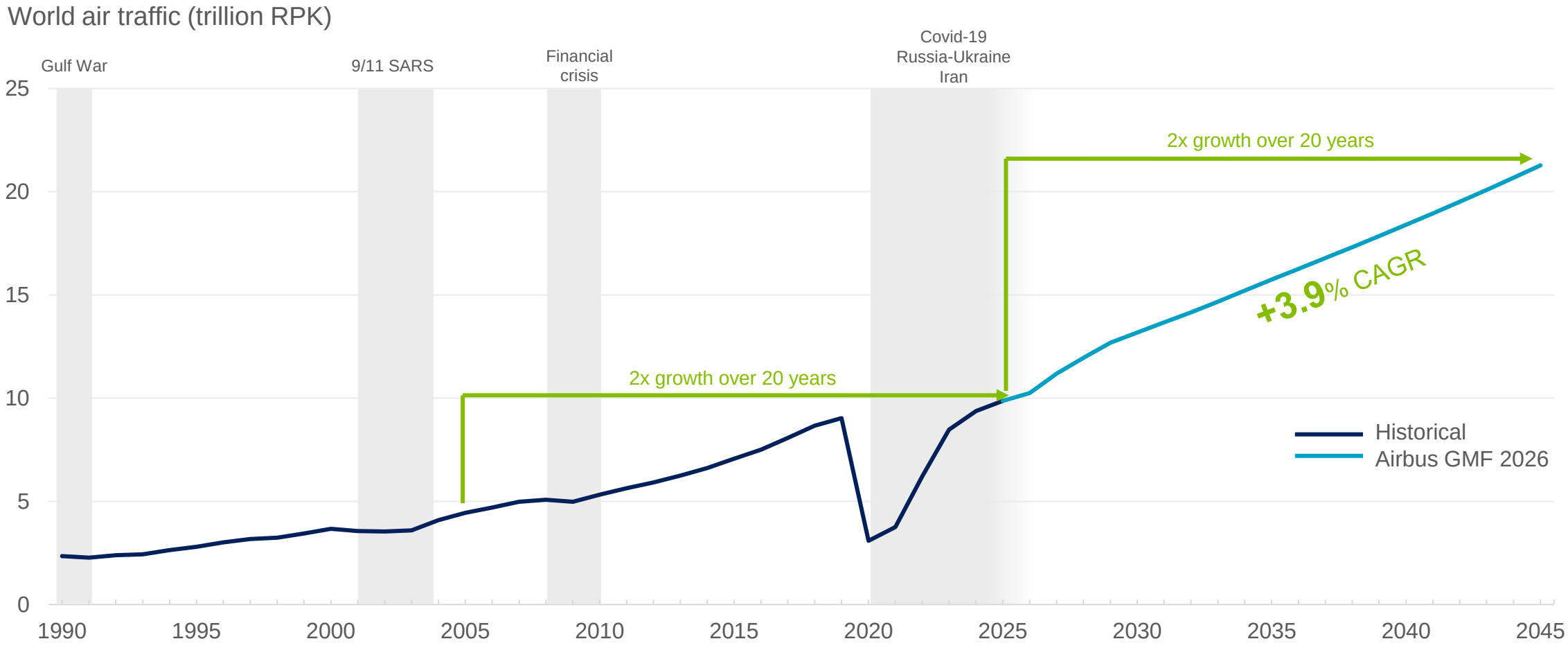
Global airline industry operating margin



Long term we are in a resilient, growth industry

The aviation industry always bounces back and growth continues

Source: Airbus GMF 2026



Demand for 42,060 new passenger aircraft

Over the next 20 years

Source: Airbus GMF 2026
Notes: Passenger aircraft only (≥ 100 seats)
Figures rounded to nearest 10 | totals rounded separately

