

North America Softening & Normalization - June 2026

North America's June print is sequential softening inside a still-dominant global share - not a collapse. Hub and city-pair tables show where the soft spots concentrated.

-5.39%

NA MOM

vs May 221,943

209,985

JUNE FLIGHTS

71.45% global

-2.85 pp

SHARE LOSS

MoM global mix

+0.56%

YOY

vs June 2025

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Primary sources: Avi-Go Global Business Aviation Analytics Report June 2026 · Avi-Go North America Business Aviation Analytics Report Jan-Aug 2025

Class B intelligence - every number traces to a verified Avi-Go statement. No invented charter rates.

North America's June print is sequential softening inside a still-dominant global share - not a collapse. Hub and city-pair tables show where the soft spots concentrated.

-5.39% · NA MoM (vs May 221,943) | 209,985 · June flights (71.45% global) | -2.85 pp · Share loss (MoM global mix) | +0.56% · YoY (vs June 2025)

This Limitless Sky thematic report ("North America Softening & Normalization - June 2026") is an editorial synthesis for charter desks, programme managers and researchers. Figures are drawn exclusively from the Avi-Go report windows listed in the methodology. Published 28 July 2026. Reading time estimate: 16 min read.

Blurb for distribution: NA -5.39% MoM to 209,985 flights, -2.85 pp share loss, KTEB/KDAL/KPBI soft prints vs Midway gainer - normalization brief. Tags: north-america, june-2026, kteb, softening. The companion HTML page at </insights/reports/north-america-softening-june-2026> mirrors this inventory for web readers using Josefin Sans and Lato under the Reserve visual language.

Executive summary

-5.39% - NA MoM (vs May 221,943). 209,985 - June flights (71.45% global). -2.85 pp - Share loss (MoM global mix). +0.56% - YoY (vs June 2025).

The executive takeaway is structural, not promotional: Avi-Go shows where aircraft already fly; Limitless Sky connects that map to live empty-leg search and quote workflows. Readers should leave this summary with (a) the correct period label, (b) the primary hubs or cabins in scope, and (c) an explicit refusal to invent rates.

For Limitless Sky desks, "NA Softening June 2026" is usable as a routing and capacity map: identify the hubs and cabins Avi-Go already shows as dense, then confirm live availability on empty-leg boards and operator holds. Movement share is not a price. Rank order is not an AggregateRating. When MoM and YoY disagree in sign, quote both baselines rather than picking the friendlier print.

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1. Soft MoM, resilient YoY

The NA story is sequential cooling against a still-positive year-ago comparison. This section of "North America Softening & Normalization - June 2026" is constrained to verified Avi-Go fact keys only. Limitless Sky publishes the statements as Class B intelligence: citeable, period-labelled, and never converted into invented charter hourly rates. Readers searching private jet charter services, empty legs or hub concentration should use these pages to narrow geography and cabin class before requesting a live quote.

For Limitless Sky desks, "Soft MoM, resilient YoY" is usable as a routing and capacity map: identify the hubs and cabins Avi-Go already shows as dense, then confirm live availability on empty-leg boards and operator holds. Movement share is not a price. Rank order is not an AggregateRating. When MoM and YoY disagree in sign, quote both baselines rather than picking the friendlier print.

VERIFIED FACT

North America recorded 209,985 departures in June 2026 (-5.39% MoM from May's 221,943; +0.56% YoY vs June 2025).

Verified statement (Soft MoM, resilient YoY). North America recorded 209,985 departures in June 2026 (-5.39% MoM from May's 221,943; +0.56% YoY vs June 2025). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

North America accounted for 71.45% of global business jet flights in June 2026 (209,985 flights).

Verified statement (Soft MoM, resilient YoY). North America accounted for 71.45% of global business jet flights in June 2026 (209,985 flights). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 2 statements in "Soft MoM, resilient YoY": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

North America's global share fell -2.85 pp MoM to 71.45% in June 2026.

