



[>> KNOW MORE.](#)

# *JETNET iQ Snap! Report Q4 2025 Summary Report*

[> BUSINESS AVIATION MARKET INTELLIGENCE](#) [> REPORTS](#) [> SUMMITS](#) [> CONSULTING](#)

Prepared for:  
JETNET iQ Global Business Aviation Survey Respondents  
\$U.S. 250

*JETNET iQ Snap!: 4th Quarter 2025 - Private & Confidential*

# Thank You, Merci, Obrigado, Muchas Gracias, תודה, Danke, ありがとう, Grazie, شكرا, спасибо, 謝謝

Thank you for participating in our quarterly JETNET iQ Global Business Aviation Surveys. Your opinions and inputs are vital to the many people in the industry tasked with designing and developing aircraft, providing aviation services on the ground and in the air, financing / selling / and buying aircraft, and creating the operational framework for safe and efficient flight.

JETNET has been a trusted source of aviation market intelligence since 1988. From humble beginnings in Utica, NY, we have built one of the finest research teams and business aviation databases in the industry. Our people are professional and dedicated, and our data products and services are unique and innovative. We are committed to continuous improvement as

we provide our clients with unprecedented global coverage, data connectability, and market insights wherever they are.

We continue to focus on new products and services to keep our customers better informed. “Know More” – JETNET’s familiar tagline – is what we hope you will agree is amongst the primary benefits that we bring to the aviation community. Thank you again for participating in our quarterly survey - we hope this JETNET iQ *Snap!* Report is useful to you.

## Navigating by JETNET iQ

JETNET iQ *Snap!* Reports are one of the ways we would like to say “thank you” for the time and opinions you provide us when participating in our quarterly JETNET iQ Global Business Aviation Surveys. With seemingly endless demands on your time, we appreciate your help and want to provide you useful information in return. In the attached pages you will find some of the latest market intelligence that we have collected and analyzed. Our goal is to be a resource to identify, analyze, and highlight issues that matter to the business aviation community. As an industry leader and aviation professional, you make a difference by participating in these surveys, providing us with objective and subjective perspectives into the state of the worldwide business aviation industry.

JETNET iQ *Snap!* Reports reflect the collaborative insights of you, our respondents, and our JETNET iQ research

team. Collectively, we have extensive experience in business aviation, from executive offices and boardrooms, to the cubicles, factory floors, design centers, situation rooms, cockpits, service hangars and flight lines of the industry. Much like a magnifying glass concentrates light and energy, JETNET iQ draws from a diverse set of intelligence sources to bring the power of this experience into sharp focus.

Since early 2011, our JETNET iQ research team has been reaching out to you – fixed-wing turbine aircraft owners and operators - with our quarterly JETNET iQ Global Business Aviation Surveys. As always, we hope that this latest issue of our JETNET iQ *Snap!* Report is insightful to you.

*Rolland Vincent*  
*JETNET iQ Creator / Director*  
*rollie@jetnet.com*

# JETNET iQ


- *Intelligence....quarterly*
- Focus: Business aviation research & forecasting
- Main features
  - Surveys – of aircraft owners and operators
  - Reports – of current and forecast market conditions
  - Summits – of industry thought leaders
  - Advisory – customized research projects

# JETNET iQ Surveys

- Turbine business aircraft owners and operators
- Quarterly
- Global
- On-line
- Multilingual
- Password-protected
- Password-linked







JETNET iQ VOICE OF GLOBAL BUSINESS & GENERAL AVIATION - Q3 2023 Exit  
 English

WELCOME



Global Business & General Aviation Survey


## Welcome!!!

**\* Survey responses:**

- 1) Will be strictly confidential
- 2) Will NOT be used in any way to directly market to you or your organization
- 3) Will take approximately 20+ minutes to complete

PASSWORD (provided by JETNET):



JETNET iQ Voice of  
Global Business & General Aviation

For questions about this survey, please contact:

**ROLLAND VINCENT**  
 JETNET iQ Creator / Director  
 Phone: 1-972-439-2069 (U.S. Central Time)  
 Email: rollie@jetnet.com

# A Note About Business Aircraft Size Categories

For the purposes of JETNET iQ Reports, business aircraft are classified into 11 different size categories, reflecting propulsion, price, performance, and weight class differences. “Personal Jets” refer to very light single-engine jets. The 11 categories are:

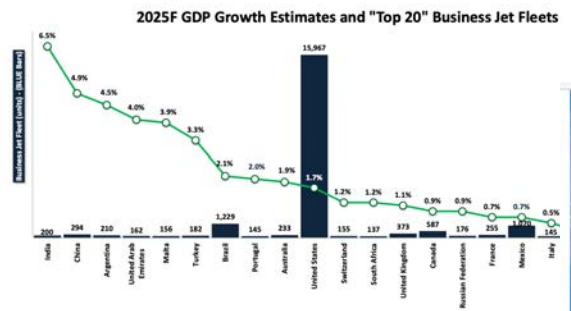
- Turboprops
- Personal Jets
- Very Light Jet
- Light Jet
- Super-Light Jet
- Mid-Size Jet
- Super Mid-Size Jet
- Large Jet
- Large Long-Range Jet
- Large Ultra Long-Range Jet
- Airline Business Jet

For presentation purposes, we sometimes further group business jets as “Small Jets”, “Medium Jets”, or “Large Jets” (as bracketed opposite). The following table summarizes the various aircraft manufacturers, size categories, and examples of aircraft models that are currently in production or in development.

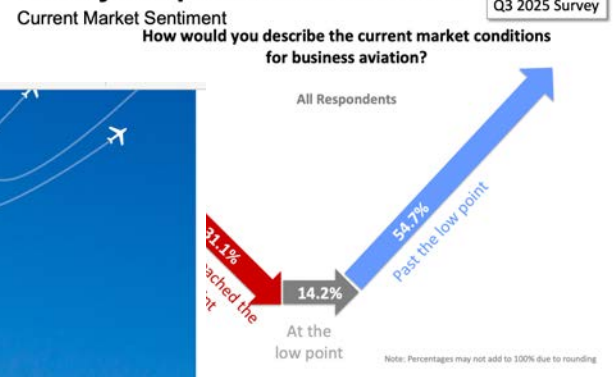
BUSINESS JETS / TURBOPROPS											
	Turboprop	Personal Jet	Very Light Jet	Light Jet	Super Light Jet	Mid-Size Jet	Super Mid-Size Jet	Large Jet	Large Long-Range Jet	Large Ultra Long-Range Jet	Airline Business Jet
Airbus											All Models
Beechcraft	King Air		Premier 1A	Beechjet							All Models
Boeing											All Models
Bombardier				Learjet 25 / 35 / 40 Learjet 70	Learjet 45 Learjet 75	Learjet 55 Learjet 60	Challenger 300 / 350	Challenger 650 Challenger 850	Global 5000 Global 5500	Global 6000 / 6500 Global 7500	
Cessna	Cessna Caravan Cessna Denali Citation Conquest		Citation M2 Citation I / II / SII / Bravo	Citation V / Ultra / Encore Citation CJ4 / CJ4	Citation XLS	Citation III / VII / Sovereign Citation Latitude	Citation X Citation Longitude				
Cirrus		CIRRUS VISION SF50									
Daher	TBM 700 / 850 TBM 900 / 910 / 930 / 940 Kodiak 100										
Dassault				Falcon 10 / 100			Falcon 20 / 200 / 50	Falcon 2000	Falcon 900 Falcon 6X / 7X	Falcon 8X Falcon 10X	
Eclipse			EA-550								
Embraer			Phenom 100	Phenom 300		Legacy 450 / Praetor 500	Legacy 500 / Praetor 600	Legacy 600 / 650			Lineage 1000
Gulfstream						Gulfstream G100 / G150 Astra / Westwind	Gulfstream G200 Gulfstream G280	Gulfstream GII / GIII / G350	Gulfstream GIV / GIVSP / G450	Gulfstream G550 Gulfstream G700 Gulfstream G600/G650	
Hawker				Hawker 400 XP	Hawker 700 / 750	Hawker 800 / 900 / 1000	Hawker 4000				
Honda			HondaJet								
Mitsubishi	MU-2										
Piaggio	P180 Avanti II										
Pilatus	PC-12NG			PC-24							
Piper	Meridian / M500 / M600										
Sabreliner						Sabreliner 65					
Quest	Kodiak 100										

# JETNET iQ Reports

## The Economy and Business Jet Fleets



## Survey Respondents' Sentiment



**JETNET iQ**  
KNOW MORE.

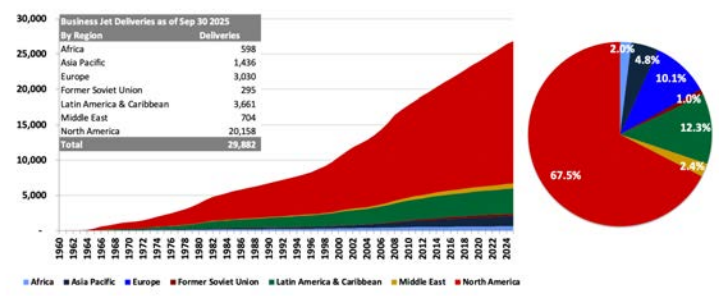
### JETNET iQ Snap! Report Q4 2025 Summary Report

► BUSINESS AVIATION MARKET INTELLIGENCE ► REPORTS ► SUMMITS ► CONSULTING

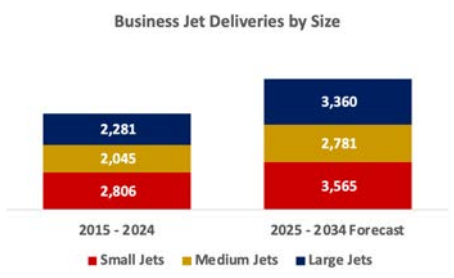
Prepared for:  
JETNET iQ Global Business Aviation Survey Respondents  
\$U.S. 250

*JETNET iQ Snap!: 4th Quarter 2025 - Private & Confidential*

## Business Jet Deliveries by Region Ever Delivered - As of September 30, 2025

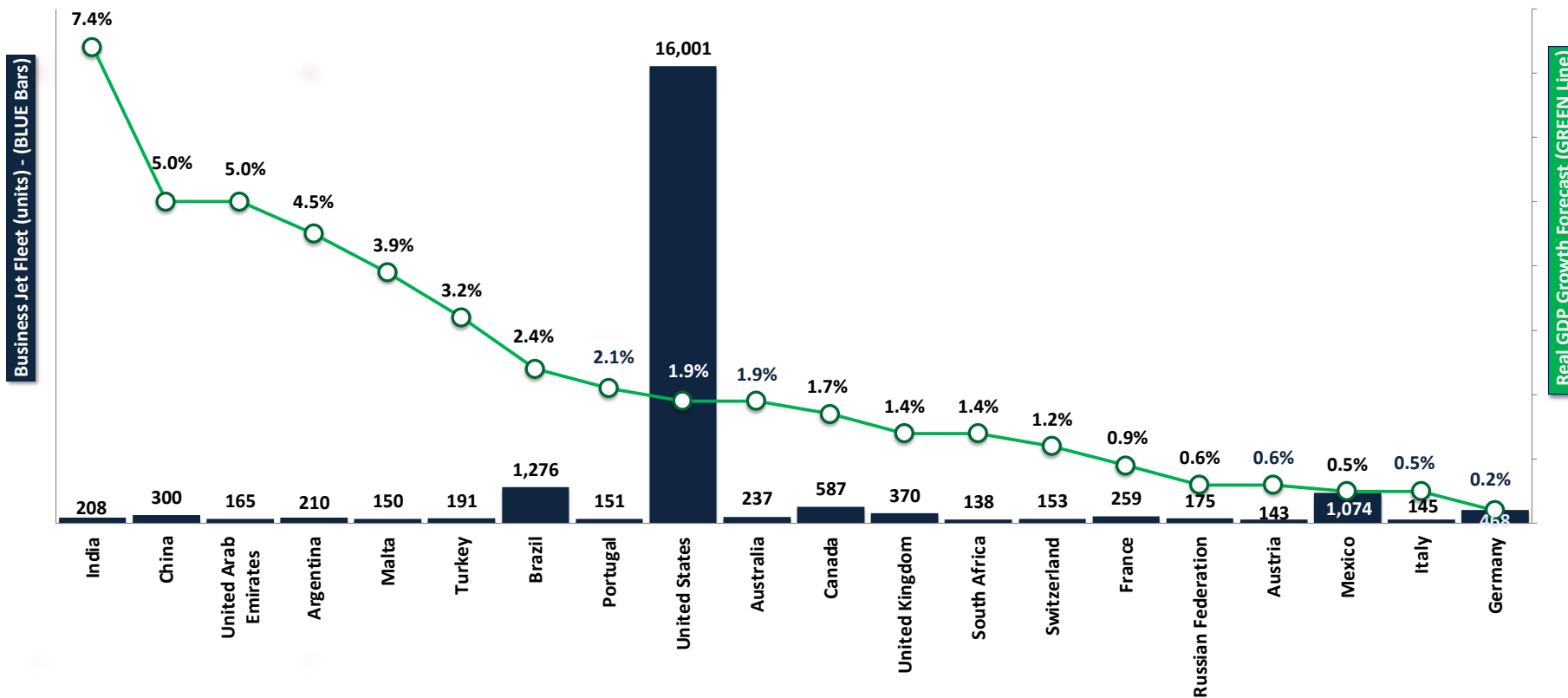


## Delivery History & Forecast



# The Economy and Business Jet Fleets

2025F GDP Growth Estimates and "Top 20" Business Jet Fleets

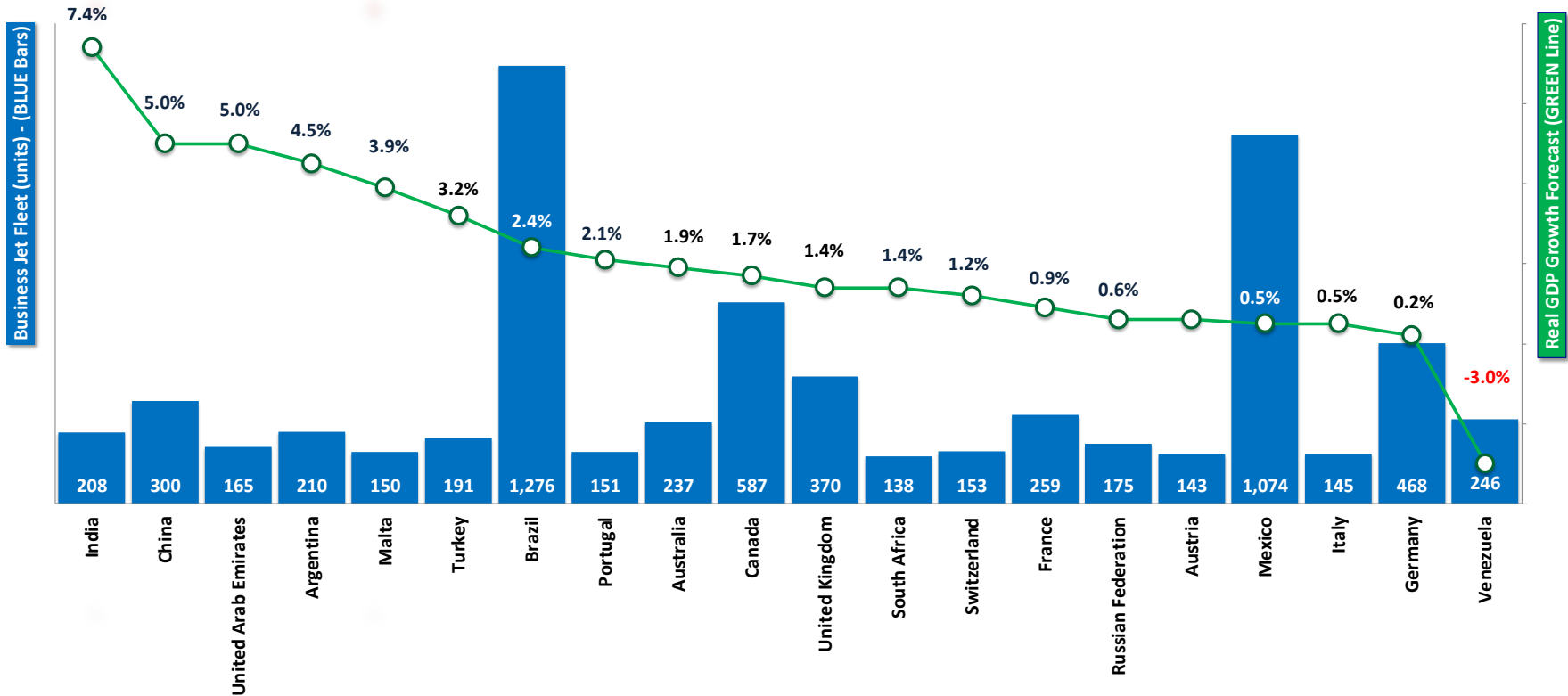


Sources: GDP forecast: The Economist – January 8, 2026; Fleet: JETNET as of December 31, 2025

Only 6 of the top 20 countries with the largest business jet fleets are expected to have had a GDP growth of 3% or higher in 2025

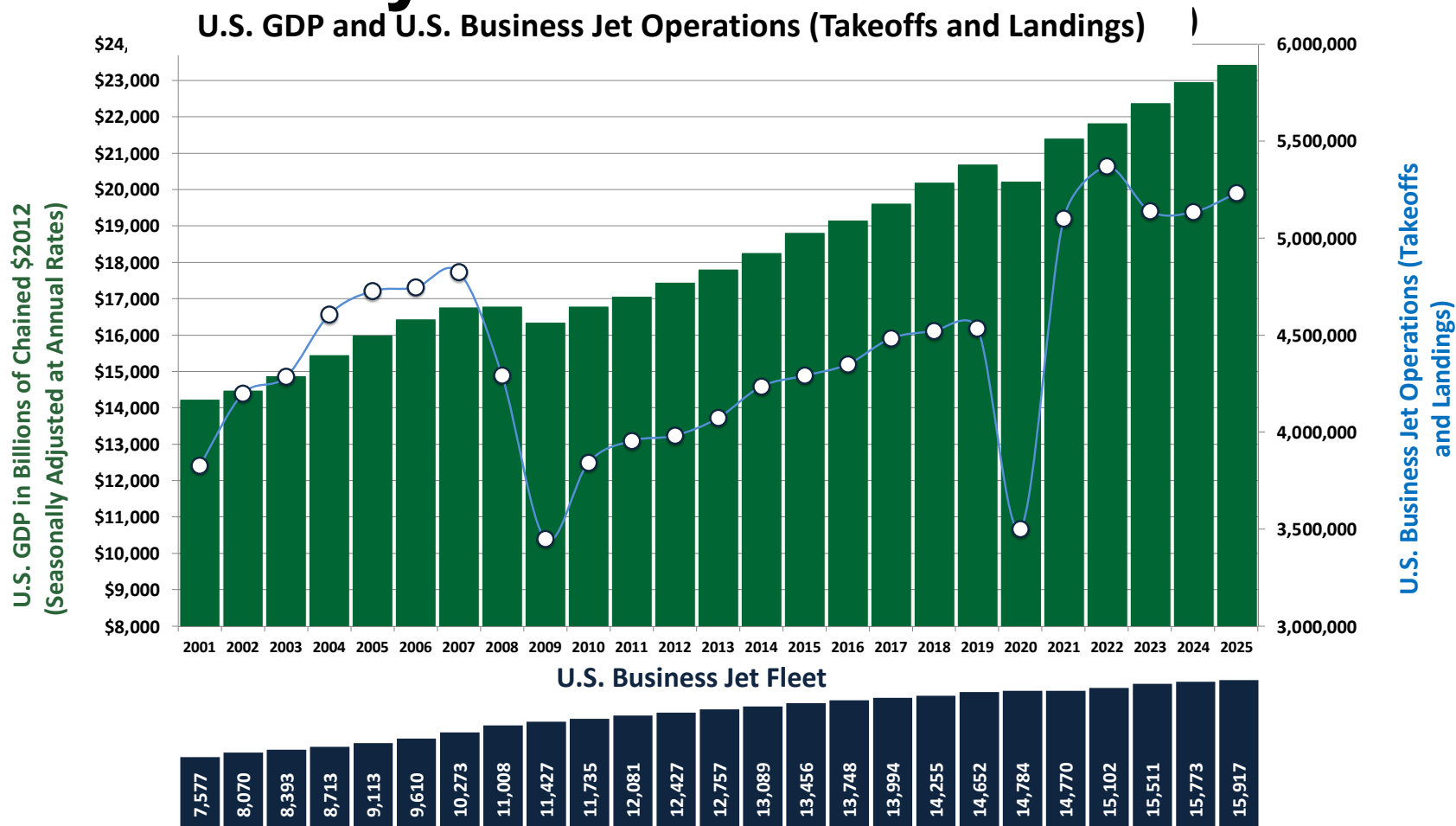
# The Economy and Business Jet Fleets

2025F GDP Growth Estimates and "Top 20" Business Jet Fleets  
(excluding the United States)



