



Global Services

2018 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

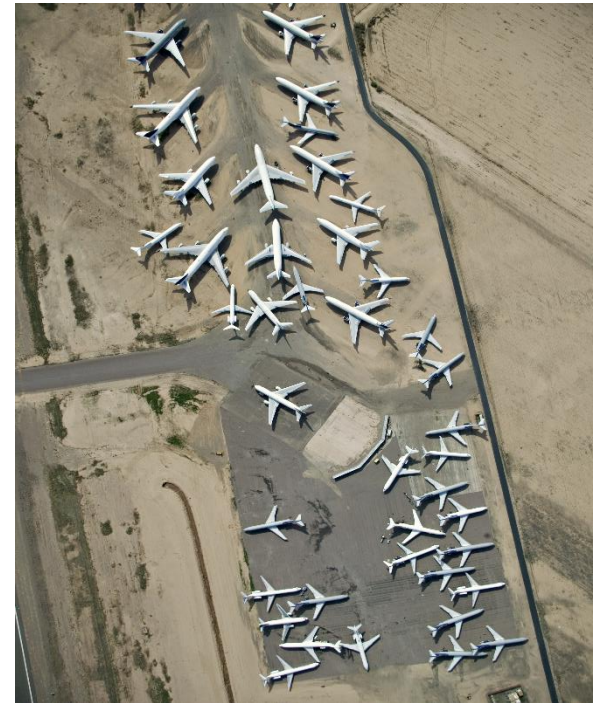
Airplane market trends



Balanced growth



Productivity and innovation



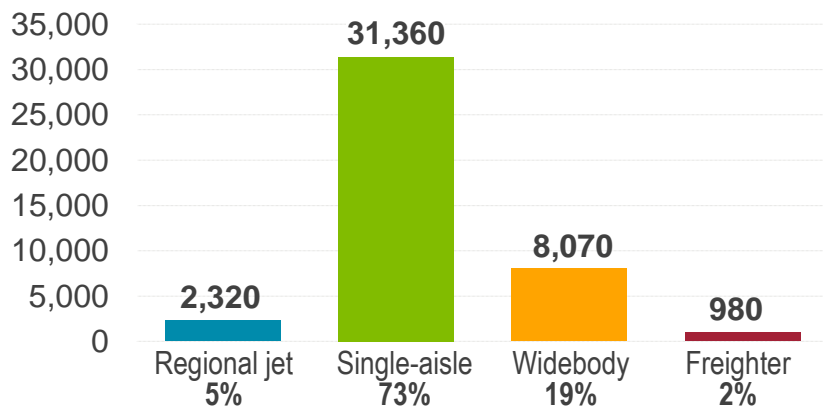
Replacement

Airlines will need 42,700 new airplanes valued at \$6.3 trillion



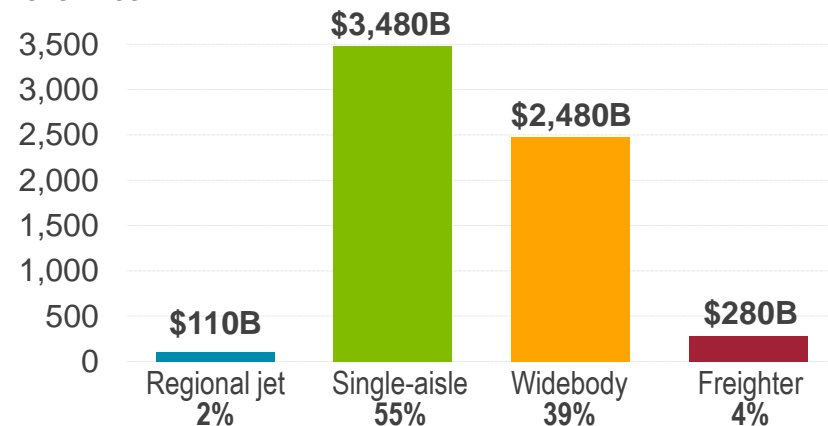
Airplane deliveries: 42,700

2018 - 2037



New airplane values: \$6,350B

2018 - 2037



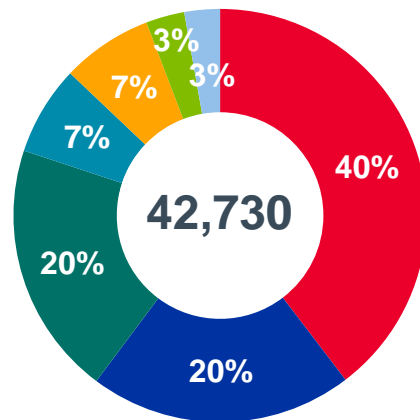
Market for new airplanes to become even more geographically balanced



