

2025 BUSINESS AVIATION WORKFORCE & OPERATIONS BRIEFING

What 2025 Taught Us – and How to Plan for 2026

EXECUTIVE SUMMARY

Business aviation is entering 2026 with demand still strong, fleets growing, and operations more complex than ever. Honeywell's 2025 Global Business Aviation Outlook forecasts 8,500 new business jet deliveries over the next decade, valued at roughly \$283 billion, with deliveries in 2026 projected to be about 5% higher than 2025 and average annual growth of around 3% over ten years ([Aviation Week](#)).

Behind that growth is a workforce under pressure. NBAA and industry partners repeatedly highlight persistent shortages of pilots, maintenance technicians, and other aviation professionals, driven by competition from the airlines and an overall decline in people choosing aviation careers ([NBAA](#)). Global studies from CAE and Boeing suggest the industry will need over 1.4 million new aviation professionals by 2034, including hundreds of thousands of pilots, maintenance technicians, and cabin crew ([CAE](#)).

At the same time, the industry is navigating:

- Intensifying safety and fatigue concerns, with NBAA naming fitness for duty, mental health, and fatigue among its top safety focus areas.
- A still-tight maintenance talent pipeline, with forecasts showing a potential shortfall of tens of thousands of aircraft maintenance workers later this decade ([ATEC](#)).

- Accelerating sustainability expectations as business aviation doubles down on its commitment to net-zero carbon emissions by 2050 and leans heavily on sustainable aviation fuel (SAF) to get there ([ATAG](#)).

For flight departments, 2026 will be defined by one central question: How do we sustain growth, safety, and service standards when talent, time, and attention are constrained and scrutiny is rising?

This whitepaper explores:

1. What actually happened in 2025 in business aviation operations and staffing.
2. Key workforce and safety trends that will shape 2026.
3. Sustainability, regulatory, and cultural forces that operators can't ignore.
4. Practical workforce strategies leading flight departments are already adopting for 2026 and beyond.

IFCC's role in this paper is simple: we're synthesizing the data and conversations we see across the industry, so you can plan more clearly, staff more intelligently, and protect your operation from avoidable risk.

1. 2025 IN REVIEW: DEMAND UP, COMPLEXITY UP, PRESSURE UP

1.1 DEMAND FOR BUSINESS AVIATION IS NOT COOLING OFF

Contrary to some worries that private aviation demand would fall given the current economic uncertainties, most indicators show continued strength heading into 2026:

- Honeywell projects 8,500 new business jets globally over the next decade, with 2026 deliveries ~5% higher than 2025 and steady average annual growth ([SherpaReport](#)).
- Analysis from Forecast International suggests 2025 will likely be the first year that business jet deliveries surpass pre-pandemic 2019 output, confirming that demand is not a temporary spike but a structural shift ([Forecast International](#)).

Simultaneously, NBAA testimony to the U.S. Congress emphasized that business aviation supports around 1.3 million American jobs and roughly \$340 billion in economic output, reinforcing the sector's strategic economic importance.

In short: more aircraft, more flying, more economic weight – and more pressure on the people who operate and maintain these fleets.

1.2 THE WORKFORCE PICTURE: TIGHT, UNEVEN, AND EVOLVING

Pilots

Global analyses still point to long-term pilot demand outpacing supply, even though the near-term gap has narrowed slightly from peak-shortage projections:

- Boeing's long-range Pilot & Technician Outlook anticipates hundreds of thousands of new pilots needed over 20 years to support fleet growth ([Boeing](#)).
- Oliver Wyman's updated modeling suggests that the projected pilot shortage in North America by 2032 has shrunk by about 23% compared to prior estimates, due to increased pilot certifications and some demand moderation, but a gap remains ([Oliver Wyman](#)).

For business aviation, the challenge is less about the absolute number of pilots and more about access to pilots with the right type ratings, experience, and lifestyle preferences. Operators competing with airlines on compensation, schedule predictability, and career progression continue to feel pressure.

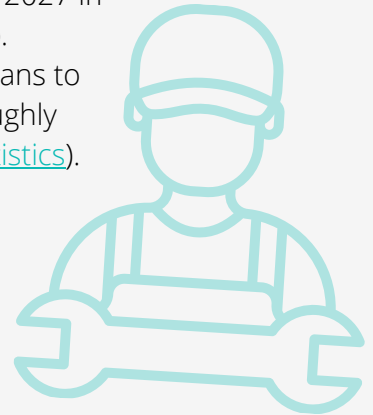


Maintenance Technicians

The maintenance technician shortage is arguably more acute and less flexible than the pilot pipeline:

- ATEC and Boeing's technician analyses show global demand for around 690,000 maintenance technicians over the next two decades, a 12% increase over prior forecasts ([ATEC](#)).
- Oliver Wyman forecasts a potential shortfall nearing 48,000 maintenance workers by 2027 in a worst-case scenario, and still tens of thousands in more likely cases ([Oliver Wyman](#)).
- U.S. labor data projects employment for aircraft and avionics mechanics and technicians to grow about 5% from 2024–2034, faster than the average for all occupations, with roughly 13,100 openings annually; much of it replacement demand ([U.S. Bureau of Labor Statistics](#)).

