MID-YEAR BUSINESS AVIATION INTELLIGENCE REPORT

# H1 2026 Business Aviation Data

**AVI-GO BUSINESS AVIATION INTELLIGENCE** **AVI-GO**

Operational evidence through 30 June 2026.

BUSINESS AVIATION INTELLIGENCE BRIEF

# H1 2026 Business Aviation Data

## CONTENTS

11 PAGES



Operational data through 30 June 2026.

EXECUTIVE SUMMARY

# The first half expanded with uneven regional momentum.

Across January to June, business-aviation activity remained above 2025 levels. North America anchored market scale, Rest of World led business-jet growth, and Europe finished the half slightly below its prior-year baseline.

**+4.2%**
GLOBAL H1 YOY
ARGUS, all business aircraft

**+2.53%**
H1 BUSINESS JET YOY
1.707M departures

**1.294M**
NORTH AMERICA H1
+2.65% YoY

**+5.91%**
REST OF WORLD H1 YOY
Fastest regional growth

## FOUR DECISIONS BEHIND THE NUMBERS

**Network** Protect dense North American capacity while tracking faster growth beyond the core market.

**Fleet** H1 model and brand rankings show persistent demand for high-utilization light and midsize platforms.

**Workflow** H1's regional growth gaps and network concentration reward faster, more current operating data in daily decisions.

**Access** Connected news, flight data and operational constraints are becoming one decision surface.

**H2 +2.2%**

ARGUS forecasts slower but positive North American growth in the second half, led by Fractional (+3.5%) and Part 135 (+3.4%). The signal is expansion with tighter prioritization, not a return to indiscriminate growth.

PART 1 / SCOPE

# Three complementary views of the market.

Each source covers a different aircraft population or market moment. The views are compared for direction while their totals remain independent.

AVI-GO REPORTS

### Business jets only

Monthly and cumulative activity across regions, airports, routes, operators and aircraft types.

ARGUS TRAQPAK

### Wider aircraft scope

Includes turboprops and jets, with North American operational categories and global departures.

AVI-GO FLIGHT INTELLIGENCE

### Comparable activity

A separate view of H1 business-jet segments across airports, routes, operators and models.

## HOW TO READ THE NUMBERS

| MEASURE | DEFINITION |
|---|---|
| **Period** | 1 January to 30 June 2026 |
| **Flight activity** | Departures or segments |
| **Airport activity** | Arrivals plus departures |
| **Route activity** | Bidirectional city or airport pairs |

**H1 totals** Use the latest first-half restatement published at the June cutoff.

**Separate totals** Different aircraft scopes are never added together.

**Consistency rule.** Coverage, classifications and revision timing differ by source. Directional comparisons are useful; apparent gaps between totals should not be treated as errors or combined into a single market figure.

