



Global Services

# 2017 Pilot & Technician Outlook

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# Overview

## Boeing Global Services

A dedicated services business focused on the needs of global defense, space, and commercial customers

### Worldwide presence

 **300+** locations

**70+** countries 

 **40+** US states

 Headquartered in the Dallas, TX area

Approximately 20,000 employees 

 Government and commercial business areas

### Robust service capabilities

 Digital Aviation & Analytics	 Engineering, Modifications & Maintenance
 Training & Professional Services	 Supply Chain

### Efficient performance

Faster customer response

Operational agility

Competitive cost structures

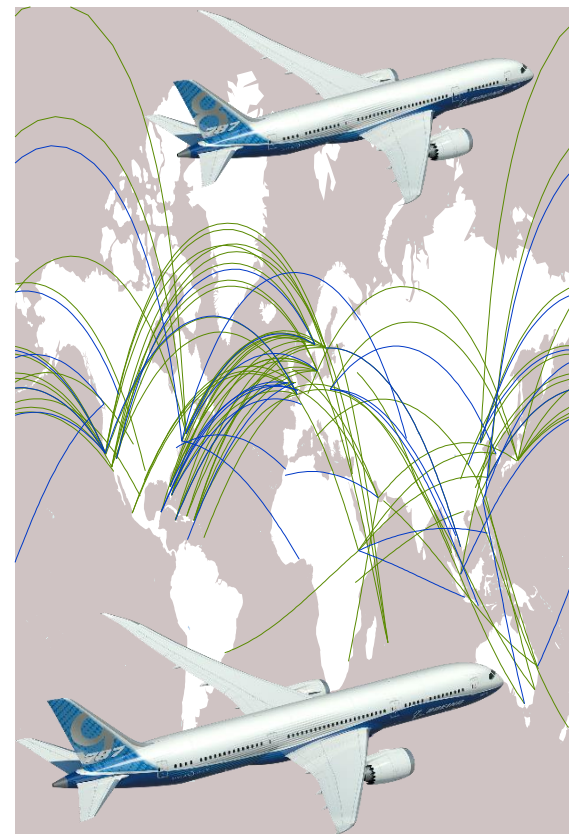
# Global aviation market trends



**Growth driven by emerging economies, LCCs**



**Continued strong replacement demand**



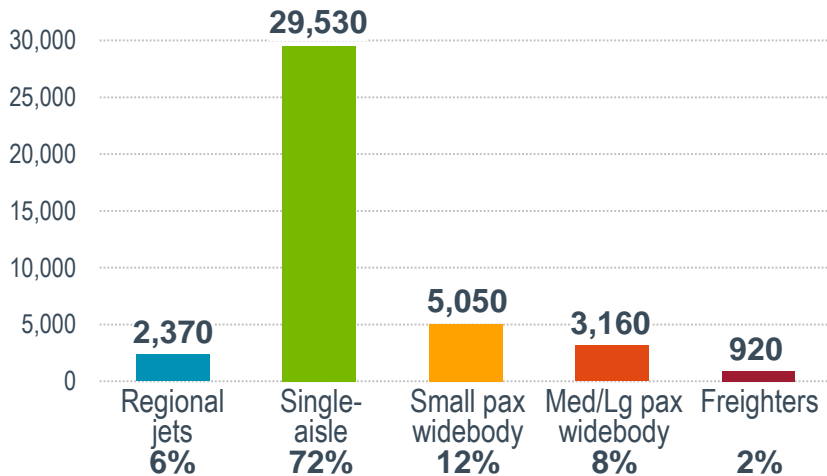
**New airplanes, capabilities opening new markets**

