

Datablast

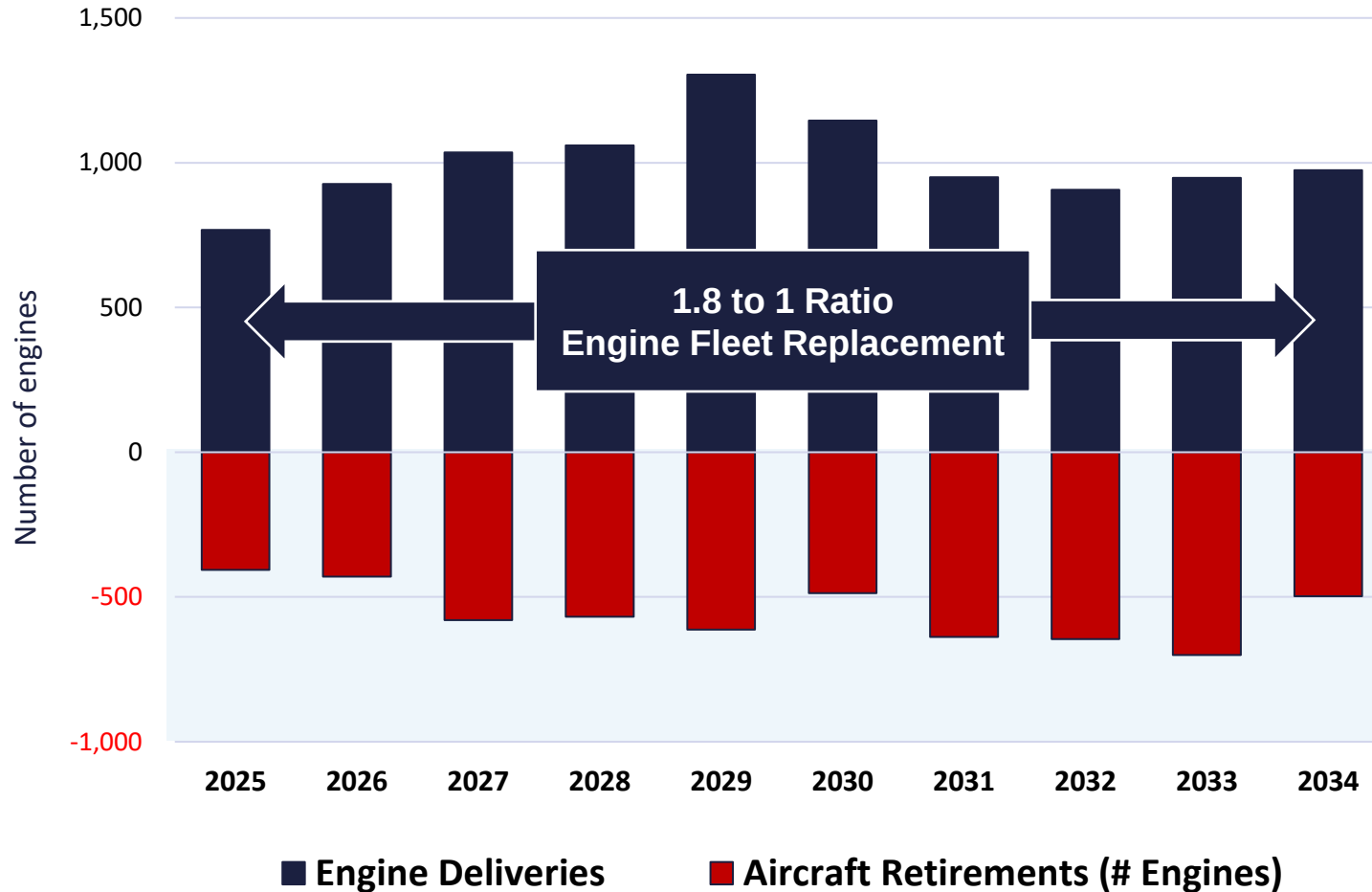
Commercial Engines in Transition

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June 2025

Forecast: Europe's Engine Transition

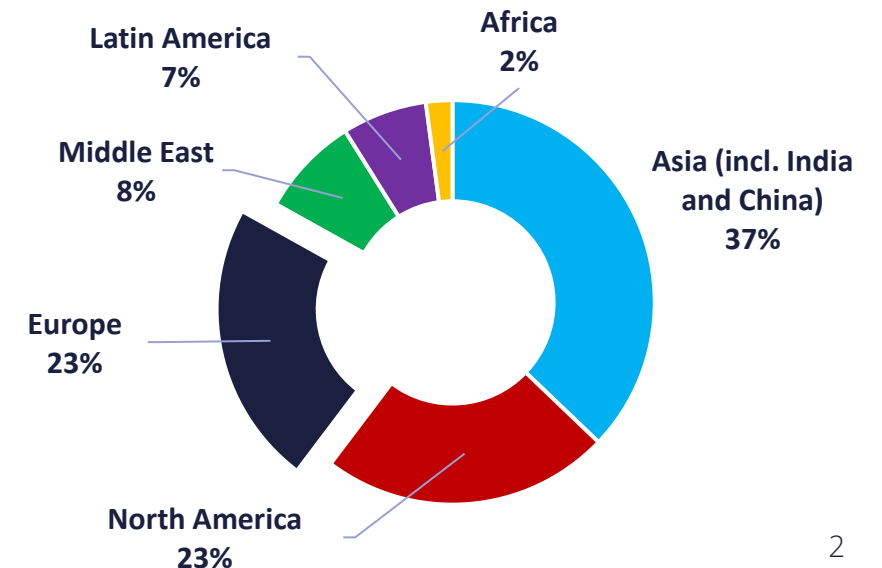
