



Boeing Global Services

Debra Santos, Chief Marketing Officer, Commercial Services

Around the Clock. Around the World. Always Ready.

The CMO is our long-term forecast of global air travel, new airplane demand and commercial services

All jets >30 seats and freighters in commercial service



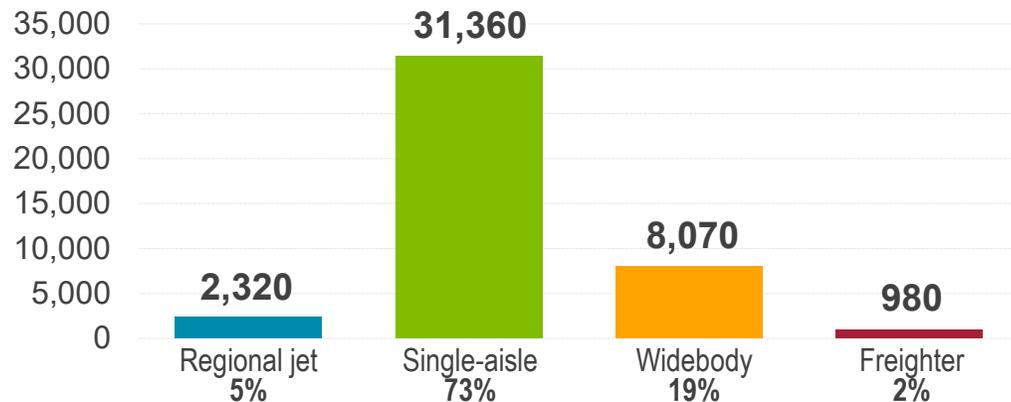
Services required to support the operation of commercial aviation