Typically Single Aisle



33,920 aircraft

~81% Share of total new deliveries

Typically Widebody



8,140 aircraft

~19% share of total new deliveries

GMF 2026

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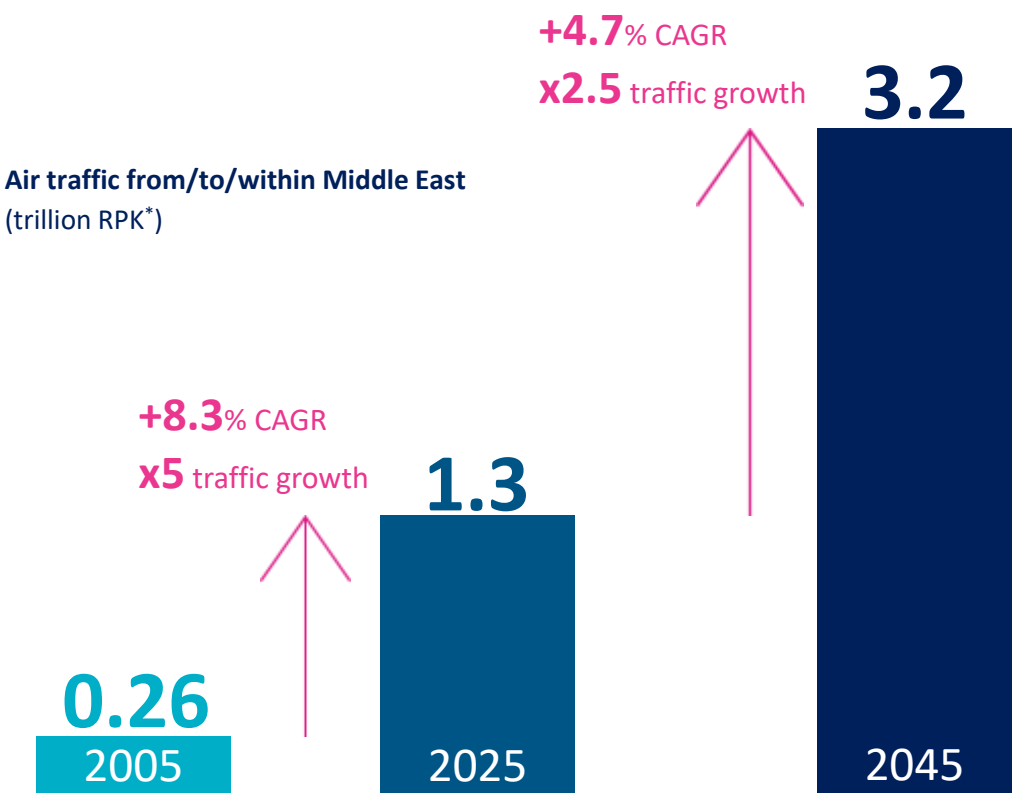
Focus on Middle East