New airplane deliveries by region

2018–2037

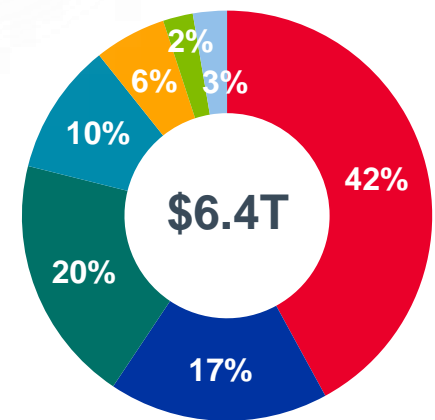
Region	Airplanes
● Asia	16,930
● North America	8,800
● Europe	8,490
● Middle East	2,990
● Latin America	3,040
● Russia/CA	1,290
● Africa	1,190
World Total	42,730



Market value by region

2018–2037

Region	\$B
● Asia	2,670
● North America	1,100
● Europe	1,240
● Middle East	660
● Latin America	360
● Russia/CA	150
● Africa	170
World Total	\$6,350B



Pilot and Technician Outlook methodology



**Commercial
Market Outlook**



**Aircraft
utilization**



**Crew
requirements**



**Regulatory
requirements**



**Operator
business models**

**2018 – 2037
Pilot & Technician
Outlook**

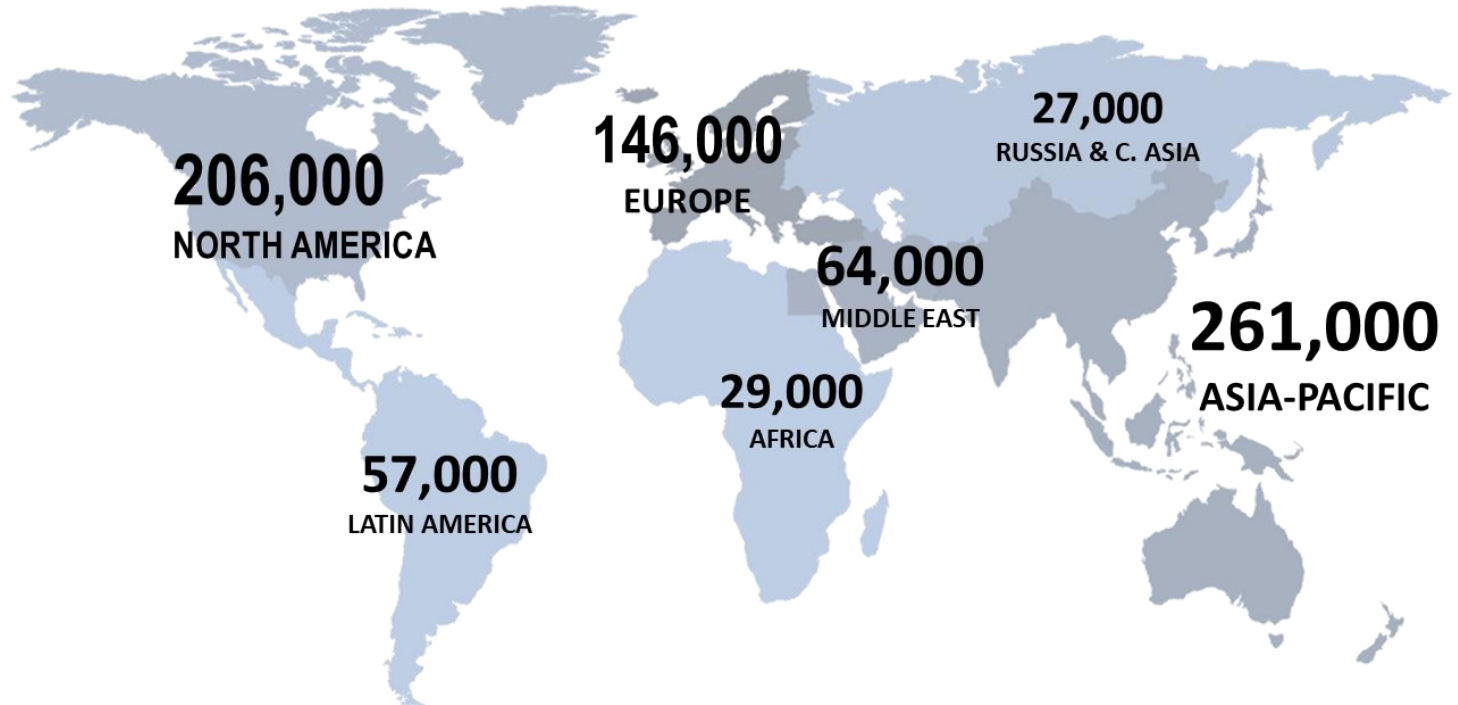
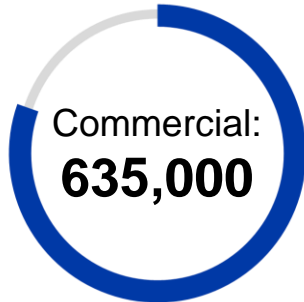
Demand for civil aviation pilots