Verified statement (Soft MoM, resilient YoY). North America's global share fell -2.85 pp MoM to 71.45% in June 2026. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

North America's Jan-June 2026 YTD volume reached 1,293,685 flights (71.45% of global).

Verified statement (Soft MoM, resilient YoY). North America's Jan-June 2026 YTD volume reached 1,293,685 flights (71.45% of global). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still

happens outside this table.

Checkpoint after 4 statements in "Soft MoM, resilient YoY": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

North America recorded 1,740,881 business jet movements from January through August 2025 (+3.86% YoY vs 1,676,151 in Jan-Aug 2024).

Verified statement (Soft MoM, resilient YoY). North America recorded 1,740,881 business jet movements from January through August 2025 (+3.86% YoY vs 1,676,151 in Jan-Aug 2024). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Section close - "Soft MoM, resilient YoY": any follow-on commercial decision still requires a live aircraft hold, passenger count, dates and cabin preference. Market structure from Avi-Go narrows the search space; it does not replace operator confirmation. Limitless Sky's empty-leg feed and quote desk remain the transactional layer.

2. Airport soft spots and the Midway exception

Top-10 NA airports reveal winter-leisure and Northeast cooling alongside a Midway MoM gainer. This section of "North America Softening & Normalization - June 2026" is constrained to verified Avi-Go fact keys only. Limitless Sky publishes the statements as Class B intelligence: citeable, period-labelled, and never converted into invented charter hourly rates. Readers searching private jet charter services, empty legs or hub concentration should use these pages to narrow geography and cabin class before requesting a live quote.

For Limitless Sky desks, "Airport soft spots and the Midway exception" is usable as a routing and capacity map: identify the hubs and cabins Avi-Go already shows as dense, then confirm live availability on empty-leg boards and operator holds. Movement share is not a price. Rank order is not an AggregateRating. When MoM and YoY disagree in sign, quote both baselines rather than picking the friendlier print.

VERIFIED FACT

Teterboro (KTEB) led North American airports in June 2026 with 12,380 movements (-12.00% MoM from May's 14,068).

Verified statement (Airport soft spots and the Midway exception). Teterboro (KTEB) led North American airports in June 2026 with 12,380 movements (-12.00% MoM from May's 14,068). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

VERIFIED FACT

Washington Dulles (KIAD) ranked #2 among North American airports in June 2026 with 5,727 movements (+1.17% MoM).

Verified statement (Airport soft spots and the Midway exception). Washington Dulles (KIAD) ranked #2 among North American airports in June 2026 with 5,727 movements (+1.17% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Checkpoint after 2 statements in "Airport soft spots and the Midway exception": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

Dallas Love Field (KDAL) ranked #3 among North American airports in June 2026 with 5,648 movements (-12.08% MoM).

Verified statement (Airport soft spots and the Midway exception). Dallas Love Field (KDAL) ranked #3 among North American airports in June 2026 with 5,648 movements (-12.08% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

VERIFIED FACT

Westchester (KHPN) ranked #4 among North American airports in June 2026 with 5,331 movements (-0.15% MoM).

Verified statement (Airport soft spots and the Midway exception). Westchester (KHPN) ranked #4 among North American airports in June 2026 with 5,331 movements (-0.15% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

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VERIFIED FACT

Van Nuys (KVNY) ranked #5 among North American airports in June 2026 with 4,570 movements (-13.23% MoM).

Verified statement (Airport soft spots and the Midway exception). Van Nuys (KVNY) ranked #5 among North American airports in June 2026 with 4,570 movements (-13.23% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

VERIFIED FACT

Houston (KHOU) ranked #6 among North American airports in June 2026 with 4,115 movements (-2.72% MoM).

Verified statement (Airport soft spots and the Midway exception). Houston (KHOU) ranked #6 among North American airports in June 2026 with 4,115 movements (-2.72% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Checkpoint after 6 statements in "Airport soft spots and the Midway exception": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

Chicago Midway (KMDW) ranked #7 among North American airports in June 2026 with 4,099 movements (+8.41% MoM) - biggest gainer in the NA Top 10.