Sources: GDP forecast: The Economist – January 8, 2026; Fleet: JETNET as of December 31, 2025

# The Economy and Aircraft Utilization

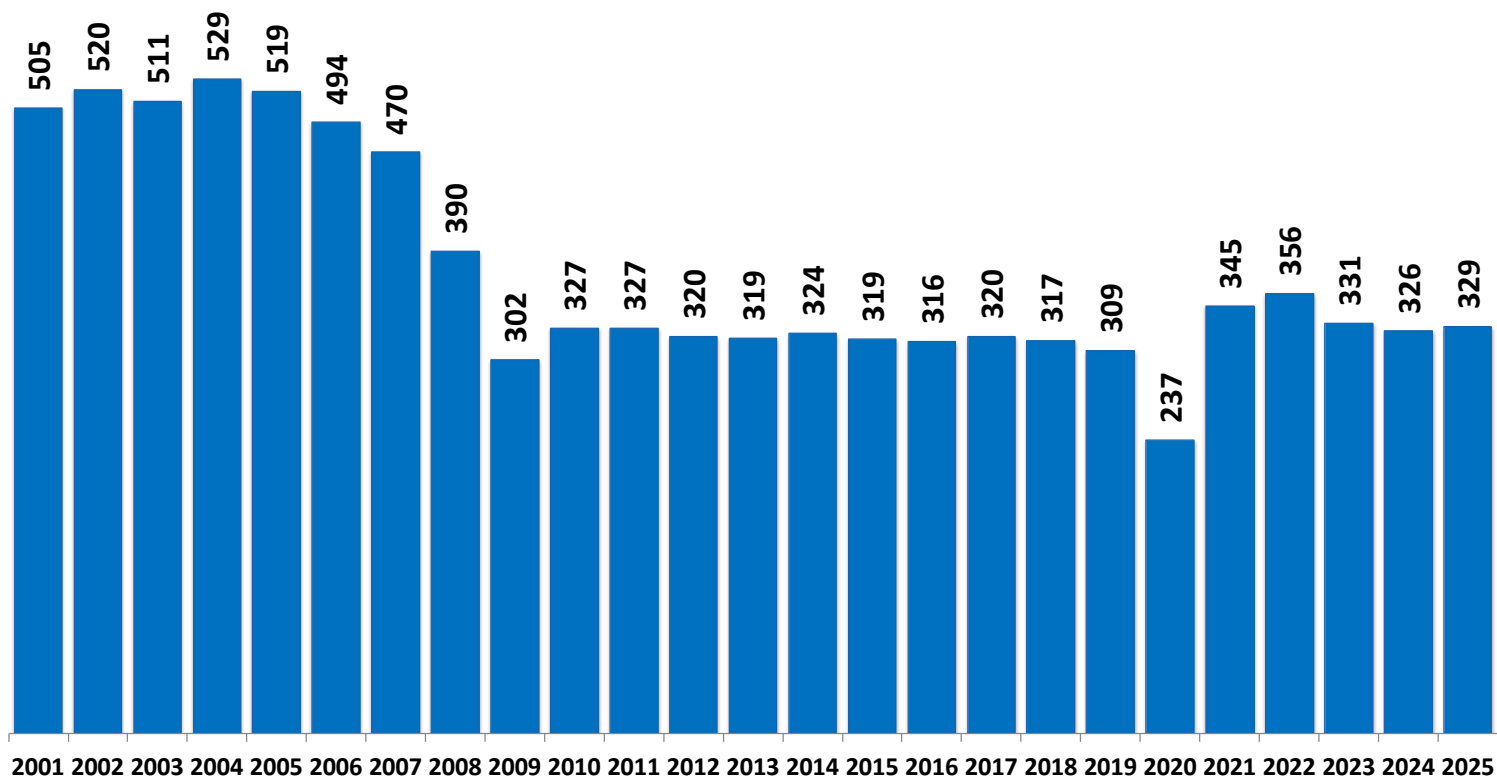


Sources: U.S. Congressional Budget Office, FAA, JETNET; operations data for latest year are YTD on a Trailing Twelve Months (TTM) basis for the most recent period available

**U.S. business jet operations were at their highest-ever levels in 2022 (blue line), and have since softened and leveled off in 2023 - 2025**

# Aircraft Utilization

Average Number of Business Jet Cycles per Aircraft Per Year - USA



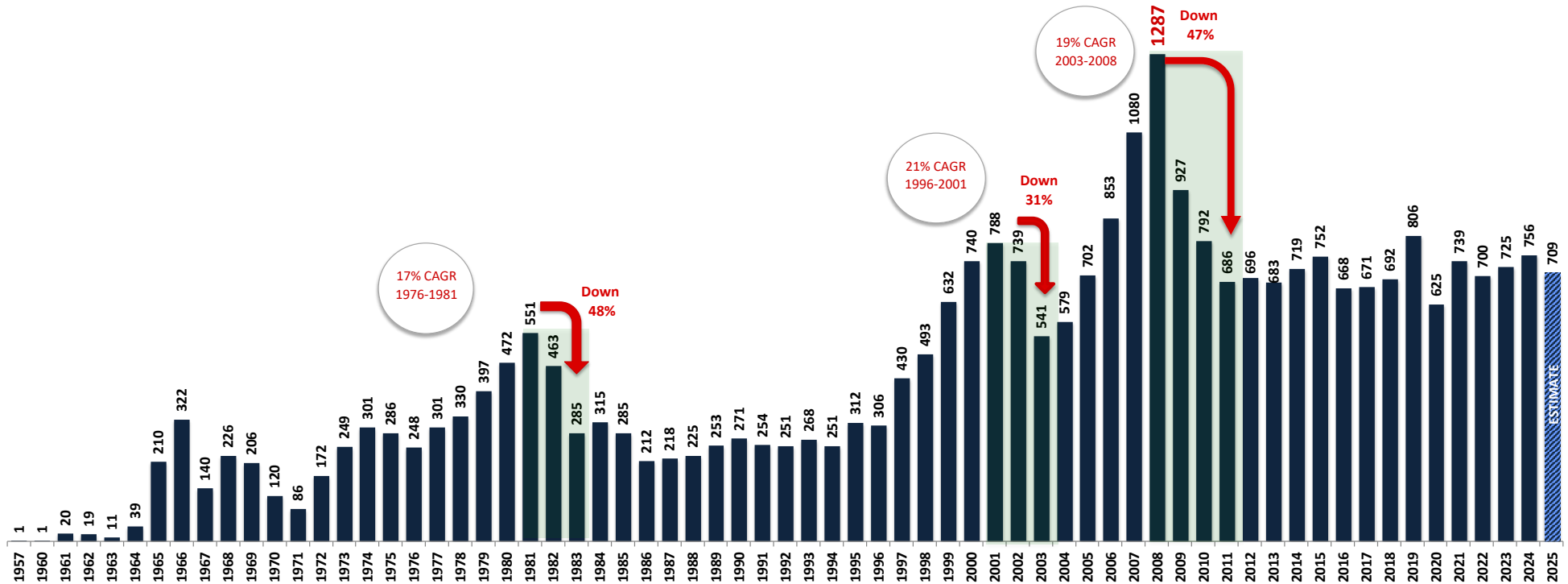
Sources: U.S. FAA; operations data for latest year are YTD on a Trailing Twelve Months (TTM) basis for the most recent period available;  
 1 cycle = 1 takeoff and landing; U.S. fleet from JETNET

Cycles per U.S.-based business jet have stabilized but at a lower rate than in the period prior to the Global Financial Crisis; cycles have dipped somewhat since 2022

# Business Jet Deliveries (Units)

Worldwide - As of December 31, 2025

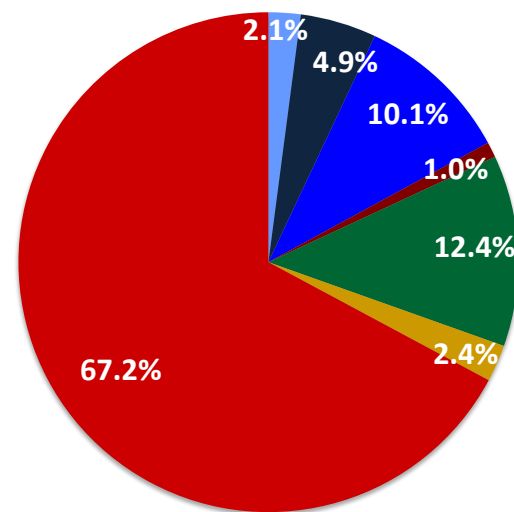
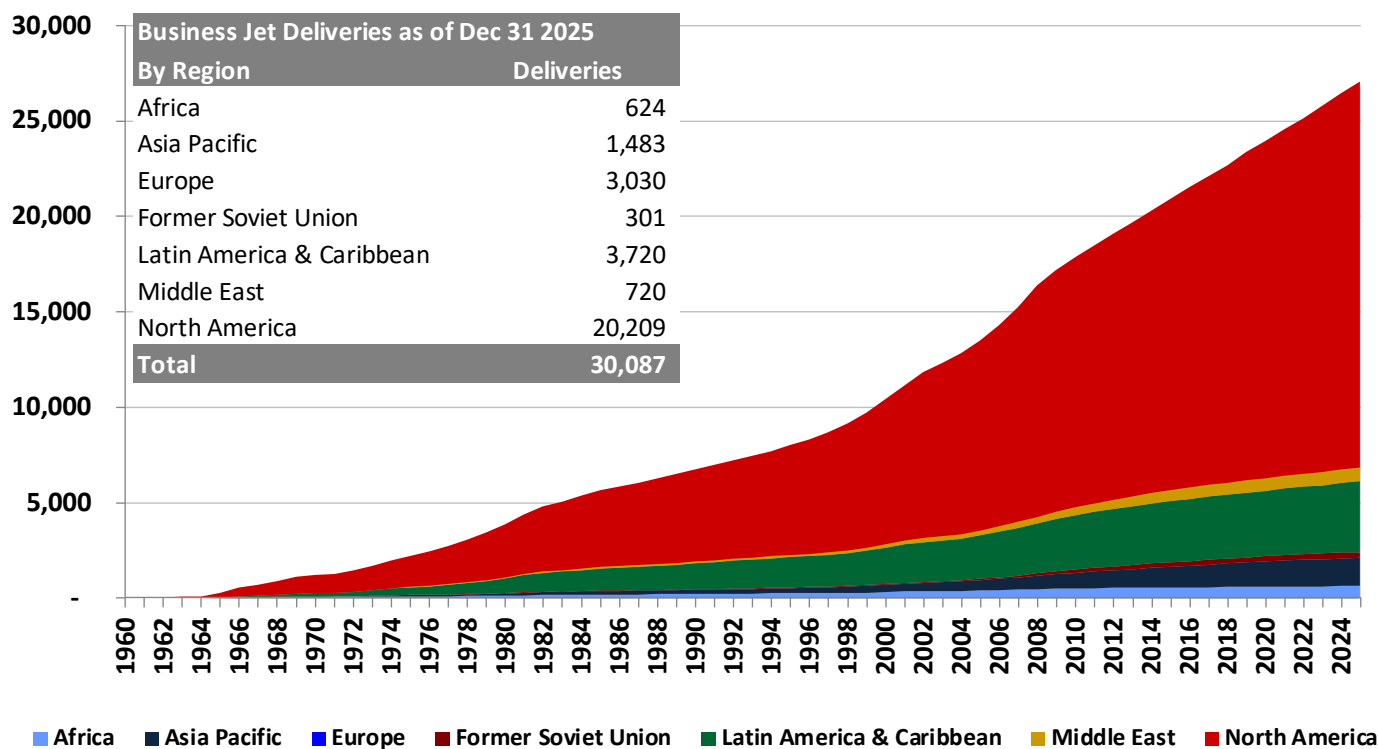
Business Jet Deliveries



Source: JETNET; totals include single-engine Personal Jets (i.e., Cirrus SF50 Vision Jet) and single-aisle airliners (e.g., Airbus ACJ, Boeing BBJ, etc.); results for the current year are preliminary and year-to-date; data for the most recent period are subject to change as additional delivery and registration data are recorded by JETNET

**JETNET has recorded 709 new business jet deliveries in 2025 although this number is expected to increase as year-end transactions are registered**

## Business Jet Deliveries by Region Ever Delivered - As of December 31, 2025



## Business Jet Deliveries by Manufacturer Ever Delivered - As of December 31, 2025

NORTH AMERICA		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		237
Bombardier		4,251
Cessna Citation		6,228
Dassault Falcon		1,890
Embraer		1,192
Gulfstream		2,859
Hawker		1,388
Other		2,164
<b>Total</b>		<b>20,209</b>

EUROPE		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		20
Bombardier		714
Cessna Citation		895
Dassault Falcon		437
Embraer		270
Gulfstream		234
Hawker		187
Other		273
<b>Total</b>		<b>3,030</b>

FORMER SOVIET UNION		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		-
Bombardier		94
Cessna Citation		17
Dassault Falcon		44
Embraer		34
Gulfstream		40
Hawker		41
Other		31
<b>Total</b>		<b>301</b>

MIDDLE EAST		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		6
Bombardier		195
Cessna Citation		59
Dassault Falcon		68
Embraer		47
Gulfstream		186
Hawker		68
Other		91
<b>Total</b>		<b>720</b>

LATIN AMERICA & CARIBBEAN		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		97
Bombardier		861
Cessna Citation		1,086
Dassault Falcon		159
Embraer		408
Gulfstream		343
Hawker		430
Other		336
<b>Total</b>		<b>3,720</b>

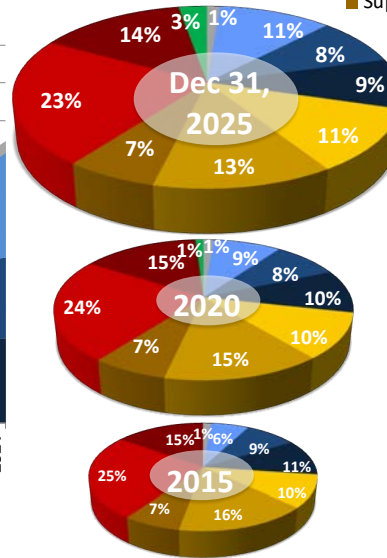
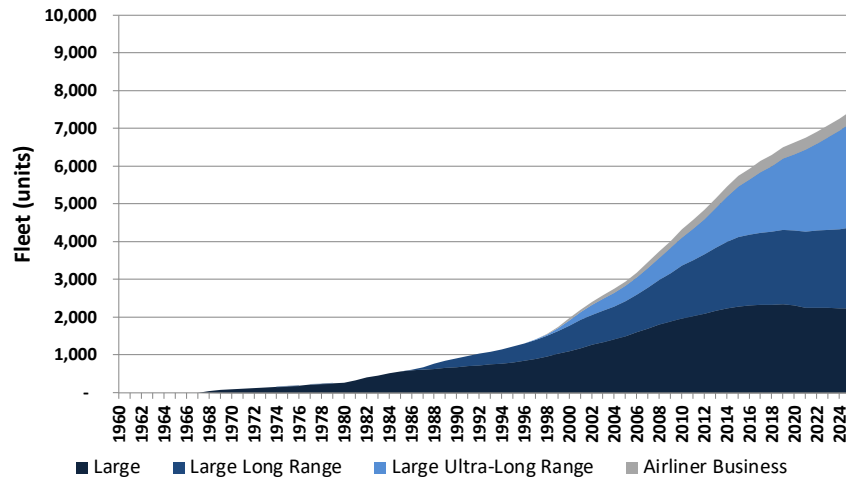
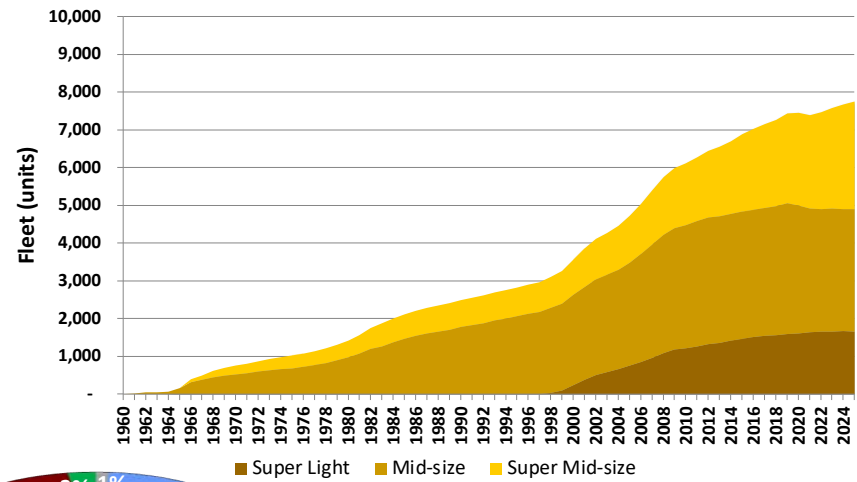
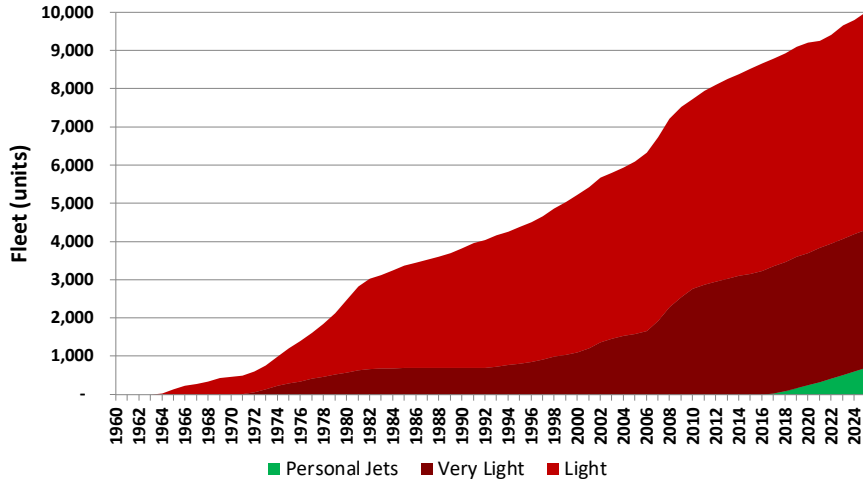
AFRICA		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		2
Bombardier		145
Cessna Citation		105
Dassault Falcon		74
Embraer		29
Gulfstream		93
Hawker		125
Other		51
<b>Total</b>		<b>624</b>

ASIA PACIFIC		Deliveries as of Dec 31 2025
<b>OEM</b>		
Beechcraft		10
Bombardier		366
Cessna Citation		296
Dassault Falcon		104
Embraer		94
Gulfstream		314
Hawker		153
Other		146
<b>Total</b>		<b>1,483</b>

JETNET indicates that there have been 29,882 jets ever-delivered through Q4 2025

## Business Jet Fleet by Size Category

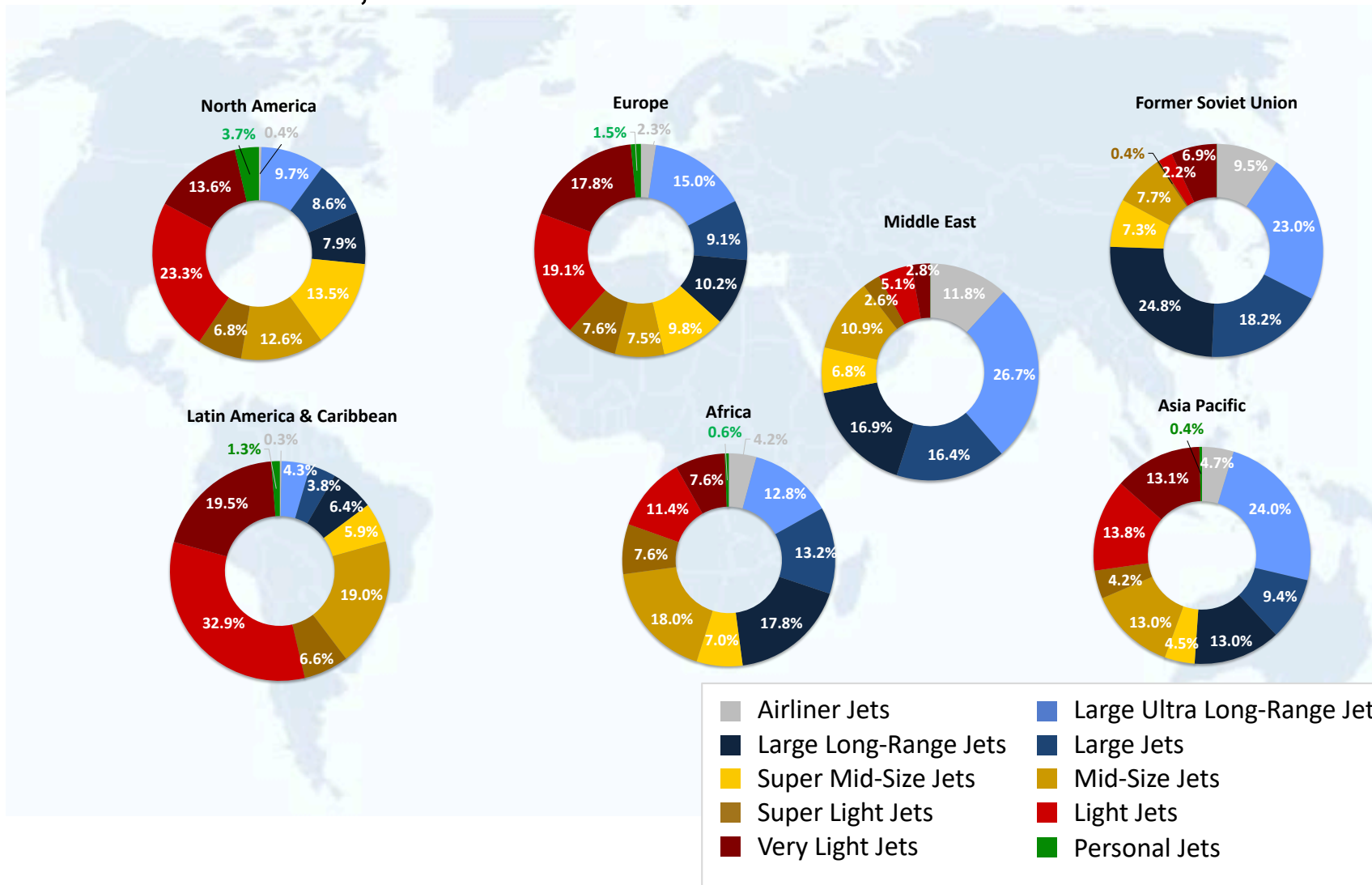
Fleet by Year From 1960 through December 31, 2025