Strong traffic growth over 20 years

Source: Airbus GMF 2026

Middle East travel growth



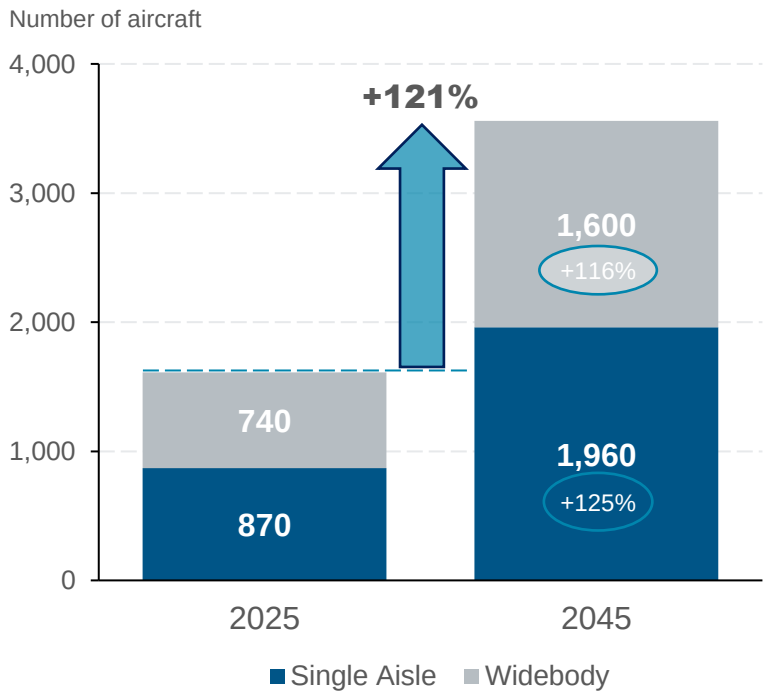
Demand and fleet evolution

The entire in service fleet today will be replaced by 2045

Total aircraft demand

Widebodies 1,670

Single Aisle 2,160



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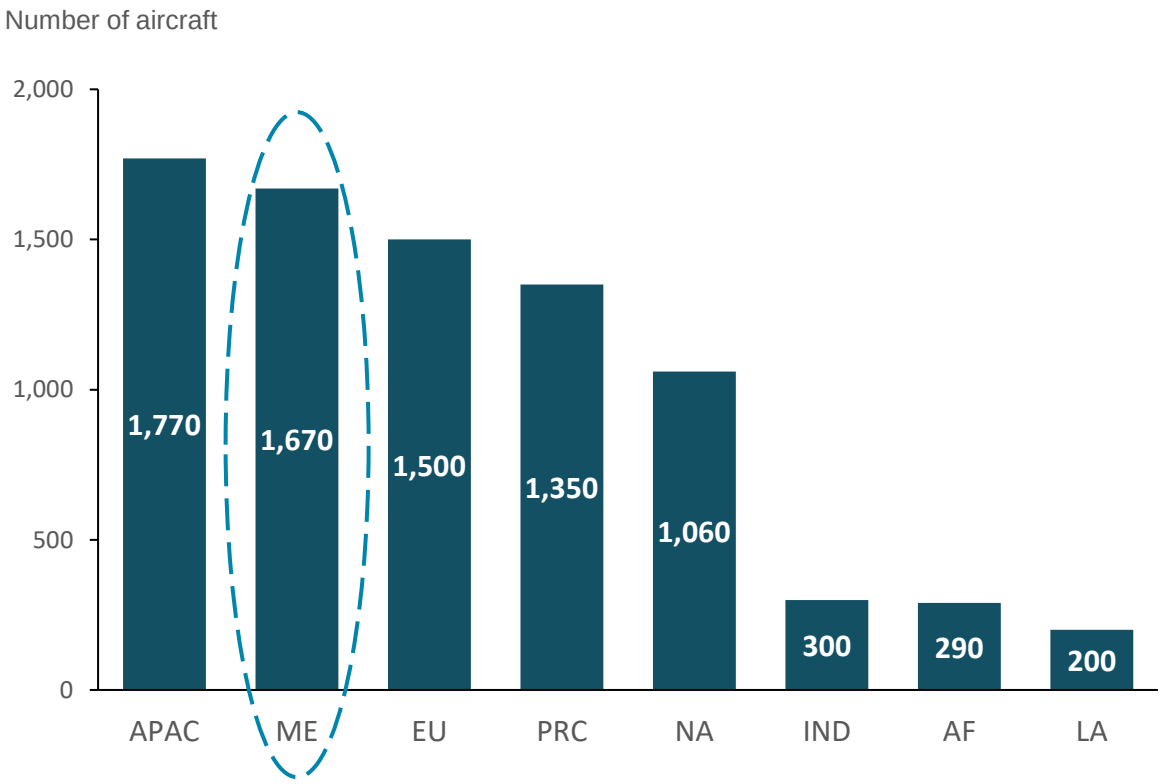
Widebody demand outstrips supply