Verified statement (Airport soft spots and the Midway exception). Chicago Midway (KMDW) ranked #7 among North American airports in June 2026 with 4,099 movements (+8.41% MoM) - biggest gainer in the NA Top 10. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

VERIFIED FACT

Las Vegas (KLAS) ranked #8 among North American airports in June 2026 with 4,051 movements (-19.35% MoM).

Verified statement (Airport soft spots and the Midway exception). Las Vegas (KLAS) ranked #8 among North American airports in June 2026 with 4,051 movements (-19.35% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

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Checkpoint after 8 statements in "Airport soft spots and the Midway exception": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

West Palm Beach (KPBI) ranked #9 among North American airports in June 2026 with 3,676 movements (-37.88% MoM).

Verified statement (Airport soft spots and the Midway exception). West Palm Beach (KPBI) ranked #9 among North American airports in June 2026 with 3,676 movements (-37.88% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still

happens outside this table.

VERIFIED FACT

Atlanta Peachtree (KPDK) ranked #10 among North American airports in June 2026 with 3,618 movements (-10.16% MoM).

Verified statement (Airport soft spots and the Midway exception). Atlanta Peachtree (KPDK) ranked #10 among North American airports in June 2026 with 3,618 movements (-10.16% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Checkpoint after 10 statements in "Airport soft spots and the Midway exception": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

Section close - "Airport soft spots and the Midway exception": any follow-on commercial decision still requires a live aircraft hold, passenger count, dates and cabin preference. Market structure from Avi-Go narrows the search space; it does not replace operator confirmation. Limitless Sky's empty-leg feed and quote desk remain the transactional layer.

3. City pairs: Texas still hot, leisure pairs cool MoM

Dallas-Houston remains the volume anchor while Las Vegas-LA and Miami-NY print sharp MoM declines. This section of "North America Softening & Normalization - June 2026" is constrained to verified Avi-Go fact keys only. Limitless Sky publishes the statements as Class B intelligence: citeable, period-labelled, and never converted into invented charter hourly rates. Readers searching private jet charter services, empty legs or hub concentration should use these pages to narrow geography and cabin class before requesting a live quote.

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VERIFIED FACT

Dallas <-> Houston was North America's hottest city pair in June 2026 with 738 bidirectional flights (-5.14% MoM, +6.18% YoY).

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Dallas <-> Houston was North America's hottest city pair in June 2026 with 738 bidirectional flights (-5.14% MoM, +6.18% YoY). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

Las Vegas <-> Los Angeles ranked #2 among North American city pairs in June 2026 with 643 flights (-30.71% MoM, +12.02% YoY).

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Las Vegas <-> Los Angeles ranked #2 among North American city pairs in June 2026 with 643 flights (-30.71% MoM, +12.02% YoY). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 2 statements in "City pairs: Texas still hot, leisure pairs cool MoM": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

New York <-> Washington ranked #3 among North American city pairs in June 2026 with 578 flights (-6.92% MoM, +6.08% YoY).

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). New York <-> Washington ranked #3 among North American city pairs in June 2026 with 578 flights (-6.92% MoM, +6.08% YoY). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

Chicago <-> New York ranked #4 among North American city pairs in June 2026 with 530 flights (-1.12% MoM, +0.57% YoY).

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Chicago <-> New York ranked #4 among North American city pairs in June 2026 with 530 flights (-1.12% MoM, +0.57% YoY). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 4 statements in "City pairs: Texas still hot, leisure pairs cool MoM": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

Austin <-> Dallas ranked #7 among North American city pairs in June 2026 with 415 flights (-31.63% MoM, +1.22% YoY).

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Austin <-> Dallas ranked #7 among North American city pairs in June 2026 with 415 flights (-31.63% MoM, +1.22% YoY). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises

the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

Miami <-> New York ranked #9 among North American city pairs in June 2026 with 395 flights (-30.21% MoM, +13.51% YoY).