Business Jet Fleet as of December 31 2025	
By size category	
Airliner Business	321
Large Ultra-Long Range	2,774
Large Long Range	2,138
Large Jets	2,237
Super Mid-size Jets	2,848
Mid-size Jets	3,252
Super Light Jets	1,651
Light Jets	5,700
Very Light Jets	3,608
Personal Jets	695
<b>Total</b>	<b>25,224</b>

# Business Jet Fleet by Size Category

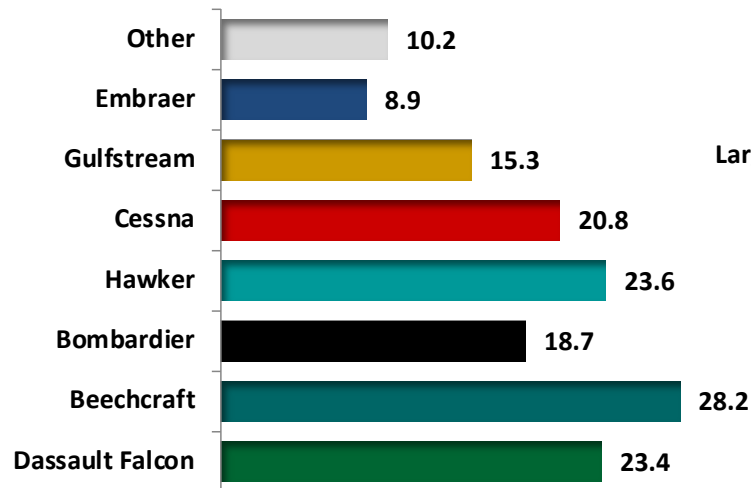
As of December 31, 2025



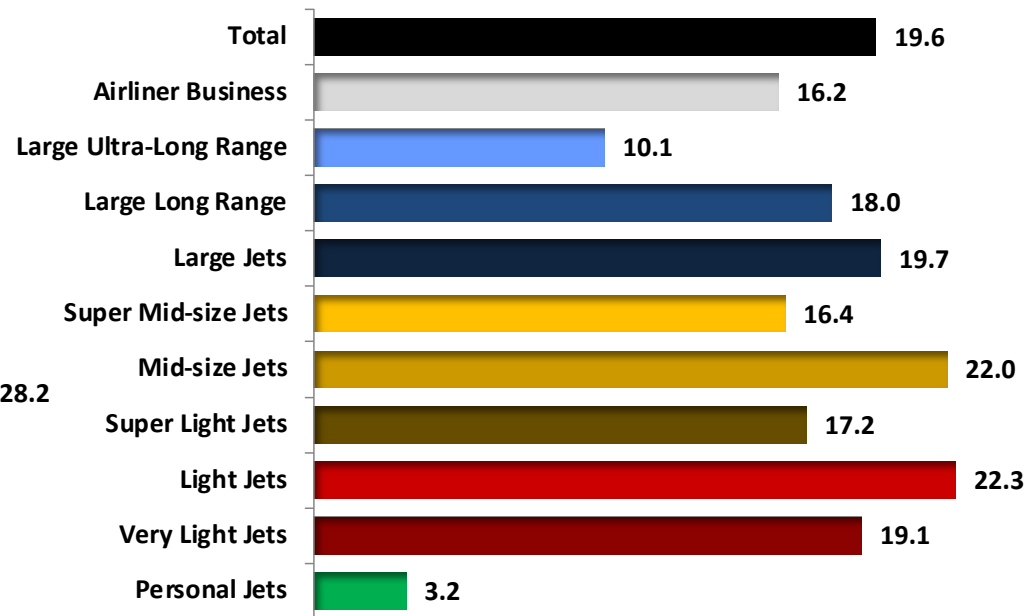
# Business Jet Fleet Age (Years)

As of December 31, 2025

Business aircraft average fleet age as of December 31, 2025

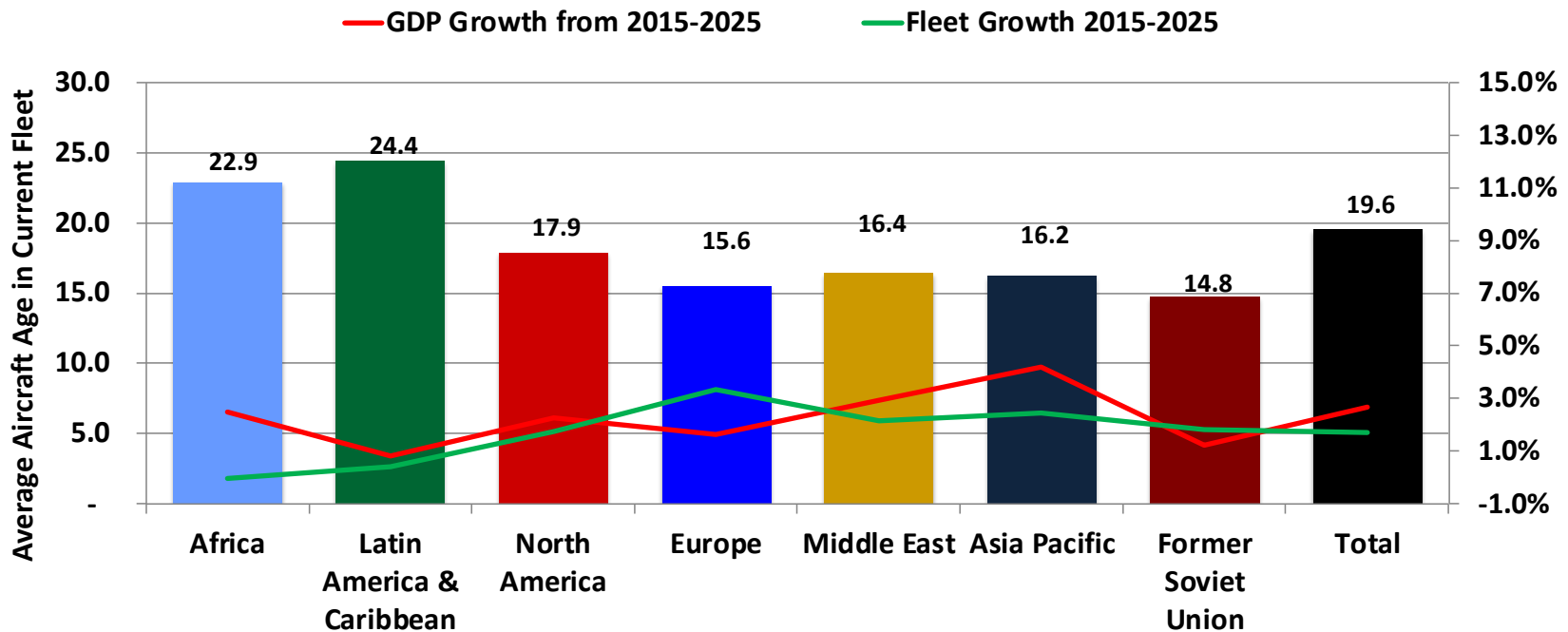


Business aircraft average fleet age as of December 31, 2025



# Business Jet Fleet Age, GDP & Fleet Growth

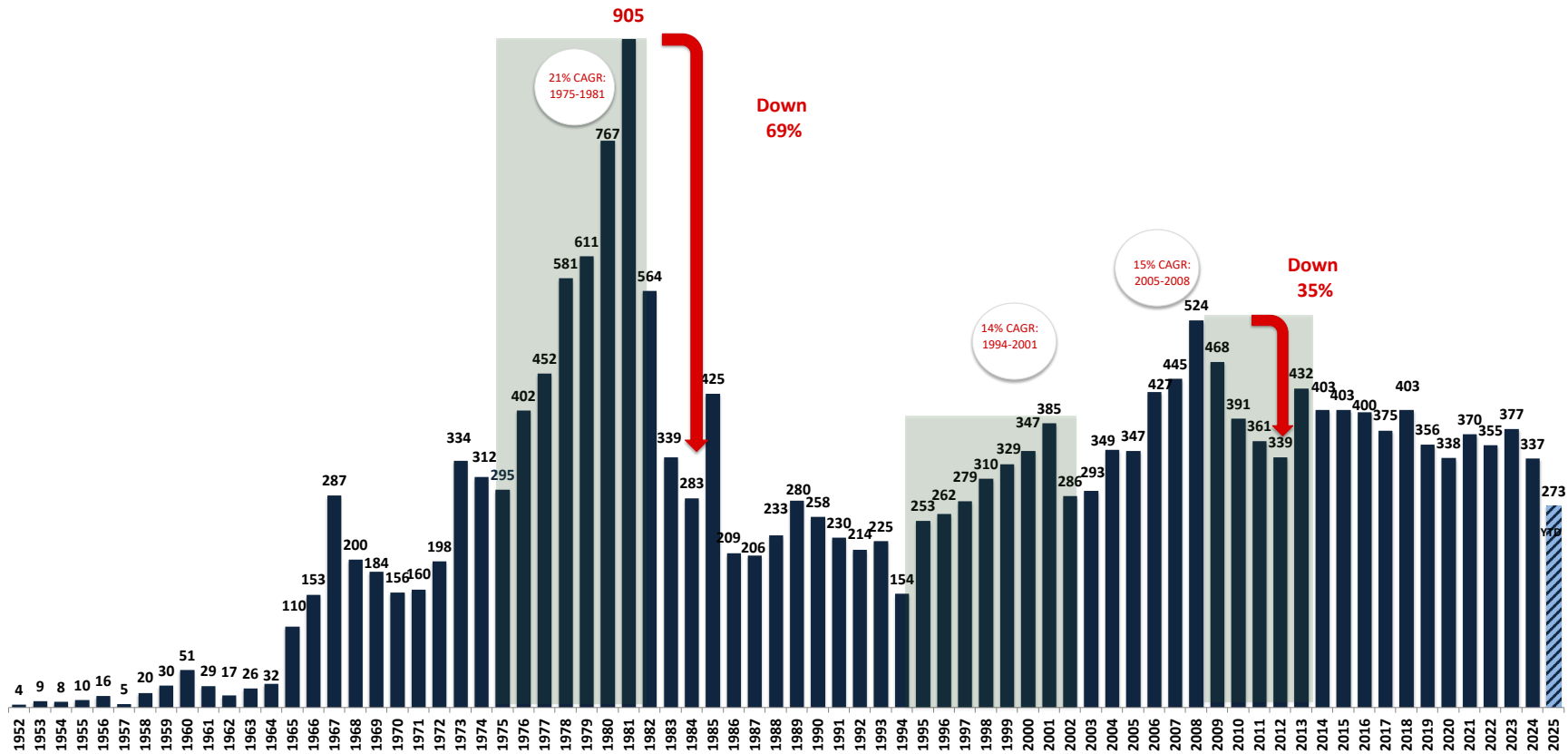
Regional profile of current average business Jet fleet age and regional GDP and fleet growth (2015-Q4 2025)



Note: Fleet age in years since initial aircraft delivery; 10-year CAGR GDP and fleet growth rates

# Business Turboprop Deliveries (Units)

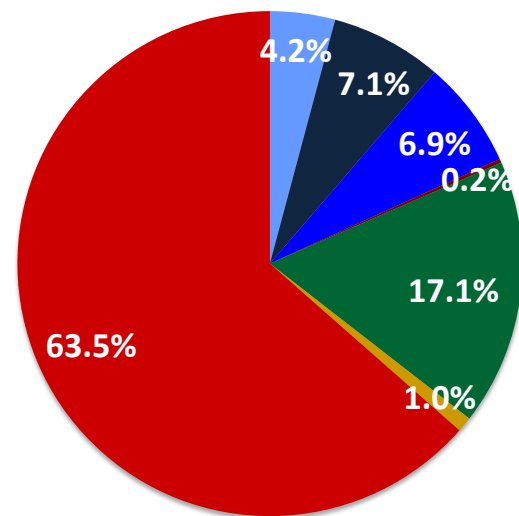
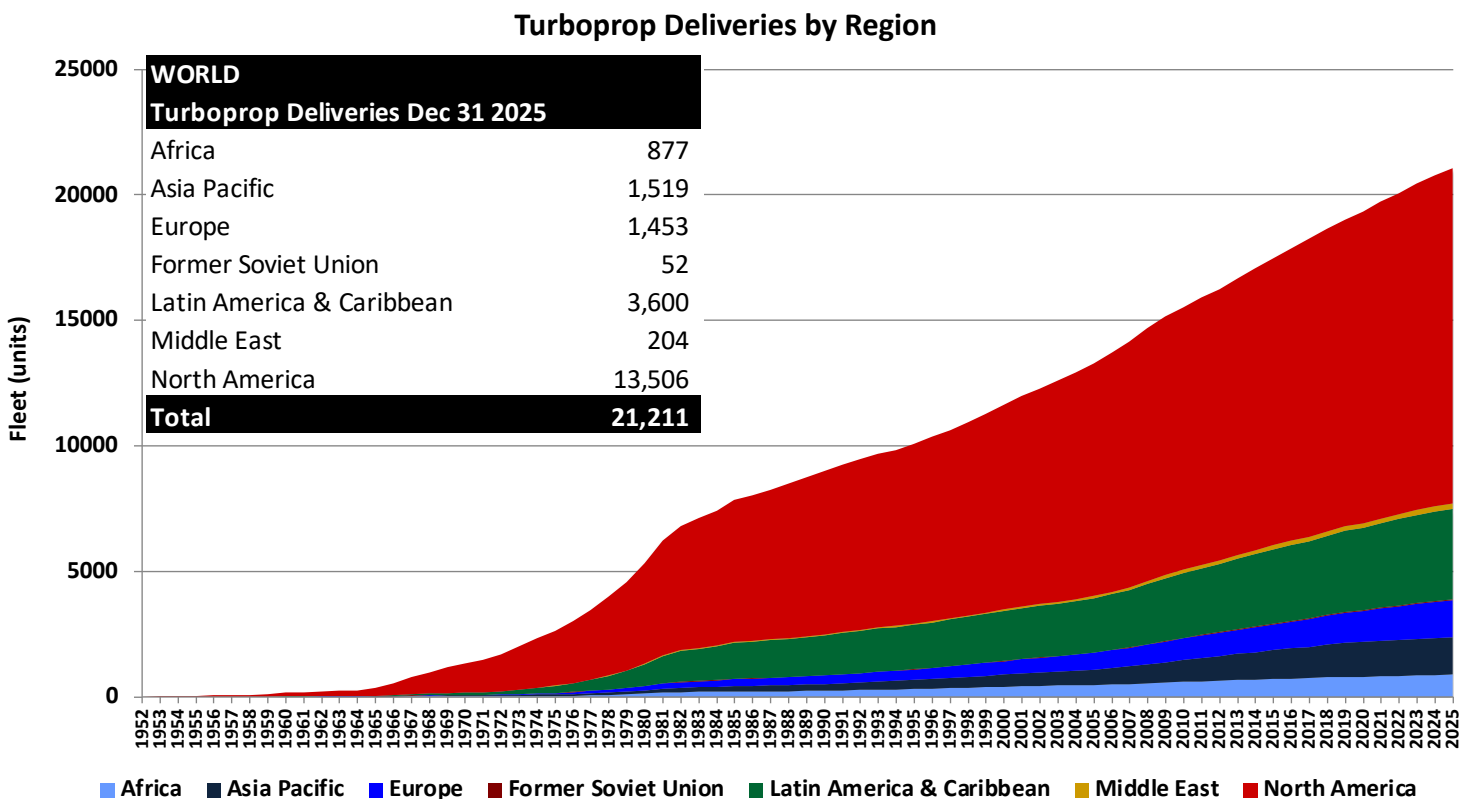
Worldwide - As of December 31, 2025



Source: JETNET

JETNET recorded 273 new turboprop deliveries in 2025 although this number is expected to increase as year-end transactions are registered

## Turboprop Deliveries by Region Ever Delivered - As of December 31, 2025



## Turboprop Deliveries by Manufacturer Ever Delivered - As of December 31, 2025

NORTH AMERICA	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	1,470
Daher	1,241
Beechcraft	4,863
Pilatus	1,550
Piper	857
Turbo Commander	540
Other	2,985
<b>Total</b>	<b>13,506</b>

EUROPE	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	146
Daher	187
Beechcraft	402
Pilatus	281
Piper	191
Turbo Commander	19
Other	227
<b>Total</b>	<b>1,453</b>

FORMER SOVIET UNION	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	9
Daher	2
Beechcraft	15
Pilatus	12
Piper	4
Turbo Commander	1
Other	9
<b>Total</b>	<b>52</b>

MIDDLE EAST	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	57
Daher	3
Beechcraft	108
Pilatus	4
Piper	3
Turbo Commander	16
Other	13
<b>Total</b>	<b>204</b>

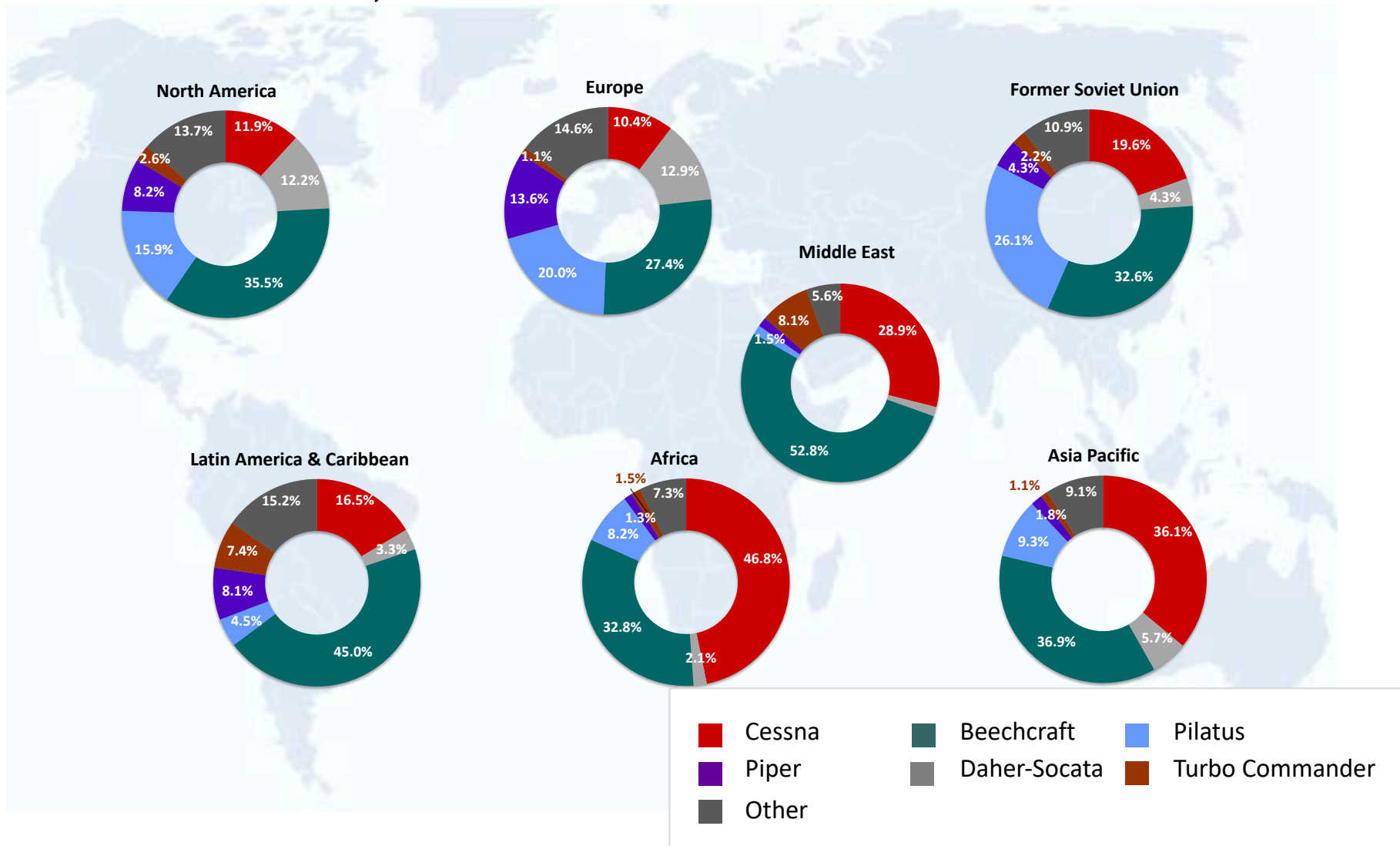
LATIN AMERICA & CARIBBEAN	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	580
Daher	113
Beechcraft	1,630
Pilatus	154
Piper	281
Turbo Commander	281
Other	561
<b>Total</b>	<b>3,600</b>