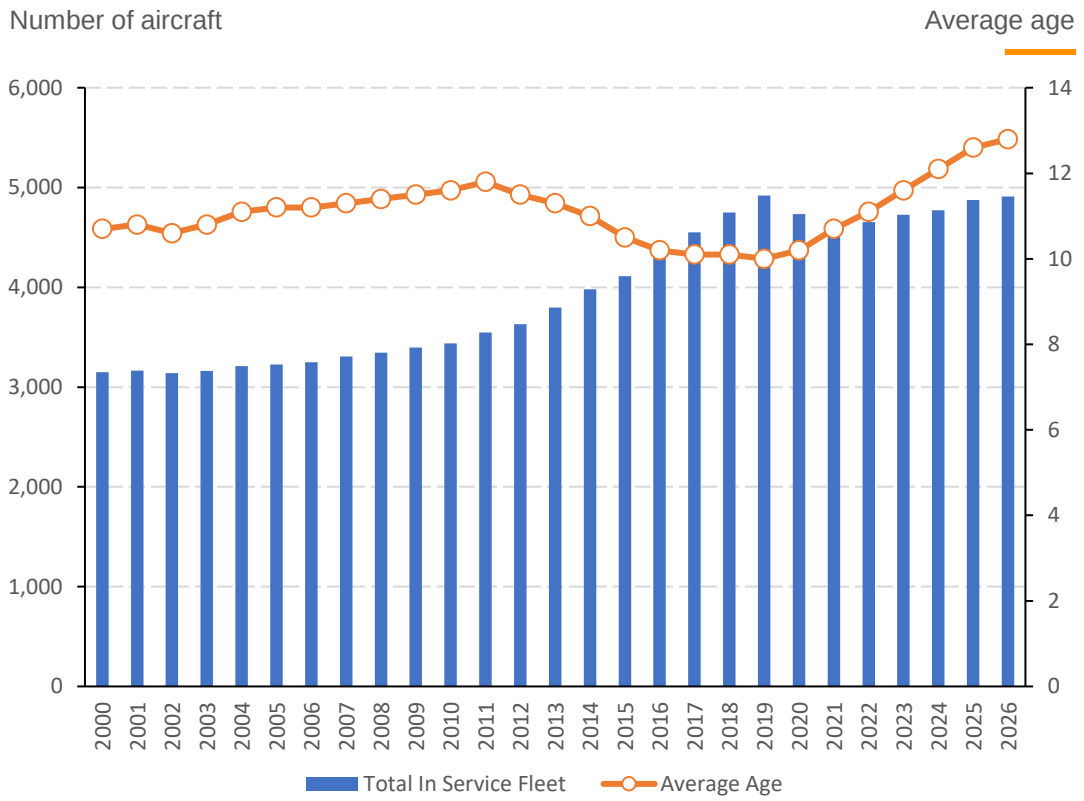
Snapshot per geographical region

Source: Airbus GMF 2026
Cirium, OAG, September 2026

Widebody 20 year demand per region



In service widebody fleet getting older



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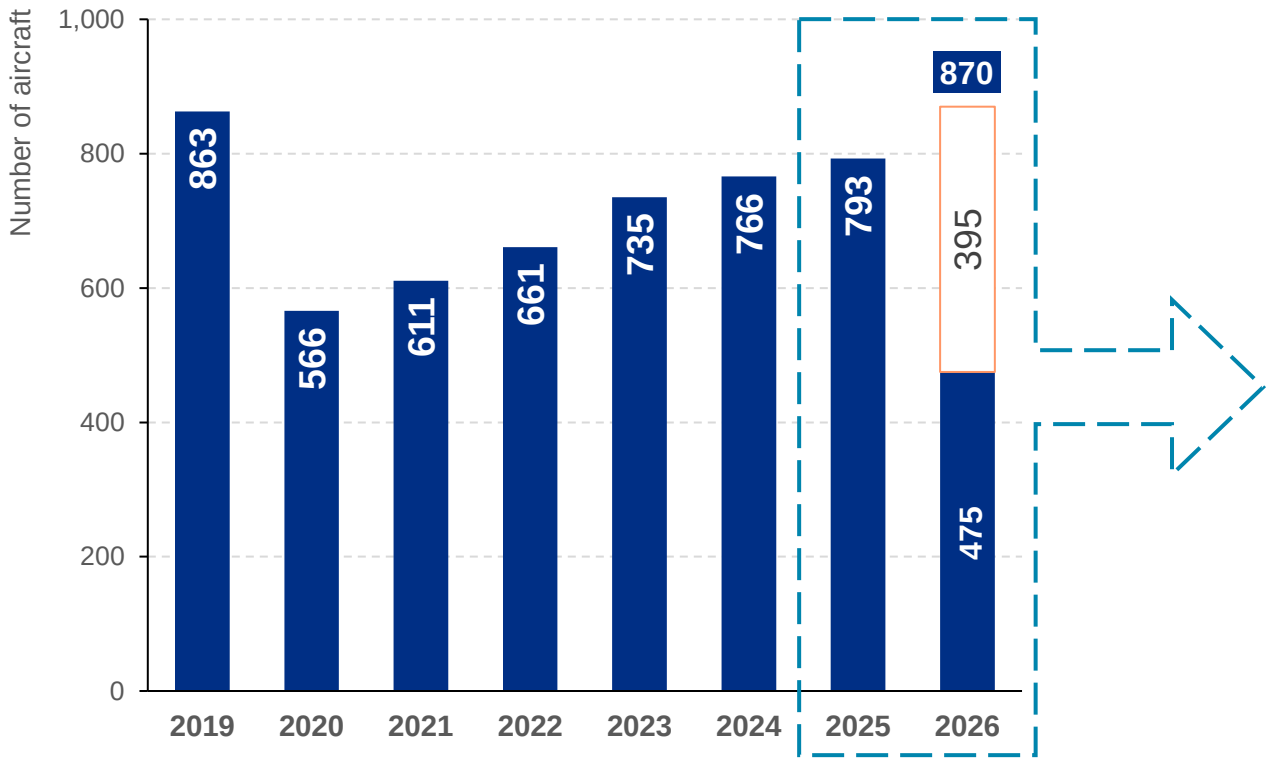
Deliveries growing