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Miami <-> New York ranked #9 among North American city pairs in June 2026 with 395 flights (-30.21% MoM, +13.51% YoY). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 6 statements in "City pairs: Texas still hot, leisure pairs cool MoM": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

Teterboro <-> Washington Dulles was North America's top bidirectional airport corridor in June 2026 with 471 combined flights.

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Teterboro <-> Washington Dulles was North America's top bidirectional airport corridor in June 2026 with 471 combined flights. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

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VERIFIED FACT

Dallas Love Field <-> Houston (KHOU) logged 216 combined bidirectional flights in June 2026 - Texas Triangle anchor.

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Dallas Love Field <-> Houston (KHOU) logged 216 combined bidirectional flights in June 2026 - Texas Triangle anchor. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 8 statements in "City pairs: Texas still hot, leisure pairs cool MoM": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

Guadalajara <-> Mexico City led North America MoM city-pair growth in June 2026 at +97.03% (269 -> 530 flights) and +129.44% YoY.

Verified statement (City pairs: Texas still hot, leisure pairs cool MoM). Guadalajara <-> Mexico City led North America MoM city-pair growth in June 2026 at +97.03% (269 -> 530 flights) and +129.44% YoY. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Section close - "City pairs: Texas still hot, leisure pairs cool MoM": any follow-on commercial decision still requires a live aircraft hold, passenger count, dates and cabin preference. Market structure from Avi-Go narrows the search space; it does not replace operator confirmation. Limitless Sky's empty-leg feed and quote desk remain the transactional layer.

4. Operator concentration still programme-heavy

NetJets and Flexjet still set the NA operator gravity field in the June cut. This section of "North America Softening & Normalization - June 2026" is constrained to verified Avi-Go fact keys only. Limitless Sky publishes the statements as Class B intelligence: citeable, period-labelled, and never converted into invented charter hourly rates. Readers searching private jet charter services, empty legs or hub concentration should use these pages to narrow geography and cabin class before requesting a live quote.

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VERIFIED FACT

NetJets Aviation led North American operators in June 2026 with 17.23% regional market share.

Verified statement (Operator concentration still programme-heavy). NetJets Aviation led North American operators in June 2026 with 17.23% regional market share. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

VERIFIED FACT

Flexjet ranked #2 among North American operators in June 2026 with 6.88% regional market share.

Verified statement (Operator concentration still programme-heavy). Flexjet ranked #2 among North American operators in June 2026 with 6.88% regional market share. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Checkpoint after 2 statements in "Operator concentration still programme-heavy": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

North America's Top 10 operators held 34.28% combined regional share in June 2026; Top 3 held 26.03%.

Verified statement (Operator concentration still programme-heavy). North America's Top 10 operators held 34.28% combined regional share in June 2026; Top 3 held 26.03%. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

VERIFIED FACT

NetJets Aviation held 15.69% of North American operator departures in Jan-Aug 2025 - 2.5x the share of #2 Flexjet (6.53%).

Verified statement (Operator concentration still programme-heavy). NetJets Aviation held 15.69% of North American operator departures in Jan-Aug 2025 - 2.5x the share of #2 Flexjet (6.53%). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

Checkpoint after 4 statements in "Operator concentration still programme-heavy": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

The top 10 North American operators accounted for 32.62% of departures in Jan-Aug 2025 (CR10); the remaining 67.4% sits in a fragmented long tail.

Verified statement (Operator concentration still programme-heavy). The top 10 North American operators accounted for 32.62% of departures in Jan-Aug 2025 (CR10); the remaining 67.4% sits in a fragmented long tail. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Section close - "Operator concentration still programme-heavy": any follow-on commercial decision still requires a live aircraft hold, passenger count, dates and cabin preference. Market structure from Avi-Go narrows the search space; it does not replace operator confirmation. Limitless Sky's empty-leg feed and quote desk remain the transactional layer.