PART 1 / FLIGHT ACTIVITY

# H1 growth held across two independent market views.

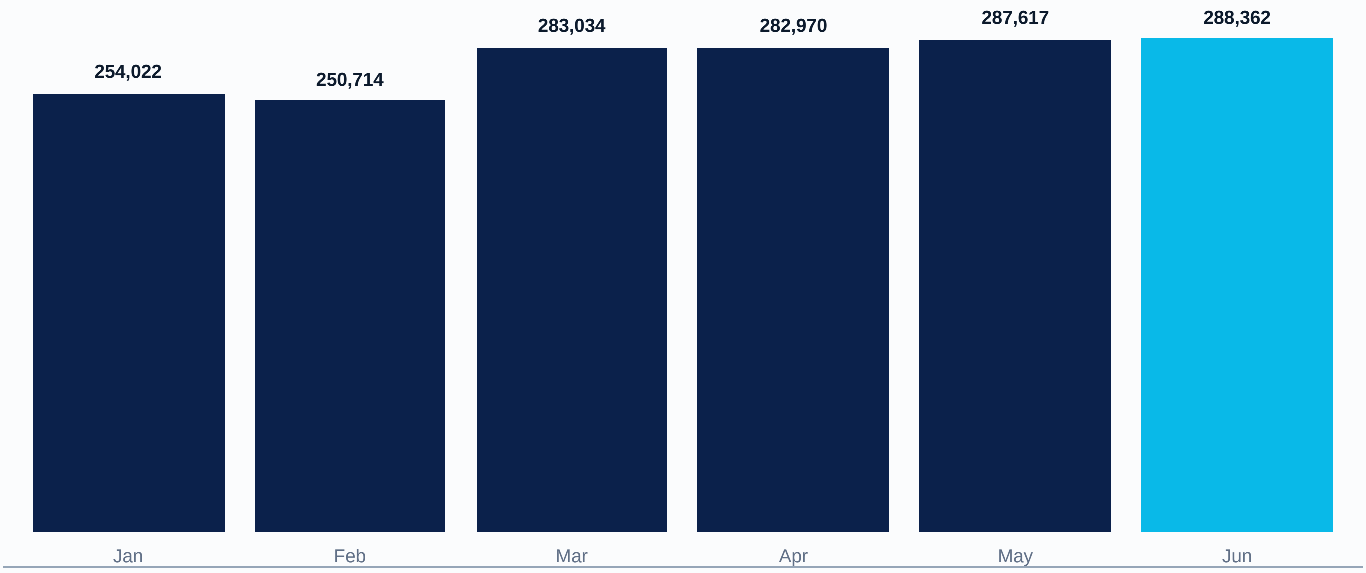
The published H1 restatement recorded 1.707 million business-jet departures, up 2.53%. ARGUS measured 2.443 million global business-aircraft flights, up 4.2%, under its wider aircraft scope.

**1.707M**
AVI-GO H1 JETS
+2.53% YoY

**1.294M**
NORTH AMERICA H1 JETS
+2.65% YoY

**2.443M**
ARGUS GLOBAL H1
+4.2% YoY

## AVI-GO H1 BUSINESS-JET ACTIVITY BY MONTH

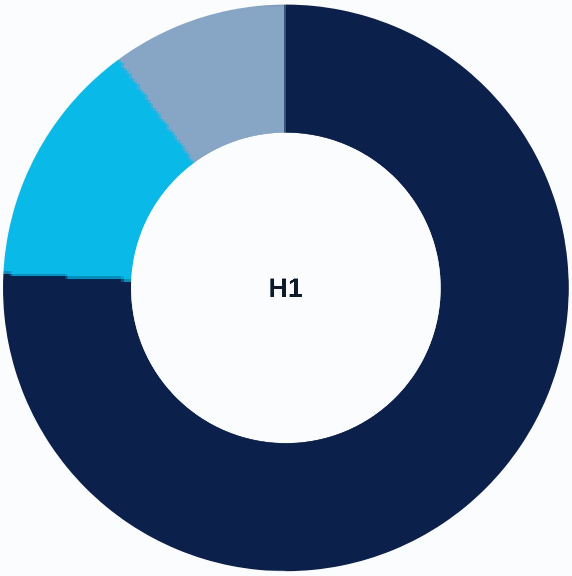



**Comparable view.** Avi-Go Flight Intelligence recorded 1,646,719 H1 jet segments. Coverage and matching rules differ from the published report total, so each figure stands on its own.

**North America remained strongest.** ARGUS recorded 1,772,287 H1 flights, +3.5%, its highest first-half total in four years, including turboprops.

PART 1 / REGIONS

# North America anchored volume. ROW led growth.




- North America 1,293,685 · 75.77%
- Europe 241,453 · 14.14%
- Rest of World 172,199 · 10.09%

H1 shares based on 1,707,337 published business-jet departures.

| REGION | H1 DEPARTURES | H1 SHARE | H1 YOY | HALF-YEAR READ |
|---|---|---|---|---|
| **North America** | 1,293,685 | 75.77% | +2.65% | Scale leader |
| **Europe** | 241,453 | 14.14% | −0.38% | Broadly stable |
| **Rest of World** | 172,199 | 10.09% | +5.91% | Growth leader |

01

NORTH AMERICA

### Scale with positive growth

More than three quarters of published H1 jet departures originated in North America, while activity still advanced 2.65% year on year.