Progressive ramp-up not without challenges

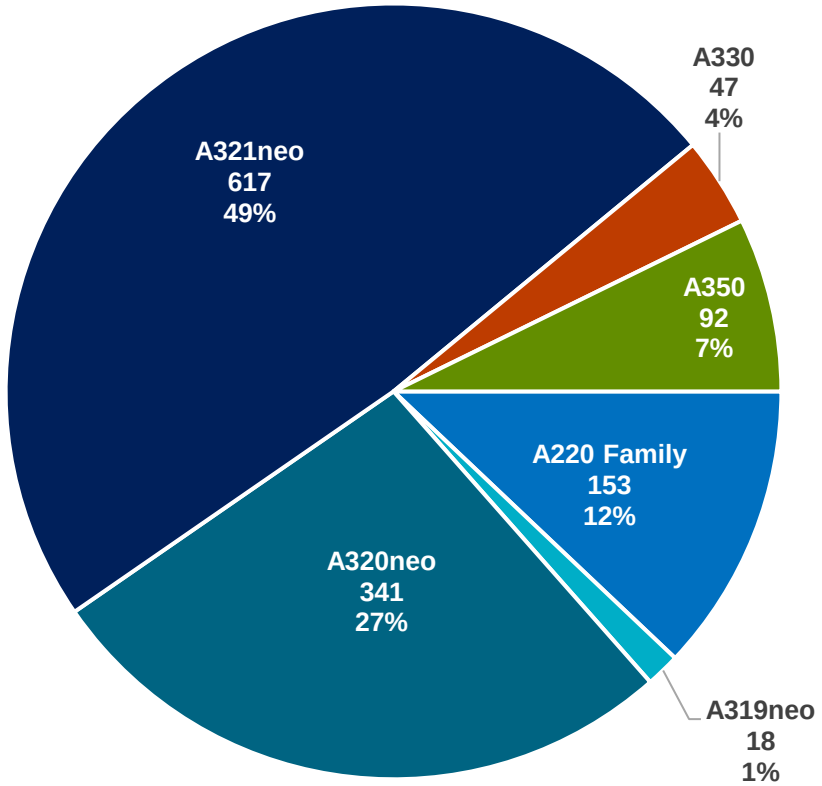
source: Airbus Orders & Deliveries 2025 and 2026 (Aug)
Cirium: Commercial Narrowbody, Widebody

Historical deliveries



2025-2026 Deliveries per Model

139 widebodies; 1,129 single aisle



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Airbus Family airline order highlights

2026 total new aircraft orders – **1157**: **995** Single Aisle and **162** Widebody