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



Airplane deliveries: 42,700

2018 - 2037

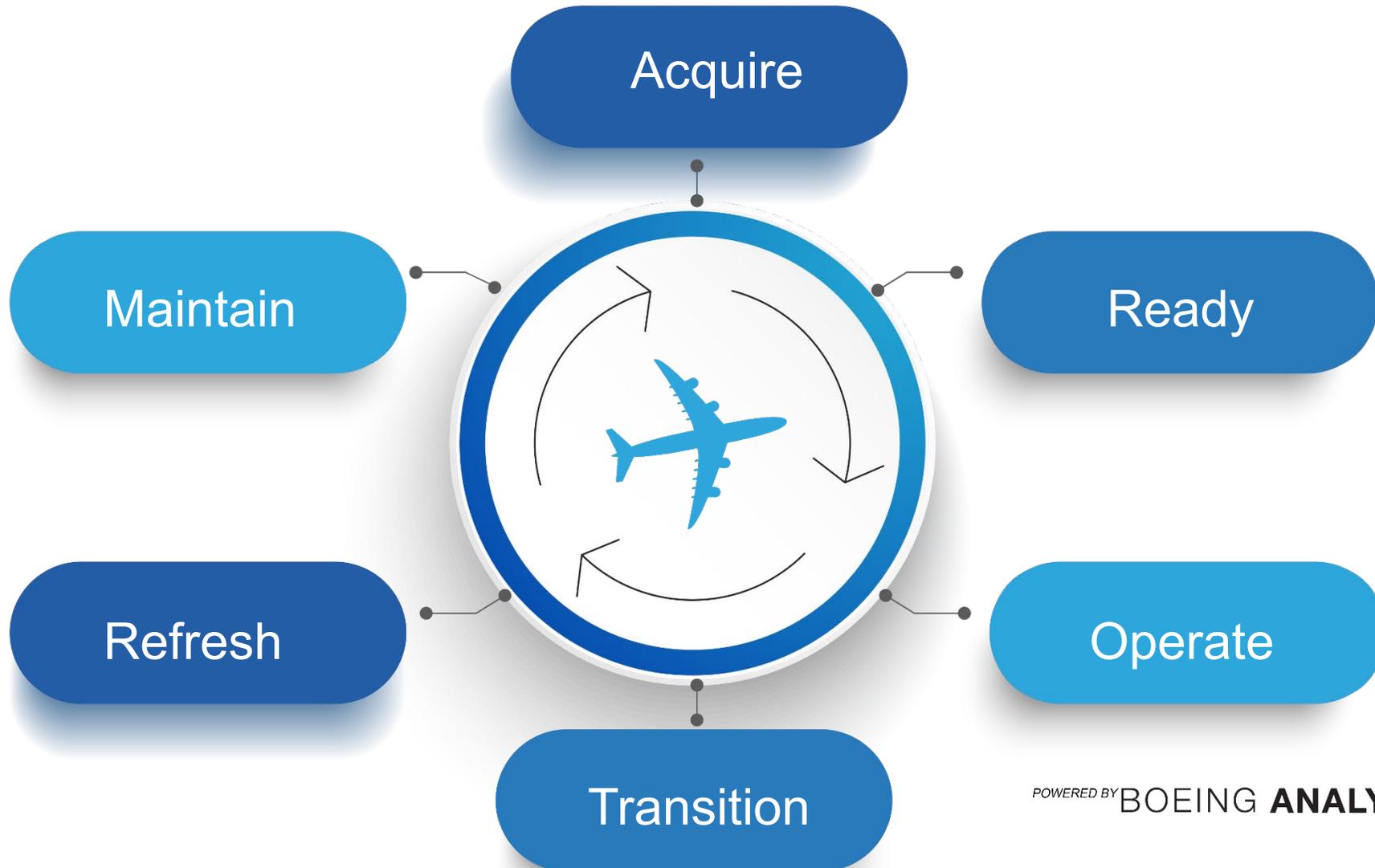


New airplane values: \$6.3T

2018 - 2037



Total Lifecycle Commitment and Support



POWERED BY BOEING **ANALYTIX**

Commercial aviation will demand \$8.8 trillion in services over 20 years



Commercial Aviation Services: \$8.8T

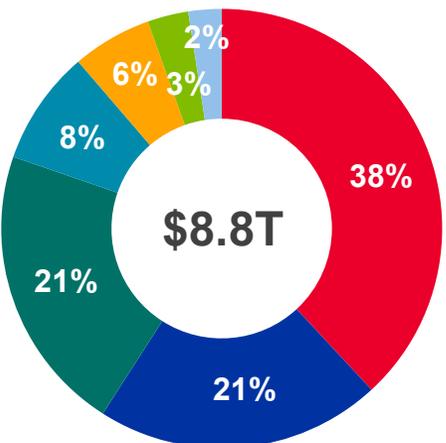
2018 - 2037



Services by Region

2018 - 2037

Region	Services	CAGR
Asia Pacific	3,365	5.1%
North America	1,850	2.9%
Europe	1,875	3.5%
Middle East	745	4.6%
Latin America	515	5.1%
Russia/CA	265	3.2%
Africa	215	5.2%
World Total	\$8,830B	4.2%



Middle East is uniquely positioned

Just 8 hours away from massive potential

65% of the global economy

70% of the 20-year economic growth

>80% of the global population

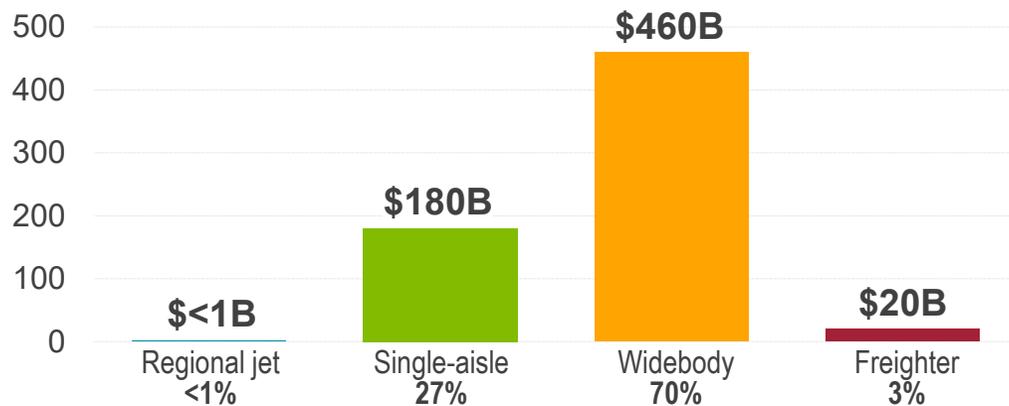


Middle East will need 2,990 new airplanes reaching 3,890 aircraft by 2037 generating services valued at \$745 billion



