

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

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

Jets

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

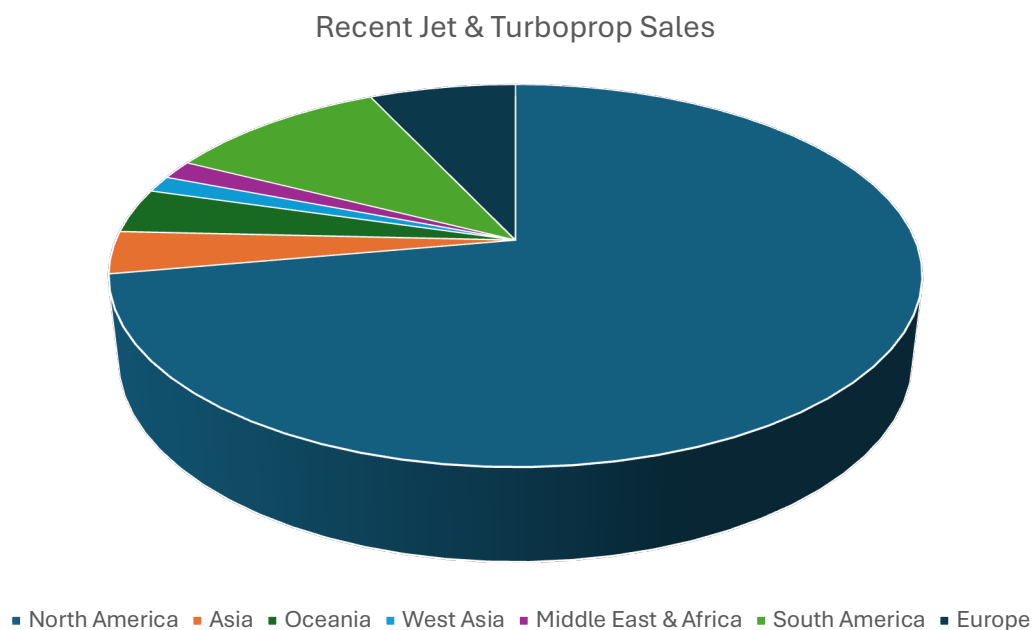
The helicopter market recorded 78 completed transactions, representing a ~30% decline compared to 110 sales last year. This marks the most significant slowdown across all segments and may reflect deferred purchasing decisions or softer demand toward year-end.

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.



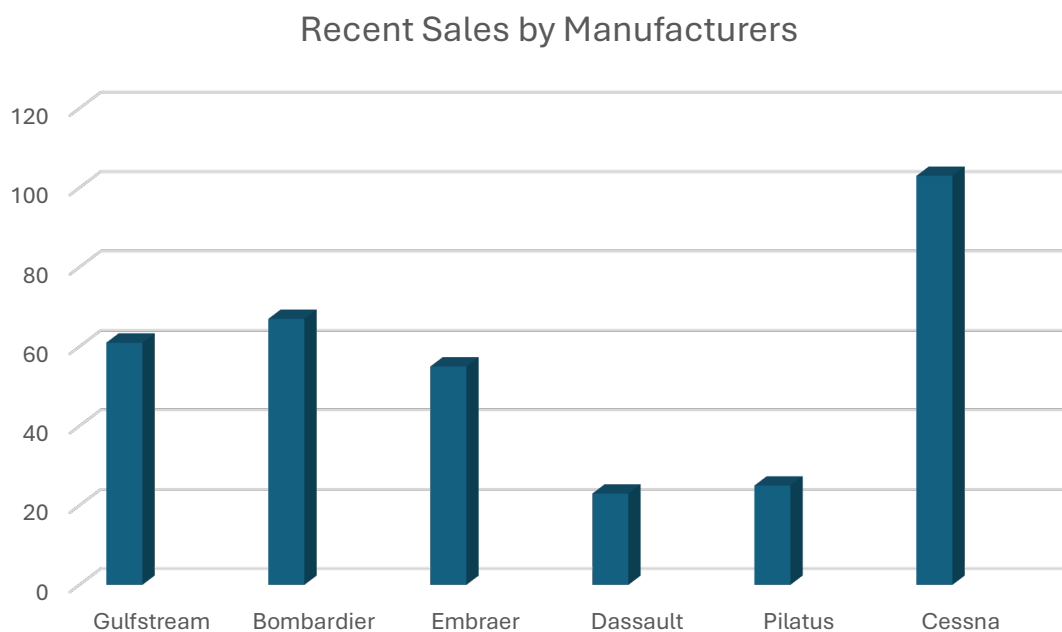
Manufacturer Performance (Jets & Turboprops)

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.