

## 2025-2026 Holiday Period: Market Activity Overview

Below are some key insights into market activity across the jet, turboprop, and helicopter segments for new and pre-owned units during the year-end holiday period, focusing on new listings and completed transactions.

### New Aircraft Added to the Market

#### Jets

A total of 40 jets were added to the market during the period, broken down as follows:

- 9 heavy jets
- 17 light jets
- 14 mid-size jets

This represents a ~20% decrease compared to the 2024/2025 holiday season, which saw 51 new jet listings.

The most notable change is within the heavy-jet segment, which recorded roughly half the number of new listings compared to last year, suggesting tighter supply or delayed sell-side decisions at the top end of the market.

#### Turboprops

The turboprop segment saw 29 new aircraft added to the market, marking a ~60% increase year-on-year compared to 18 listings last season. This sharp rise may indicate renewed seller confidence or increased fleet rotation in this category.

#### Helicopters

12 helicopters were newly listed for sale, unchanged year-on-year, pointing to a stable and predictable supply trend in this segment.

## Transaction Activity (Aircraft Sold)

A total of 333 jets were sold during the period:

- 101 heavy jets
- 132 light jets
- 100 mid-size jets

Jets

This reflects a +21% increase compared to last year's 276 jet transactions. Importantly, all jet segments experienced growth, highlighting broad-based demand rather than isolated strength.

The light-jet segment leaded the way growing by ~27%, while heavy and mid-size jets followed at ~16% and ~18% growth respectively, confirming strong activity across the market.

Turboprops

114 turboprops were sold, a figure that remains remarkably stable year-on-year, compared to just over 120 sales last holiday season. This consistency reinforces the turboprop segment's reputation as a resilient and balanced market.

Helicopters

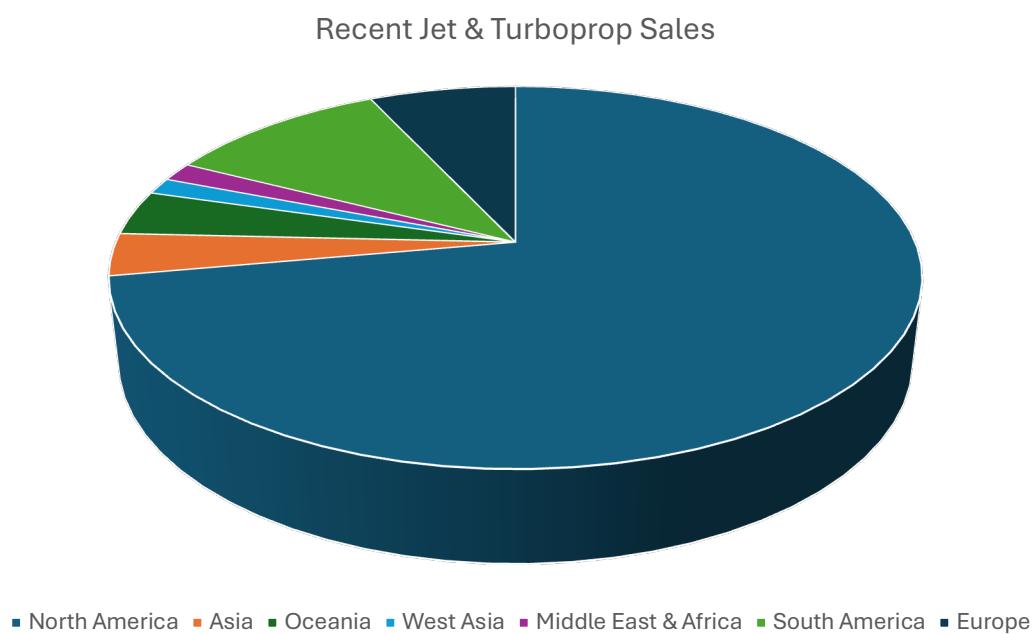
The helicopter market recorded 78 completed transactions, representing a ~30% decline compared to 110 sales last year. This marks the most significant slowdown across all segments and may reflect deferred purchasing decisions or softer demand toward year-end.

## Geographic Distribution of Transactions (Jets & Turboprops)

From a regional perspective, North America continues to dominate year-end activity:

- 81% of all transactions involved aircraft sold to or from the United States, a figure broadly in line with last year.

Europe, while still trailing significantly, recorded 35 transactions, representing a ~30% increase year-on-year. Although volumes remain modest in absolute terms, this growth suggests improving momentum across the European market.



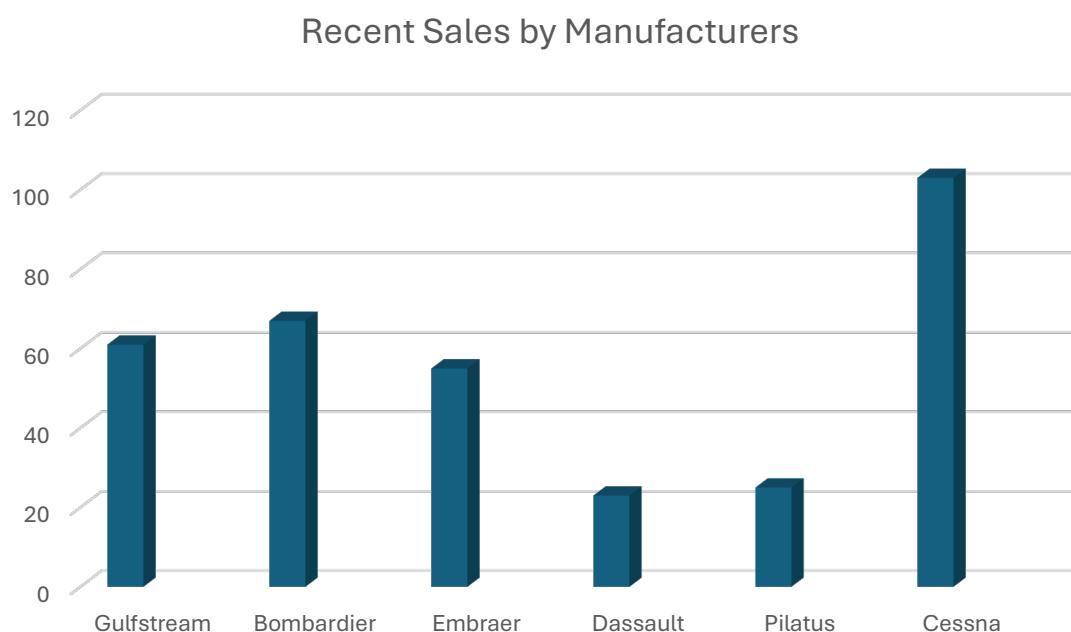
## Manufacturer Performance (Jets & Turboprops)

In terms of OEM performance:

- Cessna emerges as the clear leader with 103 year-end transactions,
- In the mid-size and large jets, Bombardier leads with 67 year-end transactions,
- followed closely by Gulfstream with 61 transactions.

While both manufacturers already led the market last year and showed no significant year-on-year surge, they continue to dominate in absolute volume.

**Dassault, with 23 transactions, remains behind in total numbers but stands out with a +28% increase in activity compared to last year, indicating strengthening demand and growing market traction.**



### Key Takeaways

- Jet transaction volumes show clear year-on-year growth, despite fewer new listings, pointing to strong absorption rates.
- Turboprops remain stable and resilient, with increased supply met by consistent demand.
- Helicopter activity softened meaningfully, marking the weakest segment this period.
- North America remains the dominant force, while Europe shows encouraging growth momentum.
- Bombardier and Gulfstream continue to lead in volume, while Dassault clearly stands out for relative growth.