# Airlines will need 41,030 new airplanes valued at \$6.1 trillion



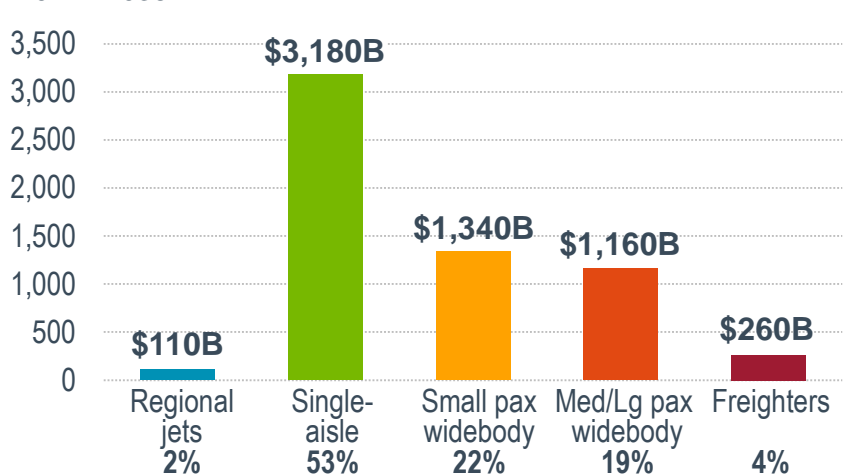
## Airplane deliveries: 41,030

2017 - 2036



## Market value: \$6,050 billion

2017 - 2036



NOTE: Market share may not equal 100% due to rounding

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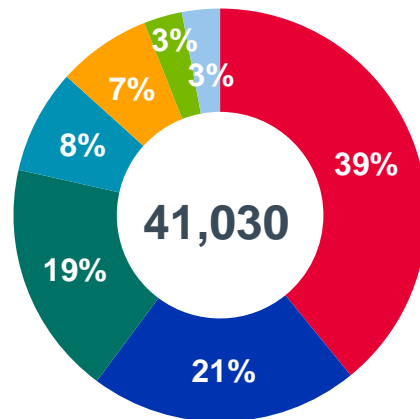
# Market for new airplanes to become even more geographically balanced



## New airplane deliveries by region

2017–2036

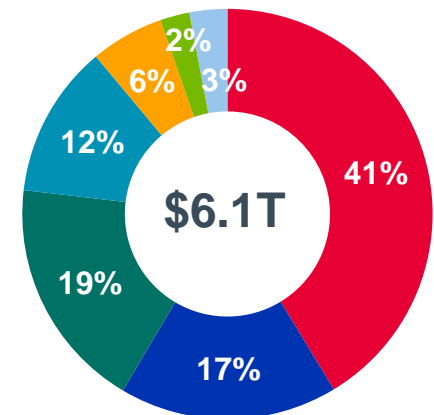
Region	Airplanes
● Asia	16,050
● North America	8,640
● Europe	7,530
● Middle East	3,350
● Latin America	3,010
● C.I.S.	1,230
● Africa	1,220
<b>World Total</b>	<b>41,030</b>



## Market value by region

2017–2036

Region	\$B
● Asia	2,500
● North America	1,040
● Europe	1,110
● Middle East	730
● Latin America	350
● C.I.S.	140
● Africa	180
<b>World Total</b>	<b>\$6,050B</b>



