Quarterly Market Report

2026 Q2

Light Jets

Quarterly Market Report

525	CJ4	Mustang
CJ1	CJ4 Gen 2	Phenom 100
CJ1+	M2	Phenom 100E
CJ2	M2 Gen 2	Phenom 300
CJ2+	Encore	Phenom 300E
CJ3	Encore+	Lear 31A
CJ3+	Bravo	Lear 35A

Light Jets

2026 Market Report – Quarter Two

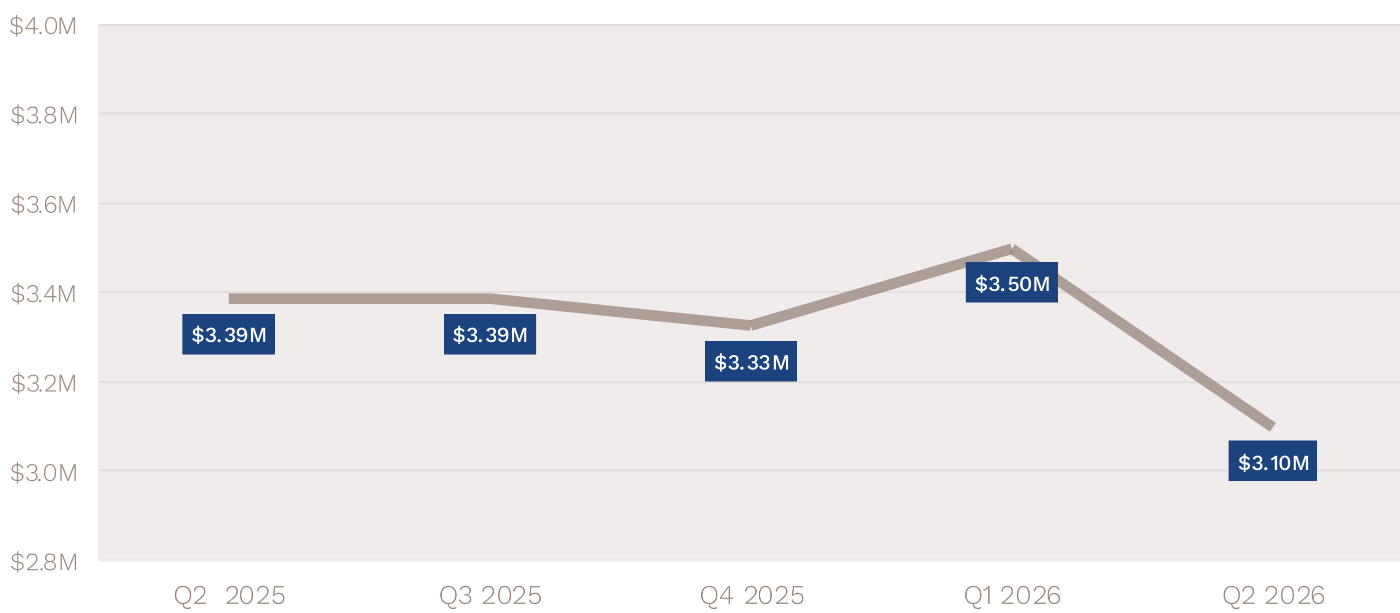
Core Light Jets

April 2025 - June 2026

The second quarter of 2026 reflected a continued moderation in the light jet market. Total inventory available for sale softened 5.0% year-over-year, though it rose a modest 5.1% quarter-over-quarter — a seasonally typical rebound following the post-Q4 inventory drawdown that persisted through Q1. Average asking prices continued to soften as well, down 9.8% YoY and essentially flat quarter-over-quarter (-1.7%), suggesting sellers are recalibrating expectations amid softer demand. Transaction volume told a similar story, falling 25.8% YoY and 11.0% QoQ, reinforcing a broader narrative of a cooling market heading into the back half of the year. Notably, average days on market improved in Q2, declining to 214 days — down from 230 in Q1 and 239 a year ago — indicating that while fewer aircraft are changing hands, well-priced listings are still moving efficiently. Taken together, this combination of softening prices, reduced transaction activity, and a shorter time-to-sale points to a market that is normalizing rather than stalling, though the persistent YoY inventory contraction is worth monitoring as we approach the historically active Q4 selling season.

Average Asking Price

Light Jet Segment | April 2025 – June 2026



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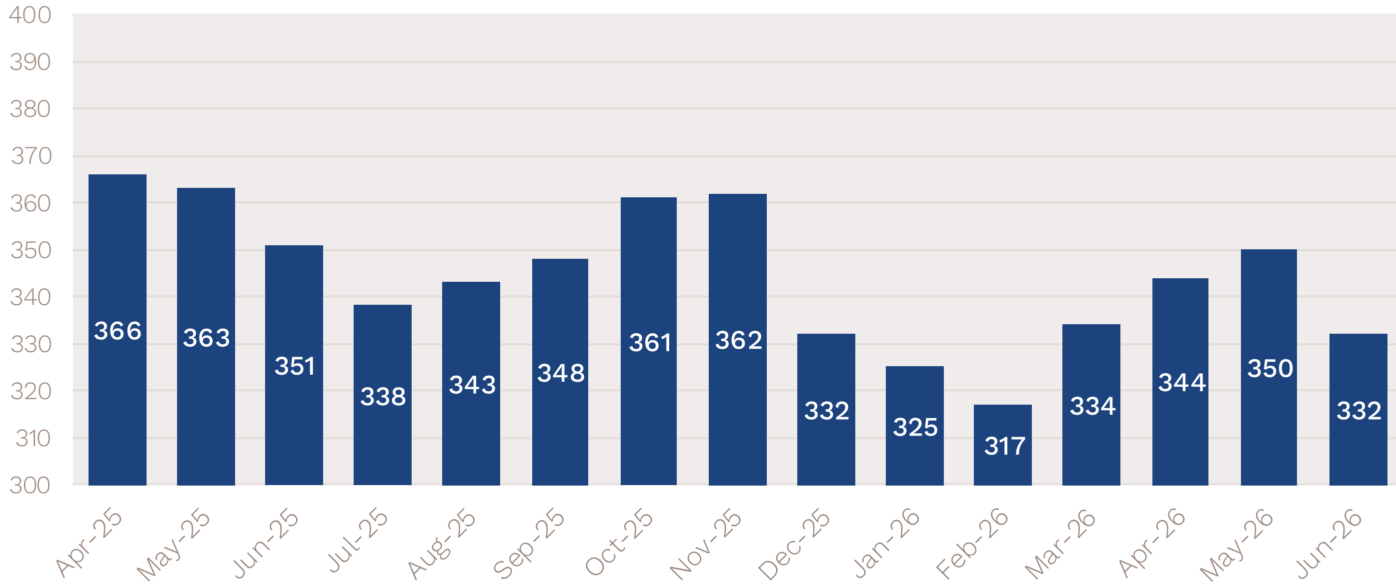
Light Jets