New engine deliveries vs. engines on retiring aircraft 2025-34



~10,000 new engines required in next 10 years

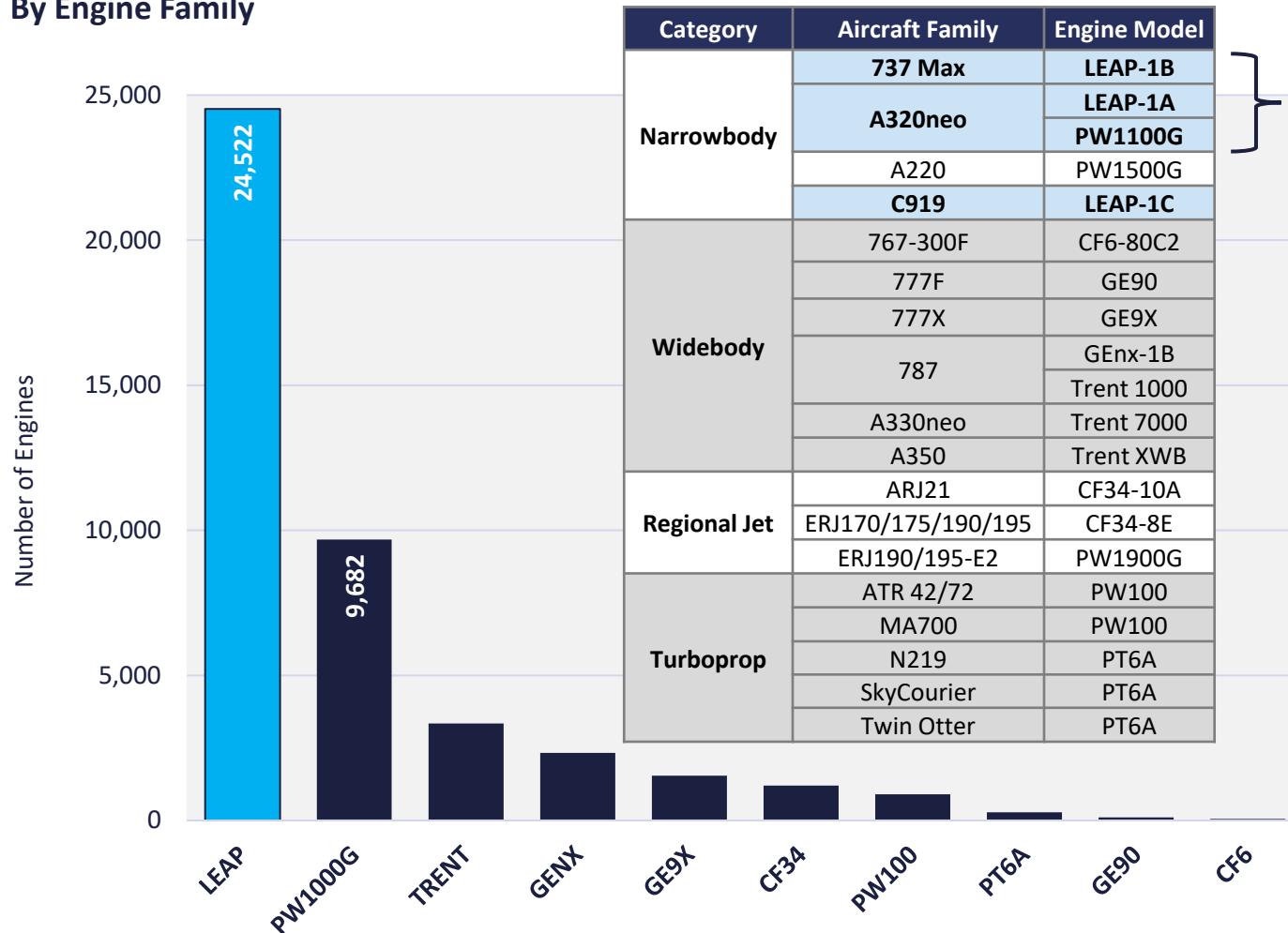
~5,500 engines associated with projected retiring aircraft