02

EUROPE

### A near-flat first half

Europe held a 14.14% share and finished 0.38% below 2025, showing stability rather than broad-based acceleration.

03

REST OF WORLD

### The fastest growth rate

Rest of World remained smaller in absolute volume but expanded 5.91%, the strongest H1 regional growth in the published view.

PART 1 / NETWORK ACTIVITY

# H1 network density centered on enduring hubs.

| NORTH AMERICA H1 MOVEMENTS | |
|---|---|
| **KTEB** New York | 69,836 |
| **KDAL** Dallas | 36,225 |
| **KIAD** Washington | 32,558 |
| **KHPN** Westchester | 31,259 |

| EUROPE H1 MOVEMENTS | |
|---|---|
| **LFPB** Paris | 22,215 |
| **LFMN** Nice | 16,657 |
| **LSGG** Geneva | 13,338 |
| **LIML** Milan | 12,485 |

| REST OF WORLD H1 MOVEMENTS | |
|---|---|
| **MYNN** Nassau | 13,385 |
| **LTBA** Istanbul | 6,895 |
| **MYAM** Marsh Harbour | 6,456 |
| **SBJH** São Paulo | 5,505 |

**KTEB**
**69,836**

Teterboro remained the clearest H1 density point in the reviewed business-jet data. Paris and Nice led Europe, while Nassau topped the Rest of World airport view.

## ROUTE SIGNALS

**KTEB** ↔ **KIAD** **2,634**

New York–Washington · H1 bidirectional jet segments.

**KLAS** ↔ **KVNY** **2,179**

Las Vegas–Los Angeles · H1 bidirectional jet segments.

**MYNN** ↔ **KTEB** **491**

Nassau–New York · H1 bidirectional jet segments.

**KDAL** ↔ **KHOU** **1,499**

Dallas–Houston · H1 bidirectional jet segments.

**LFPB** ↔ **LFMN** **1,250**

Paris–Nice · H1 bidirectional jet segments.

**LFMN** ↔ **LSGG** **780**

Nice–Geneva · H1 bidirectional jet segments.

**Operating read-through.** H1 traffic concentrated around a limited set of high-density gateways, but regional leaders differed: major U.S. business hubs, European capitals and leisure gateways, and Caribbean nodes each supported distinct mission patterns.

PART 1 / CAPACITY

# Scale leadership persisted across the half.

NORTH AMERICA IDENTIFIED LEADERS

**26.38%**

NetJets 16.17%; Flexjet 6.81% of H1 regional departures.

EUROPE IDENTIFIED LEADERS

**23.06%**

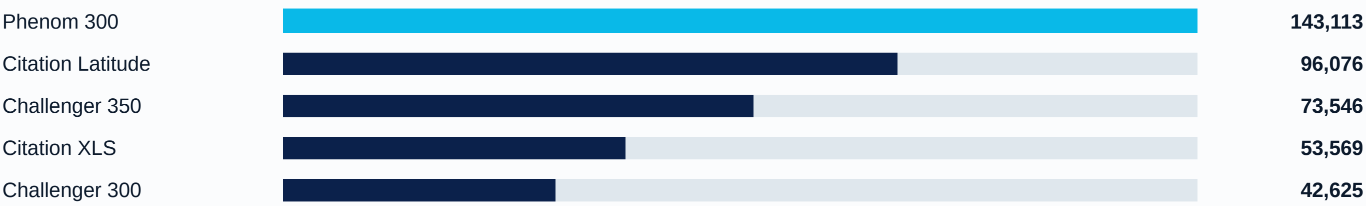
NetJets Europe 12.03%; VistaJet 7.19%.