2026 Market Report – Quarter Two

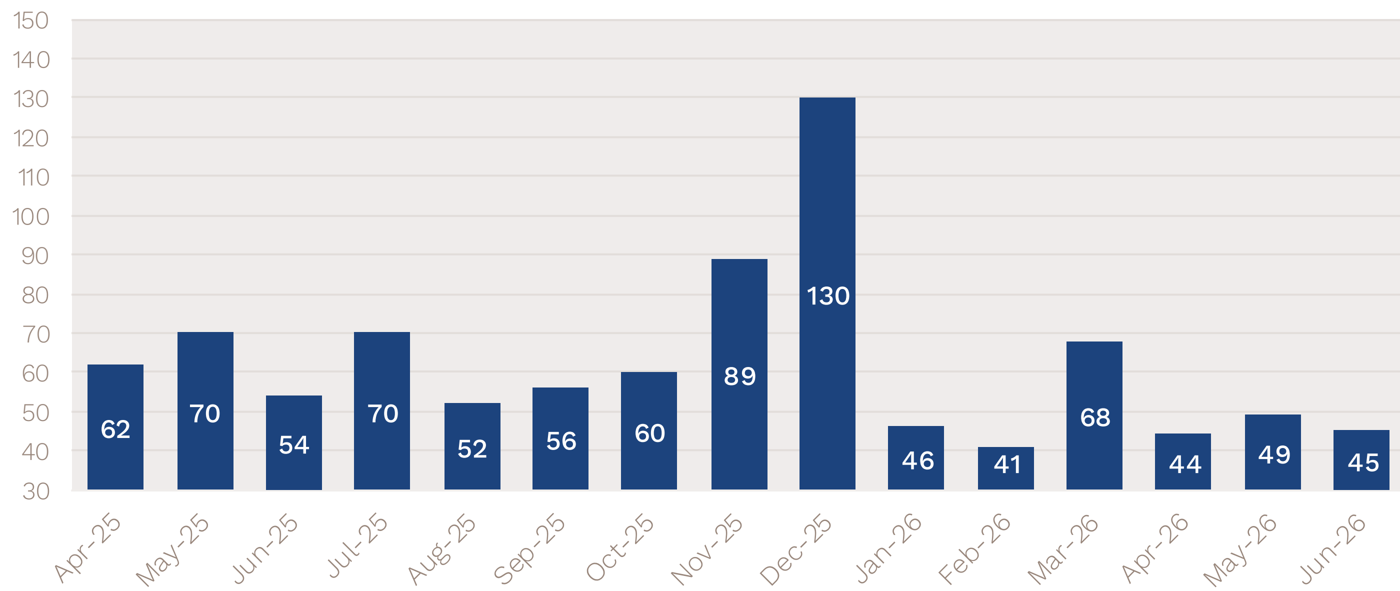
Aircraft Supply

Light Jet Segment | April 2025 – June 2026



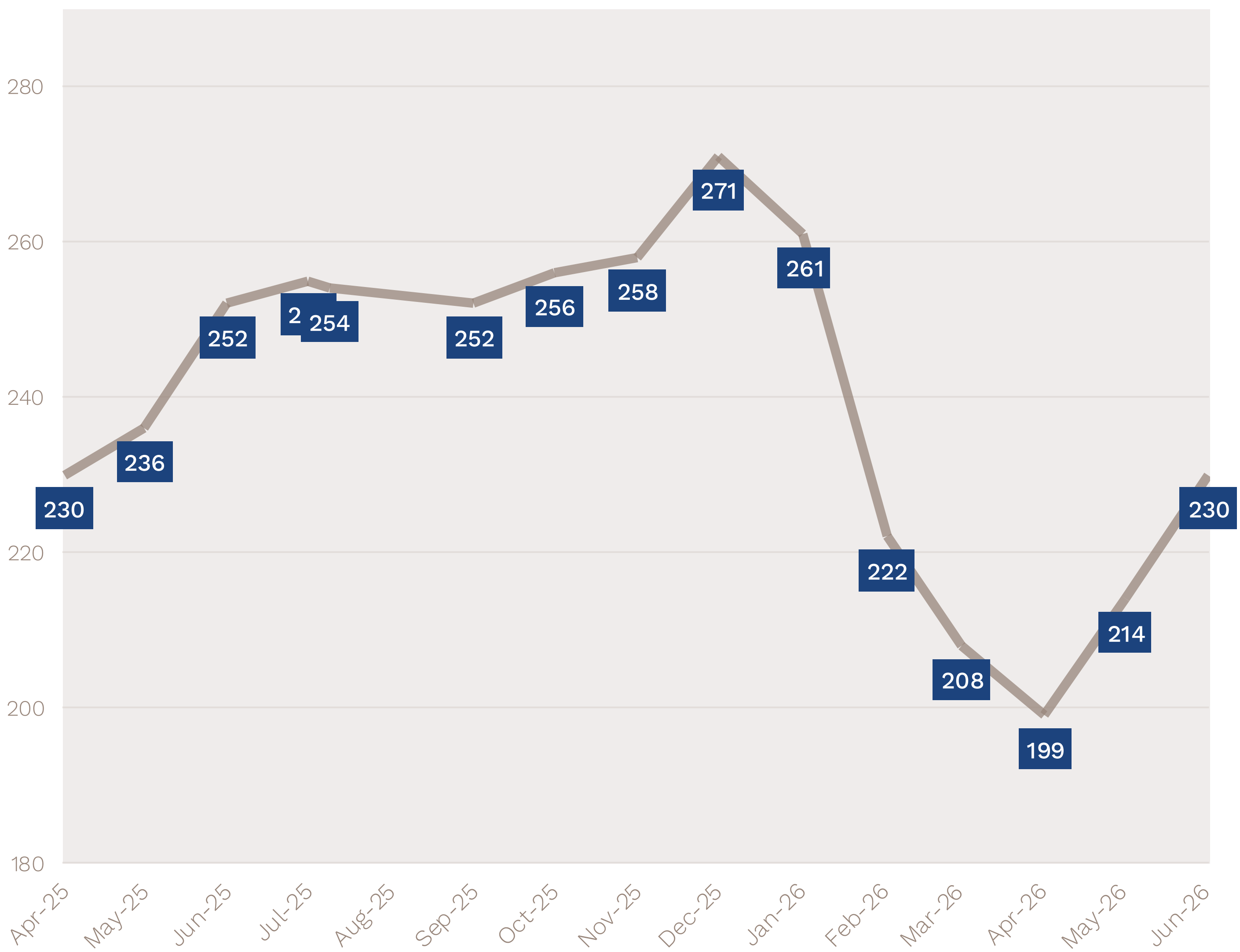
Aircraft Transactions

Light Jet Segment | April 2025 – June 2026



Days on Market

Light Jet Segment | April 2025 – June 2026



Mid-Size Jets

Quarterly Market Report

Excel
XLS
XLS+
XLS Gen 2
Lear 40
Lear 40XR
Lear 45
Lear 45XR
Lear 55
Lear 60
Lear 60XR
Lear 70
Lear 75
G150
Falcon 50
Falcon 50EX
Hawker 750
Hawker 800XP
Hawker 850XP
Hawker 900XP

