



Enabling Growth in Commercial Aviation

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President, Boeing Southeast Asia

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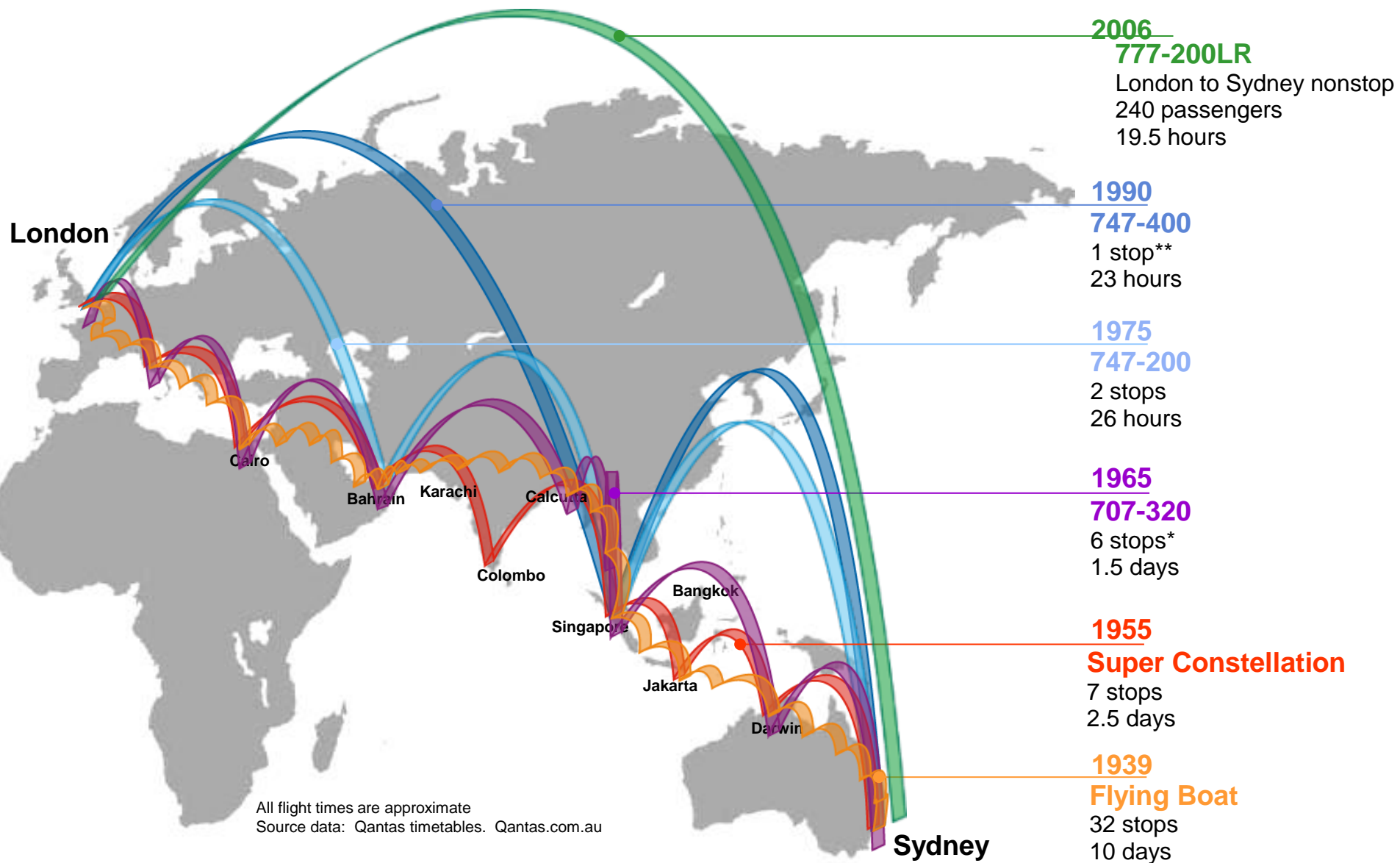
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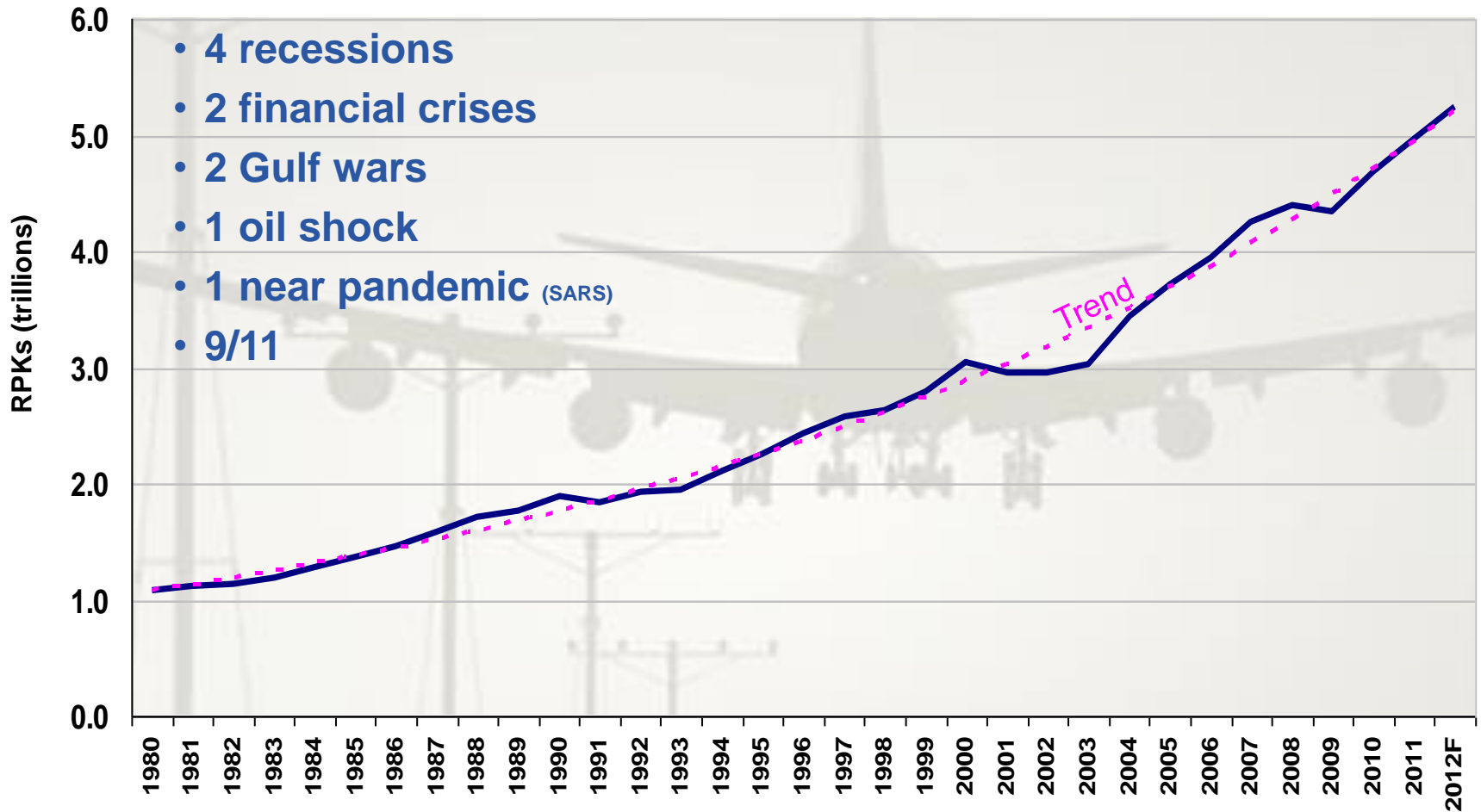
Agenda

