

Europe Business Jet - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Business Jet Market size is estimated at 5.2 billion USD in 2025, and is expected to reach 7.08 billion USD by 2030, growing at a CAGR of 6.36% during the forecast period (2025-2030).

Increase in business travel flight hours after the pandemic generated a high demand for business jets

- Business jets offer European executives and corporations direct access to smaller airports and avoid the time-consuming processes associated with commercial flights. These jets enable busy executives to maximize their productivity and reduce travel-related disruptions. The COVID-19 pandemic adversely impacted business jet deliveries in the region, with a decline of 26% in 2020 compared to 2021. There has been a shift toward private flying as a safer mode of transportation among the HNWI population in the region, aiding in procuring business jets. However, the market gradually recovered from the pandemic, and in 2022, the region recorded 34% growth compared to 2020.
- In terms of deliveries, during 2017-2022, the large jet segment dominated the region with 53% of the share, followed by light and mid-size jets with 35% and 12%, respectively. During the same period, the OEM that delivered most of the business jets was Embraer, with 11% of the total jets delivered in the region, followed by Cessna with 10% of jets delivered, Bombardier delivered 9% of the jets, and Gulfstream delivered 7% of the jets.
- Cessna was the leading OEM, with 30% of the current operational fleet size, followed by Bombardier and Dassault, with 19% and 14%, respectively, in the European business jet fleet as of December 2022. The surge in UHNWI individuals in the region is expected to aid the business jet segment. Around 1,244 aircraft are expected to be delivered between 2023 and 2030.

An increase in new memberships and rising HNWI wealth in the region is driving the demand for business jets in the region

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- As a hub for global finance, commerce, and tourism, Europe's dynamic business landscape relies heavily on the efficiency, flexibility, and luxury that business jets provide. As of December 2022, Europe accounted for around 12% of the global business jet fleet, with Germany leading the region with 18% of the total European business jet fleet, followed by the United Kingdom and France, with around 11% and 9%. There has been a shift toward private flying as a safer mode of transportation among the HNWI population in the region, aiding in procuring business jets. However, with the rapid vaccination rates and opening of borders, in 2022, a growth of 28% was recorded compared to 2020.
- In 2023, air charter service providers witnessed high demand in the European region and a surge in new memberships for business aviation. In May 2023, VistaJet International recently introduced its VJ25 program to Europe, the Middle East, and Africa. Aimed at travelers with flexible schedules flying 25 to 49 hours per year and offered as a three-year subscription, VJ25 provides guaranteed on-demand access to the Vista fleet of more than 360 aircraft worldwide, including its flagship ultra-long-range Bombardier Global 7500.
- Business jet demand in Europe continued to be affected by the COVID-19 pandemic and the Russia-Ukraine conflict, especially for medium and long-haul flights, as travel restrictions to many regions and countries remained in place during much of 2022. The Y-o-Y fleet growth and an increasing number of long-range and very light jets are signs of increased demand for European operators to use business jets inside Europe and on flights to destinations outside the region. During the forecast period, around 1,244 jets are expected to be procured.

Europe Business Jet Market Trends

Rise in the HNWI population acting as the major growth driver for the market

- HNWIs and UHNWIs often own private jets for personal or business travel. Europe is home to a multitude of scenic and exclusive destinations that may not be easily accessible through commercial flights. Business jets provide the opportunity for HNWIs to fly directly to remote locations, avoiding congested airports and time-consuming connections. In 2022, the number of UHNWIs in Europe increased by 5% compared to 2021. This was because the Eurozone utilities, tech stocks, and luxury goods sectors performed well, registering solid gains. Europe recorded the third significant rise in the ultra-wealthy population, which recorded 67% of the global HNWI population during 2017-2022.
- The leading position of Europe in terms of the number and assets of HNWIs is mainly attributed to Germany, France, and the United Kingdom. In 2022, these three countries alone recorded 67% of the total HNWIs in Europe. Germany led the HNWI population with 3.5 million HNWIs, followed by France with 3.07 million and the United Kingdom with 2.9 million. The United Kingdom attracts a steady stream of high-net-worth individuals from Africa, Asia, and the Middle East. Russia saw the least growth in the HNWI population, which recorded 2%. This was because well-off people have been moving out of Russia every year for the past 10 years, a sign of the current issues the country is facing. The crisis in Ukraine posed risks to the global economy, especially to inflation and financial markets. However, the market is expected to recover during the forecast period. In 2030, the HNWI population is expected to grow by 18.4 million.

Europe Business Jet Industry Overview

The Europe Business Jet Market is fairly consolidated, with the top five companies occupying 98.05%. The major players in this market are Bombardier Inc., Dassault Aviation, Embraer, General Dynamics Corporation and Textron Inc. (sorted alphabetically).

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- The market estimate (ME) sheet in Excel format
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