World Engine Delivery Share



Forecast: Global Commercial Engine Deliveries 2025-34

By Engine Family



Drivers

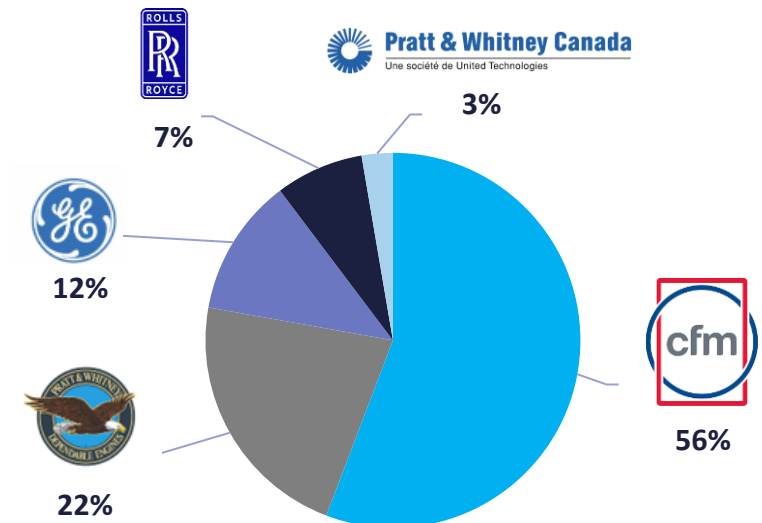


Credit: Guy Norris, Aviation Week

CFM's LEAP engine alone projected at over + 24,500 deliveries.