- Industry Transformation
- Industry Forecast
- Enabling the Future of our Industry

Breakthroughs in Airplane Capabilities



World Air Travel Growing 5% Per Year Since 1980



RPKs = Revenue Passenger Kilometers

Sources: ICAO Scheduled Traffic

Drivers of Air Travel



**Economic
growth**

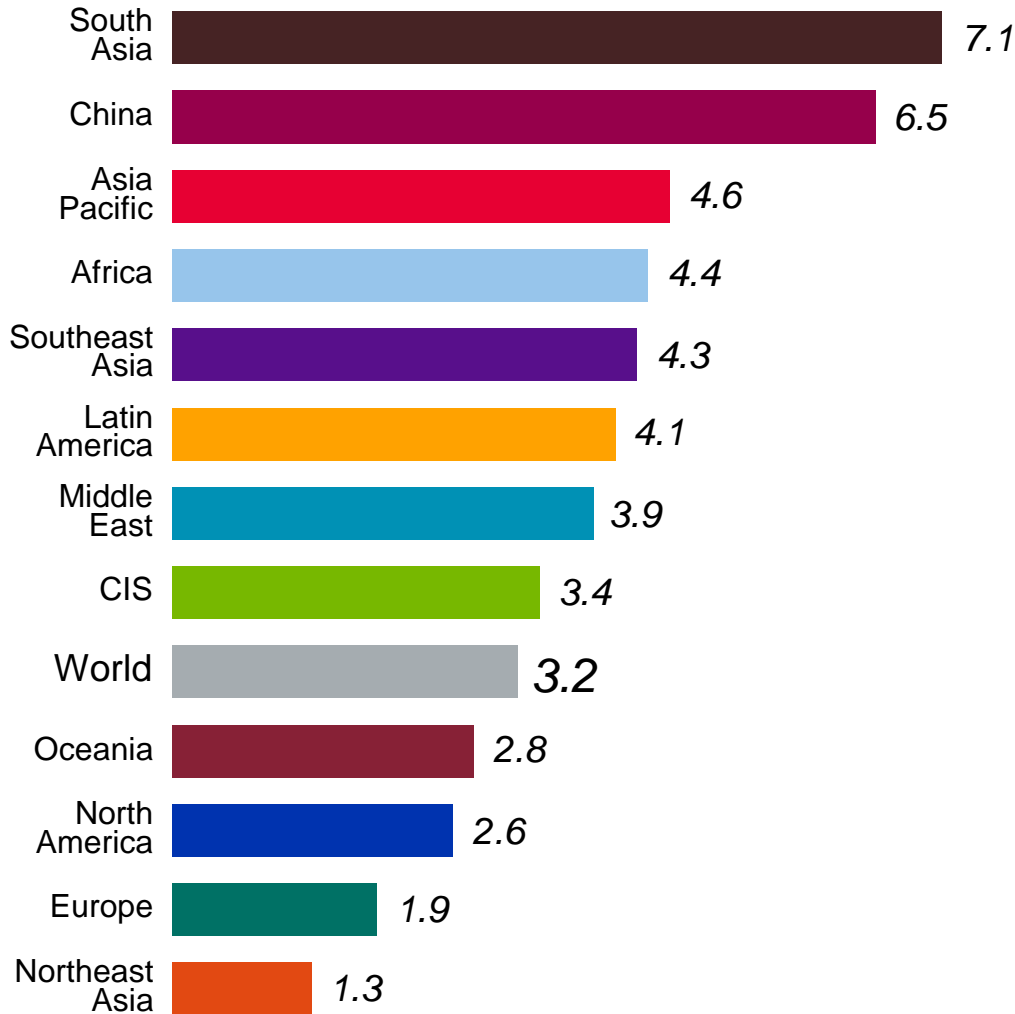
**Global
trade**

**Traveler
values**

Emerging Markets Driving Economic Growth

Annual GDP growth

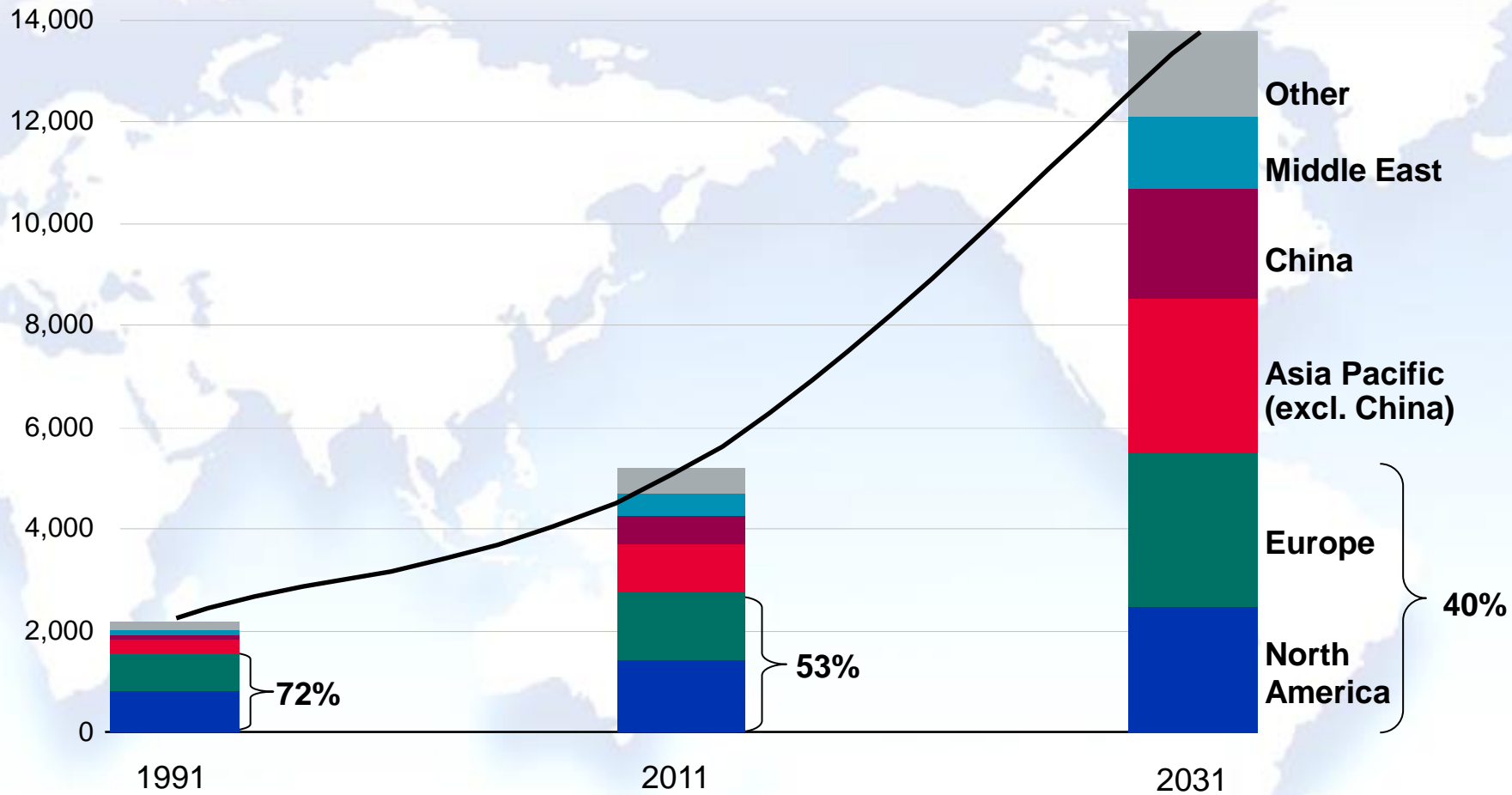
2011 – 2031