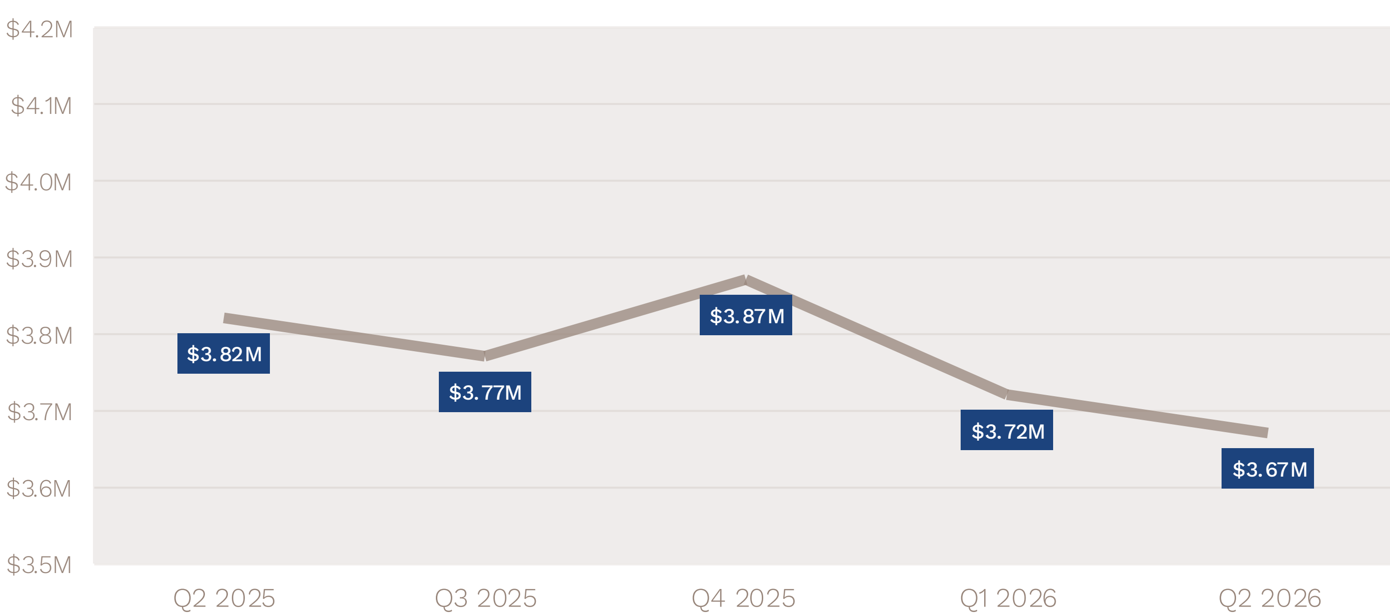
Core Mid-Size Jets

April 2025 - June 2026

The mid-size jet market showed a more resilient picture in the second quarter of 2026 compared to the light jet segment. Inventory available for sale ticked down just 2.0% year-over-year but climbed a solid 6.6% quarter-over-quarter, as the market rebuilt from a tight Q1 following typical post-Q4 clearance. Average asking prices continued to soften, down 3.8% YoY and a further 1.8% QoQ, reflecting sellers adjusting to buyer expectations in a more price-sensitive environment. Transaction activity was the standout metric this quarter: while volume remained down 28.3% year-over-year, it rose 8.0% quarter-over-quarter, suggesting Q2 brought a genuine pickup in deal flow after a sluggish start to the year. Average days on market held essentially steady, up just 1.5% YoY and down 2.6% QoQ to 274 days, indicating that pricing discipline — not distressed selling — is driving the modest recovery in transaction pace. Taken together, the mid-size segment appears to be stabilizing faster than the light jet market, with the QoQ transaction rebound the clearest signal that buyer appetite is returning as we move toward Q4.

Average Asking Price

Mid-Size Jet Segment | April 2025 – June 2026



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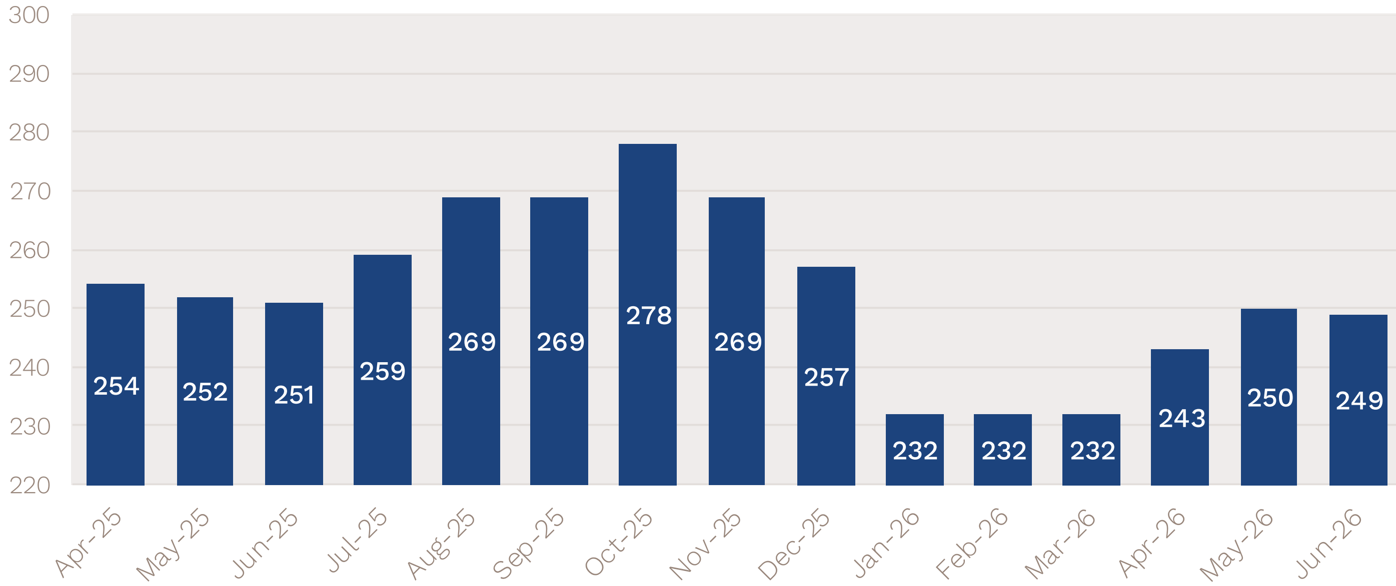
Mid-Size Jets