AFRICA	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	404
Daher	17
Beechcraft	296
Pilatus	67
Piper	11
Turbo Commander	15
Other	67
<b>Total</b>	<b>877</b>

ASIA PACIFIC	
Turboprop Deliveries Dec 31 2025	Deliveries
Cessna	544
Daher	85
Beechcraft	558
Pilatus	139
Piper	27
Turbo Commander	17
Other	149
<b>Total</b>	<b>1,519</b>

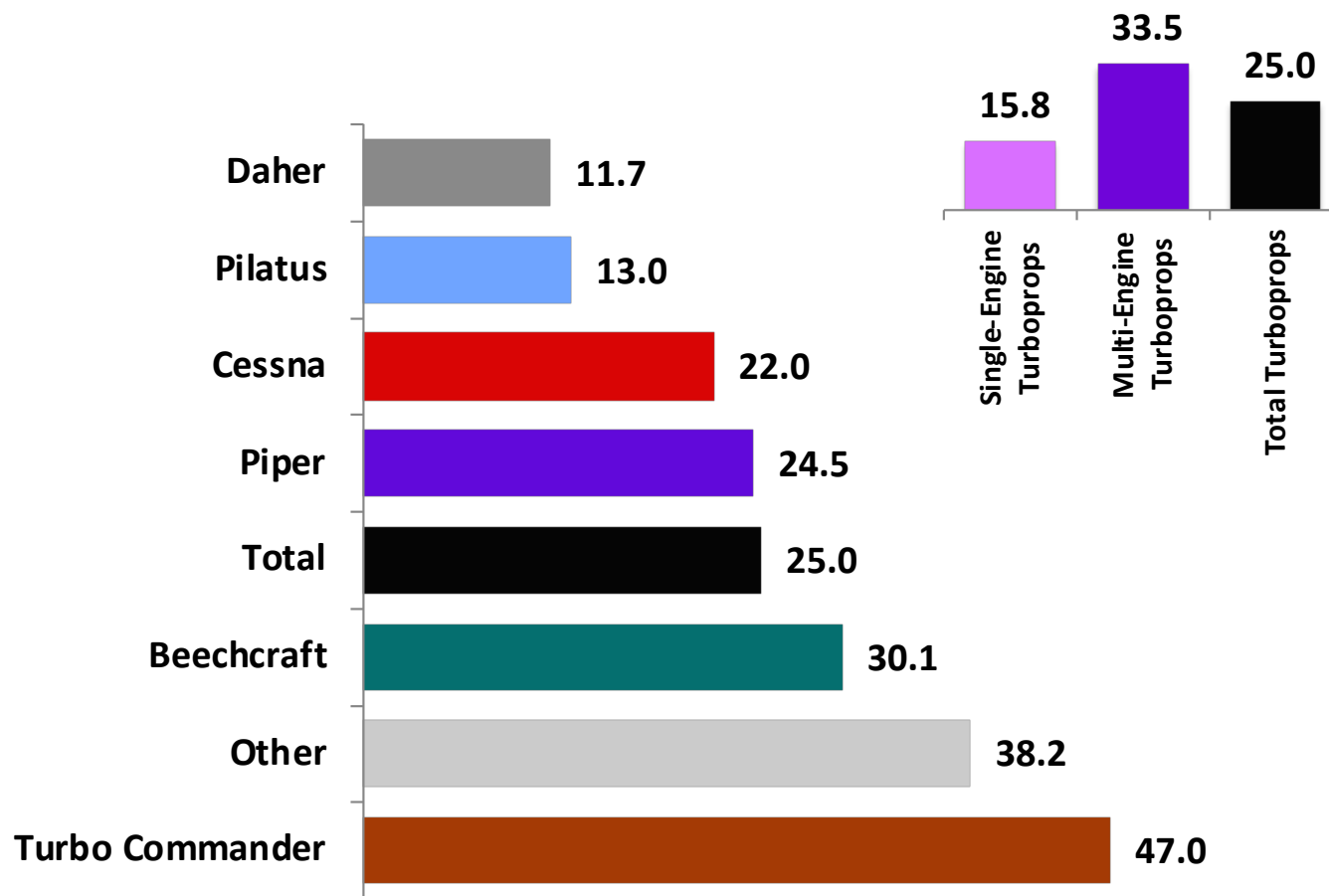
# Business Turboprop Fleet by Manufacturer

As of December 31, 2025



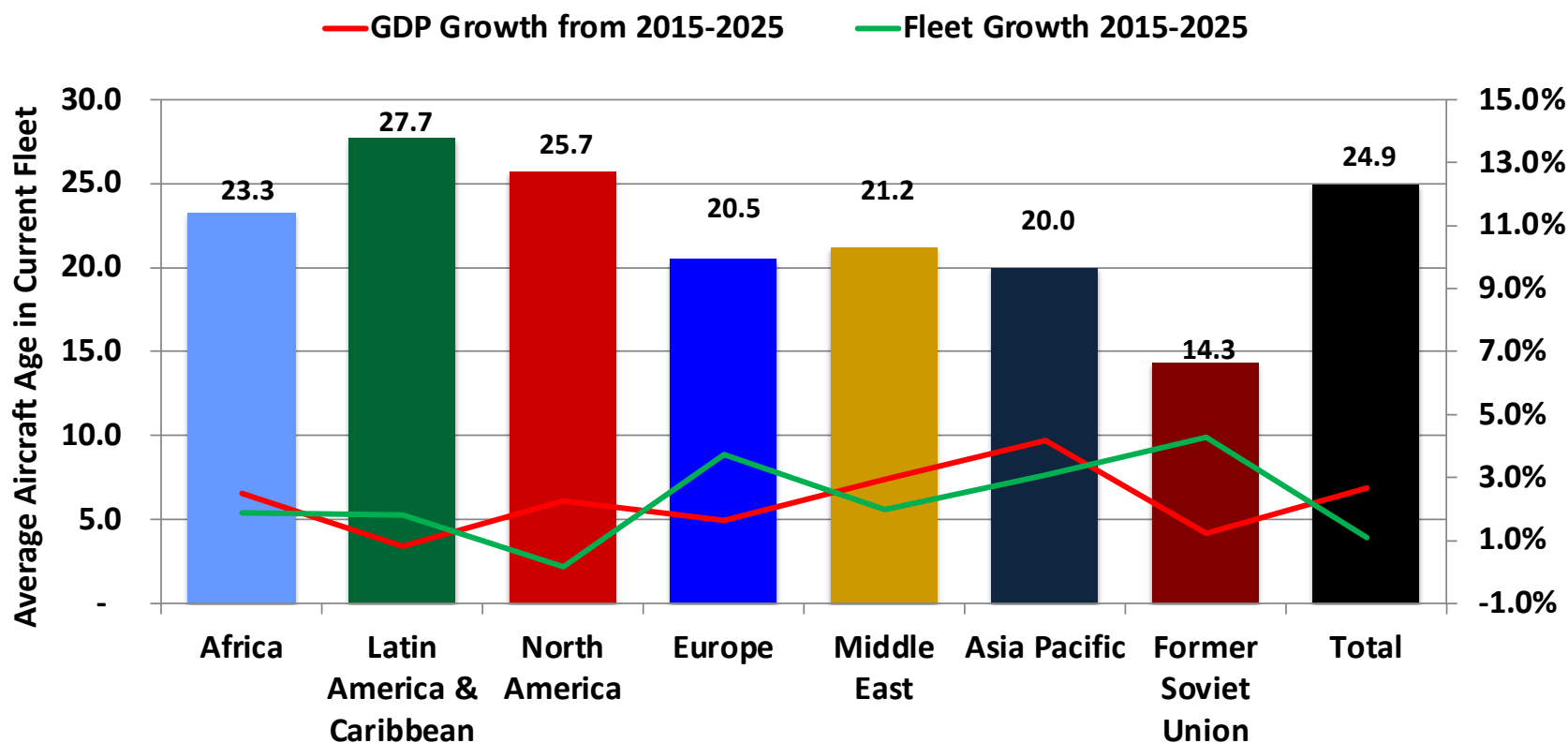
# Turboprop Fleet Age (Years)

As of December 31, 2025



# Turboprop Fleet Age, GDP & Fleet Growth

Regional profile of current average turboprop fleet age and regional GDP and fleet growth (2015-Q4 2025)



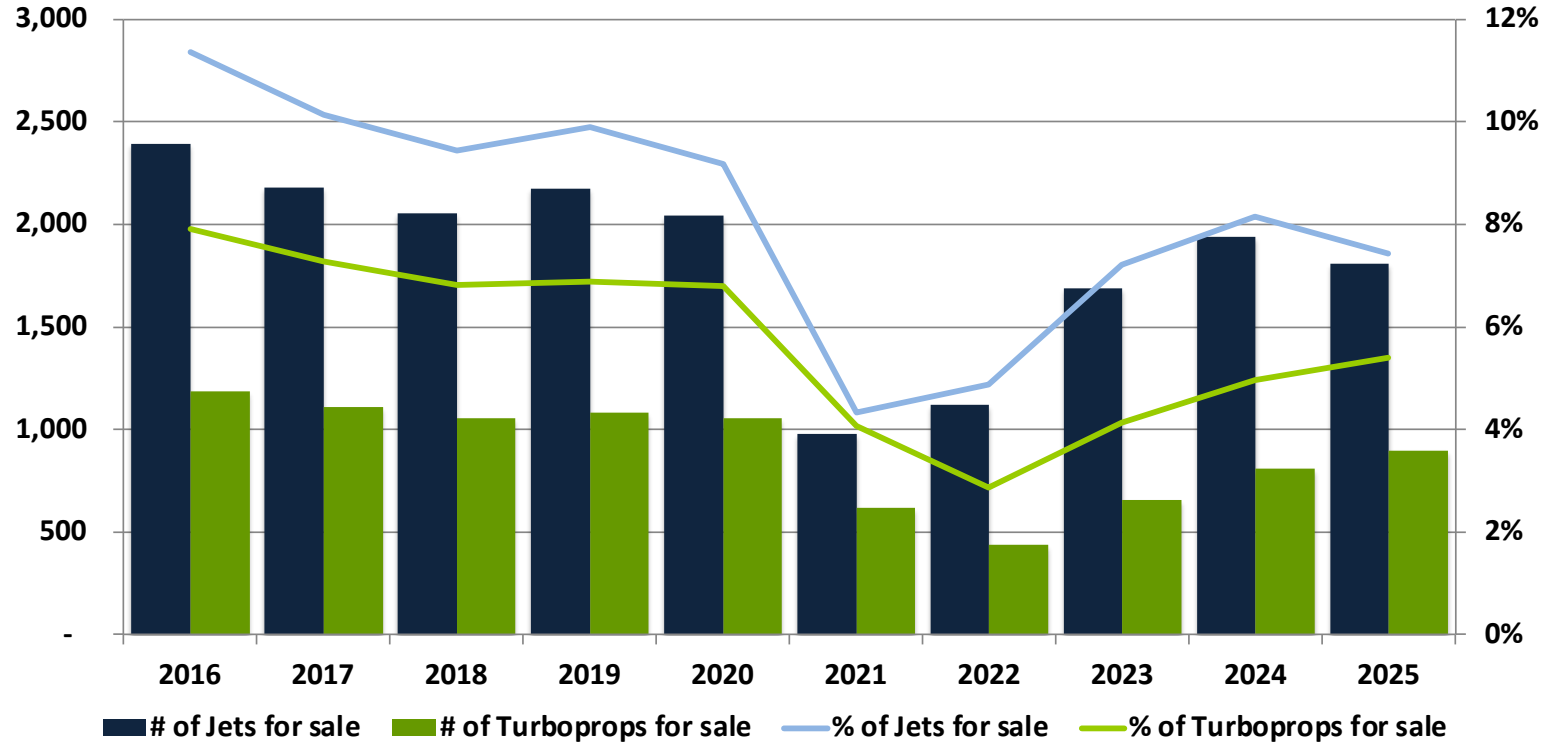
Note: Fleet age is in years since initial aircraft delivery; GDP and fleet growth rates are 10-year CAGR

JETNET iQ Snap!: 4th Quarter 2025 - Private & Confidential

# Pre-Owned Business Aircraft Inventory

Business Jets and Turboprops for sale

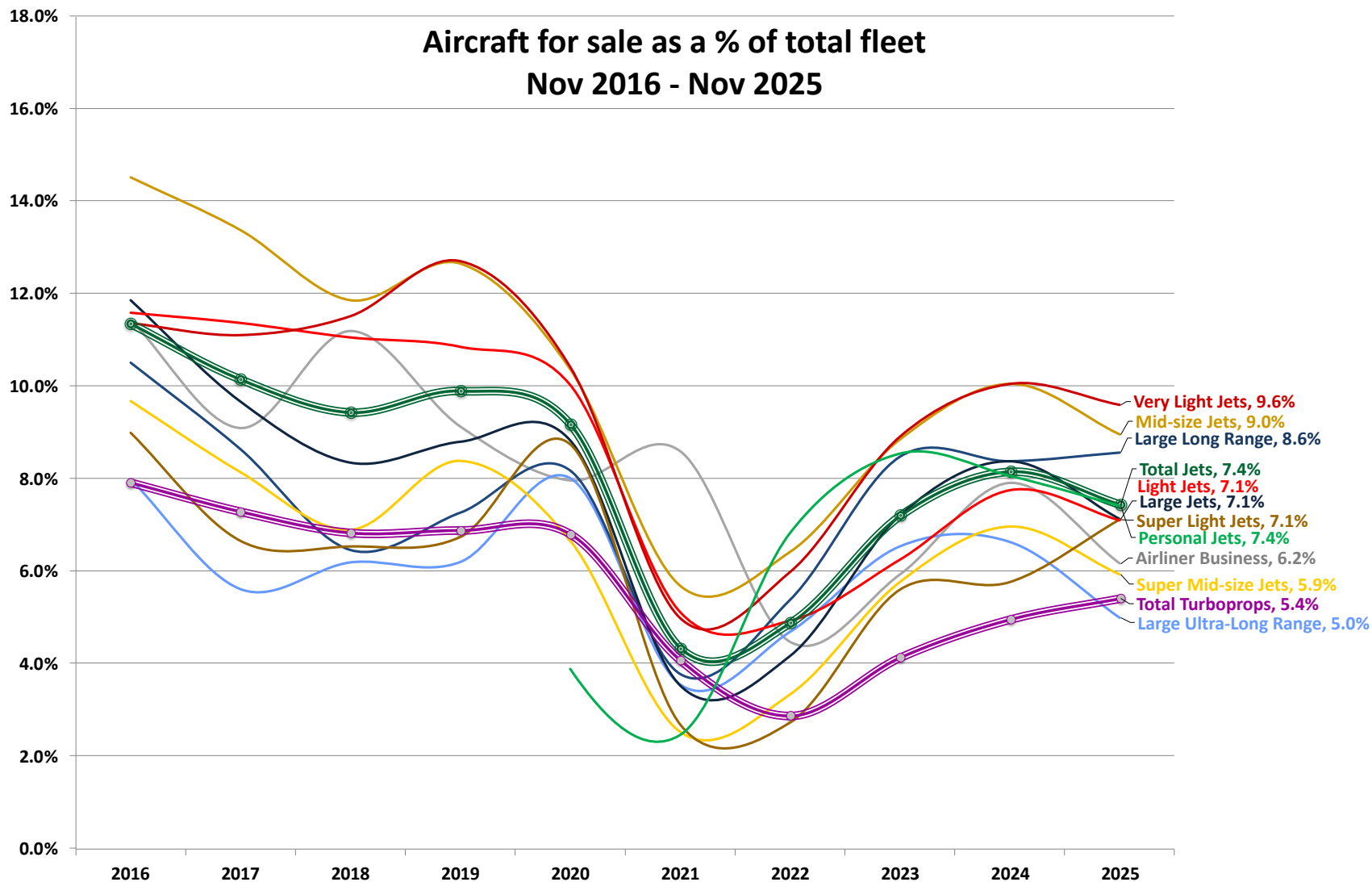
Nov 2016 - Nov 2025



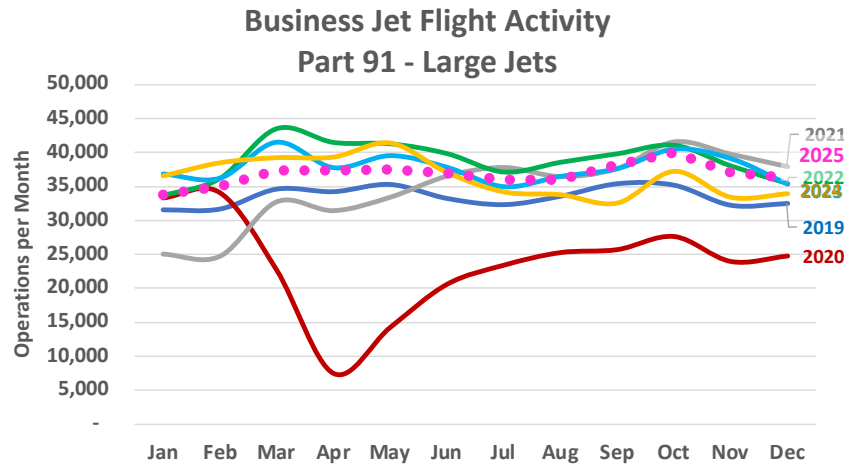
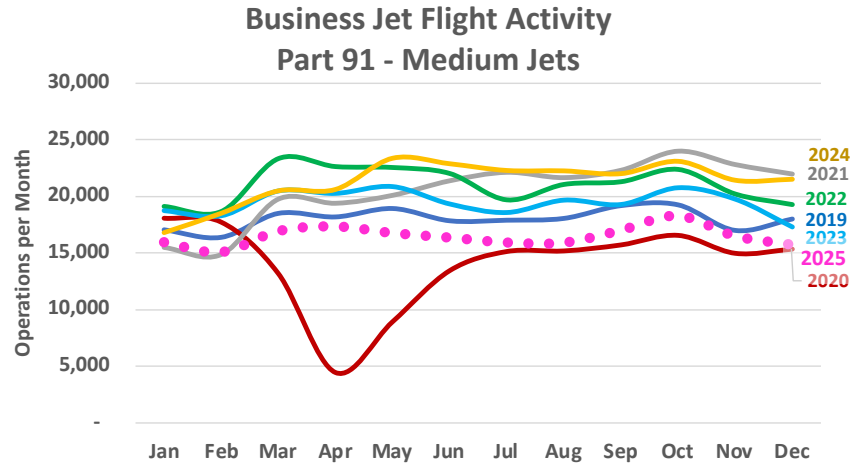
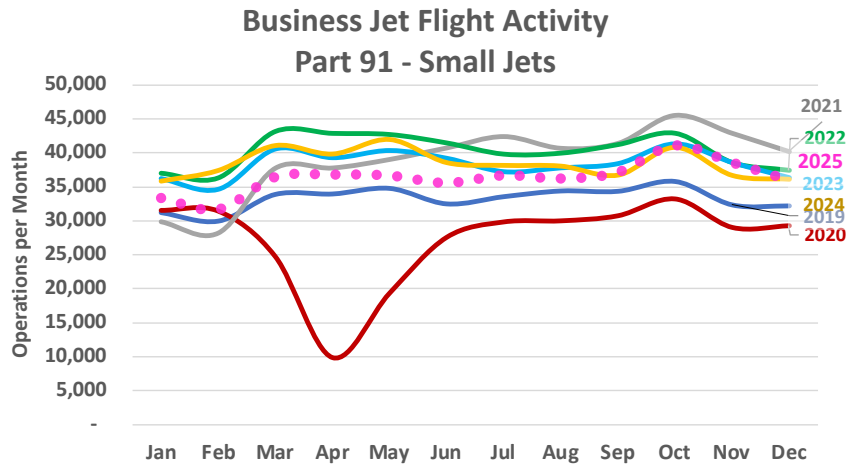
Aircraft Available for Sale as % of World Fleet (as of November 30)										
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Business Jets	11.4%	10.1%	9.4%	9.9%	9.2%	4.3%	4.9%	7.2%	8.2%	7.4%
Turboprop	7.9%	7.3%	6.8%	6.9%	6.8%	4.1%	2.9%	4.1%	5.0%	5.4%

For-sale inventories of pre-owned business jets slipped lower in 2025 in the face of enduring customer demand and the return of 100% bonus depreciation in the U.S.