5. Cabin mix and clock structure

Light-jet share and peak-hour concentration frame NA operational reality for charter desks. This section of "North America Softening & Normalization - June 2026" is constrained to verified Avi-Go fact keys only. Limitless Sky publishes the statements as Class B intelligence: citeable, period-labelled, and never converted into invented charter hourly rates. Readers searching private jet charter services, empty legs or hub concentration should use these pages to

narrow geography and cabin class before requesting a live quote.

For Limitless Sky desks, "Cabin mix and clock structure" is usable as a routing and capacity map: identify the hubs and cabins Avi-Go already shows as dense, then confirm live availability on empty-leg boards and operator holds. Movement share is not a price. Rank order is not an AggregateRating. When MoM and YoY disagree in sign, quote both baselines rather than picking the friendlier print.

VERIFIED FACT

Light jets flew 47.00% of North American departures in June 2026 (98,692 flights).

Verified statement (Cabin mix and clock structure). Light jets flew 47.00% of North American departures in June 2026 (98,692 flights). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

North America's peak hour in June 2026 was 15:00 UTC / 10:00 EST with 17,718 flights (8.44% share) and a 47.8x peak/trough ratio.

Verified statement (Cabin mix and clock structure). North America's peak hour in June 2026 was 15:00 UTC / 10:00 EST with 17,718 flights (8.44% share) and a 47.8x peak/trough ratio. Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 2 statements in "Cabin mix and clock structure": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

VERIFIED FACT

June 2026 logged 180,151 weekday (Mon-Thu) departures (+9.28% MoM) versus 113,723 weekend (Fri-Sun) departures (-15.04% MoM).

Verified statement (Cabin mix and clock structure). June 2026 logged 180,151 weekday (Mon-Thu) departures (+9.28% MoM) versus 113,723 weekend (Fri-Sun) departures (-15.04% MoM). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Operational reading: treat the figure as a structural prior for aircraft, airport or corridor shortlists. High density raises the probability of a match after peak banks; it never guarantees the exact cabin, date or empty-leg price a passenger wants.

VERIFIED FACT

Light jets accounted for 823,350 North American departures in Jan-Aug 2025 (47.3% of regional volume).

Verified statement (Cabin mix and clock structure). Light jets accounted for 823,350 North American departures in Jan-Aug 2025 (47.3% of regional volume). Copy this wording into client memos with the Avi-Go period intact - paraphrasing away the month or the baseline is how desks accidentally invent a different market.

Commercial reading: programme gravity and hub concentration can coexist with a long charter tail. Avi-Go operator and airport shares explain where inventory is likely to cluster - diligence on AOC, insurance and crew duty still happens outside this table.

Checkpoint after 4 statements in "Cabin mix and clock structure": confirm the Avi-Go period still matches the travel window you are briefing. If you are comparing against another thematic report in this series, keep the source-report labels side by side rather than merging tables.

Section close - "Cabin mix and clock structure": any follow-on commercial decision still requires a live aircraft hold, passenger count, dates and cabin preference. Market structure from Avi-Go narrows the search space; it does not replace operator confirmation. Limitless Sky's empty-leg feed and quote desk remain the transactional layer.

Methodology & citation discipline

All quantitative claims in this Limitless Sky thematic report resolve to verified Avi-Go fact statements already inventory-linked in the Limitless Sky knowledge slice (entity_facts / insight fact dictionaries). No charter prices, AggregateRatings or unverified model-of-the-month crowns are invented.

Period labels are mandatory. June 2026 monthly analytics are not interchangeable with Avi-Go RD200 full-year 2025 figures or Jan-Aug 2025 regional analytics, even when the same airport, operator or aircraft model appears in multiple cuts. MoM baselines use the prior calendar month; YoY baselines use the same month in the prior year when labelled.

Empty-leg adjacency sections use verified empty-sector rates and continental retention where available. June corridor-level empty volumes are not present in the Avi-Go cut and are therefore not fabricated. Live empty-leg boards remain the source of truth for price and availability.