2026 Market Report – Quarter Two

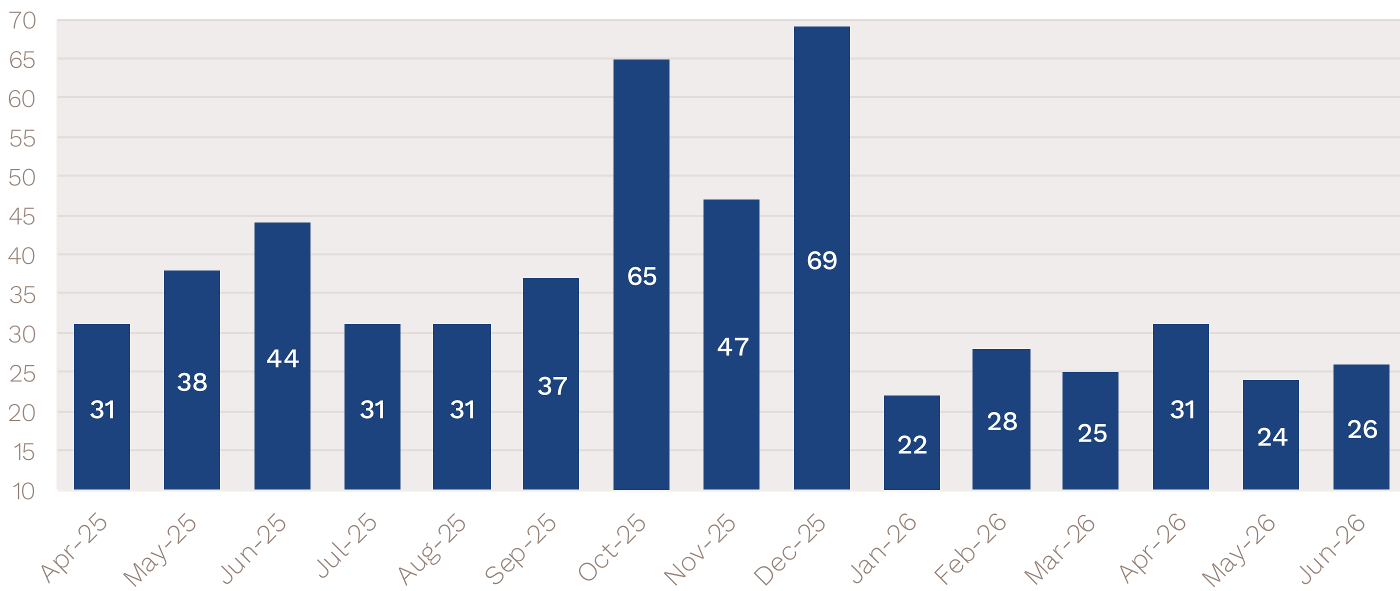
Aircraft Supply

Mid-Size Jet Segment | April 2025 – June 2026



Aircraft Transactions

Mid-Size Jet Segment | April 2025 – June 2026

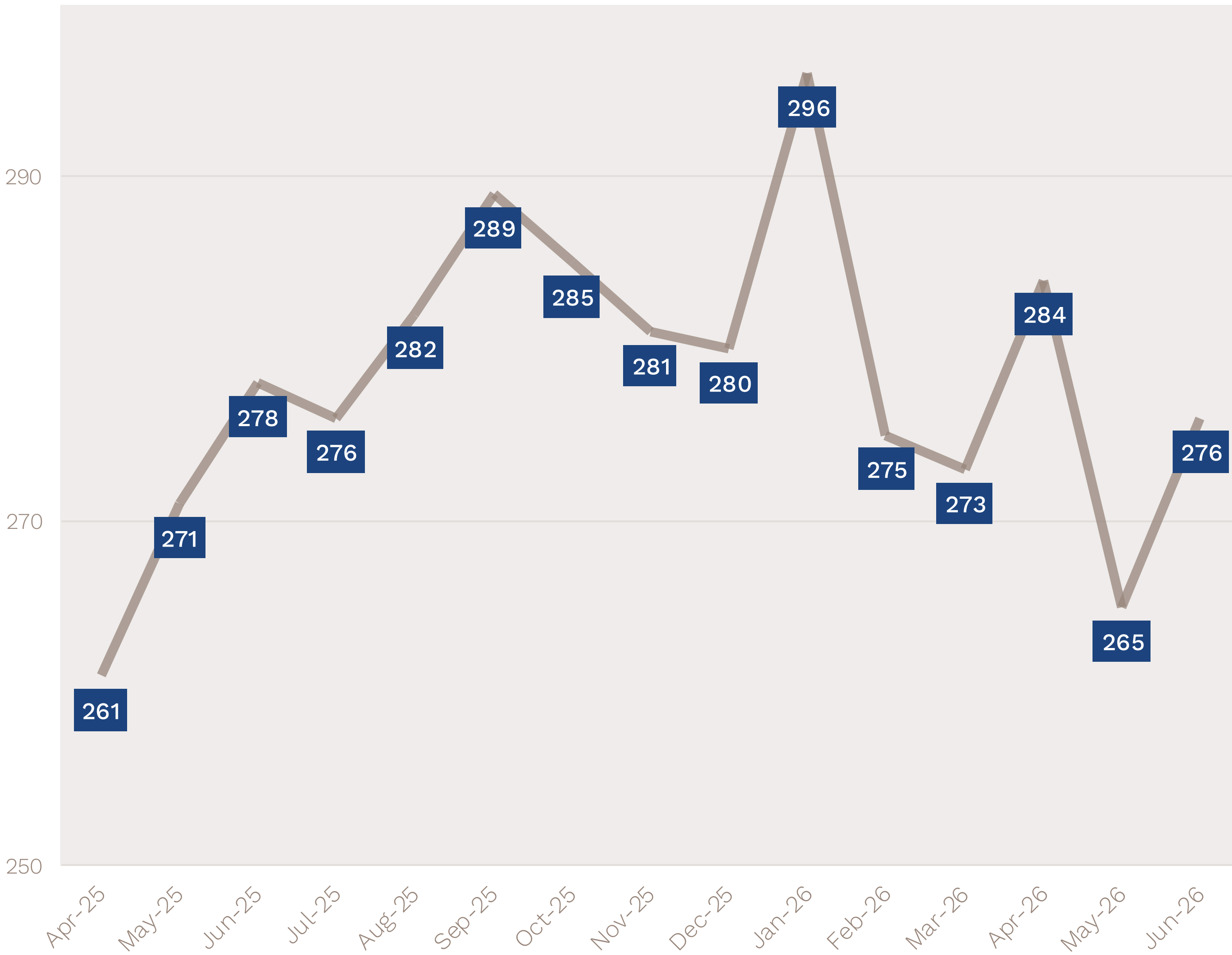


Mid-Size Jets

2026 Market Report – Quarter Two

Days on Market

Mid-Size Jet Segment | April 2025 – June 2026



Super-Mid Jets

Quarterly Market Report

Sovereign	Legacy 500	Falcon 2000
Sovereign+	Praetor 600	Falcon 2000S
Latitude	G200	Falcon 2000EX/EXy
Longitude	G280	Falcon 2000LX
Citation X	Challenger 300	Falcon 2000LXS
Citation X+	Challenger 350 / 3500	Hawker 4000
Embraer L450/Praetor 500	Falcon 900EXy	

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Super-Mid Jets

2026 Market Report – Quarter Two

Core Super-Mid Jets

April 2025 - June 2026

The super midsize market continues to demonstrate resilience, holding both inventory and values within a narrow band for five consecutive quarters. After a soft Q1, activity recovered through the spring, reinforcing the stability that has defined this segment.