# Pre-Owned Business Jet Inventory

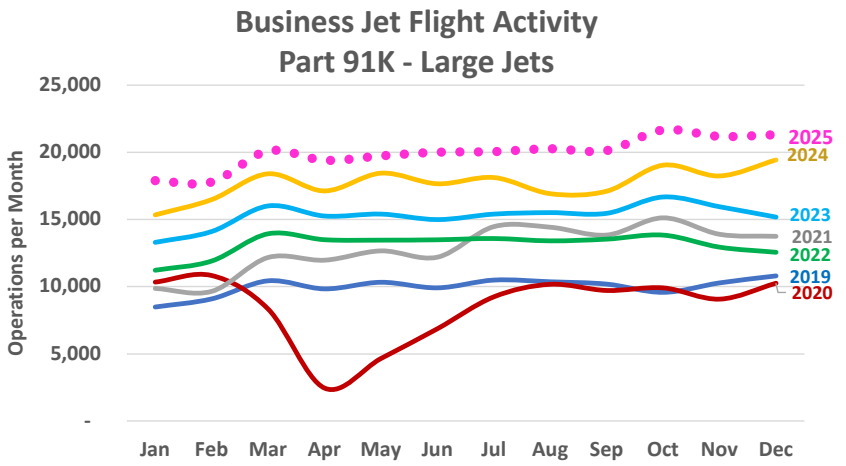
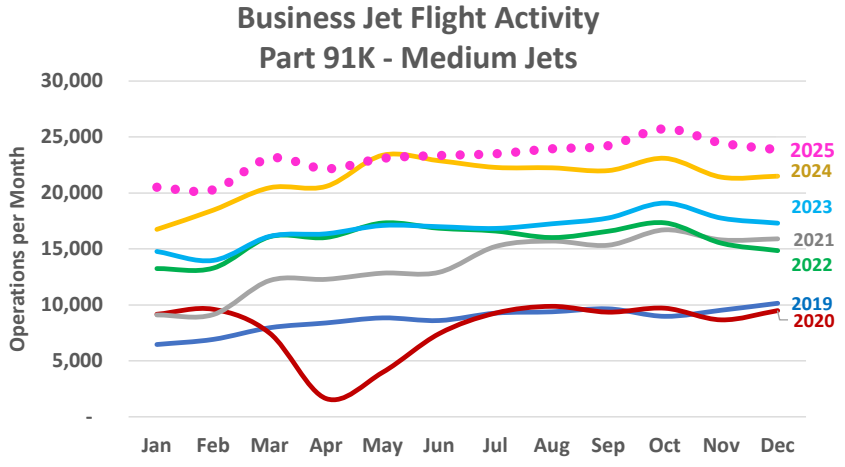
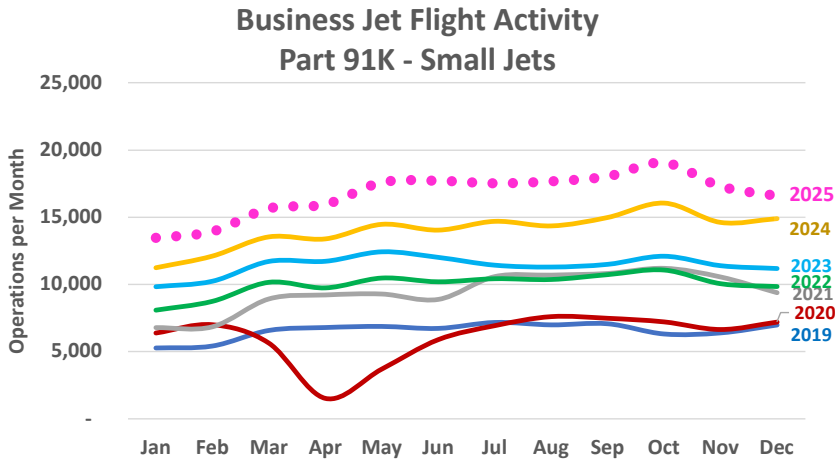


# U.S. Business Jet Utilization – Part 91



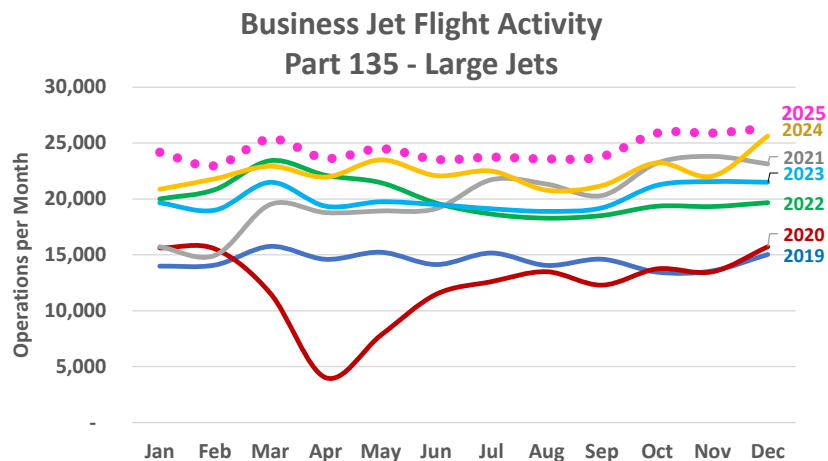
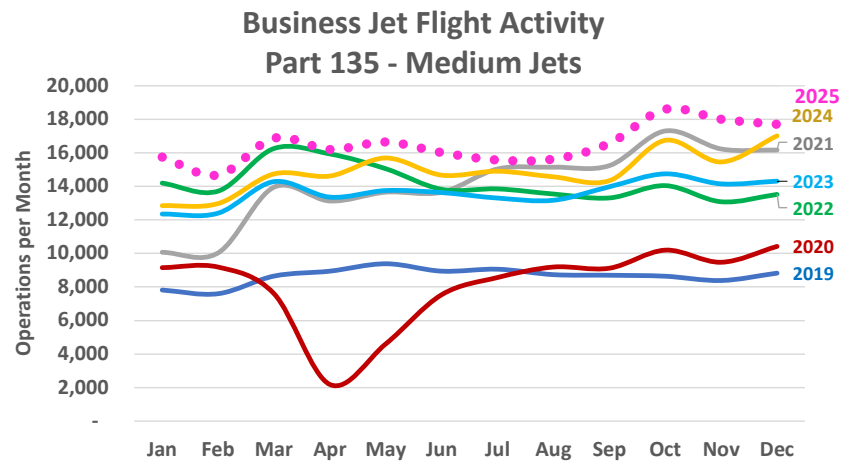
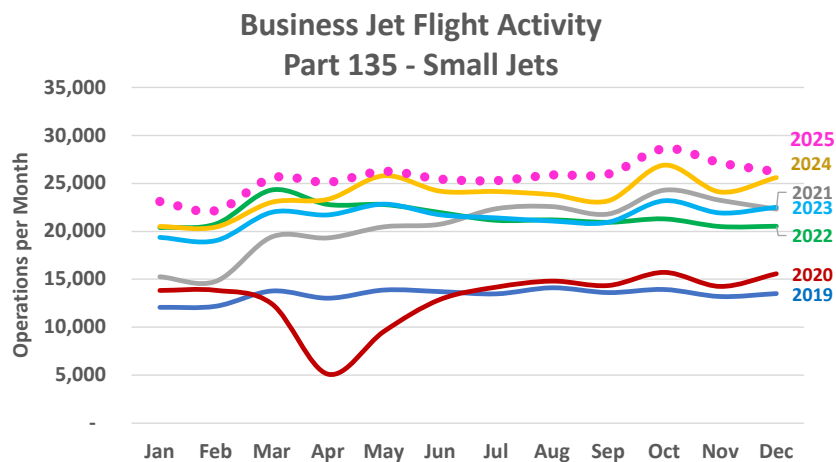
Source: U.S. FAA; JETNET; U.S. Part 91 includes private and corporate flight operations (not for-hire)

# U.S. Business Jet Utilization – Part 91K



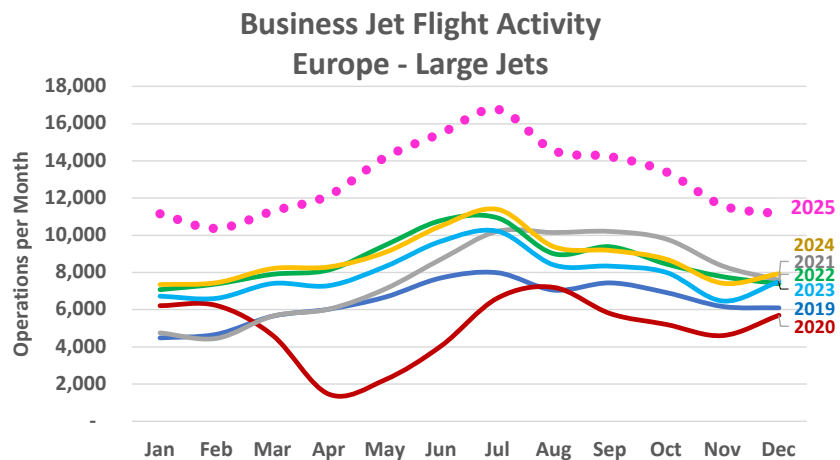
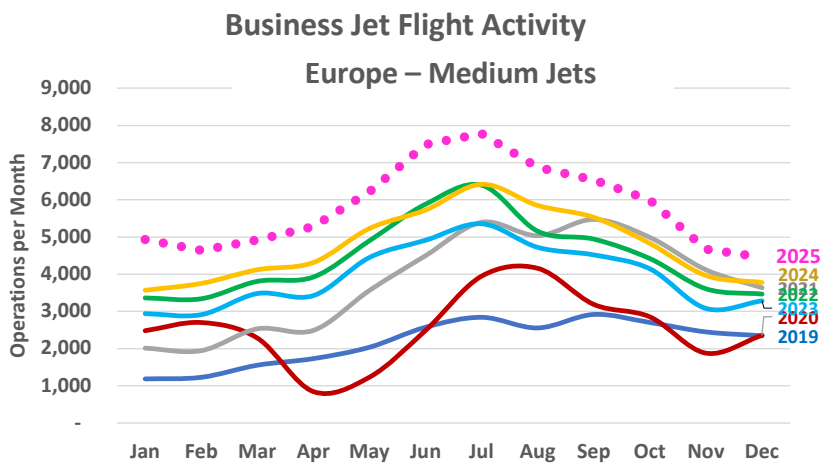
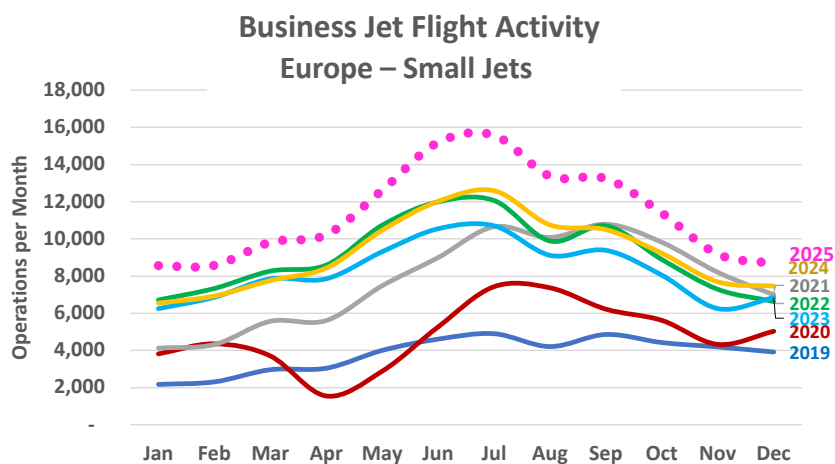
Source: U.S. FAA; JETNET; U.S. Part 91K includes fractional ownership program flight operations

# U.S. Business Jet Utilization – Part 135



Source: U.S. FAA; JETNET; U.S. Part 135 includes on-demand, charter, and other for-hire flight operations

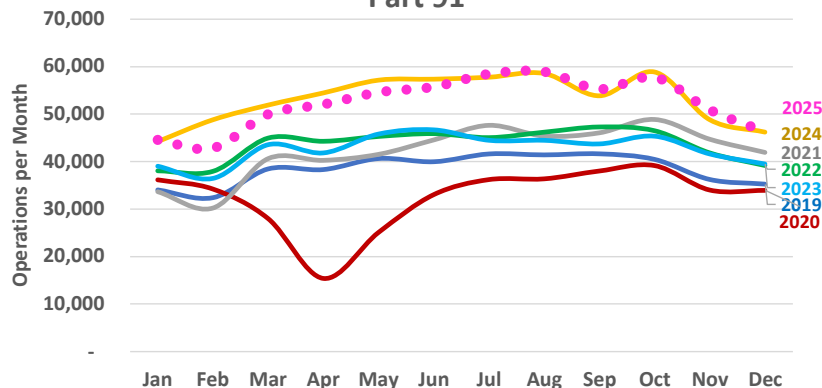
# European Business Jet Utilization



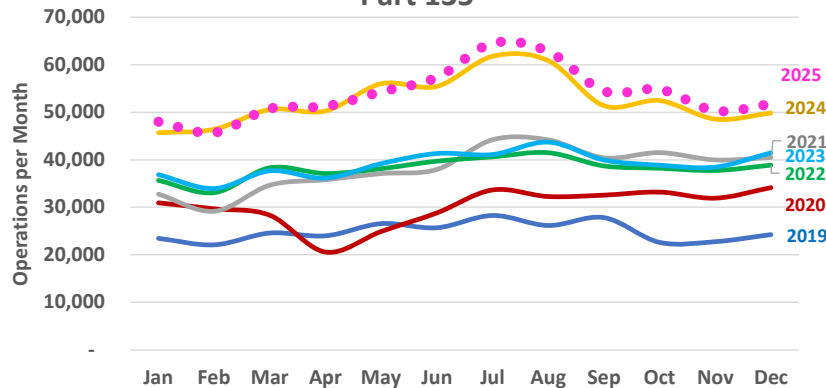
Source: Eurocontrol; JETNET

# Business Turboprop Utilization

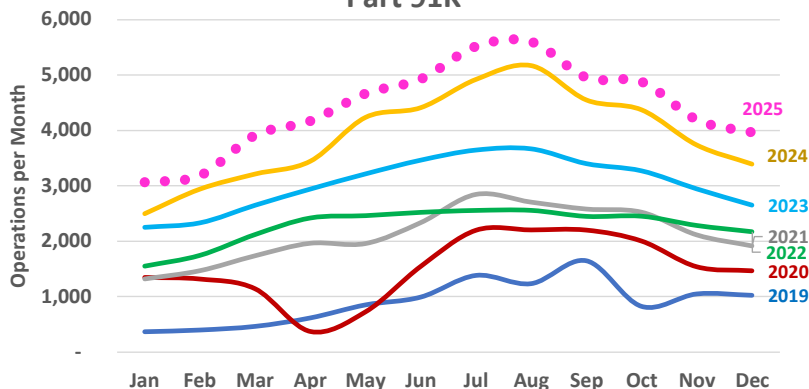
Turboprop Flight Activity Part 91



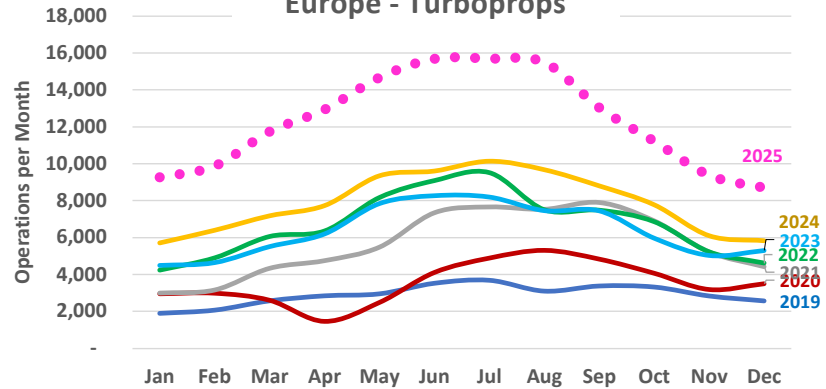
Turboprop Flight Activity Part 135



Turboprop Flight Activity Part 91K



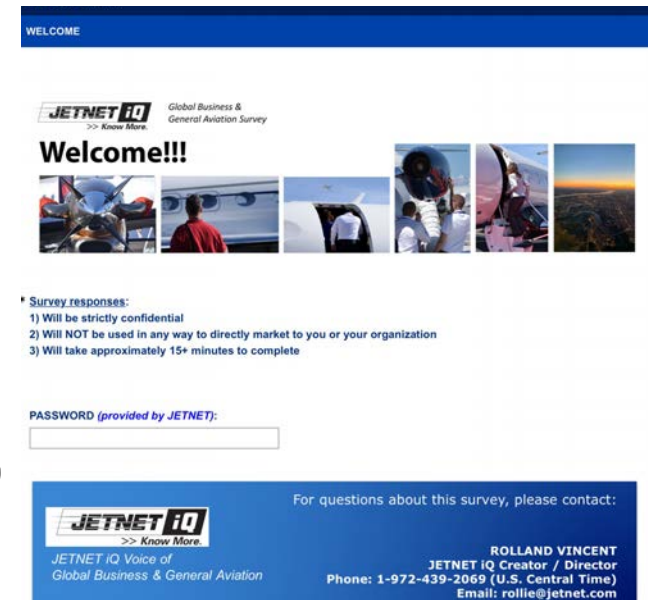
Turboprop Flight Activity Europe - Turboprops



Source: U.S. FAA; JETNET

# JETNET iQ Quarterly Surveys

- Multilingual owner / operator surveys
  - Utilization patterns and expectations
  - Brand perceptions
  - Purchase criteria / inhibitors
  - Purchase / selling intentions
  - New product preferences
  - Special topics of interest (examples)
    - New products
    - Utilization
    - Mood of the market



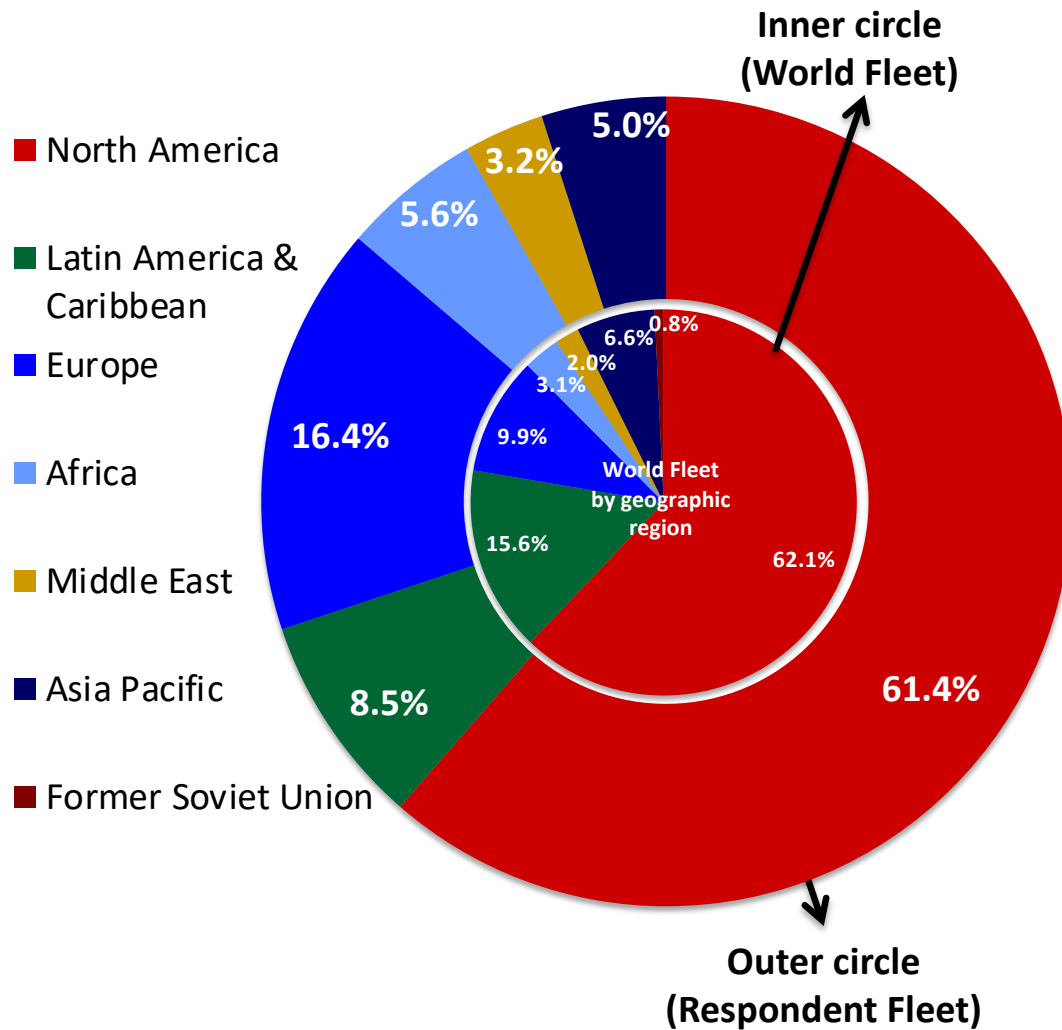
**JETNET iQ Surveys: Quarterly, multilingual, worldwide**