Source: Airbus, August 2026

A220 A320neo

AirAsia x150



Air Astana x25



Bermuda Air x10



Flynas x20



China Eastern x101



Shohin Airlines x4



China Southern x102



Air Cairo x15



A330neo

Flynas x5



SAS 18x A330neo



Delta 16x A330neo 15x A350



China Eastern x25



A350

Air Canada 8x A350-1000



Riyadh Air 6x A350-1000



Philippine 9x A350-1000



Lufthansa 10x A350-900



A350F



Atlas Air 20x A350F

Air China 4x A350F



Cathay 2x A350F



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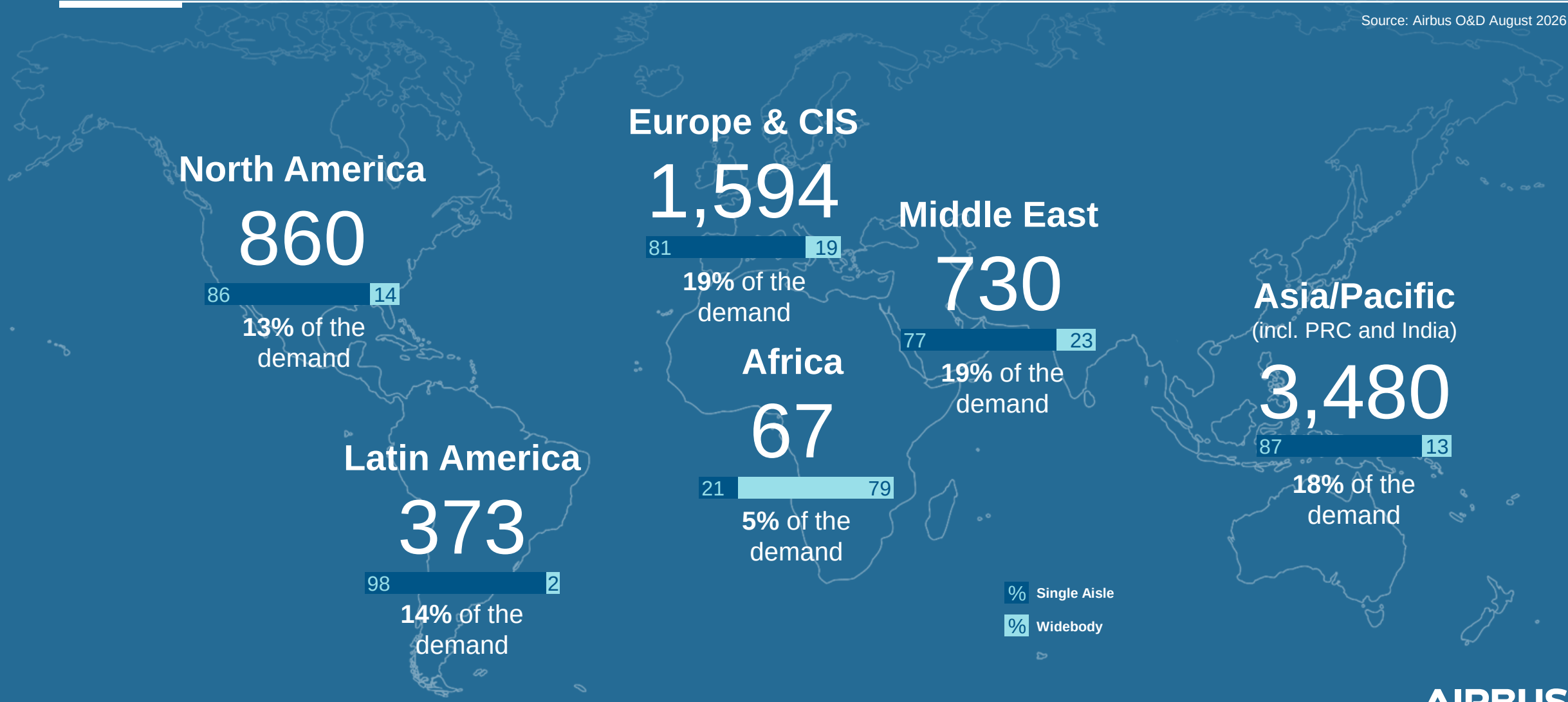
Current total airline Airbus backlog

Over 7,100 aircraft in the airline backlog

Source: Airbus O&D August 2026



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Lessors are rebuilding A320 FAMILY backlog

Secure availability in 2030+ timeframe | 307 aircraft ordered in 2025

2023

100



60



2024

80



36*



2025

50



70



30



75



30



52*



2026

100



100



* PA transfer

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Today: Airbus new generation product line