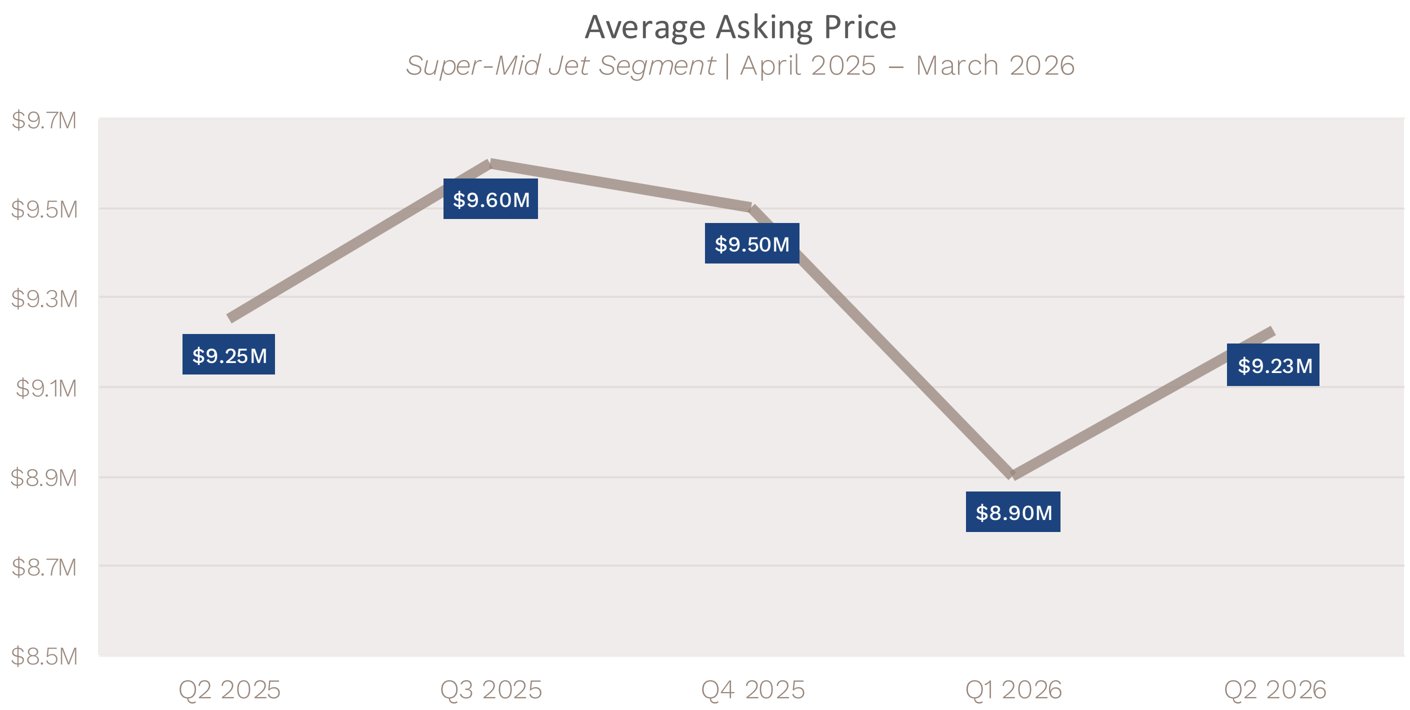
While transaction volume improved to 126 aircraft (+11% QoQ), it remains below year-ago levels. Values held firm, with essentially no movement from Q1 at an average of $9.23M.

At the same time, supply expanded — June brought 49 new aircraft to market, the largest single-month addition in the period — yet absorption held firm at approximately 42 transactions monthly. This balance underscores a market that is active, not overheated.

Importantly, demand continues to concentrate where supply is thinnest. Challenger 350 availability ran as low as 1.67% of fleet against a segment average of 5.2%, with listings moving in 96 to 129 days versus 171 segment-wide. Realized values climbed accordingly, reaching $19.7M in Q2 against $16.7M a year ago.

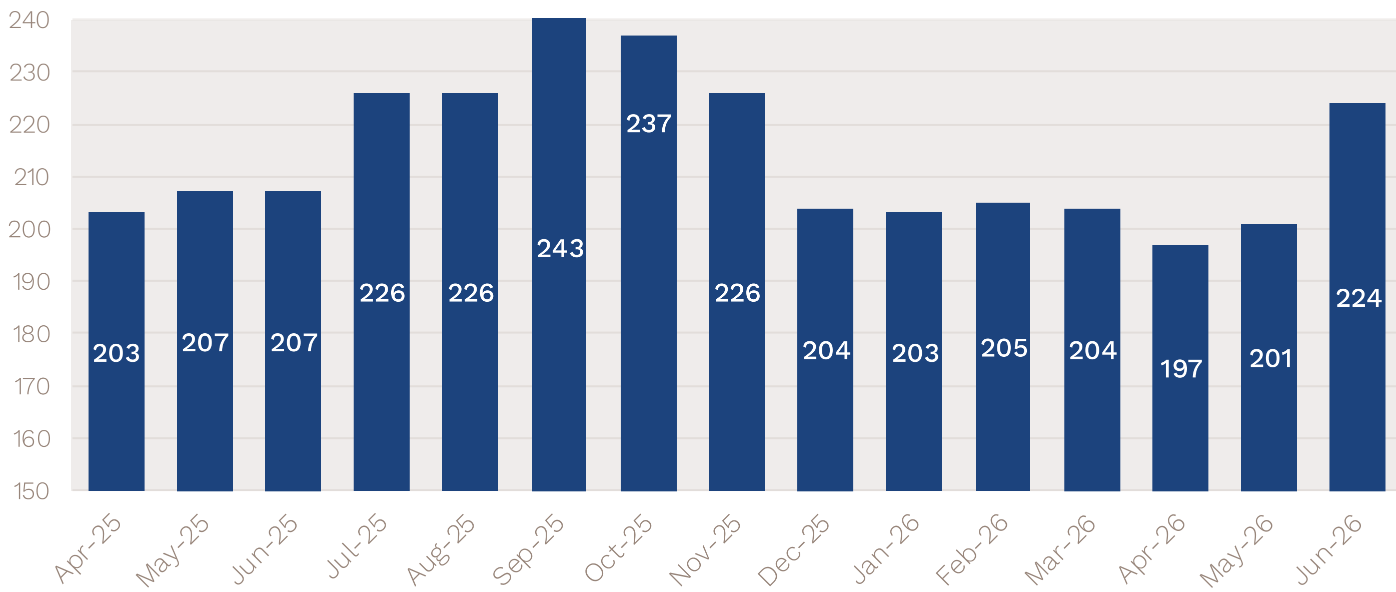
Outlook:

Pricing discipline has held through a full year of stable conditions, and the June supply build represents the first real test of that balance. For sellers, the window to transact ahead of new comparables is now; for buyers, the incoming inventory offers the first meaningful selection this segment has seen since last fall.