2018 Pilot & Technician Outlook



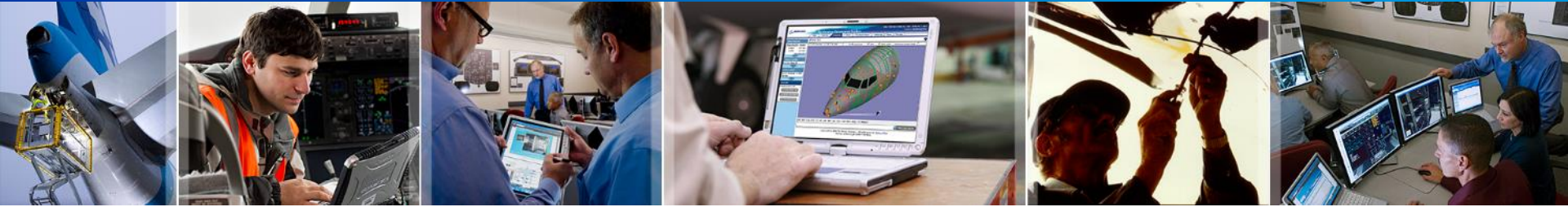
2018 - 2037

World Demand: 790,000



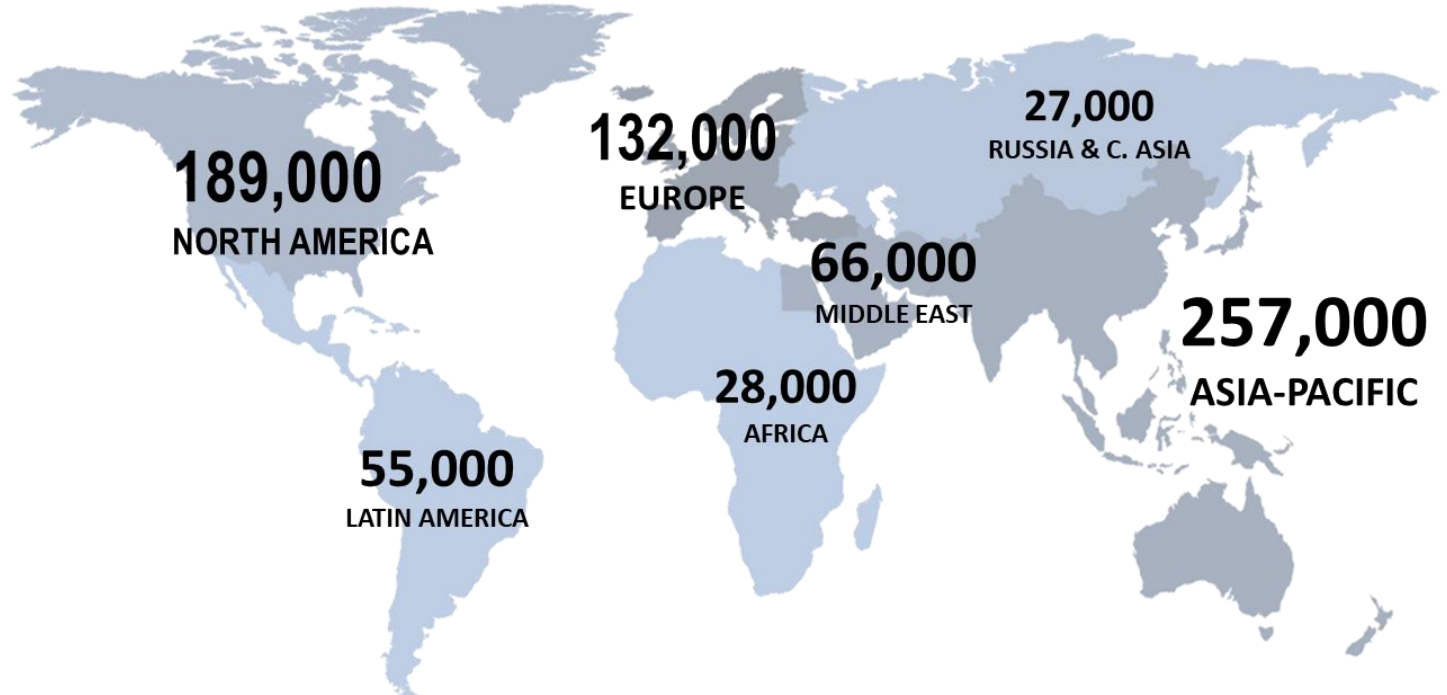
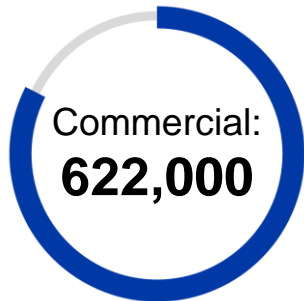
Demand for civil aviation technicians