## Survey Respondents' Location

### By Respondent Location

Q4 2025 Survey

RESPONDENT COUNTRIES FROM Q4 2025 SURVEY			
COUNTRIES/TERRITOR	# of respondents		# of respondents
ARGENTINA	3	PHILIPPINES	1
AUSTRALIA	8	POLAND	2
AUSTRIA	2	PORTUGAL	1
BELGIUM	2	ROMANIA	2
BRAZIL	16	SERBIA	2
BULGARIA	1	SEYCHELLES ISLANDS	1
CANADA	16	SINGAPORE	1
CHILE	1	SLOVAK REPUBLIC	1
CHINA	4	SLOVENIA	1
CZECHIA	3	SOUTH AFRICA	7
DENMARK	2	SPAIN	2
ESTONIA	1	SWEDEN	1
ETHIOPIA	2	SWITZERLAND	12
FRANCE	3	THAILAND	2
GERMANY	9	TURKEY	6
HONDURAS	1	UGANDA	1
INDIA	1	UNITED ARAB EMIRATES	2
IRELAND	4	UNITED KINGDOM	5
ITALY	10	UNITED STATES	224
KENYA	1	ZAMBIA	1
KUWAIT	1		
LIBYA	1	<b>Total Respondents</b>	<b>380</b>
LUXEMBOURG	1	<b>Total # of countries</b>	<b>52</b>
MALAYSIA	1	Africa	17
MALTA	1	Asia Pacific	19
MEXICO	11	Europe	62
MONACO	1	Former Soviet Union	0
NAMIBIA	2	Latin America & Caribbean	33
NEW ZEALAND	1	Middle East	9
NIGERIA	1	North America	240
PANAMA	1	<b>Total</b>	<b>380</b>

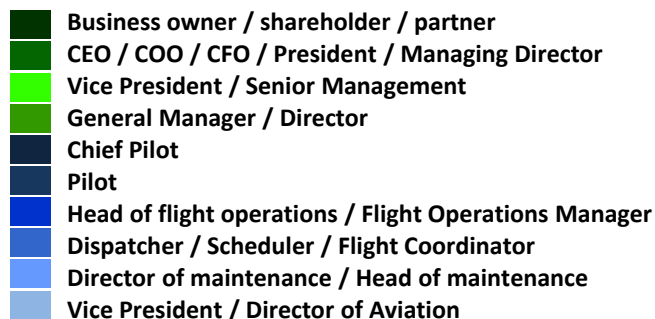
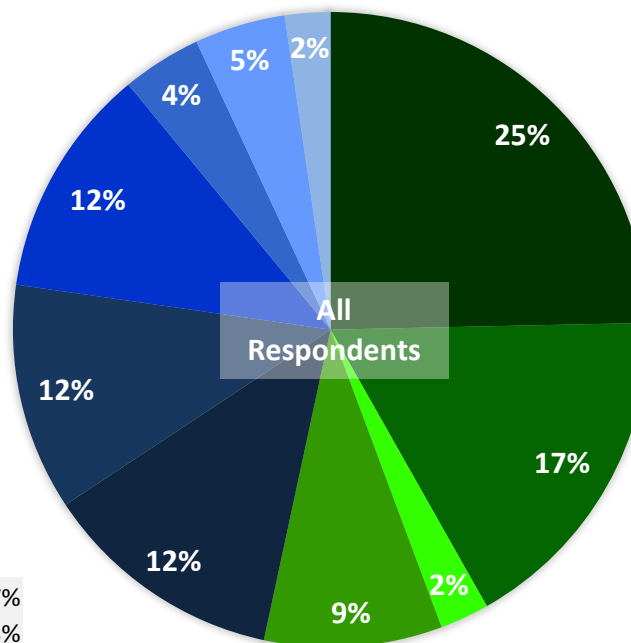


## Survey Respondents' Roles

Q4 2025 Survey

Title of respondent	Completed
Business owner / shareholder / partner	128
CEO / COO / CFO / President / Managing Director	89
Vice President / Senior Management	13
General Manager / Director	47
Chief Pilot	64
Pilot	60
Head of flight operations / Flight Operations Manager	61
Dispatcher / Scheduler / Flight Coordinator	21
Director of maintenance / Head of maintenance	24
Vice President / Director of Aviation	12
<b>Total</b>	<b>519</b>

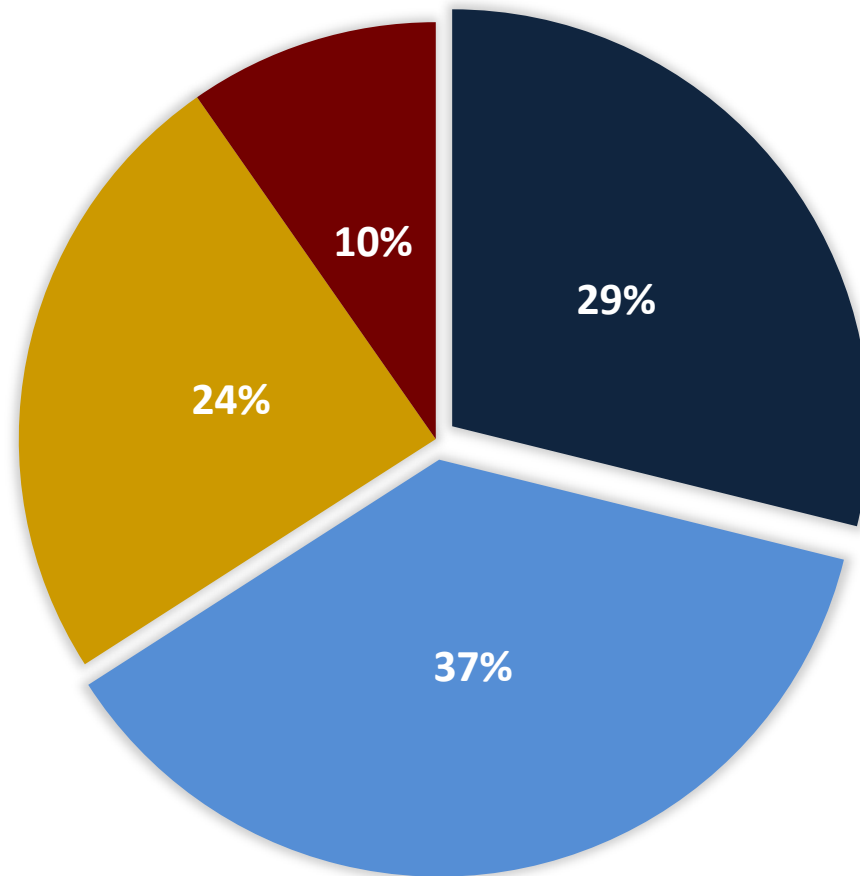
Aviation Professionals	242	47%
Senior Management / General Manager	277	53%



# Survey Respondents' Roles

By Involvement in Last Fixed-Wing Turbine Aircraft Purchase

Q4 2025 Survey



Decision-maker

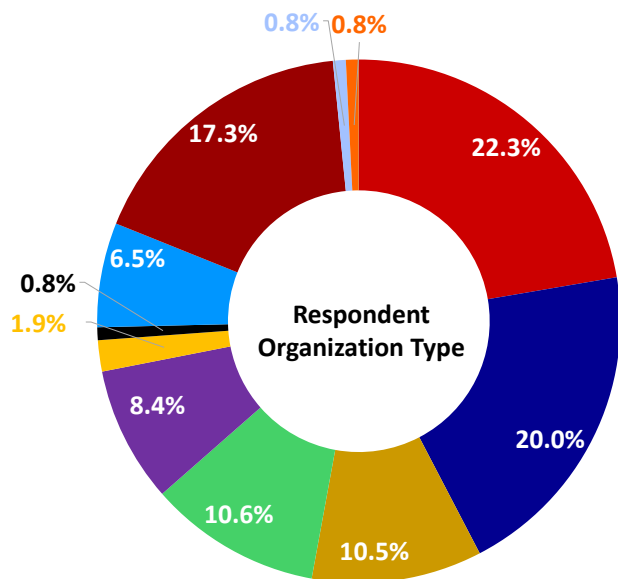
Influenced the purchase decision

Provided information supporting the purchase decision

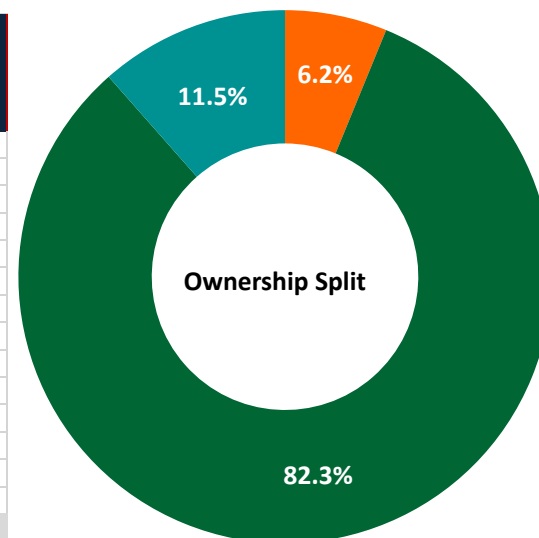
Not involved in the purchase decision

# Survey Respondents' Organization

Q4 2025 Survey



Please indicate which of the following best describes your organization or company (check as many as apply):		All Respondents
Aircraft owner		197
Aircraft operator		177
Flight department		93
Aircraft management company		94
Air taxi or charter operator		74
Fractional aircraft operator		17
Fractional share / jet card holder		7
Aircraft MRO		57
Broker / Dealer		153
Financial Institution		7
Government		7
Other		-
Privately-held		93
Publicly-traded		13
<b>Total</b>		<b>989</b>



Breakdown for Respondents who indicated ownership

- Aircraft owner
- Air taxi or charter operator
- Broker / Dealer
- Aircraft operator
- Fractional aircraft operator
- Financial Institution
- Flight department
- Fractional share / jet card holder
- Government
- Aircraft management company
- Aircraft MRO
- Other

- Government
- Privately held
- Publicly held

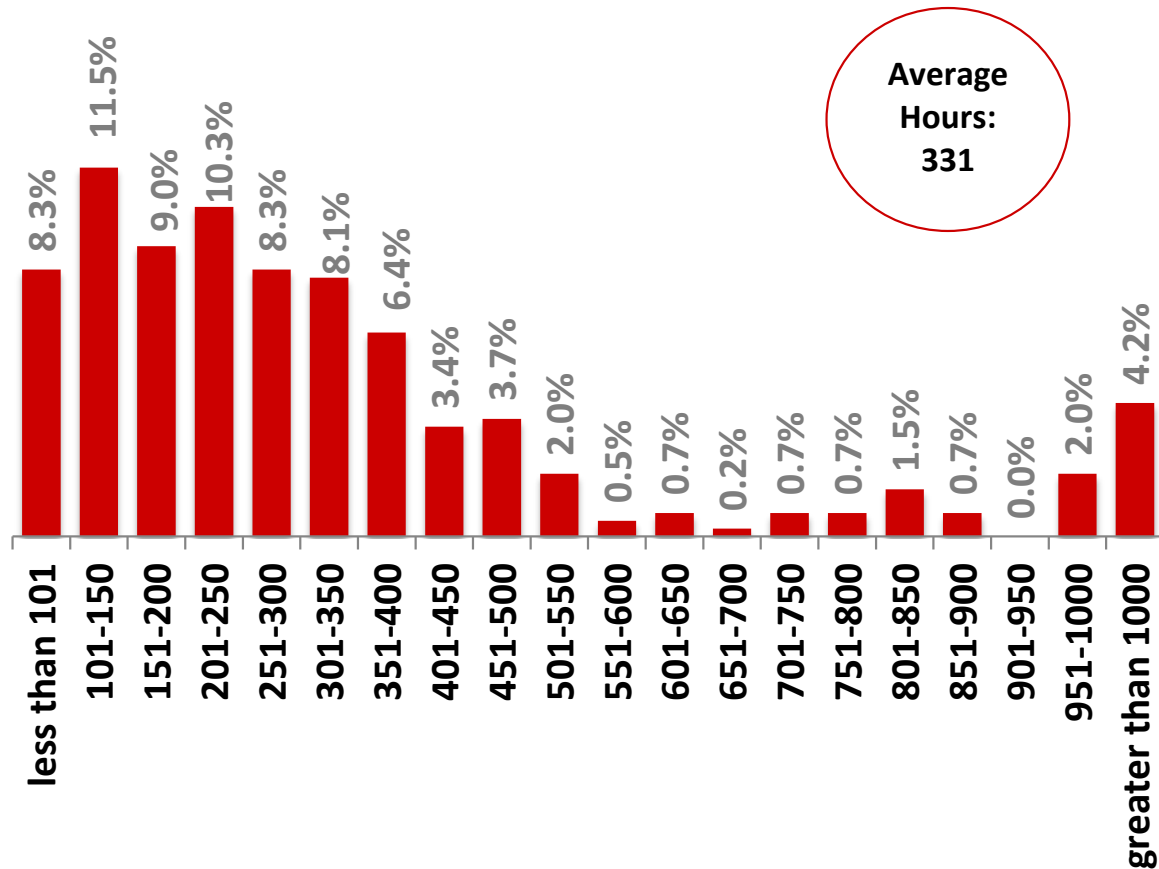
Note: Respondents may have chosen multiple organizational types

# Survey Respondents' Flight Operations

Last 12 Months – World (Fixed-Wing Business Jets and Turboprops Only)

**Annual Flight Hours Per Aircraft**

Q4 2025 Survey

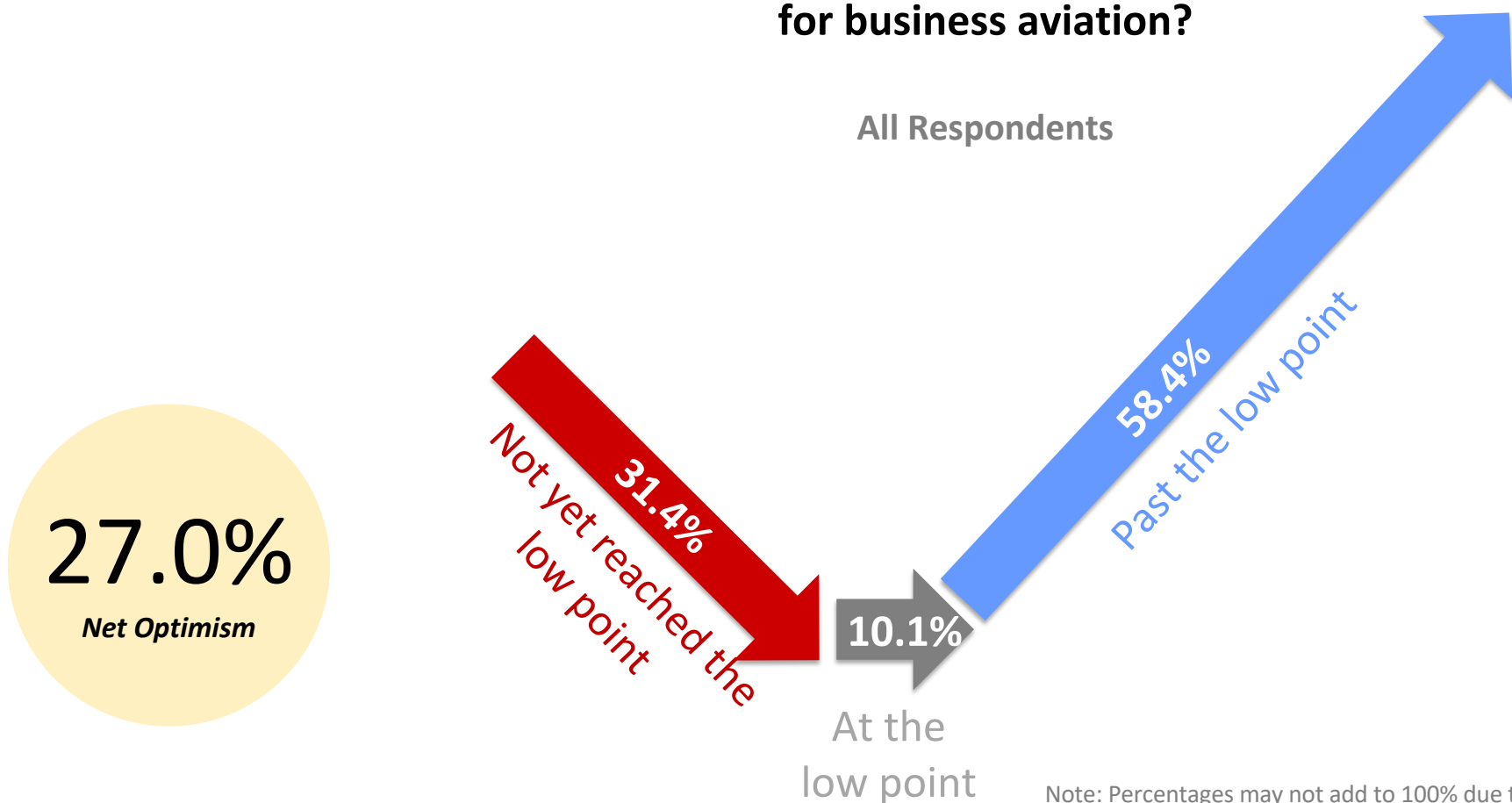


# Survey Respondents' Sentiment

Current Market Sentiment

Q4 2025 Survey

How would you describe the current market conditions for business aviation?