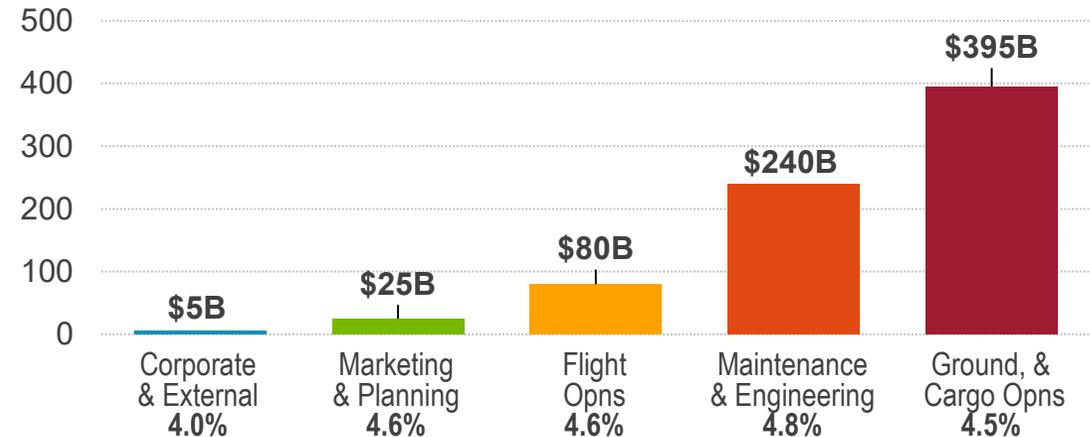
Middle East New airplane values: \$660 billion