For flight departments, this translates into longer lead times to hire qualified technicians, increased competition with airline MRO and OEMs, and a higher risk of delays or AOG events if staffing is not planned well in advance.



Cabin Crew, Schedulers, and Dispatchers

Industry research and NBAA workforce commentary highlight widespread difficulty attracting and retaining “non-cockpit” roles such as schedulers, dispatchers, cabin crew, and other specialists as airlines and other sectors compete for similar skillsets.

Dispatchers and schedulers, in particular, face:

- Increasing operational complexity (airspace constraints, weather disruptions, geopolitical considerations).
- More unpredictable hours and higher mental load.
- Limited visibility and recognition compared to pilots, despite their central role in safety and efficiency.



1.3 MENTAL HEALTH, FATIGUE, AND SAFETY CULTURE IN 2025

The human factors conversation moved from the margins to the mainstream in 2024–2025:

- NBAA's top Safety Focus Areas underscore fitness for duty, fatigue management, and aeromedical issues as key risks, emphasizing the need for clear policies around sleep, medications, and psychological fitness ([NBAA](#)).
- Industry coverage and safety webinars highlight how stress, anxiety, impaired sleep, and burnout directly affect decision-making and safety performance (Skies Magazine).
- Peer Support Programs (PSPs) have gained traction as a confidential, non-diagnostic way to encourage aviation professionals to seek help without fear of career impact ([AIN](#)).

The takeaway: fatigue and mental wellness are no longer “soft” topics. They are core components of safety, retention, and operational resilience and they will be top-of-mind in 2026.



2. MACRO FORCES SHAPING 2026 IN BUSINESS AVIATION

Looking ahead, several macro themes will define how operators hire, train, schedule, and support their people in 2026.

2.1 SUSTAINED DEMAND + CONSTRAINED RESOURCES

With business jet deliveries climbing and many operators expecting to fly more or at least the same in 2026, the sector is planning for continued high utilization. Honeywell's survey data shows 91% of respondents expect their business jet usage to remain steady or increase in 2026, reinforcing that there is little expectation of a demand collapse ([Honeywell](#)).

Yet at the same time:

- Maintenance and pilot pipelines remain tight.
- Airline competition for talent continues.
- Economic and political uncertainty from election-year dynamics to global trade issues complicate long-range budget planning.



This creates an environment where flexibility, not headcount, will be the differentiator. Operators that rely solely on fixed staffing models are likely to experience more fatigue, more disruptions, and higher risk exposure.

2.2 SUSTAINABILITY PRESSURE AND THE RISE OF SAF

Business aviation is publicly and formally committed to net-zero carbon emissions by 2050, through a collaborative roadmap established by NBAA, IBAC, and other associations.

Key sustainability trends that will affect operations and staffing in 2026:

- Sustainable Aviation Fuel (SAF) is central to the net-zero strategy. SAF can reduce lifecycle CO₂ emissions by up to ~80% compared to conventional Jet A, and business aviation organizations describe it as perhaps the most important tool for meeting climate commitments ([IATA](#)).



- Global SAF production is still small but growing rapidly. Industry and NGO analyses show SAF represented around 0.3% of global jet fuel in 2024, with production expected to more than double to around 2.1 million tonnes in 2025 - roughly 0.7% of demand ([APG](#)).
- Regulatory and financial incentives are emerging worldwide:
 - The EU has allocated over €100 million in ETS allowances to encourage SAF purchases ([European Commission](#)).
 - Singapore plans a SAF levy on airline tickets beginning in 2026 to fund sustainable fuel use ([The Times of India](#)).
 - Book-and-claim platforms and SAF availability at business aviation events like NBAA-BACE are becoming more common, signaling mainstream adoption in the sector.

Operationally, this means:

- Schedulers, dispatchers, and flight planners will increasingly be asked to understand and implement book-and-claim systems, navigate SAF availability, and communicate emissions impacts to corporate stakeholders.
- Maintenance and engineering staff will need familiarity with SAF specifications, materials compatibility, and documentation.
- Leadership and crews will be asked to understand and often defend business aviation's sustainability story in more detail, as public scrutiny grows.

2.3 SAFETY, FATIGUE, AND “INVISIBLE LOAD” RISKS

Safety regulators, unions, and academic studies have raised concerns about cost-cutting, staff shortages, and fatigue eroding safety margins in parts of the aviation system. One large European study of pilots and cabin crew found that workload and precarious employment structures can drive fatigue, erode wellbeing, and discourage reporting of safety issues ([The Guardian](#)).