# Pilot and Technician Outlook methodology

**Current Market Outlook  
2017 – 2036**

**Resource Requirements**

**Regulatory Requirements**

**Airline Strategies & Business Models**

**2017 – 2036  
Pilot & Technician  
Outlook**



# Demand for commercial airline pilots

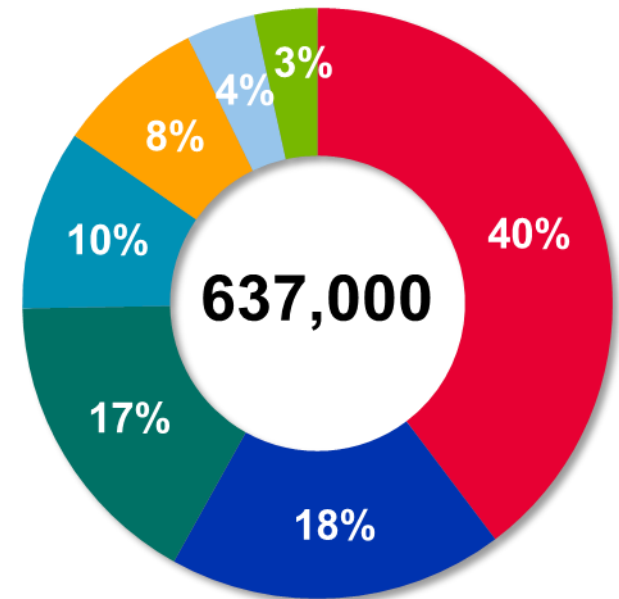
## 2017 Pilot & Technician Outlook



### New Pilots by Region

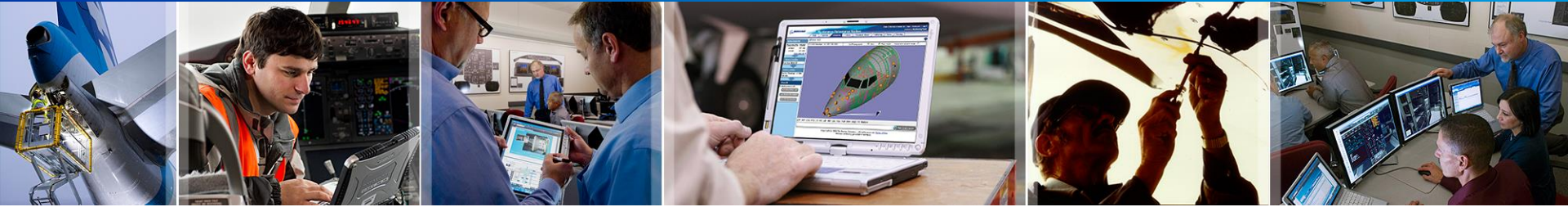
2017–2036

● Asia Pacific	253,000
● North America	117,000
● Europe	106,000
● Middle East	63,000
● Latin America	52,000
● Africa	24,000
● C.I.S. / Russia	22,000
<b>World Total</b>	<b>637,000</b>



# Demand for commercial airline technicians

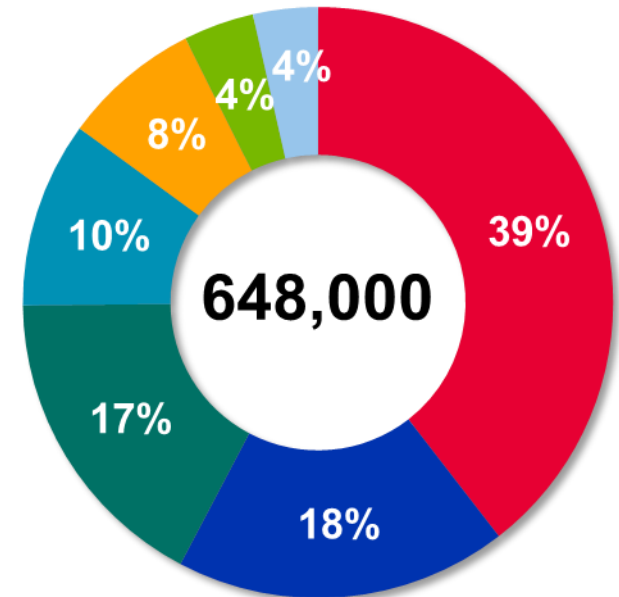
## 2017 Pilot & Technician Outlook



### New Technicians by Region

2017–2036

● Asia Pacific	256,000
● North America	118,000
● Europe	111,000
● Middle East	66,000
● Latin America	49,000
● C.I.S. / Russia	25,000
● Africa	23,000
<b>World Total</b>	<b>648,000</b>