2018 - 2037



Middle East Commercial Aviation Services: \$745B

2018 - 2037



Services market trends



Airline business models



Big data and analytics



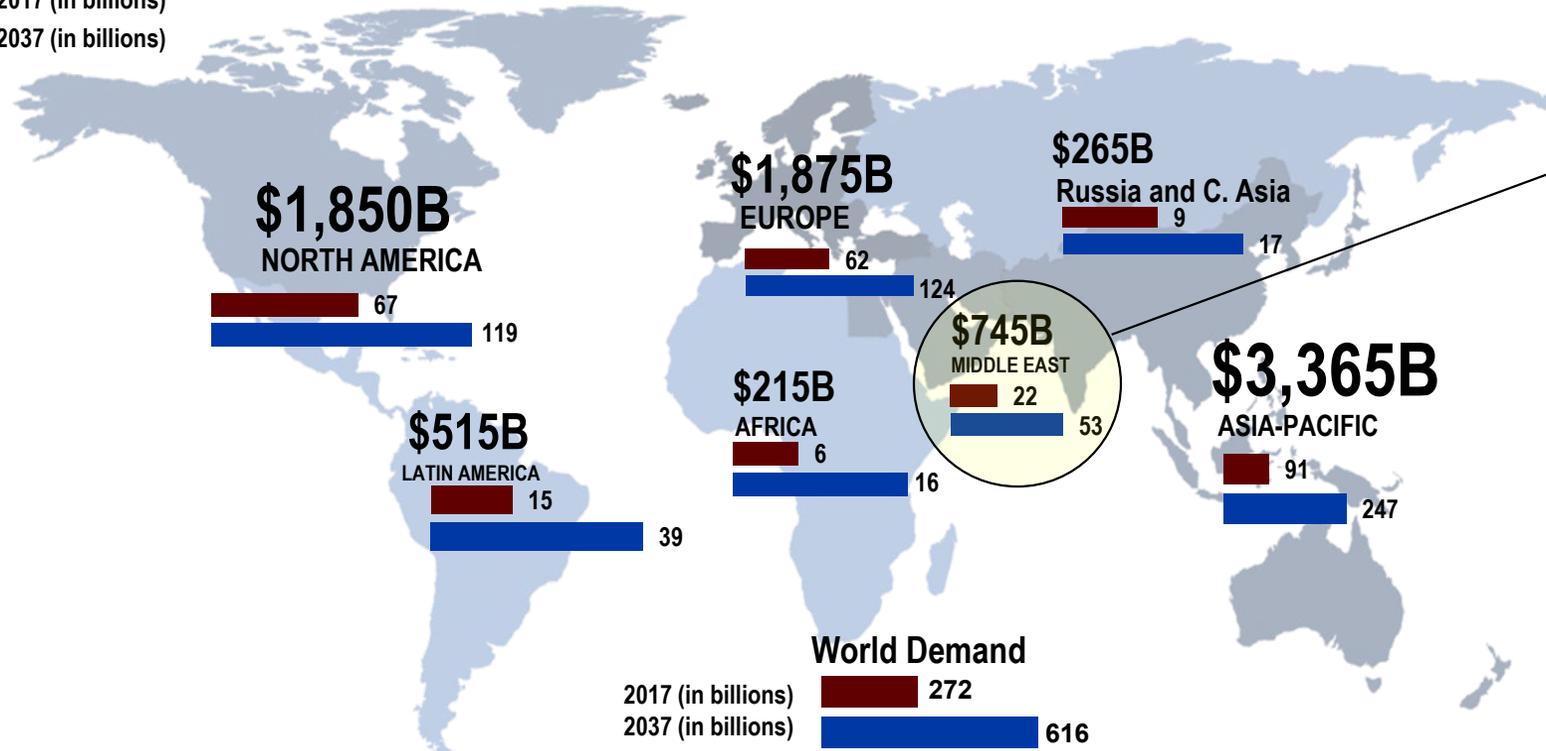
New technologies and innovations

Commercial aviation will demand \$8.8 trillion in services over 20 years

Middle East will drive more than 8% of the global demand, growing at 4.6% annually

Market Demand by Region Commercial Aviation Services

■ 2017 (in billions)
■ 2037 (in billions)

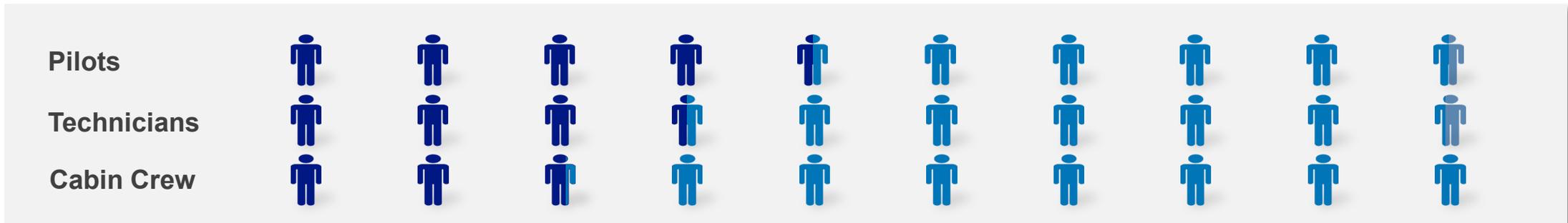
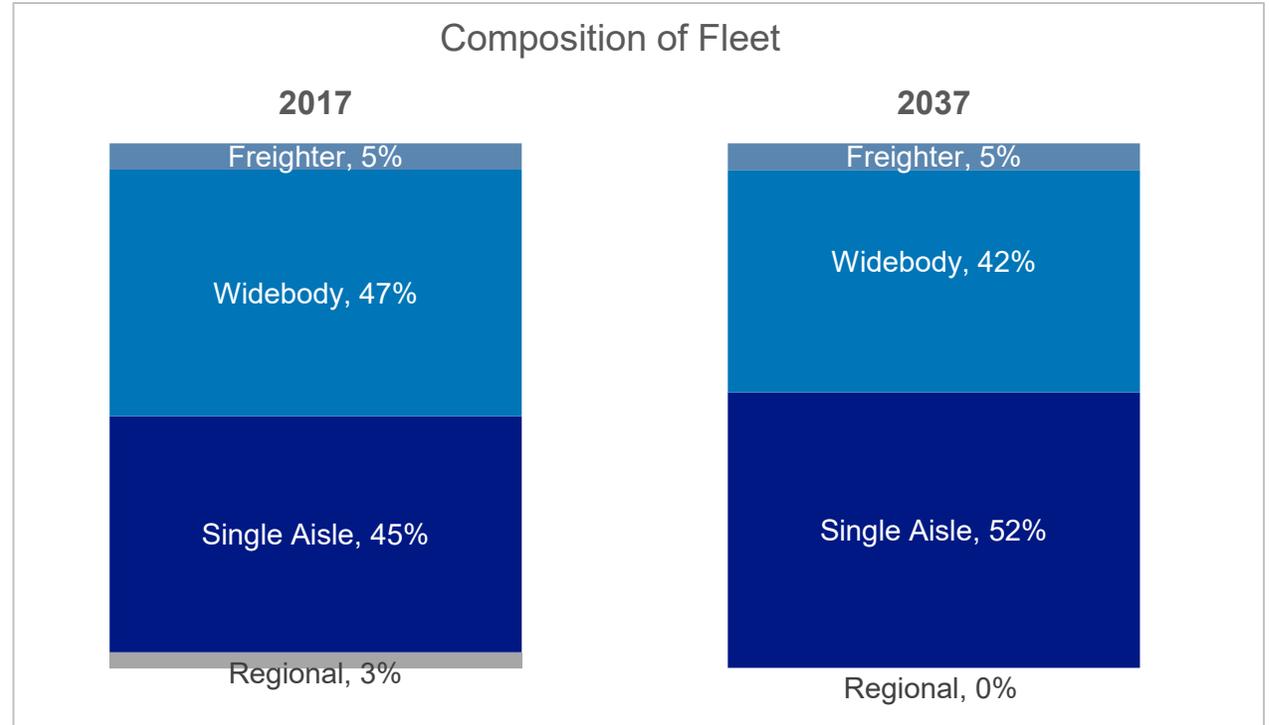
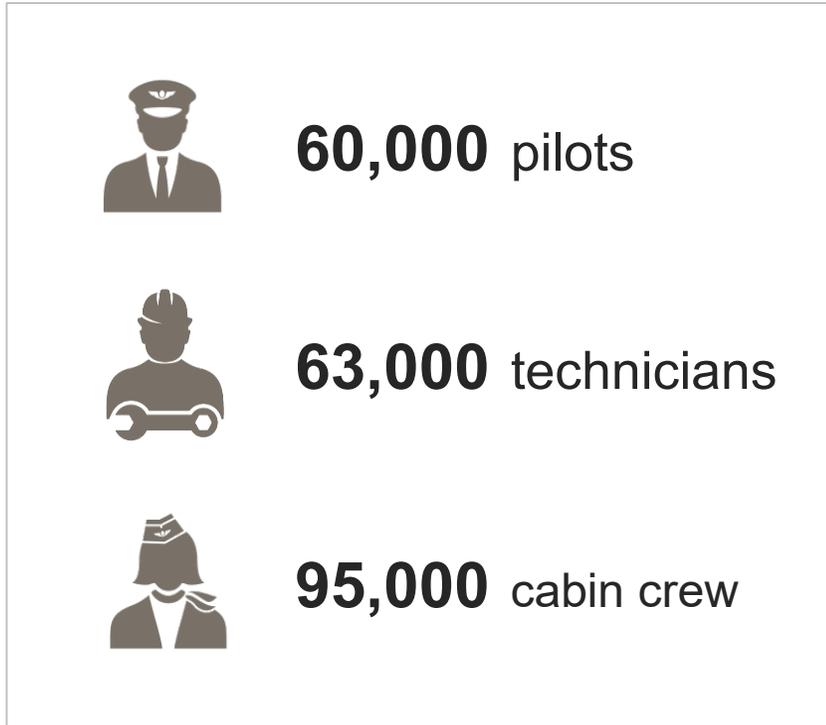