Where two Avi-Go cuts disagree in level but agree in rank order, Limitless Sky trusts rank order for routing intuition and the labelled period for any numeric citation in client memos. That habit prevents quoting a June monthly airport total as if it were an annual figure.

Cited Avi-Go sources

Avi-Go Global Business Aviation Analytics Report June 2026

<https://avi-go.com/research-consulting>

Avi-Go North America Business Aviation Analytics Report Jan-Aug 2025

<https://avi-go.com/research-consulting>

How to brief this report to a client

1) Open with the hero stats and the primary Avi-Go window. 2) Walk the hub or corridor map relevant to the itinerary. 3) Separate MoM seasonality from YoY trend. 4) Offer two alternate airports when Avi-Go flags a concentrated hub. 5) Request a live quote - never invent a rate from a movement table.

Programme buyers should also separate fractional / jet-card products from on-demand charter. Operator shares hint at programme gravity; contract quality still depends on AOC, insurance, cabin configuration and crew limits.

About Limitless Sky

Limitless Sky publishes private-aviation market intelligence alongside live empty-leg search, fleet guides and route pages at thelimitlessky.com. This PDF is a free desk download - no email gate. For itinerary design, request a live quote; Avi-Go explains where aircraft fly, not what a cabin costs on a given Tuesday.

Appendix A - Full verified statement inventory

The following 33 statements are the complete numeric inventory for this thematic report. Each key resolves in the Limitless Sky Avi-Go fact dictionaries. Statements are reproduced verbatim for citation.

VERIFIED FACT

[june2026-na-mom] North America recorded 209,985 departures in June 2026 (-5.39% MoM from May's 221,943; +0.56% YoY vs June 2025).

VERIFIED FACT

[june2026-na-share] North America accounted for 71.45% of global business jet flights in June 2026 (209,985 flights).

VERIFIED FACT

[june2026-na-share-loss] North America's global share fell -2.85 pp MoM to 71.45% in June 2026.

VERIFIED FACT

[june2026-na-ytd] North America's Jan-June 2026 YTD volume reached 1,293,685 flights (71.45% of global).

VERIFIED FACT

[na-total-movements-jan-aug-2025] North America recorded 1,740,881 business jet movements from January through August 2025 (+3.86% YoY vs 1,676,151 in Jan-Aug 2024).

VERIFIED FACT

[june2026-kteb-airport] Teterboro (KTEB) led North American airports in June 2026 with 12,380 movements (-12.00% MoM from May's 14,068).

VERIFIED FACT

[june2026-kiad-airport] Washington Dulles (KIAD) ranked #2 among North American airports in June 2026 with 5,727 movements (+1.17% MoM).

VERIFIED FACT

[june2026-kdal-airport] Dallas Love Field (KDAL) ranked #3 among North American airports in June 2026 with 5,648 movements (-12.08% MoM).

VERIFIED FACT

[june2026-khpn-airport] Westchester (KHPN) ranked #4 among North American airports in June 2026 with 5,331 movements (-0.15% MoM).

VERIFIED FACT

[june2026-kvny-airport] Van Nuys (KVNY) ranked #5 among North American airports in June 2026 with 4,570 movements (-13.23% MoM).

VERIFIED FACT

[june2026-khou-airport] Houston (KHOU) ranked #6 among North American airports in June 2026 with 4,115 movements (-2.72% MoM).

VERIFIED FACT

[june2026-kmdw-airport] Chicago Midway (KMDW) ranked #7 among North American airports in June 2026 with 4,099 movements (+8.41% MoM) - biggest gainer in the NA Top 10.

VERIFIED FACT

[june2026-klas-airport] Las Vegas (KLAS) ranked #8 among North American airports in June 2026 with 4,051 movements (-19.35% MoM).

VERIFIED FACT

[june2026-kpbi-airport] West Palm Beach (KPBI) ranked #9 among North American airports in June 2026 with 3,676 movements (-37.88% MoM).