Versatile new-generation aircraft family to fulfil demand



25% less fuel burn

100% SAF capable by 2030

3 key A220 milestones in 2026

Now 10 years in service

*A319neo, E190/195E2 & 737 MAX 7. As at 31st August, 2026

500th Delivery

31st March 2026



More *deliveries* than total *orders* for competition

1,000+ Orders & 160-seats

6th May 2026

AirAsia order for 150 A220-300

- **Largest single order for A220*….orders now total 1,110***
- **Launch customer for the new 160-seat cabin configuration**
  - **Up to +10 seats**
  - **Extra over-wing exit on each side**



Major endorsement from a major Asian LCC

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Orders
20,418
Deliveries
12,841
Backlog
7,577
A320 FAMILY
The World's favorite airliner
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A321 XLR is already showing its versatility



50 A321 XLRs flying with 11 airlines

Aer Lingus	6 (CFM)
Air Canada	3 (PW)
American	8 (CFM)
Iberia	8 (CFM)
IndiGo	3 (CFM)
jetBlue	1 (PW)
Qanot Sharq	1 (CFM)
QANTAS	7 (PW)
Saudia	2 (CFM)
United	1 (PW)
Wizz Air	10 (PW)

Airline fleet as at 31st August, 2026

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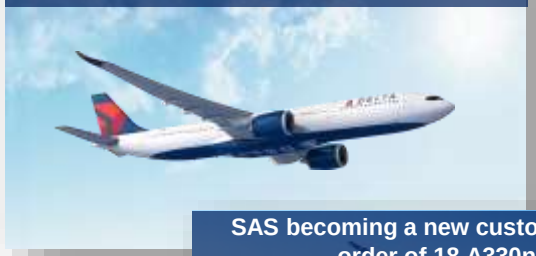
A330 continues on the path to growth

Major milestones achieved for the most popular family of widebody aircraft

2,000 orders

Delta Air Lines orders 16 additional A330-900



SAS becoming a new customer with an order of 18 A330neo



China Eastern x25



520+ are for A330neo

New operators



MRTT+ launched



New placements





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First flight of A350-1000ULR for QANTAS

24 aircraft on order | EIS in 2027

Source: Airbus and Qantas















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A350F The only new-generation freighter

Endorsements from major cargo operators



Payload
Up to **111t / 244,000lb**

Range
Up to **4,700nm / 8,700km**

115 Orders
15 Customers

中国国际货运航空 AIR CHINA CARGO
AIRFRANCE KLM Martinair CARGO
ATLAS AIR
CATHAY CARGO
CMA CGM
ETIHAD CARGO
KOREAN AIR CARGO
silkway west airlines
SINGAPORE AIRLINES CARGO
STARLUX Cargo
TURKISH CARGO
AVILEASE AIRCRAFT LEASING COMPANY
MNG AIRLINES