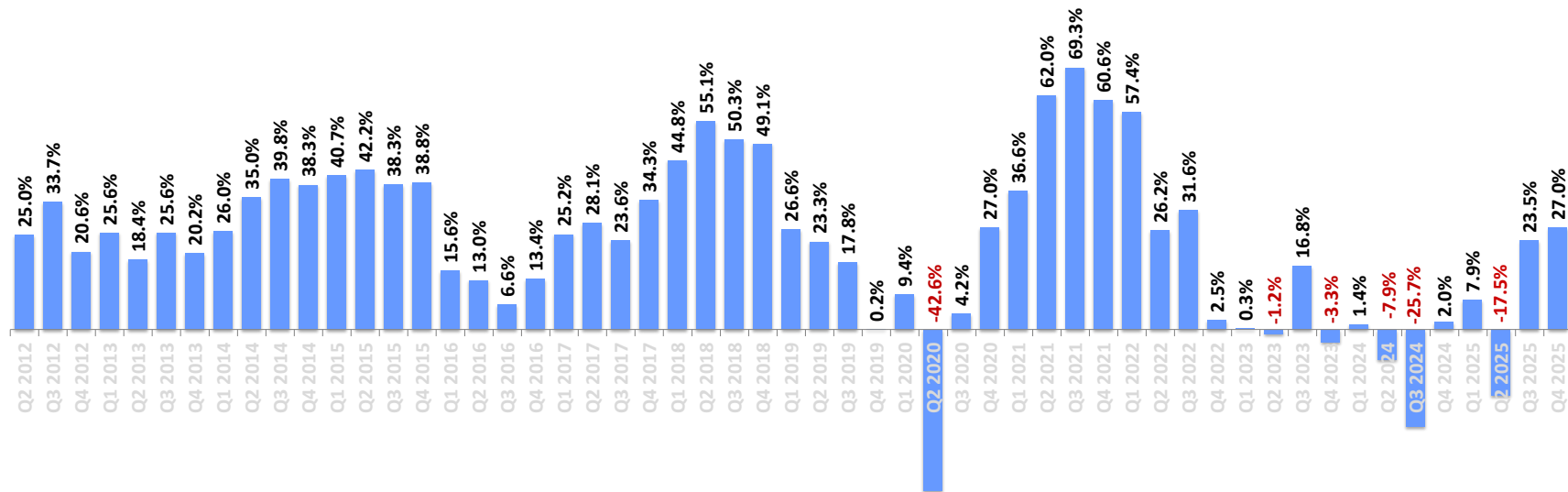


Note: Percentages may not add to 100% due to rounding

# Survey Respondents' Sentiment

## Current Market Sentiment – Net Optimism

### Overall Worldwide Net Optimism by Quarter



Net optimism = "Past the low point" minus "Not yet reached the low point"

**Net optimism has rallied to 27.0% in Q4 2025 from 23.5% in Q3 2025**

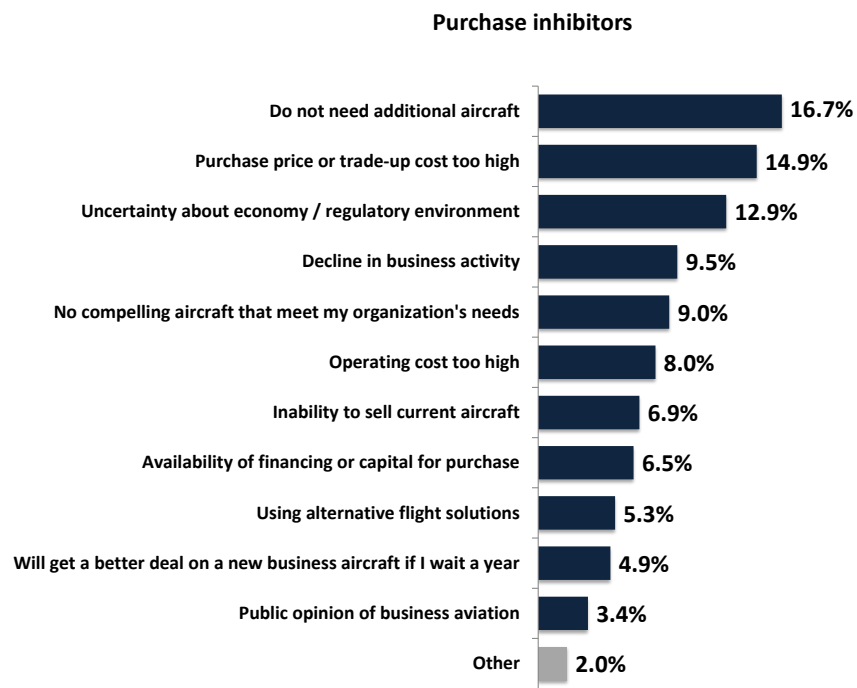
# Aircraft Purchase Inhibitors

## Inhibitors – Weighted Average

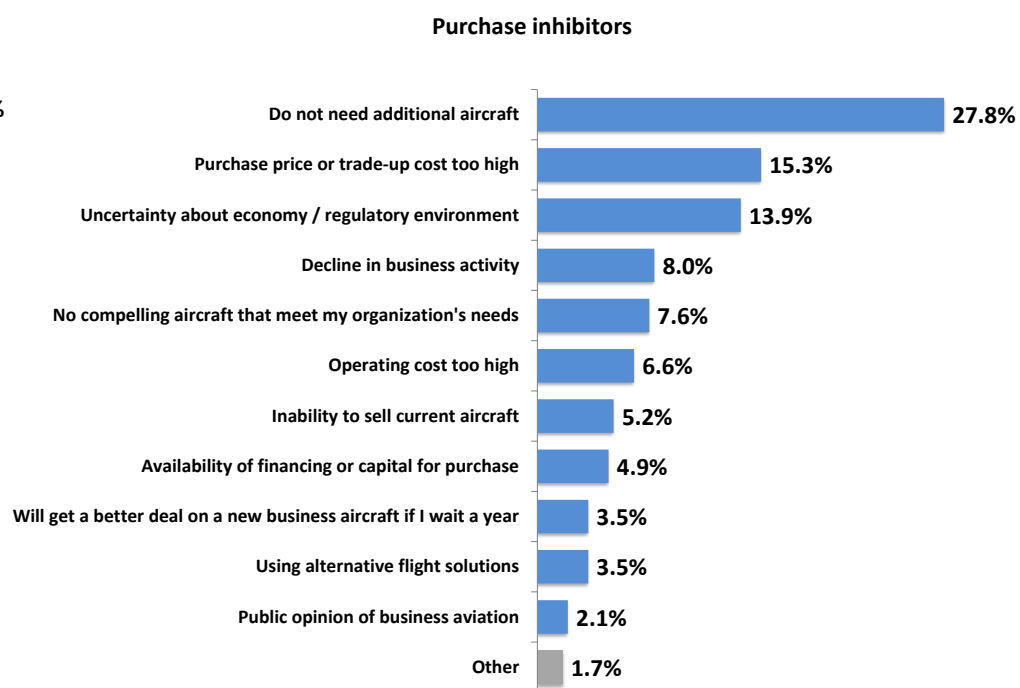
Q4 2025 Survey

*“Which of the following factors are most likely to prevent or delay your organization from purchasing a business aircraft over the next 12 months?”*

**Weighted Average Importance of Factors**



**Chosen as “Most Important” factor**



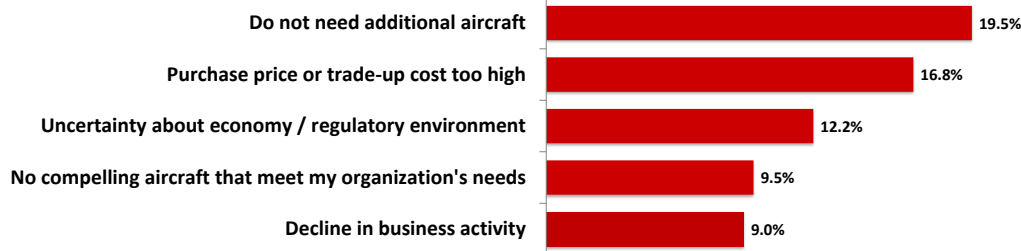
# Aircraft Purchase Inhibitors

## Top 5 Inhibitors – Weighted Average

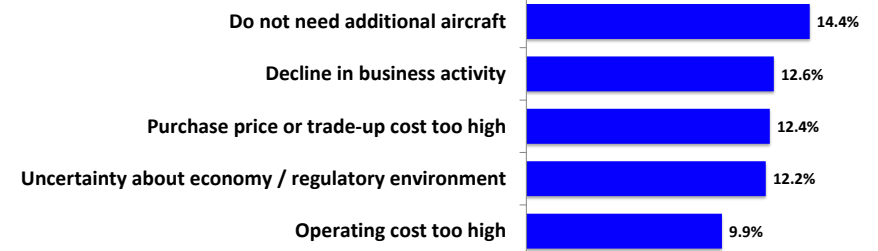
Q4 2025 Survey

*“Which of the following factors are most likely to prevent or delay your organization from purchasing a business aircraft over the next 12 months?”*

**Purchase inhibitors - North America**



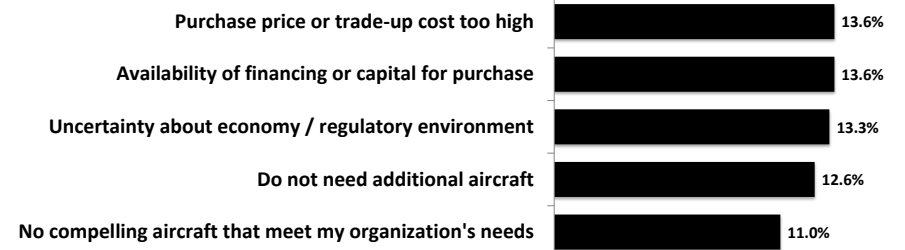
**Purchase inhibitors - Europe**



**Purchase inhibitors - Latin America & Caribbean**



**Purchase inhibitors - Rest of World**

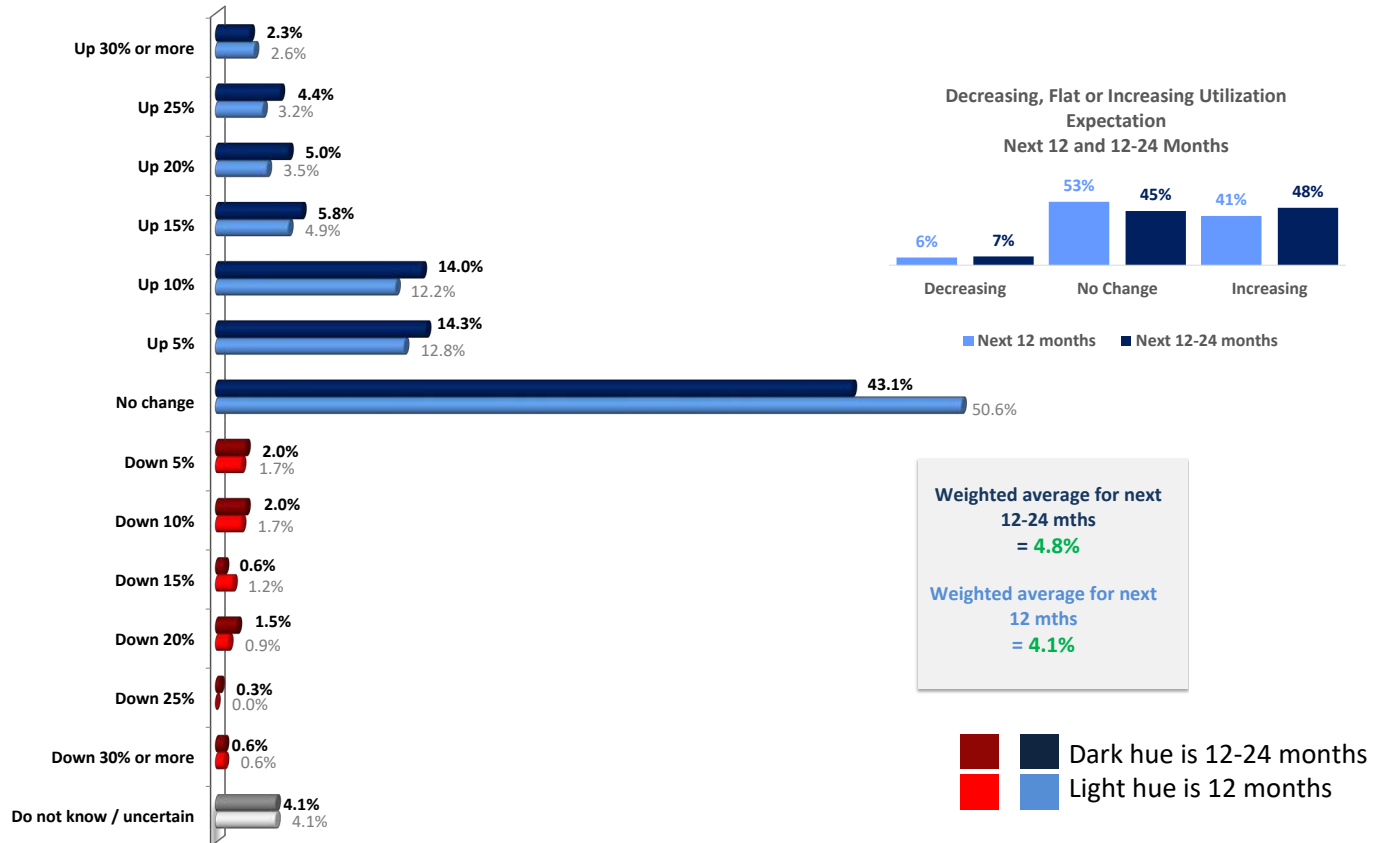


# Aircraft Utilization

## Next 12 and 12-24 Months versus Prior 12 Months

Q4 2025 Survey

Compared with your past 12 months, what changes do you expect in your total annual flight hours over the next 24 months?

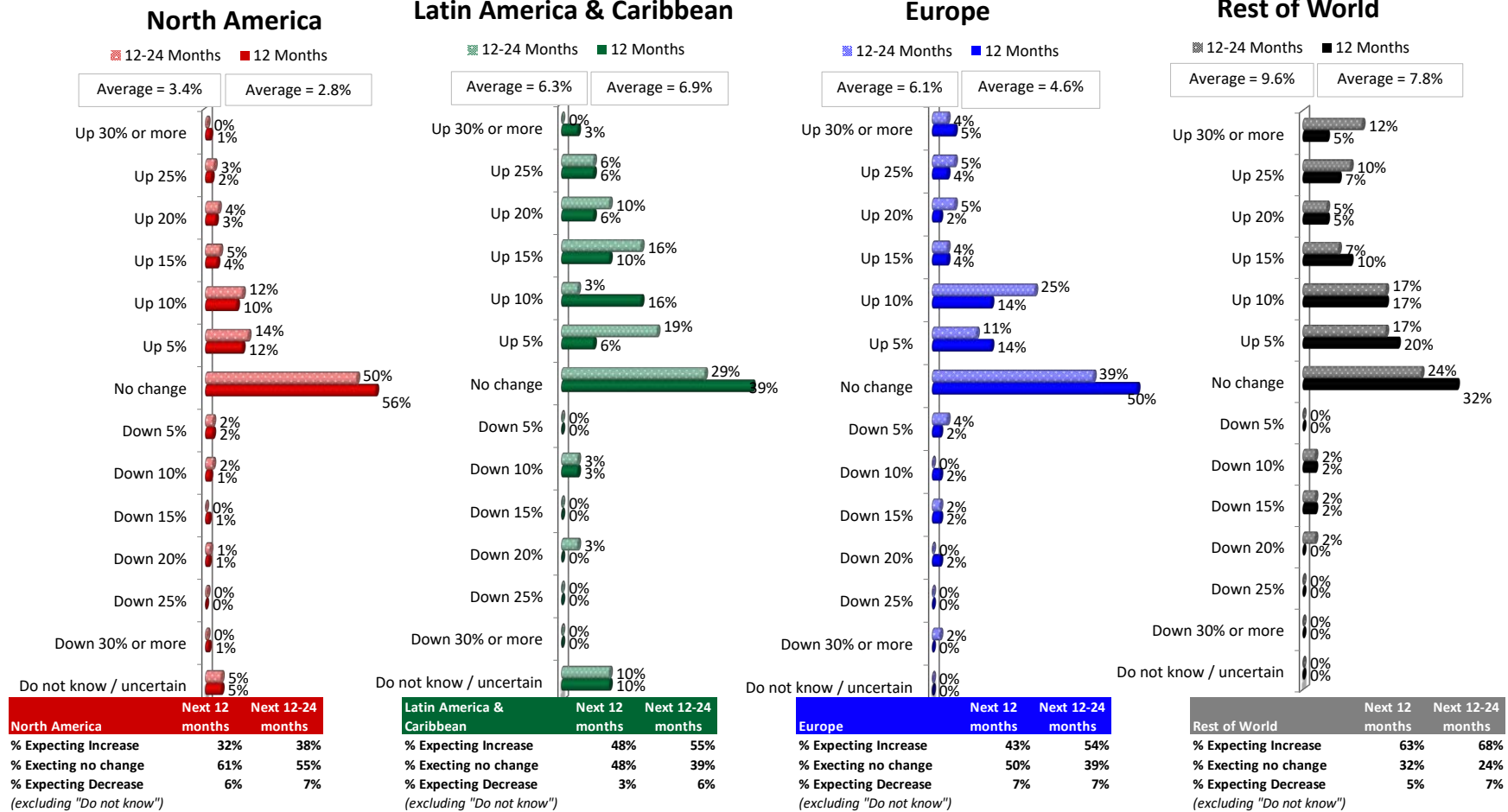


Respondents expect to fly 4.1% more hours in the next 12 months vs. prior 12 months and 4.8% more in the next 12-24 months

# Aircraft Utilization

Q4 2025 Survey

## Next 12 Months and 12-24 Months Versus Prior 12 Months by Region



Utilization expectations for next-12-months have increased across most regions

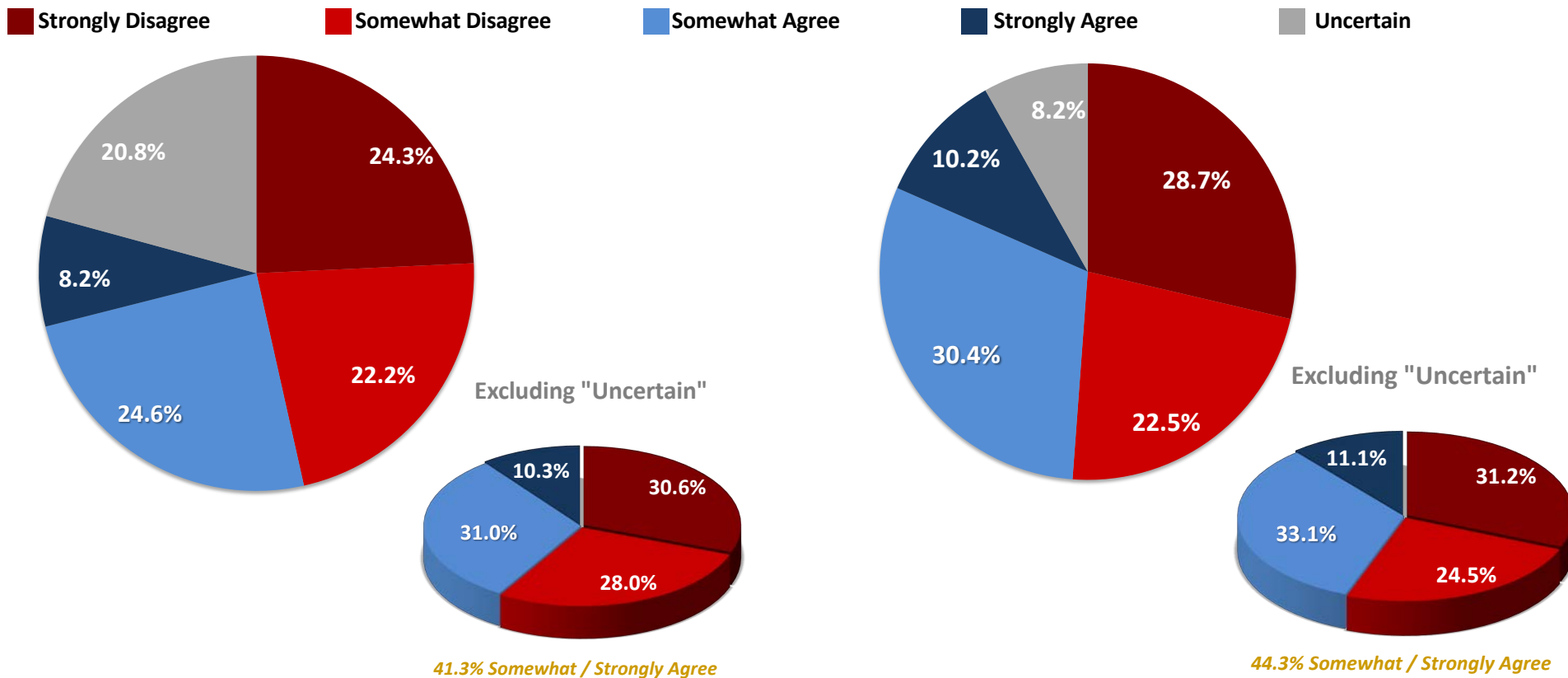
# Aircraft Owner / Operator Opinions

Q4 2025 Survey

Please evaluate these statements and indicate the extent to which you agree or disagree:

*I/we will seriously consider flying with sustainable aviation fuels (SAF) in the next 24 months*

*I/we have been increasingly using Artificial Intelligence (AI) for operations planning and optimization*



# Aircraft Owner / Operator Opinions

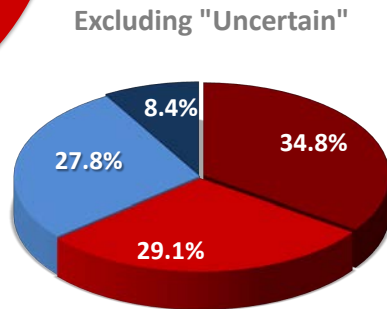
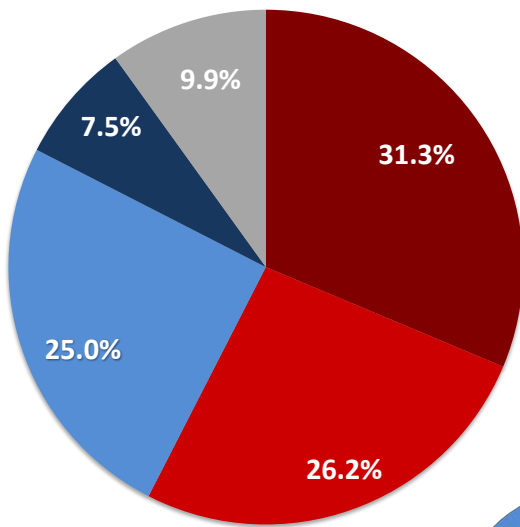
Q4 2025 Survey