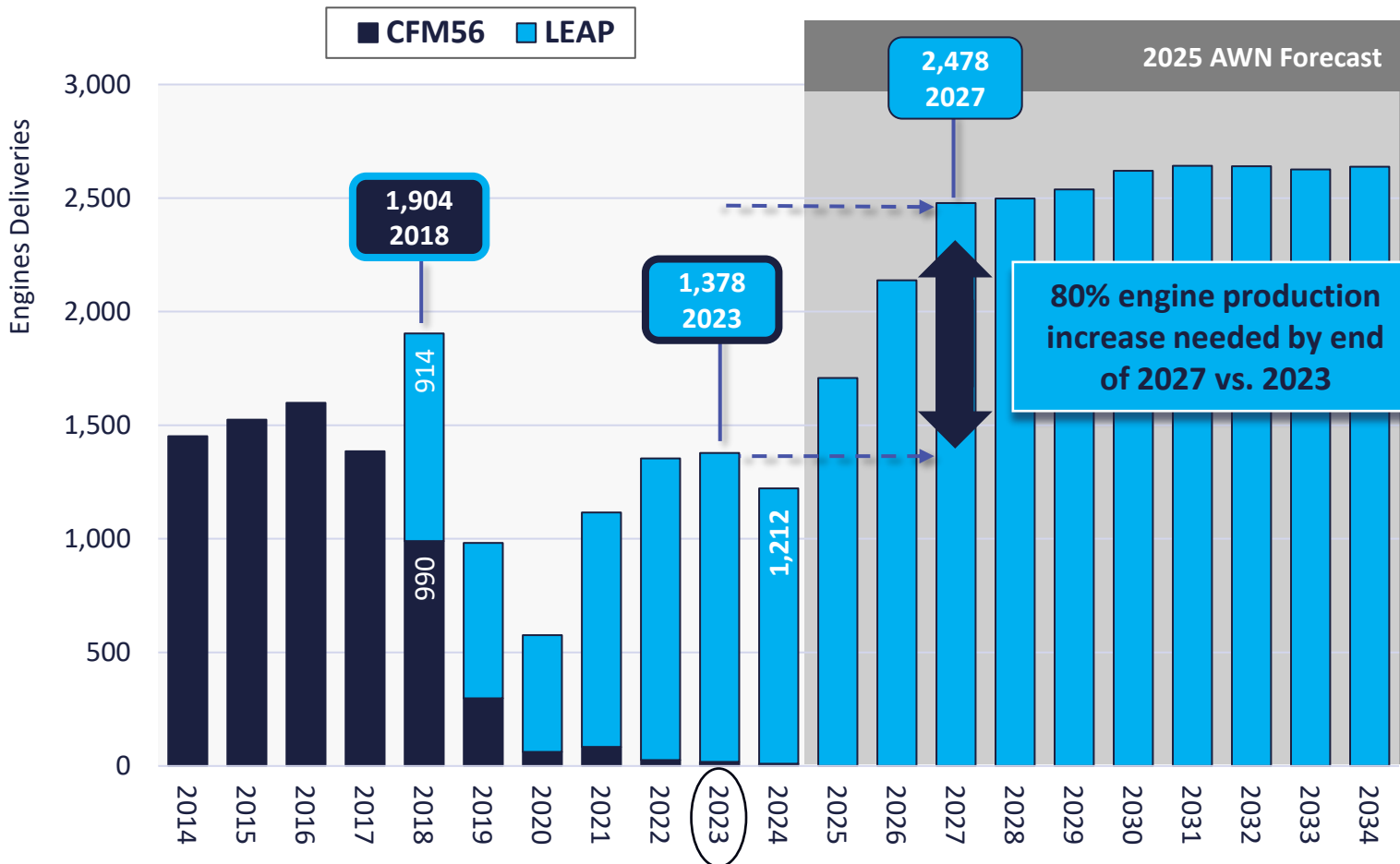
CFM engines account for 56% of all engine deliveries (not including spares)