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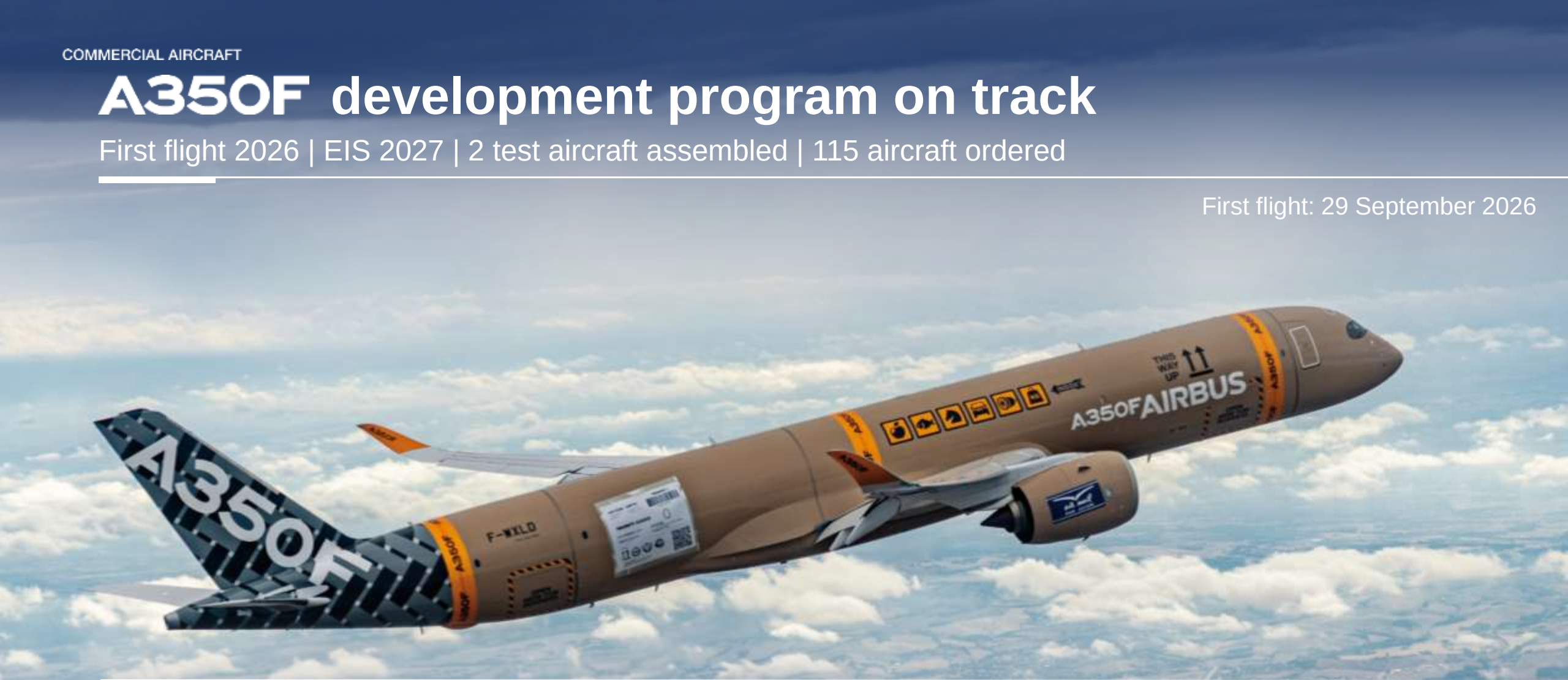
A350F development program on track

First flight 2026 | EIS 2027 | 2 test aircraft assembled | 115 aircraft ordered

First flight: 29 September 2026



Up to **111 tons** payload

Up to **4,700 nm** range

Clean-sheet capability: large engines, livestock, perishables, oversize cargo

New-generation economics

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Takeaways

Airline Economics



1 Aviation is a long-term, resilient industry

2 Strong long term demand, focus on ramp-up

3 Product developments continue to deliver

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Discussion panel



View of the experts

40 minutes

Panel discussion



Moderator:

Alexander Selyanko
Airbus - Marketing Director

Panelists:

Simone De Wit-Huijs
VP Fleet Planning

Ramon Stortini
Managing Director for Middle East Africa and East Asia

Grainne van den Berg
Head of Sales, MEA

View of the experts

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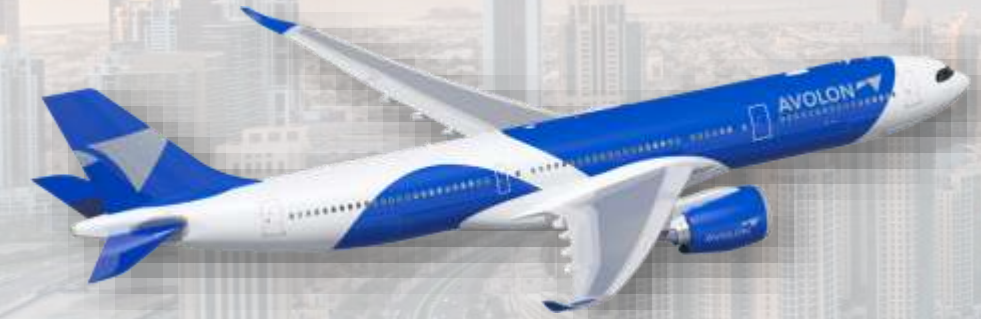
Panel discussion





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