Please evaluate these statements and indicate the extent to which you agree or disagree:

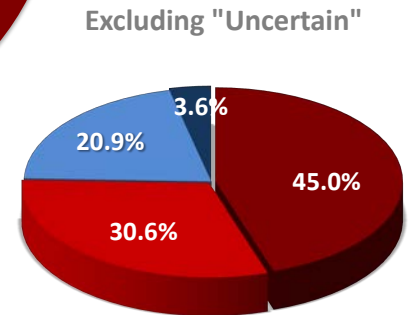
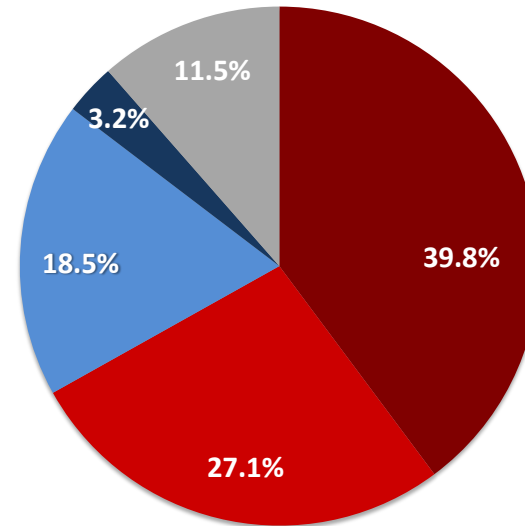
*I/we have been increasingly using AI in our operations for safety / risk monitoring and decision support*

*I/we have been increasingly using AI in our operations for environmental / compliance / emissions tracking*

■ Strongly Disagree    
 ■ Somewhat Disagree    
 ■ Somewhat Agree    
 ■ Strongly Agree    
 ■ Uncertain



36.1% Somewhat / Strongly Agree



24.5% Somewhat / Strongly Agree

# Aircraft Owner / Operator Opinions

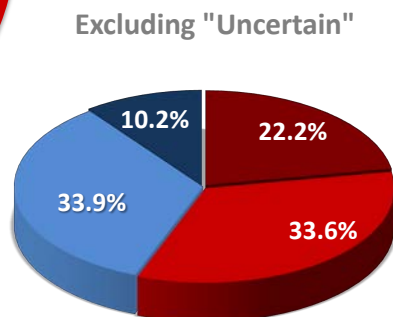
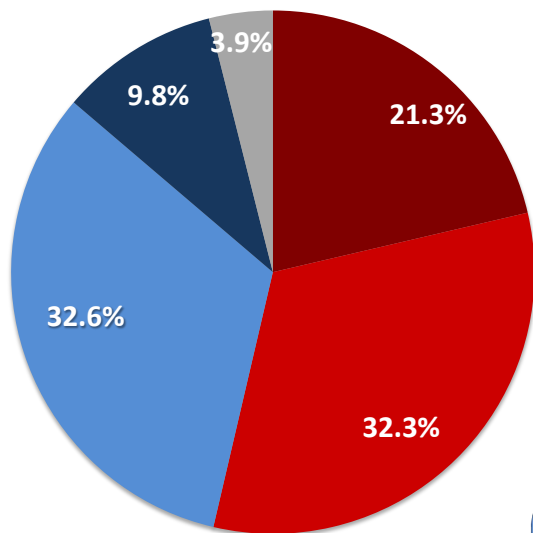
Q4 2025 Survey

Please evaluate these statements and indicate the extent to which you agree or disagree:

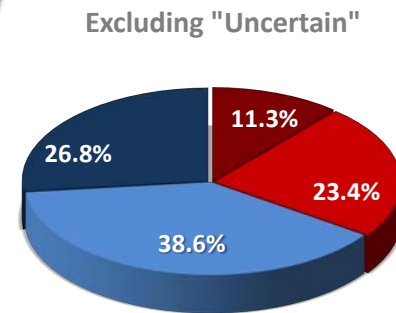
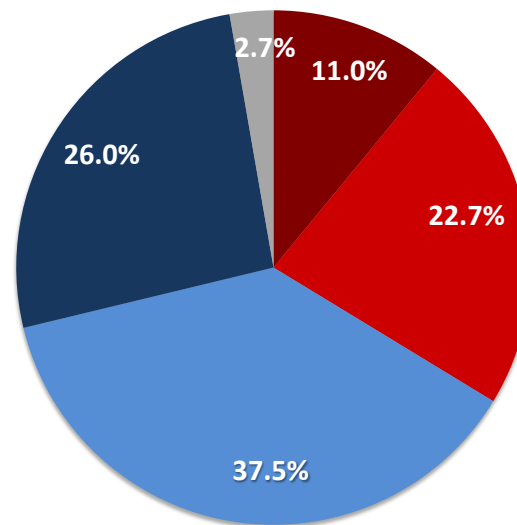
*Assuming all other things being equal, brand is more important to me than price when selecting a Fixed Base Operator (FBO)*

*Assuming all other things being equal, brand is more important to me than price when selecting a Maintenance Repair and Overhaul provider (MRO)*

■ Strongly Disagree    
 ■ Somewhat Disagree    
 ■ Somewhat Agree    
 ■ Strongly Agree    
 ■ Uncertain



44.2% Somewhat / Strongly Agree



65.4% Somewhat / Strongly Agree

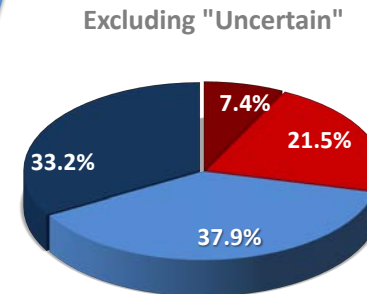
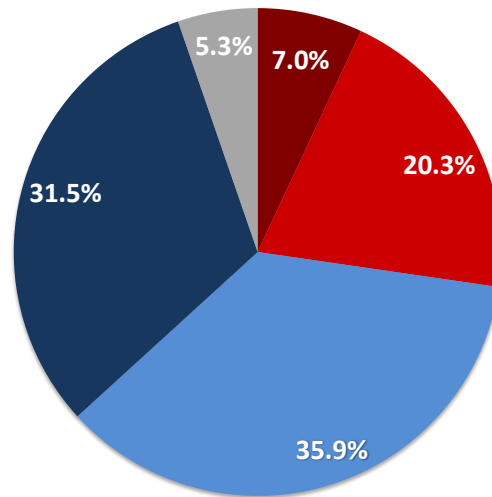
## Aircraft Owner / Operator Opinions

Q4 2025 Survey

Please evaluate these statements and indicate the extent to which you agree or disagree:

*I/we have been experiencing more delays than usual scheduling  
OEM and/or third-party MRO services over the past year*

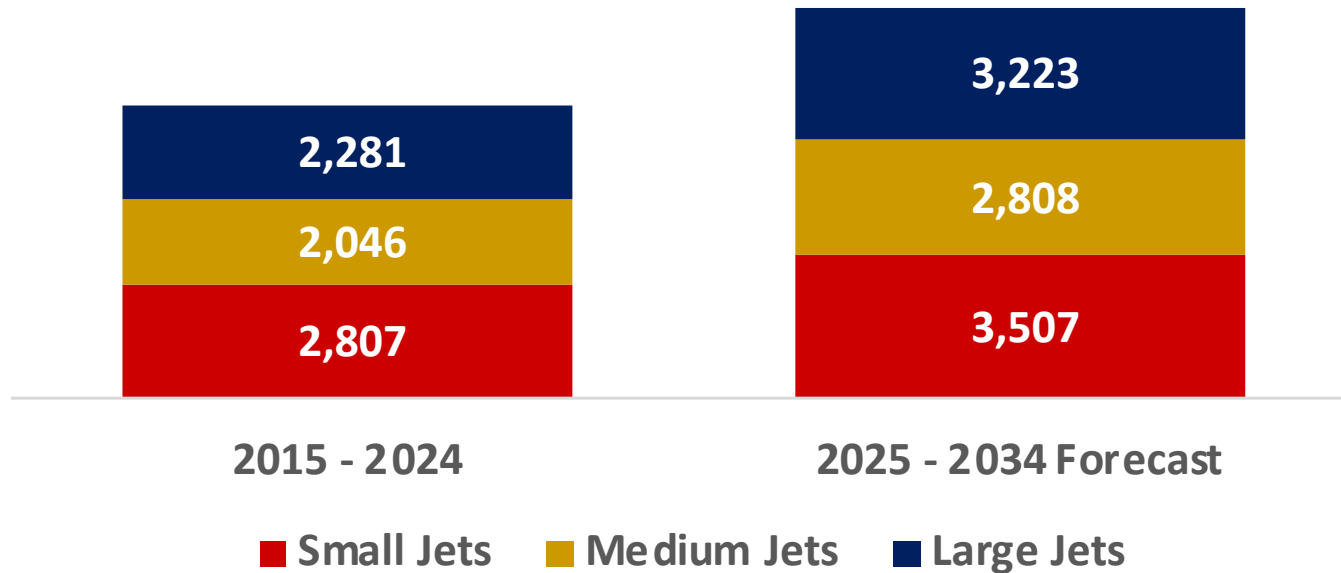
**Strongly Disagree**      **Somewhat Disagree**      **Somewhat Agree**      **Strongly Agree**      **Uncertain**



71.2% Somewhat / Strongly Agree

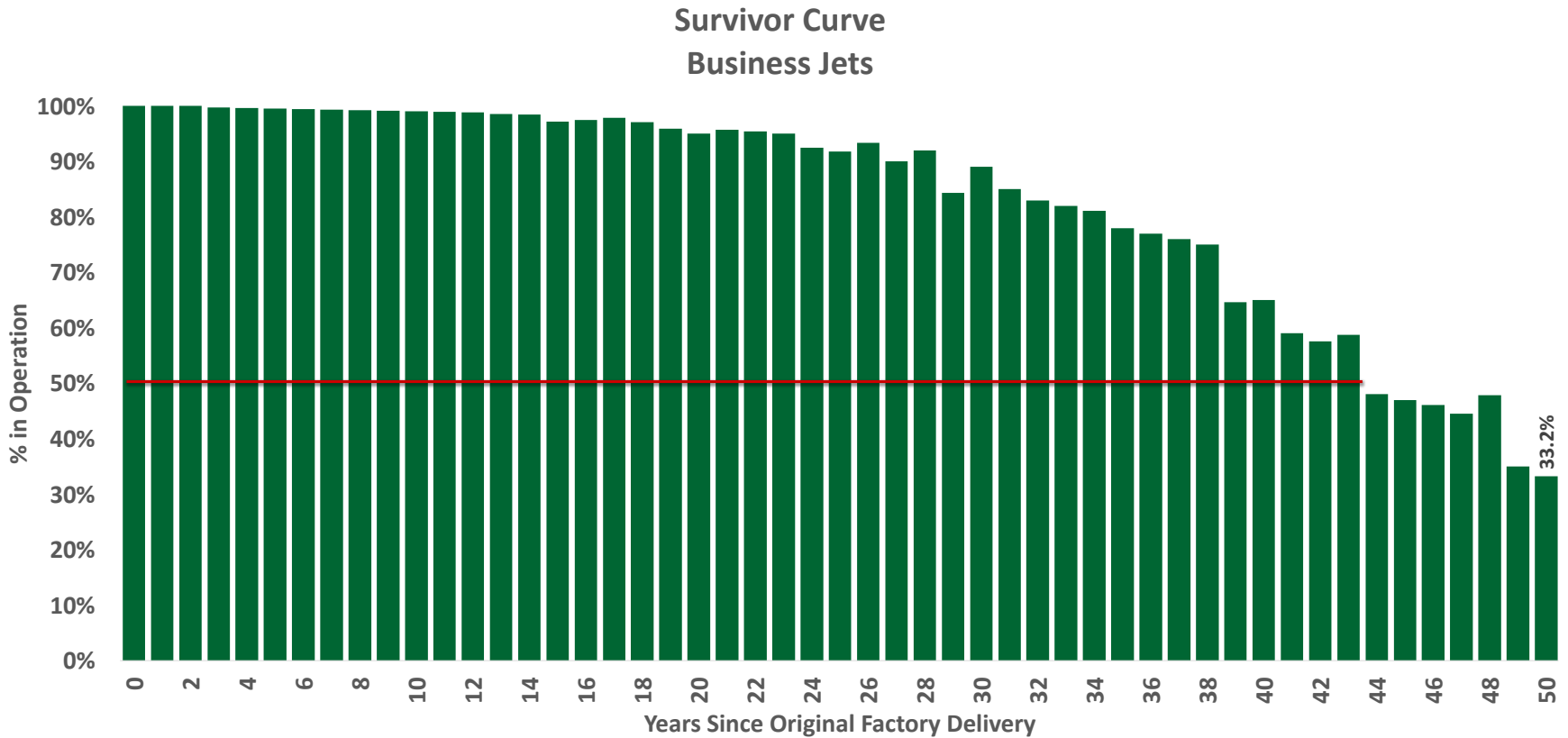
# Business Jet Delivery History & Forecast

Business Jet Deliveries by Size



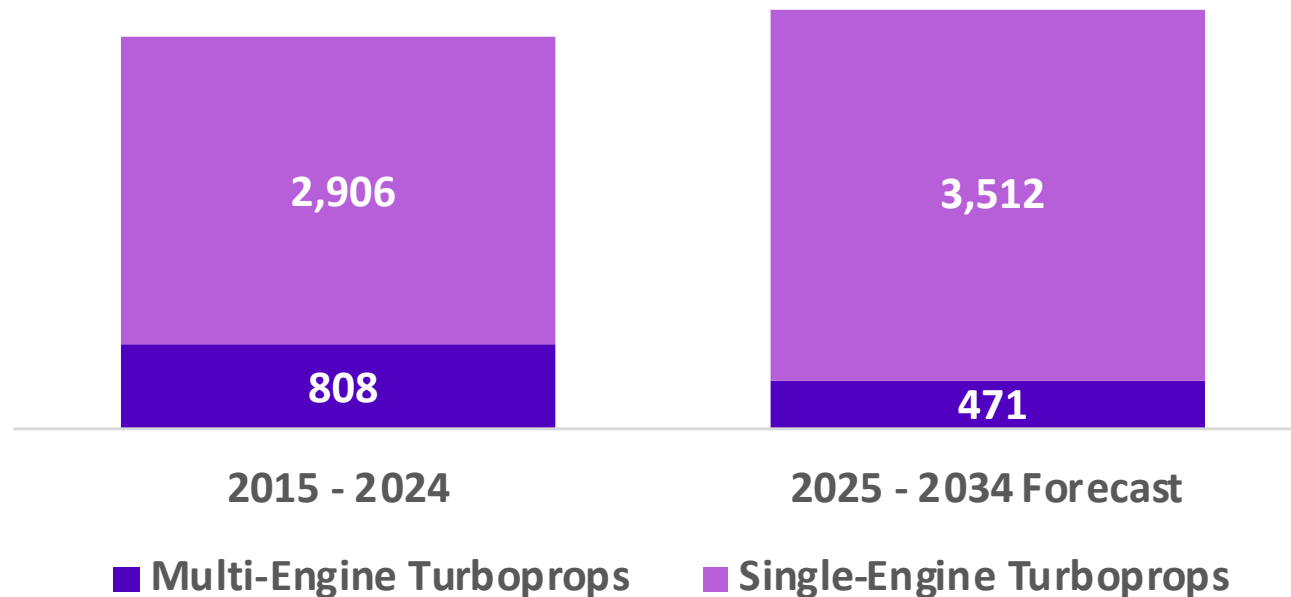
JETNET iQ 10-year forecast for 2025-2034 is for 9,538 new business jet deliveries (including single-engine Personal Jets) valued at \$328 billion (\$U.S. 2025)

# Business Jet Survivor Curve



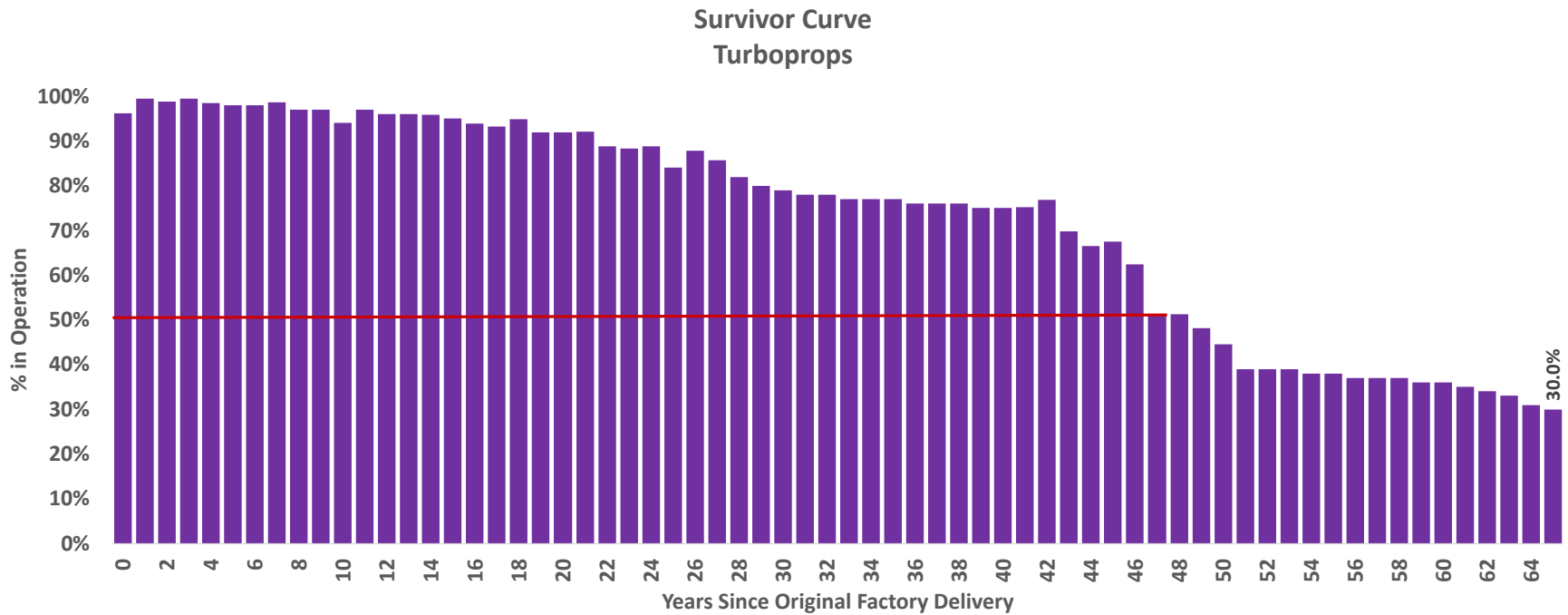
# Turboprop Delivery History & Forecast

Turboprop Deliveries by Size



**JETNET iQ 10-year forecast for 2024-2033 is for 3,983 new turboprop deliveries valued at \$22.9 billion (\$U.S. 2025)**

# Turboprop Survivor Curve



## About JETNET iQ

Launched in January 2011, JETNET iQ is a forecasting and premium advisory service for the business aviation market, designed to help customers “Know More”. JETNET iQ has 3 main elements:

- 1) JETNET iQ REPORTS are the definitive analytical reference for the business aviation industry, incorporating state-of-the-industry analyses, proprietary aircraft owner/operator surveys, and detailed 10-year delivery and fleet forecasts, updated quarterly.
- 2) JETNET iQ SUMMITS provide fast-paced thought-provoking insights into the state of the industry, and unique networking opportunities.
- 3) JETNET iQ ADVISORY serves the needs of clients with customized research and analysis requirements on a project-by-project basis.

For more information on JETNET iQ, please log on to [www.jetnetiq.com](http://www.jetnetiq.com) or contact Rolland Vincent, JETNET iQ Creator / Director at 1-972-439-2069 or [rollie@jetnet.com](mailto:rollie@jetnet.com).

## **About JETNET**

Since 1988, JETNET has delivered the most comprehensive and reliable business aircraft research to its exclusive clientele of aviation professionals worldwide. JETNET is the ultimate source for information and intelligence on the worldwide business, commercial, and helicopter aircraft fleet and marketplace, comprised of more than 110,000 airframes. Headquartered in its state-of-the-art facility in Utica, NY, JETNET offers comprehensive user-friendly aircraft data via real-time internet access or regular updates.

For more information on JETNET LLC, please log on to [jetnet.com](http://jetnet.com) or contact Paul Cardarelli, JETNET Vice President of Sales, at 800-553-8638 (USA) or [paul@jetnet.com](mailto:paul@jetnet.com); for International inquiries, please contact Karim Derbala, JETNET Managing Director of Global Sales, at 41.0.43.243.7056 or [karim@jetnet.com](mailto:karim@jetnet.com).