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works through a backlog of supply-chain problems, industry sources said.

The cautious tone on deliveries was reinforced at a recent customer gathering in Toulouse and increases pressure on Airbus to demonstrate progress towards a goal of increasing production of its main model to 75 jets a month, they added.

Airbus has reported some improvement in supply chains that have struggled to overcome parts and labour shortages since the pandemic, but the planemaker still faces bottlenecks over engines and some structural parts.



“Airbus is talking about delays to aircraft in both 2027 and 2028,” a senior airline executive said, adding the delays were being communicated in piecemeal fashion every few months.

Another source said aircraft due for delivery later this decade had already been pencilled in for a six-month delay.

“There is no real sign of improvement,” said a third person following a recent customer presentation.

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“We are working together with suppliers to mitigate the impact of the current situation on our customers,” an Airbus spokesperson said.

Air Lease Corp said earlier this month it had received notifications from Airbus about delays to A320neo and A321neo jets in 2027 and 2028.

Leasing companies are prone to somewhat greater volatility than airlines in their delivery planning as they juggle commitments, but such comments highlight continued concerns over delays, which have exacerbated a shortage of new planes.

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Slow may deliveries

Industry sources said it is unusual for delays to be notified as far as three years ahead, reflecting record volume targets and pressure from airlines to offer more transparency.

“When you reach such production volumes and draw the two graphs of what you want to build and can build, then the area in between gets huge,” a senior industry source said.

Several leasing companies have warned of problems in the aerospace supply chain for the rest of the decade.

Airbus CEO Guillaume Faury said in January he was confident of reaching the already postponed goal of 75 a month in 2027 as planned and last month said Airbus continued to ramp up towards that rate. Analysts say production has touched 60 a month.

Short-term deliveries also remain under pressure, though Airbus reiterated that it expected them to be weighted towards year-end.

Airbus has delivered 32 aircraft so far this month

and may top 40 for the whole of May, but is unlikely to match 53 seen in May last year, said Rob Morris, global head of consultancy at Cirium Ascend. Deliveries between January and April fell 5 per cent.

Airbus this month reaffirmed a target of 820 commercial deliveries for the year, up 7 per cent, but has warned that problems with engine supplies will get worse before they get better.

Engine maker CFM, facing pressing aftermarket demand, has not yet agreed a schedule for supporting Airbus's target for 75 new jets a month, three industry sources said.

CFM declined to comment.

Safran, which co-owns the world's biggest engine maker with GE Aerospace, said last month CFM had seen improvements in supply chains and was poised to recover a slow start to 2025. REUTERS

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