Deliveries By Engine Manufacturer



CFM Challenge: LEAP Global Production Needed

Historical & Forecast Engine Deliveries - CFM56 & LEAP

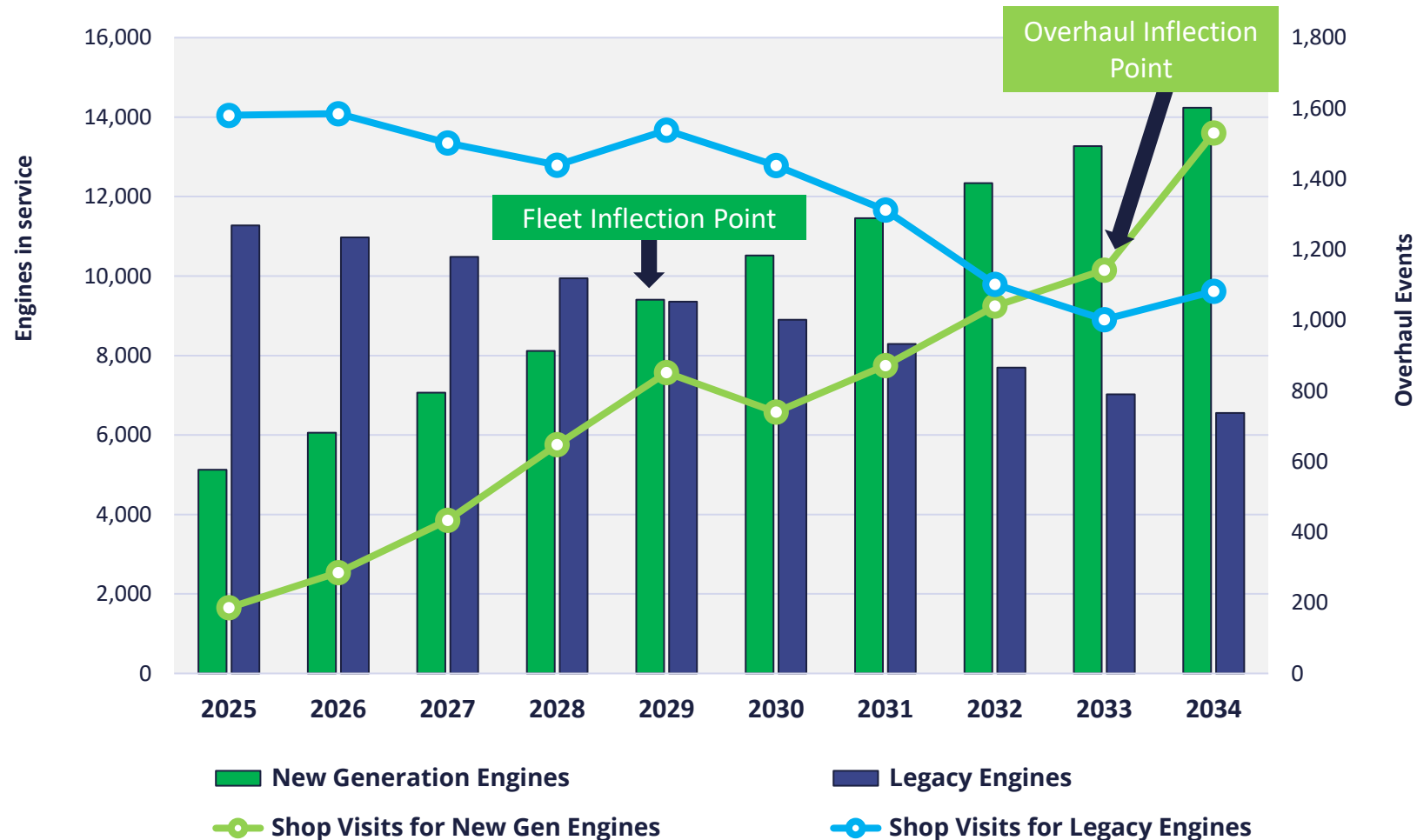


Highlights

- ✚ 80% production increase needed by 2027 to meet A320 and 737 projections.
- ✚ +24,500 LEAP engines needed over 2025-34 period (w/o spares).
- ✚ 2016 busiest year for CFM56 deliveries, ~1,600 units shipped.
- ✚ 2018 busiest year with combined CFM56 & LEAP engines, 1,904.
- ✚ 2023 +1,360 LEAP engines delivered, forecast to exceed 1,700 in 2025.
- ✚ Challenges: A320 orderbook – rate 75, 737-7 & -10 safety exemptions for nacelle deicing withdrawn..., COMAC orders growing...