# Demand for commercial airline cabin crew

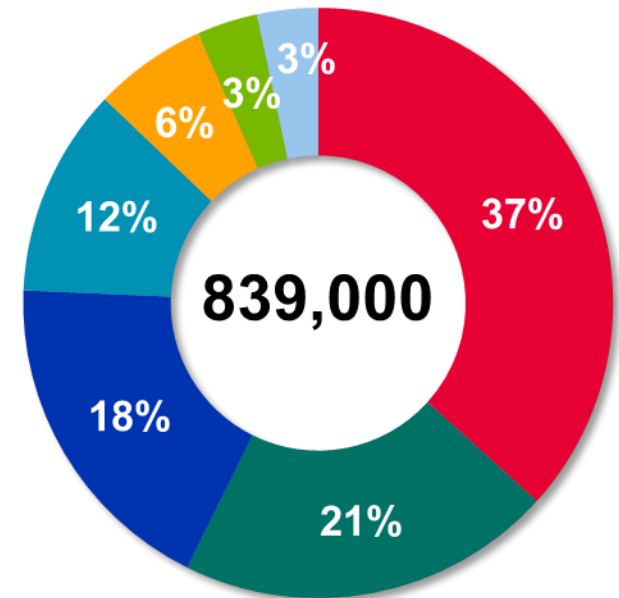
## 2017 Pilot & Technician Outlook



### New Cabin Crew by Region

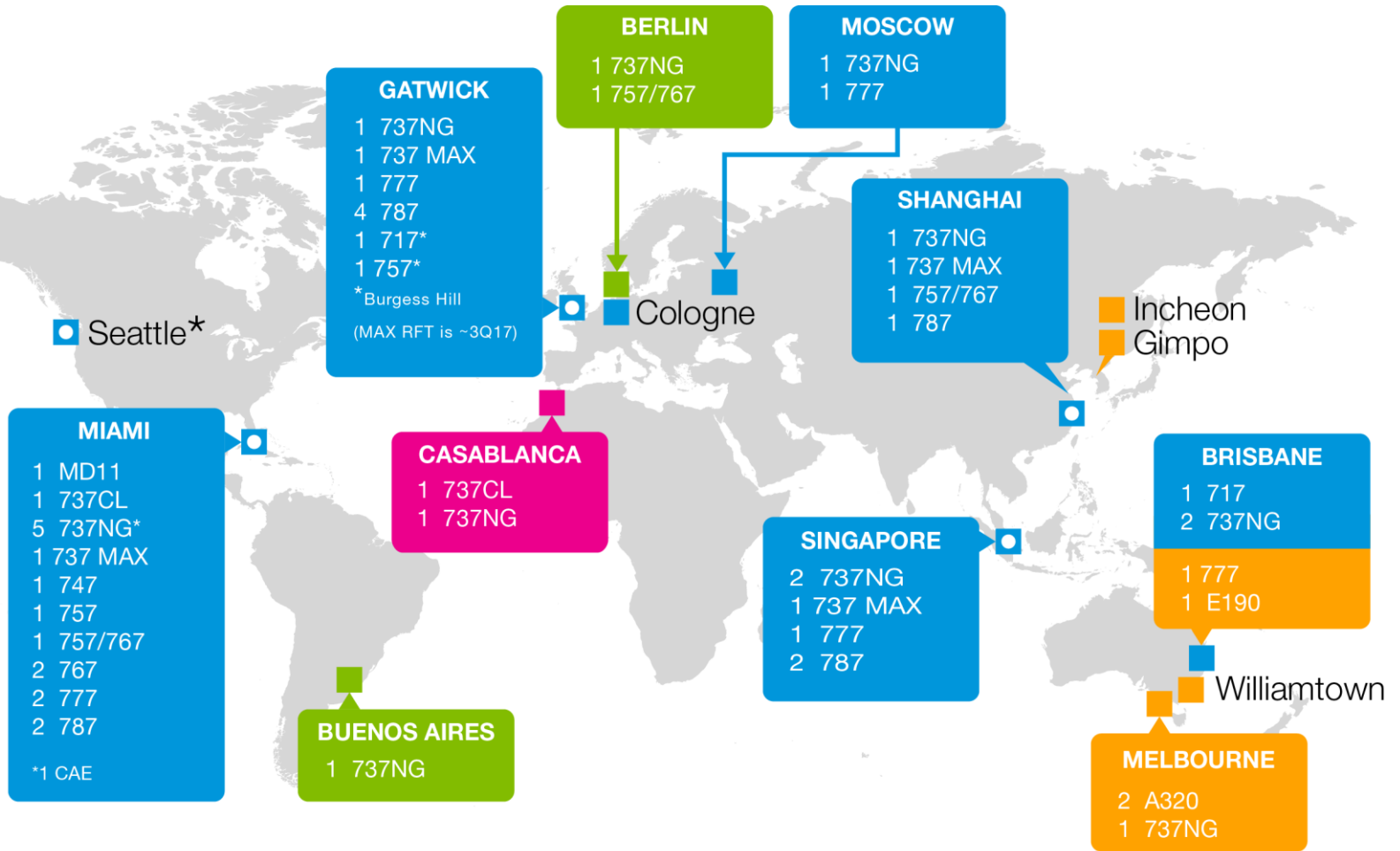
2017–2036

● Asia Pacific	308,000
● Europe	173,000
● North America	154,000
● Middle East	96,000
● Latin America	52,000
● C.I.S. / Russia	28,000
● Africa	28,000
<b>World Total</b>	<b>839,000</b>



# Global Training Locations

Bringing training closer to our customers around the world



■ T&PS Campus

■ Proforma  
\* Pro forma for MT only

■ Customer Campus

■ Joint Venture

■ Simulator Placement

# What is Boeing Training & Professional Services doing?

Inspiring and developing tomorrow's workforce



