



BUSINESS AVIATION ENTERS A NEW PHASE: ELEVATED ACTIVITY AND STABILIZING PRICES DEFINE MID-2025 MARKET

News / Business aviation



JETNET released its Mid-2025 Market Snapshot: business jet inventory, pricing and activity. Business aviation market is transitioning from the post-pandemic boom to a more balanced and sustainable growth phase, according to the newly released report from JETNET. The report presents a detailed analysis of flight activity, inventory trends, pricing dynamics, and buyer behavior for the first half of the year, offering a comprehensive outlook for the remainder of 2025.

Flight activity remains robust, with global business jet usage up approximately 3% year-over-year and more than 10% above pre-COVID levels. United States continues to lead the recovery, driven by demand from charter and fractional operators. Despite a slight dip in European traffic following a high-profile 2024 summer, global flight volumes underscore the enduring value of private aviation.

Richard Koe, Managing Director of WINGX commented: “Business jet activity continues to grow year on year. Underscoring a systemic expansion of the user base over the last five years.”

Paul Cardarelli, Vice President of Sales at JETNET stated: “The market is maturing into a more thoughtful, resilient phase. Buyers are more selective, and the frenzy has cooled, but activity remains elevated, especially compared to pre-pandemic levels. This suggests we’re seeing a new normal, not a retreat.”

Rolland Vincent, JETNET iQ Creator/Director said: “The post-pandemic landscape has redefined what’s ‘normal’ in business aviation. We are operating on a permanently higher baseline, with increased utilization and durable interest from new customer segments.”

Pre-owned inventory rose modestly—up 1.3% from January through June—while remaining below historical norms. The average age of listed aircraft reached 22 years, contributing to longer sales cycles. Still, demand remains strong, with whole-aircraft transactions rising 13.3% compared to the first half of 2024. Notably, newer jets with modern features and low time continue to command premium prices despite an overall 9% decline in asking prices.

OEMs delivered 455 new business jets in the first half of the year, and forecasts project 820 total deliveries for 2025—an 8% increase year-over-year. Backlogs remain strong, and while pricing is showing signs of softening, values remain historically high.

Additional highlights from the report include:

? **Inventory levels** remain well below the pre-2020 average, supporting a seller-favorable environment.

? **Days on Market (DOM)** rose from 184 days in H1 2024 to 220 days in H1 2025, reflecting increased buyer deliberation.

- **Aircraft mix** is shifting: 3% fewer large jets and 3% more light jets were included in the inventory compared to H1 2024.
- **High-value transactions** remain active, with the top recorded sale reaching \$67.5 million.

? **Fractional ownership** and jet card programs continue to attract pandemic-era entrants.

JETNET iQ analysts note that while macro-economic conditions—such as easing inflation and the return of 100% bonus depreciation—have helped support financing and transactions, global uncertainties and policy shifts remain potential wildcards. Looking ahead, H2 2025 is expected to extend current trends: continued elevated usage, a healthy pace of transactions, and moderate pricing corrections. Structural shifts, including a younger and more diverse customer base, broader adoption of fractional models, and stronger brand visibility for private aviation, position the industry for continued resilience.

The full [Mid-2025 Market Snapshot](#) is now available from JETNET.

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