Within business aviation, the emerging consensus is:

- Fatigue and burnout are as real a risk as technical malfunction.
- Mental health stigma is still a barrier to early intervention.
- Scheduling and staffing decisions are safety decisions, not just financial or HR decisions.

In 2026, flight departments that treat fatigue management and psychological safety as core components of their SMS and workforce strategy, not “wellness perks”, will be better positioned to avoid both incidents and attrition.



2.4 WORKFORCE DIVERSITY AND THE TALENT PIPELINE

NBAA and industry partners have been explicit: to solve long-term workforce challenges, business aviation must attract, retain, and advance more diverse talent, particularly women and underrepresented groups ([NBAA](#)).

Key Trends:



Women remain underrepresented in many professional roles in business aviation, but are increasingly visible as pilots, maintenance leaders, dispatchers, and executives.

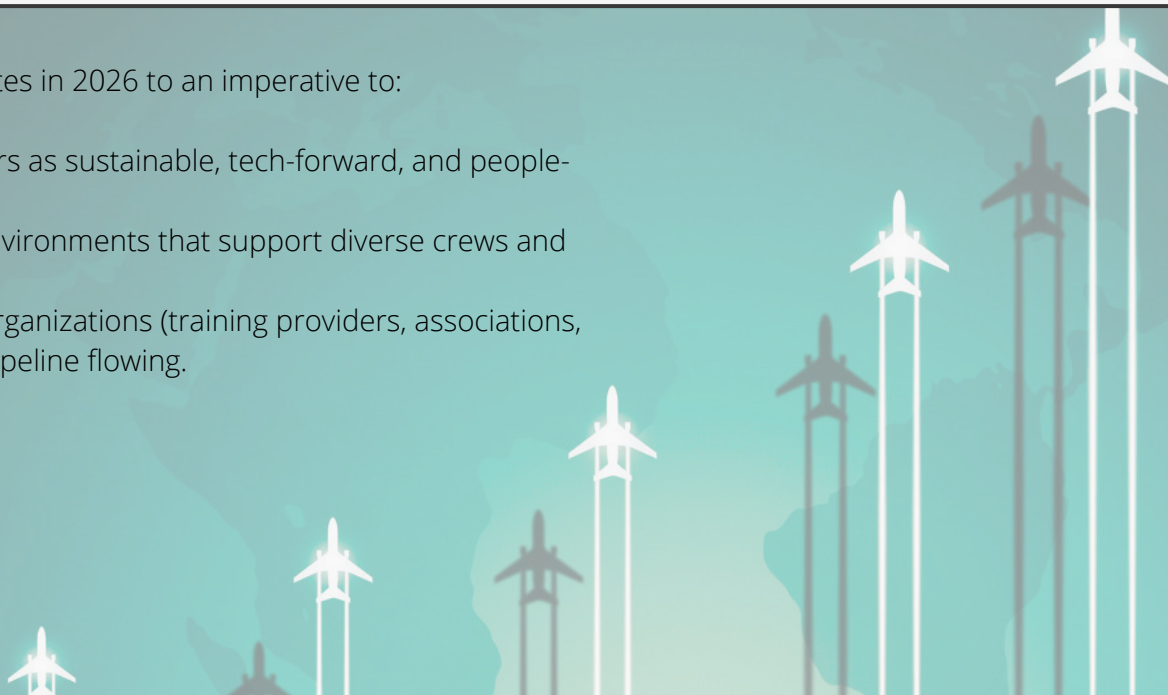
Workforce initiatives are shifting focus earlier in the pipeline. Focusing not just universities, but high schools and even grade schools to introduce aviation career paths sooner.



Sustainability, technology, mental health openness, and flexible work structures are often key attractors for younger professionals evaluating aviation careers.

For operators, this translates in 2026 to an imperative to:

- Present aviation careers as sustainable, tech-forward, and people-centric.
- Build inclusive work environments that support diverse crews and leadership paths.
- Partner with trusted organizations (training providers, associations, schools) to keep the pipeline flowing.





3. WHAT LEADING FLIGHT DEPARTMENTS WILL DO IN 2026

Based on current data, industry forecasts, and what we see across our client base, leading operators are converging on several practical workforce strategies for 2026.

3.1 BUILD A 12–18 MONTH WORKFORCE MAP, NOT A 3-MONTH SCHEDULE

Instead of thinking in terms of “next month’s trips,” leading flight departments are:

- Mapping recurrent training, medicals, and type-rating events across the full year.
- Blocking out known maintenance events and heavy checks early to align staffing.
- Identifying seasonal peaks (summer, holidays, major events) where historical data shows increased flying.
- Overlaying this with vacation plans and known personal commitments for key personnel.