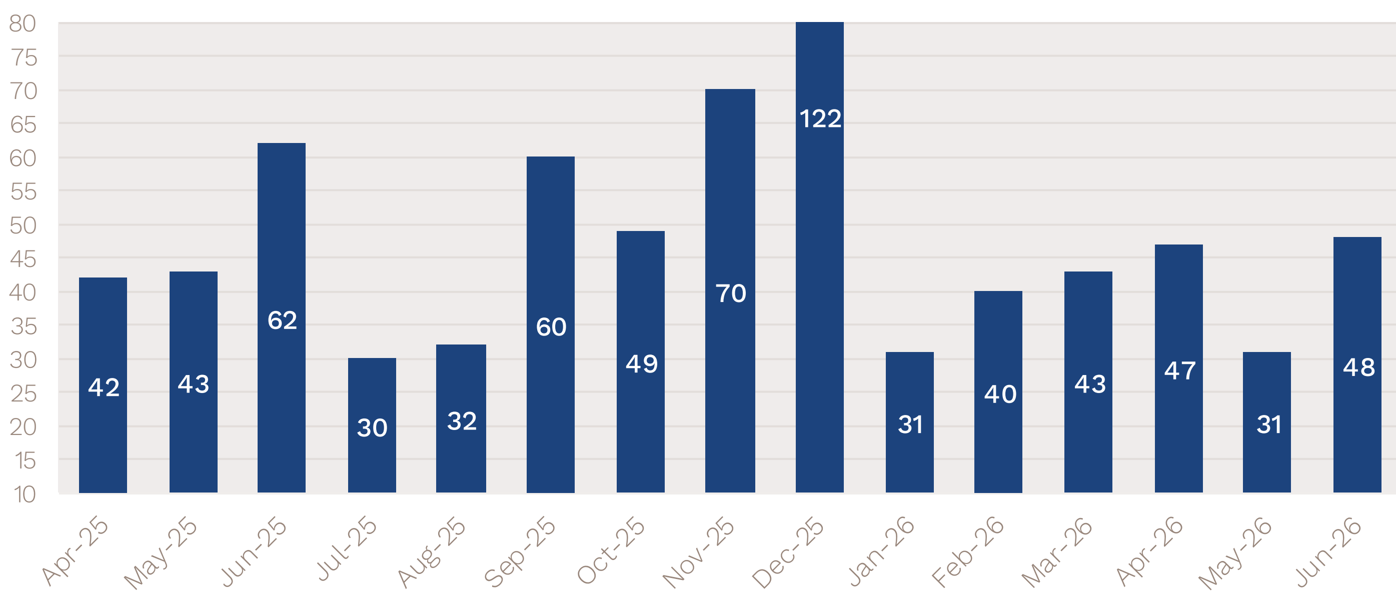
Aircraft Supply

Super-Mid Jet Segment | April 2025 – March 2026



Aircraft Transactions

Super-Mid Jet Segment | April 2025 – March 2026

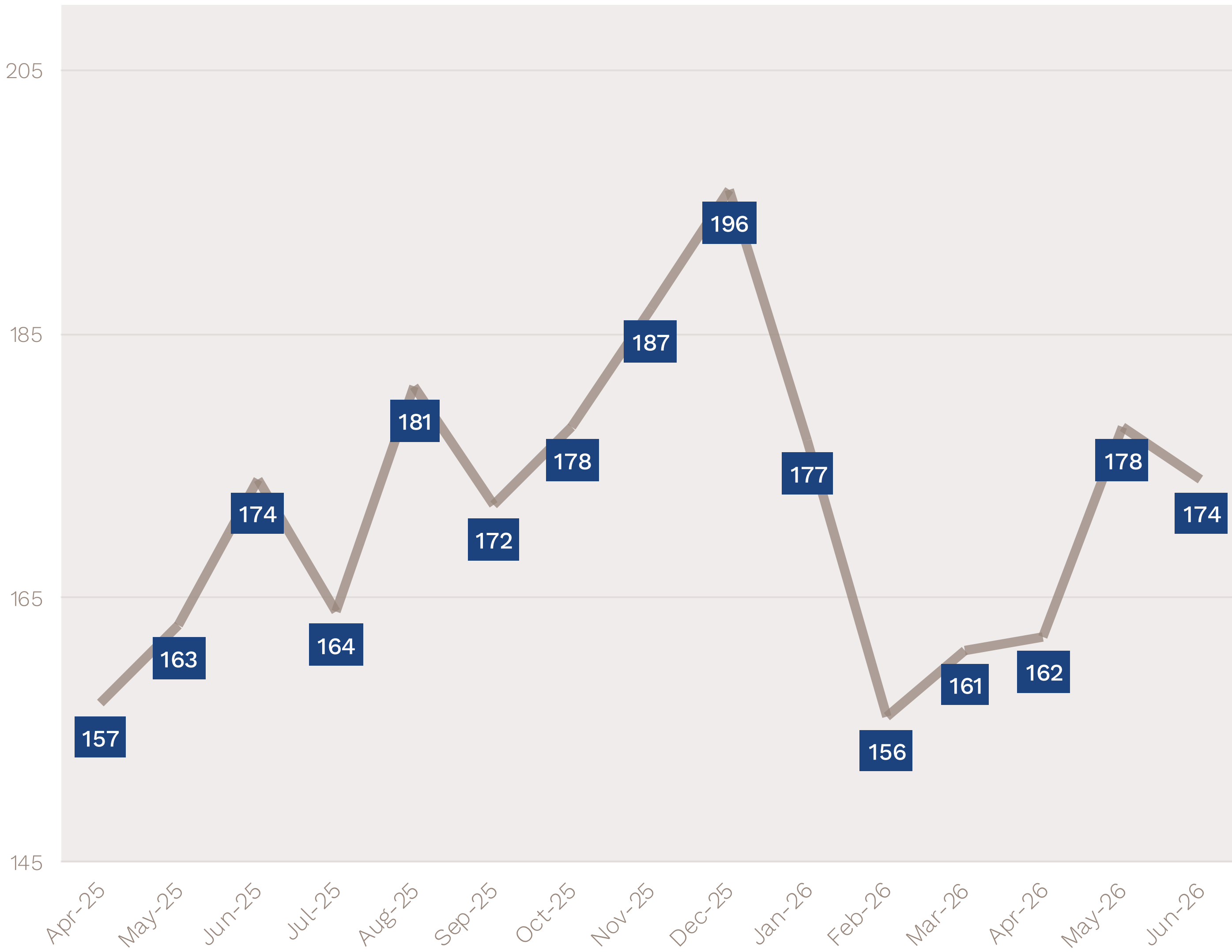


Super-Mid Jets

2026 Market Report – Quarter Two

Days on Market

Super-Mid Jet Segment | April 2025 – March 2026



Large Jets

Quarterly Market Report

GIV	G700	Challenger 850	Falcon 8X
GIV-SP	Challenger 600	Falcon 900B	Global 5000
GV	Challenger 604	Falcon 900C	Global 5500
G450	Challenger 605	Falcon 900DX	Global 6000
G500	Challenger 601-1A	Falcon 900LX	Global 6500
G550	Challenger 601-3A	Falcon 900EX	Global 7500
G600	Challenger 601-3R	Falcon 6X	Global Express
G650/ER	Challenger 650	Falcon 7X	Global XRS

Core Large Jets

April 2025 - March 2026

Sustained absorption through the first half of 2026 has left large cabin inventory at period lows, extending the supply-starved environment buyers faced entering the year.