REST OF WORLD IDENTIFIED LEADERS

**9.39%**

NetJets 3.60%; VistaJet 3.19%.

## H1 GLOBAL TOP AIRCRAFT MODELS




**578,640**

CESSNA H1 SEGMENTS

35.16% global share

**366,744**

BOMBARDIER H1 SEGMENTS

22.28% global share

**238,790**

EMBRAER H1 SEGMENTS

14.51% global share

## ARGUS H1 NORTH AMERICA, WIDER AIRCRAFT SCOPE

| OPERATING CATEGORY | FLIGHTS | YOY |
|---|---|---|
| Charter | 641,518 | +3.1% |
| Fractional | 371,138 | +11.7% |
| General aviation | 759,446 | +0.3% |

| AIRCRAFT CATEGORY | FLIGHTS | YOY |
|---|---|---|
| Turboprop | 497,080 | +4.3% |
| Small cabin | 458,445 | +6.1% |
| Mid-size | 567,506 | +3.2% |
| Large cabin | 249,080 | −1.8% |

**Commercial signal.** H1 activity combined durable operator leadership with a long supplier tail. High-utilization light and midsize platforms dominated the model ranking, while fractional activity delivered the strongest ARGUS category growth.

PART 2 / COMING SOON

# AVI-GO Business Aviation Intelligence Center

H1 showed how fast the picture moves — regional growth gaps widened and the operator base kept fragmenting. Staying ahead means seeing the news, data and context behind those shifts in one place, which is what we're building next.

A focused business aviation information experience built around Featured News and Following.

APPENDIX 01

# Data provenance & methodology

A concise record of the scope, definitions and controls behind the operating data, market signals and interpretations in this report.

## TEMPORAL FRAMEWORK

- **Operating period:** 1 January to 30 June 2026.
- **H1 totals:** the latest first-half restatement available at the June reporting cutoff takes precedence over earlier monthly figures.

## PRIMARY DATA SOURCES

- **AVI-GO Global Business Aviation Analytics Reports, January to June 2026:** published business-jet departures and regional restatements.
- **ARGUS TRAQPak 2026 Mid Year Business Aviation Review:** global business-aircraft activity under its broader aircraft definition.
- **Avi-Go Flight Intelligence:** H1 airport, route, operator, model and brand activity extracted on 3 August 2026.

## ACTIVITY DEFINITIONS

**Departure / segment:** one recorded flight leg departing within the stated period. **Airport movement:** one arrival or one departure. **Route:** a bidirectional airport or city pair unless noted otherwise.

## SCOPE SEPARATION

AVI-GO figures in this report cover business jets only. ARGUS includes the aircraft classes defined in TRAQPak, including turboprops. The two views describe different market scopes and their totals are never added together.

## CALCULATION RULES

- **Year-on-year change:** current period divided by prior-year period, minus one.
- **Regional or market share:** relevant activity divided by the stated source total.
- **Rankings:** based on the displayed source population after stated exclusions.
- **Rounding:** values may be shown to one or two decimal places, so displayed shares may not sum precisely to 100%.

## QUALITY CONTROLS

- Later published restatements supersede previously reported H1 values.
- One inconsistent airport-code mapping was excluded from the network ranking.
- Unidentified operator records were excluded from displayed leader shares.
- Cross-source comparisons retain the original scope, unit and cutoff of each dataset.

## EVIDENCE LABELS

**Fact** identifies sourced data or an official announcement. **Signal** identifies a trend interpretation supported by multiple observations. **Avi-Go view** identifies the report's industry perspective, not a forecast or guarantee.

> **Data cutoffs.** H1 operating data ends 30 June 2026.

APPENDIX 02

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This report is provided for general information and market context only. It is a high-level synthesis of business-aviation activity and selected industry announcements, not a complete record of the market.

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Data sources differ in aircraft scope, geographic coverage, classifications, revision timing and completeness. Published values may be corrected or restated. Totals from different source systems are not directly comparable and must not be combined.

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