2018 Pilot & Technician Outlook



2018 - 2037

World Demand: 754,000



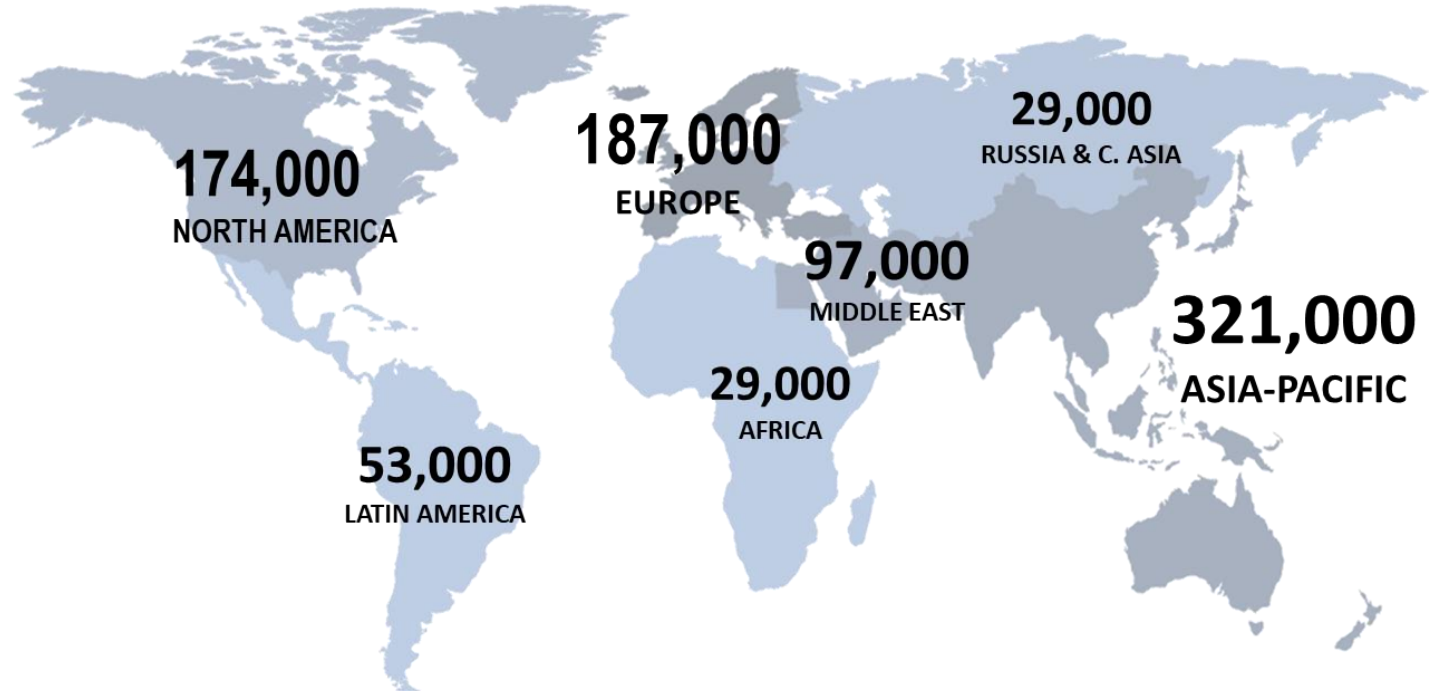
Demand for civil aviation cabin crew

2018 Pilot & Technician Outlook



2018 - 2037

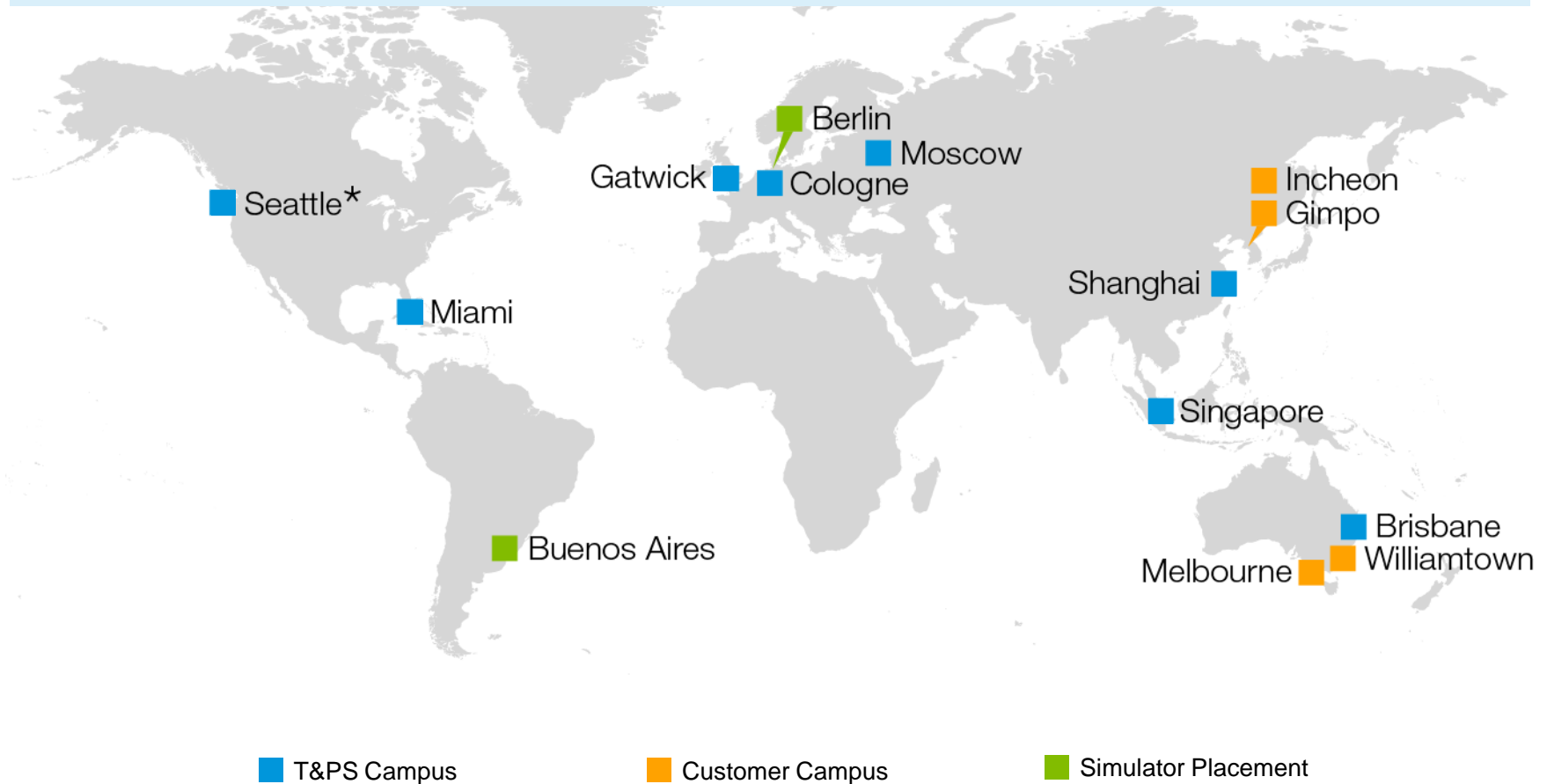
World Demand: 890,000



Training & Professional Services

Commercial Training Locations

**~1200 Employees • 9 Countries • 39% International • 55% outside the Puget Sound
14 Flight Services Campuses on Five Continents**



What is Boeing Training & Professional Services doing?

Inspiring and developing tomorrow's workforce