Key platforms — including the G450, G550, and Challenger 605 — saw accelerated absorption, with the G450 most acutely impacted. Availability fell from 22 aircraft at the end of Q1 to 11 by June, just 3.1% of the fleet, with days on market compressing to 113 against a segment average of 226.

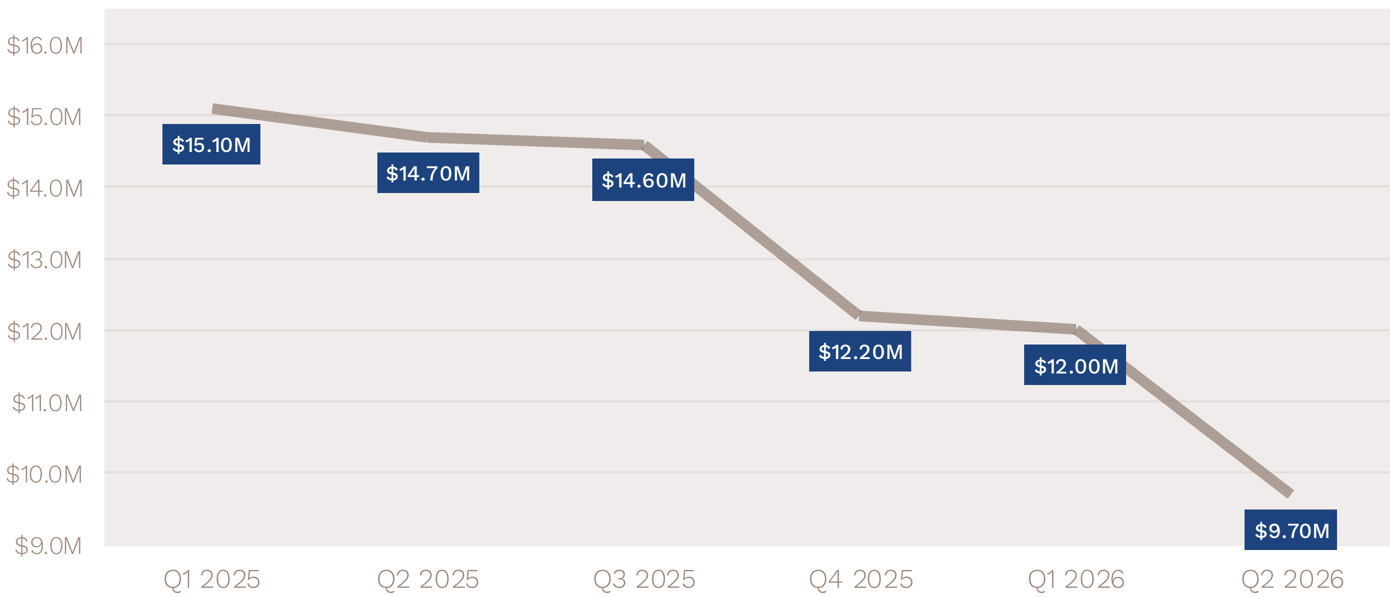
While new supply has begun to re-enter the market, it continues to trail transactional demand by ~70%, with total inventory averaging ~294 aircraft across the segment. Pricing firmed ~2% alongside a 23% increase in transaction volume — reflecting genuine demand rather than constrained availability alone.

Outlook:

Demand for large cabin assets remains structurally strong, with replacement supply still trailing absorption. Q2 activity concentrated in mid-life, program-enrolled aircraft rather than the newest airframes — a pattern worth watching as buyers weigh immediate availability against long-term maintenance exposure.