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The result is a coverage risk map that exposes where contract or supplemental staffing will be needed and gives enough lead time to do it thoughtfully.

3.2 TREAT SUPPLEMENTAL STAFFING AS STRATEGIC INFRASTRUCTURE

Given the combination of strong demand and tight pipelines, blended staffing models are becoming the norm:



- Core full-time team: pilots, schedulers, maintenance, cabin crew who anchor your culture and standard operating procedures.
- Trusted contract bench: pre-vetted pilots, flight attendants, and technicians who understand your operation and can be scheduled like extended teammates.
- Specialty and surge resources: professionals with unique international experience, language skills, special mission profiles, or availability in specific geographic clusters.

The shift for 2026 is to view this not as “emergency coverage” but as deliberate resilience engineering; a way of absorbing training cycles, life events, unexpected maintenance, and demand spikes without overextending your core team.

3.3 INTEGRATE FATIGUE AND MENTAL HEALTH INTO YOUR STAFFING PLAN

Leading operators are:

- Embedding fatigue risk management into scheduling tools and trip decision-making.
- Creating clear, stigma-free pathways for pilots, dispatchers, and cabin crew to raise mental health concerns or request relief.
- Educating leaders on the warning signs of burnout and cognitive overload.
- Using contract or relief coverage to protect rest periods, instead of asking the same individuals to “push through.”

In 2026, regulators, insurers, and corporate boards will increasingly expect to see evidence of how fatigue and mental wellness are addressed, not just statements of intent.

3.4 ALIGN TRAINING & UPSKILLING WITH FUTURE TECH AND SUSTAINABILITY DEMANDS

With new aircraft technologies, avionics upgrades, and sustainability requirements accelerating, forward-looking departments are:

- Investing in advanced procedures training (e.g., international operations, performance-based navigation, data-driven decision support).
- Ensuring crews, dispatchers, and technicians understand SAF, book-and-claim, emissions reporting, and sustainability narratives, since these will increasingly appear in corporate ESG reports.
- Supporting cross-training between dispatch, operations, and maintenance to improve mutual understanding and reduce silo-driven friction.

This is not just about compliance; it's about keeping your team attractive in a global labor market and reducing onboarding friction when new technologies arrive.



3.5 RE-DESIGN ROLES AND SCHEDULES FOR SUSTAINABILITY (OF PEOPLE, NOT JUST FUEL)

Leading operators are quietly rethinking how work is structured:

- More predictable rotations where possible, even in charter or ad hoc operations.
- Dedicated “deep work” time for schedulers/dispatchers to plan without constant interruptions.
- Transparent career paths for dispatchers, schedulers, and cabin crew to grow into leadership roles, not just “support” roles.
- Use of hybrid/remote options for roles that don't have to be physically on site every day.

The goal is simple: lower attrition, higher engagement, and a reputation as an employer people seek out, rather than leave.



4. WHERE IFCC FITS IN – WITHOUT MAKING THIS ALL ABOUT US

This whitepaper is intentionally industry-wide, but it's worth stating clearly how In-Flight Crew Connections is positioning itself in light of these trends.

We see our role as:

- Translating macro trends into practical staffing strategies for flight departments.
- Maintaining a broad, current view across many operators so our clients benefit from patterns that might not be visible from inside a single department.
- Providing flexible, high-quality supplemental staffing across pilots, cabin crew, maintenance, and other roles not just to fill emergencies, but to enable long-term planning and fatigue-conscious scheduling.
- Continuing to invest in tools, partnerships, and education that align with where business aviation is actually heading:
 - Demand resilience and schedule flexibility.
 - Safety and human performance.
 - Sustainability literacy and operations.
 - Workforce diversity and long-term talent development.

We believe the most successful operators in 2026 will be those who:

1

Acknowledge the real constraints on time, talent, and attention.

2

Use data and forecasting to plan workforce needs 12-18 months out.

3

Invest in people, not just aircraft, with the same seriousness and strategic intent.

4

Cultivate strong external partnerships so they are not solving every problem alone.



CONCLUSION

Business aviation is moving into a mature phase of sustained demand, rising expectations, and structural workforce constraints. New aircraft are coming. The sustainability bar is rising. Regulatory and public scrutiny will only continue to increase.

The question for 2026 is not whether flight departments can meet the schedule. It's whether they can do so safely, sustainably, and humanely... in a way that attracts and retains the next generation of aviation professionals.

Flight departments that treat workforce planning as a strategic discipline, on par with fleet planning, safety management, and financial management, will be those best positioned to thrive in this environment.

That's the future we're planning for.



704-236-3647



ccs@inflightcrewconnections.com



www.inflightcrewconnections.com

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