Forecast: Engine Fleet & Overhaul Events – Europe

New generation vs. legacy fleet share & SV event forecast



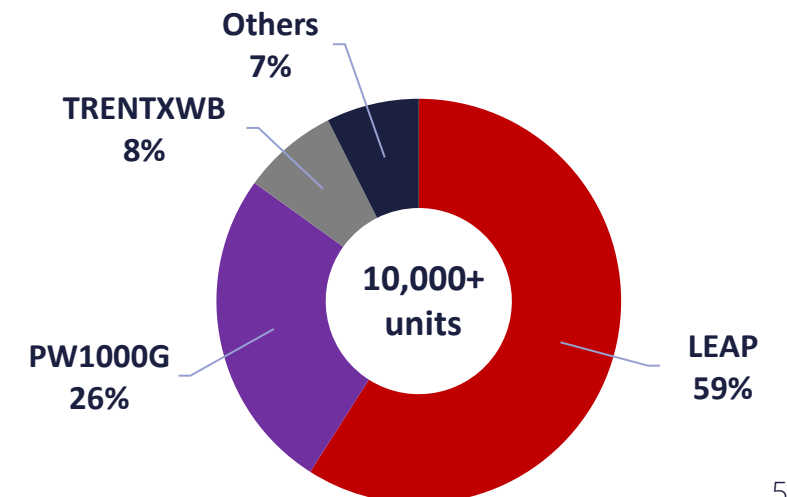
2029

New Generation Engines
Fleet Inflection Year

2033

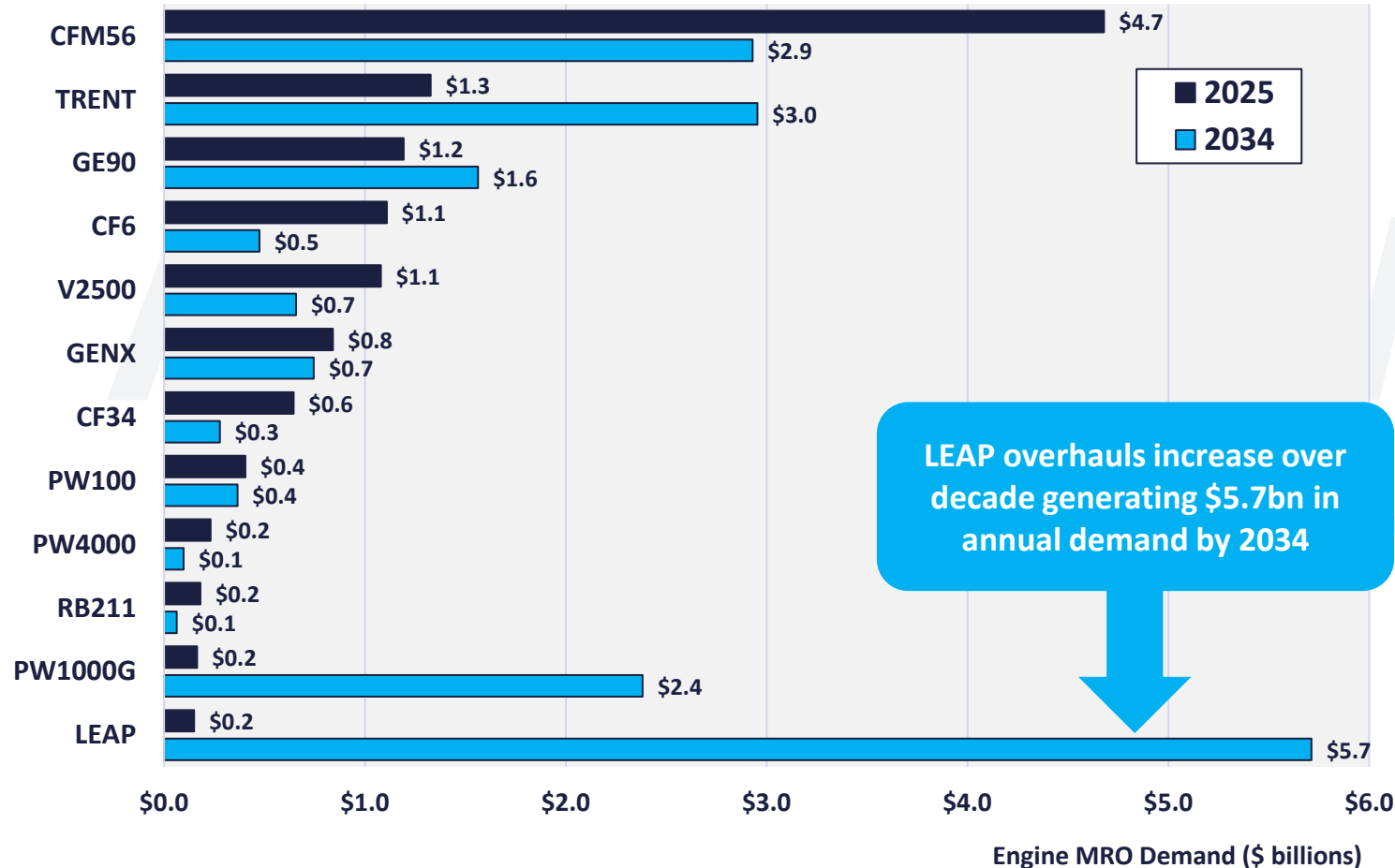
Inflection point for overhaul events
+28,000 Overhaul Events

New Gen Engine Deliveries
(2025-34 to Europe)



Forecast: Engine MRO Demand in Europe

MRO Demand by Engine Family



CFM56 Family

\$40.7B Demand 10-year

TRENT Family

\$21.9B Demand 10-year

LEAP Family

\$21.6B Demand 10-year

Source: 2025 Commercial Aviation Fleet & MRO Forecast, Fleet Discovery, Aviation Week Network, Copyright 2024.

Notes: LLPs and 2025 and 2026 new generation engine technical upgrades not included. Information for Asia Pacific and China combined.