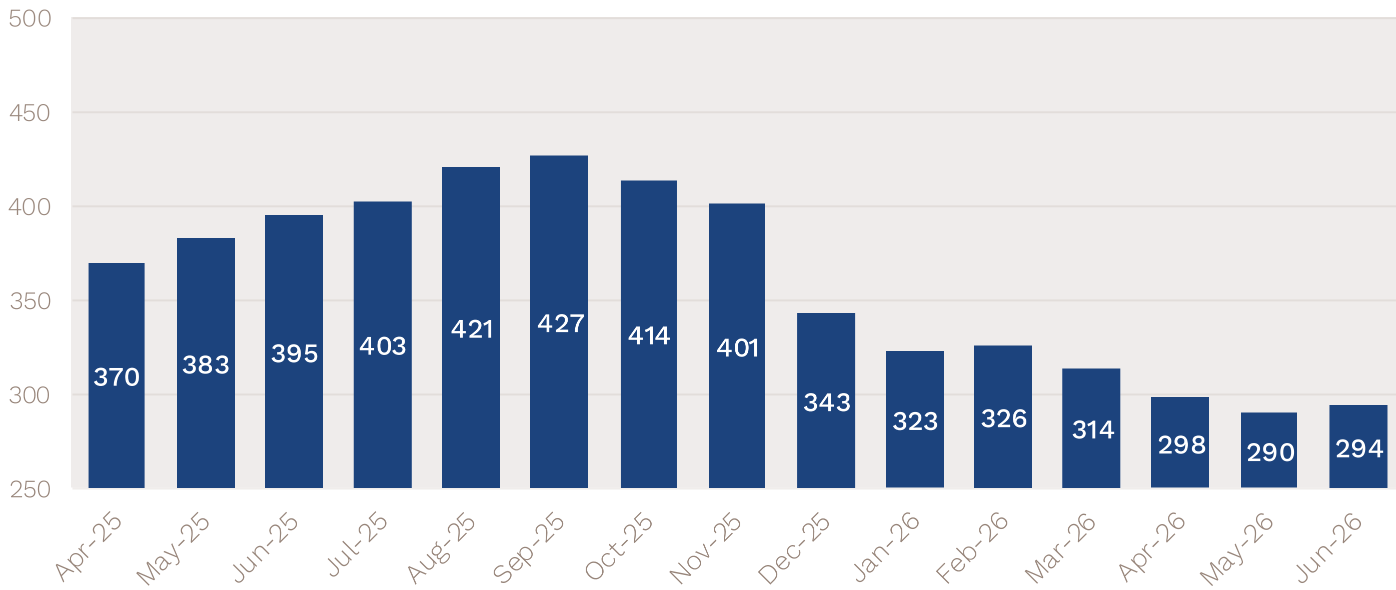
Average Asking Price

Large Jet Segment | April 2025 – March 2026



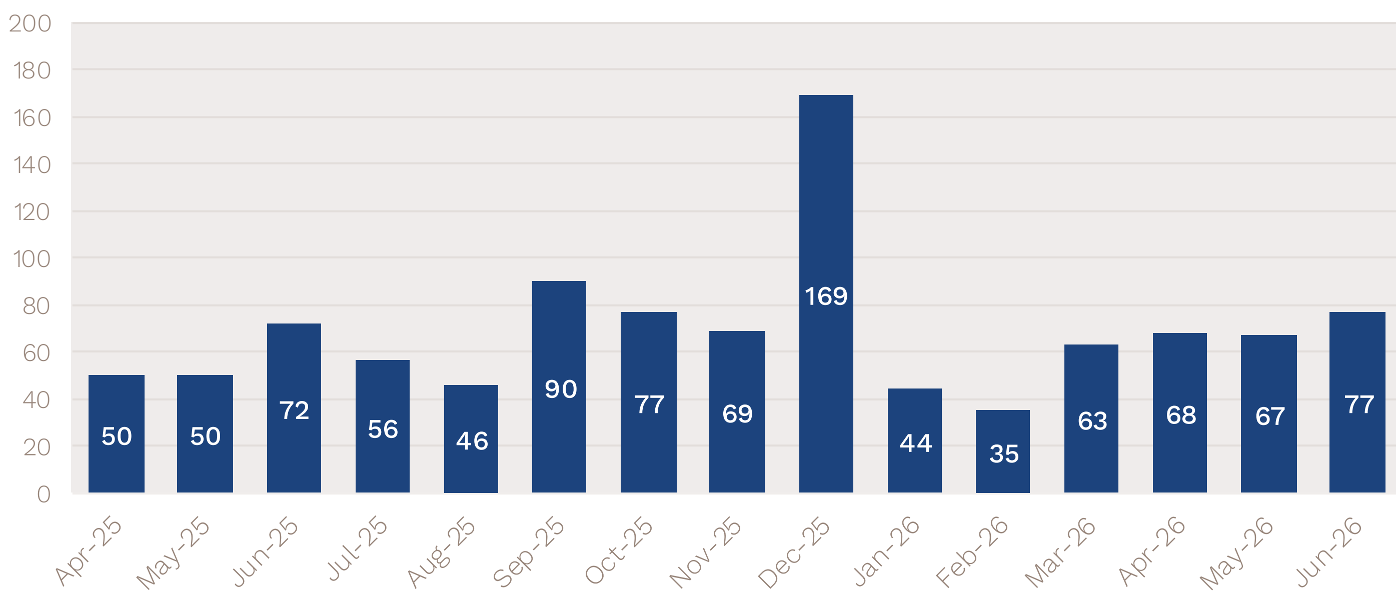
Aircraft Supply

Large Jet Segment | April 2025 – March 2026



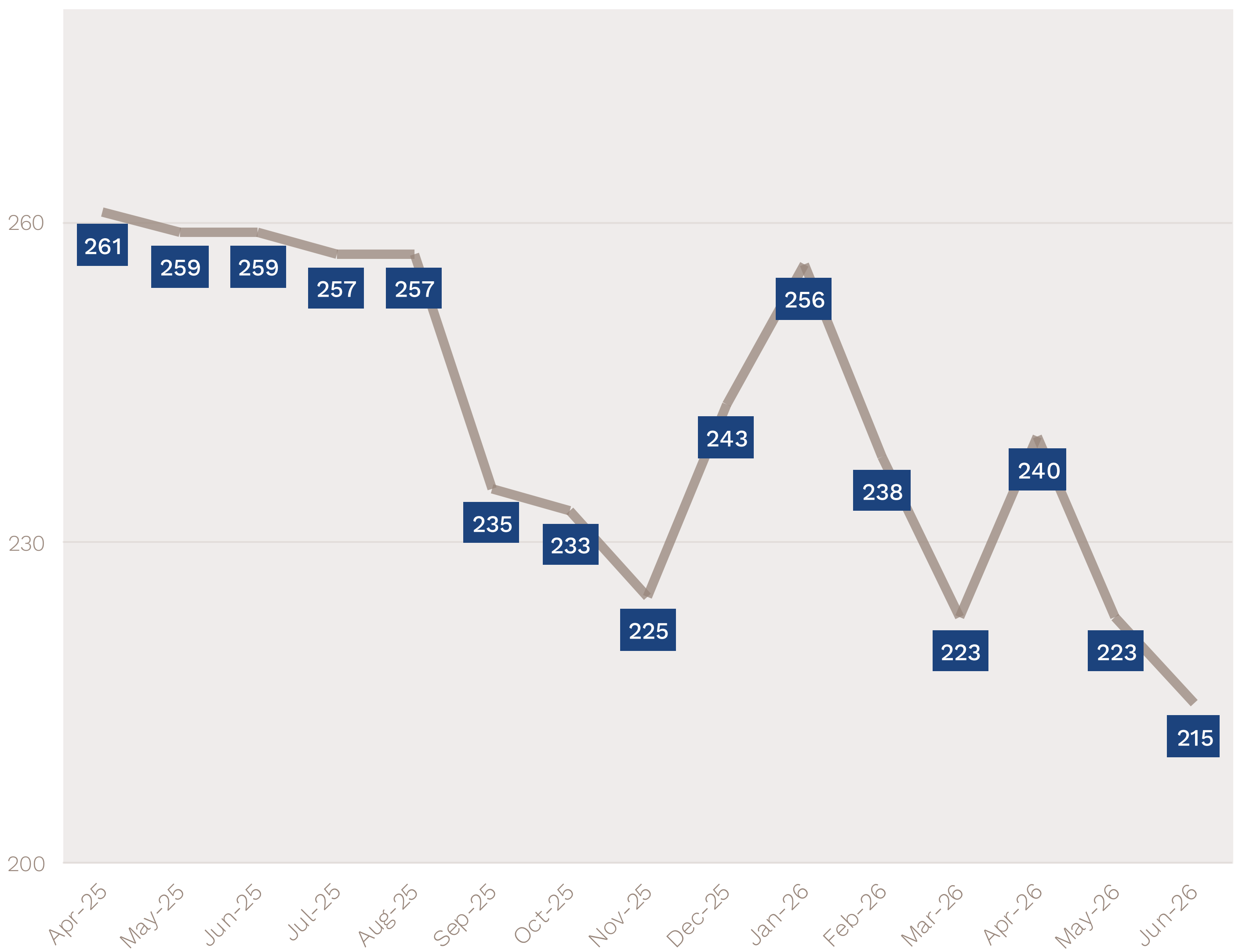
Aircraft Transactions

Large Jet Segment | April 2025 – March 2026



Days on Market

Large Jet Segment | April 2025 – March 2026



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