Nearly 218,000 new pilots, technicians and cabin crew needed

Big Data & Analytics

OEM & MRO Investments in the Region to meet demand

Nearly 218,000 new personnel needed in Middle East



Boeing Global Services in the Middle East

Services Solutions by Country

Bahrain*

- Supply Chain
- Digital Aviation
- Engineering, modifications, and maintenance
- Training

Egypt

- Apache
- Chinook

Iraq*

- Supply Chain
- Digital Aviation
- Engineering, modifications, and maintenance
- Training

Jordan*

- Supply Chain
- Digital Aviation
- Engineering, modifications, and maintenance
- Training

Kuwait

- Apache
- C-17
- F-18
- Supply Chain*
- Digital Aviation*
- Training*

Lebanon*

- Supply Chain
- Digital Aviation

Oman*

- Supply Chain
- Digital Aviation
- Training

Qatar

- Apache
- C-17
- Supply Chain*
- Digital Aviation*
- Engineering, modifications, and maintenance*
- Training*

Saudi Arabia

- AH-61
- Apache
- Chinook
- F-15
- Supply Chain*
- Digital Aviation*
- Engineering, modifications, and maintenance*
- Training*

United Arab Emirates

- Apache
- C-17
- Chinook
- Supply Chain*
- Digital Aviation*
- Engineering, modifications, and maintenance*
- Training*

*Commercial Services

★ Boeing-Aviall facility and Boeing-Jeppesen facility



More than 2,300 employees and partners providing services support

Market outlook

Commercial: Boeing estimates that the Middle East will need **2,990 airplanes** over the next 20 years for fleet renewal and growth.

Government: Boeing estimates the Government Services market in the Middle East to exceed **\$90 billion** over the next 10 years.



Partnerships to grow indigenous capabilities

- Alsalam Aerospace Industries
- Boeing-Aviall Middle East facility
- Emirates Flight Training Academy
- Boeing-Jeppesen Middle East facility
- Saudi Rotorcraft Support Company



Service capabilities



Extensive local supply chain



Maintenance, repair, and overhaul facilities



Data-driven solutions



Comprehensive training services