MRO Demand Share & Comparisons, 2025 vs. 2019

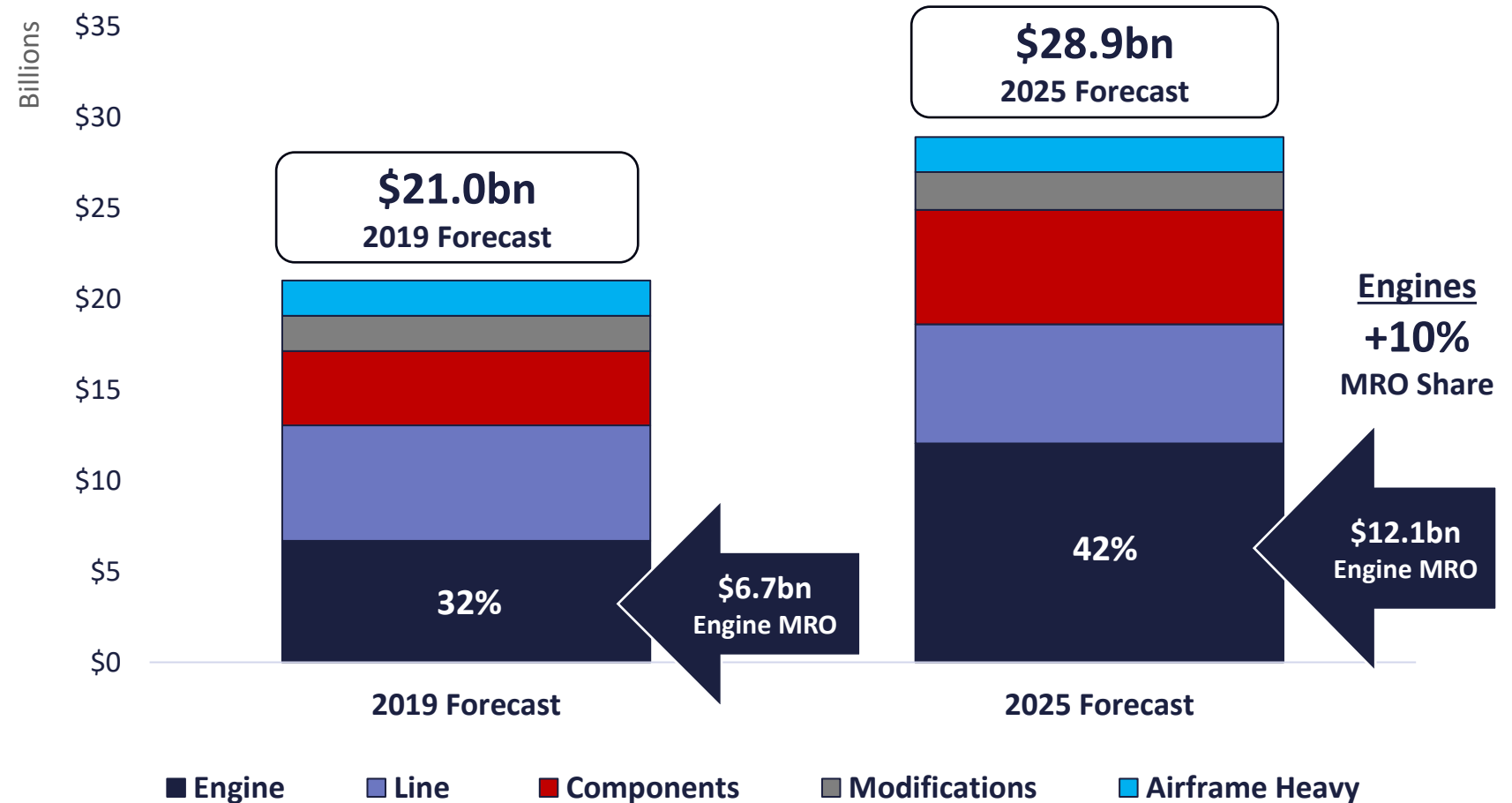
2025 v. 2019 Aviation Week Forecasts; MRO demand share for Europe

Engine MRO now 42% of MRO demand for 2025.

\$12.1 billion engine MRO expected in 2025 (LLPs + O/Hs) vs. \$6.7 billion in 2019.

Higher percentages in other regions

Drivers: old engines, new tech, CLP, shortages of USM, labor...



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