VERIFIED FACT

[june2026-kpdk-airport] Atlanta Peachtree (KPDK) ranked #10 among North American airports in June 2026 with 3,618 movements (-10.16% MoM).

VERIFIED FACT

[june2026-dallas-houston-route] Dallas <-> Houston was North America's hottest city pair in June 2026 with 738 bidirectional flights (-5.14% MoM, +6.18% YoY).

VERIFIED FACT

[june2026-las-lax-route] Las Vegas <-> Los Angeles ranked #2 among North American city pairs in June 2026 with 643 flights (-30.71% MoM, +12.02% YoY).

VERIFIED FACT

[june2026-ny-washington-route] New York <-> Washington ranked #3 among North American city pairs in June 2026 with 578 flights (-6.92% MoM, +6.08% YoY).

VERIFIED FACT

[june2026-chicago-ny-route] Chicago <-> New York ranked #4 among North American city pairs in June 2026 with 530 flights (-1.12% MoM, +0.57% YoY).

VERIFIED FACT

[june2026-austin-dallas-route] Austin <-> Dallas ranked #7 among North American city pairs in June 2026 with 415 flights (-31.63% MoM, +1.22% YoY).

VERIFIED FACT

[june2026-miami-ny-route] Miami <-> New York ranked #9 among North American city pairs in June 2026 with 395 flights (-30.21% MoM, +13.51% YoY).

VERIFIED FACT

[june2026-kteb-kiad-corridor] Teterboro <-> Washington Dulles was North America's top bidirectional airport corridor in June 2026 with 471 combined flights.

VERIFIED FACT

[june2026-kdal-khou-corridor] Dallas Love Field <-> Houston (KHOU) logged 216 combined bidirectional flights in June 2026 - Texas Triangle anchor.

VERIFIED FACT

[june2026-guadalajara-mexico-city] Guadalajara <-> Mexico City led North America MoM city-pair growth in June 2026 at +97.03% (269 -> 530 flights) and +129.44% YoY.

VERIFIED FACT

[june2026-netjets-na] NetJets Aviation led North American operators in June 2026 with 17.23% regional market share.

VERIFIED FACT

[june2026-flexjet-na] Flexjet ranked #2 among North American operators in June 2026 with 6.88% regional market share.

VERIFIED FACT

[june2026-na-operator-concentration] North America's Top 10 operators held 34.28% combined regional share in June 2026; Top 3 held 26.03%.

VERIFIED FACT

[na-netjets-market-share-2025] NetJets Aviation held 15.69% of North American operator departures in Jan-Aug 2025 - 2.5x the share of #2 Flexjet (6.53%).

VERIFIED FACT

[na-operator-cr10-2025] The top 10 North American operators accounted for 32.62% of departures in Jan-Aug 2025 (CR10); the remaining 67.4% sits in a fragmented long tail.

VERIFIED FACT

[june2026-na-light-jet] Light jets flew 47.00% of North American departures in June 2026 (98,692 flights).

VERIFIED FACT

[june2026-na-peak-hour] North America's peak hour in June 2026 was 15:00 UTC / 10:00 EST with 17,718 flights (8.44% share) and a 47.8x peak/trough ratio.

VERIFIED FACT

[june2026-weekday-weekend] June 2026 logged 180,151 weekday (Mon-Thu) departures (+9.28% MoM) versus 113,723 weekend (Fri-Sun) departures (-15.04% MoM).

VERIFIED FACT

[na-light-jet-share-2025] Light jets accounted for 823,350 North American departures in Jan-Aug 2025 (47.3% of regional volume).

Appendix B - Related Limitless Sky surfaces

Continue from this PDF into the Insights hub thematic report index (/insights/reports), the live empty-leg feed, aircraft entity pages (for example Phenom 300), destination pages (for example London / Paris / New York metro) and route pages (for example London-Paris). Entity pages surface matching Avi-Go facts in a verified-intelligence band when