Source: IHS Global Insight

Air Travel Becoming More Diverse Geographically

Air traffic, RPKs (billions)



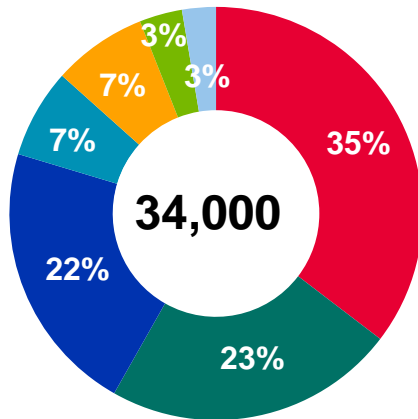


Airlines will need 34,000 new airplanes valued at \$4.5 trillion by 2031

New airplane deliveries by region

2012–2031

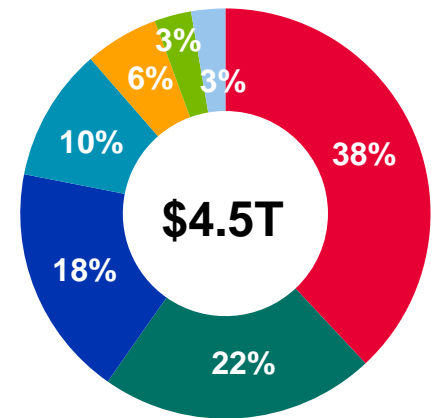
Region	Airplanes
● Asia Pacific	12,030
● Europe	7,760
● North America	7,290
● Middle East	2,370
● Latin America	2,510
● C.I.S.	1,140
● Africa	900
World Total	34,000



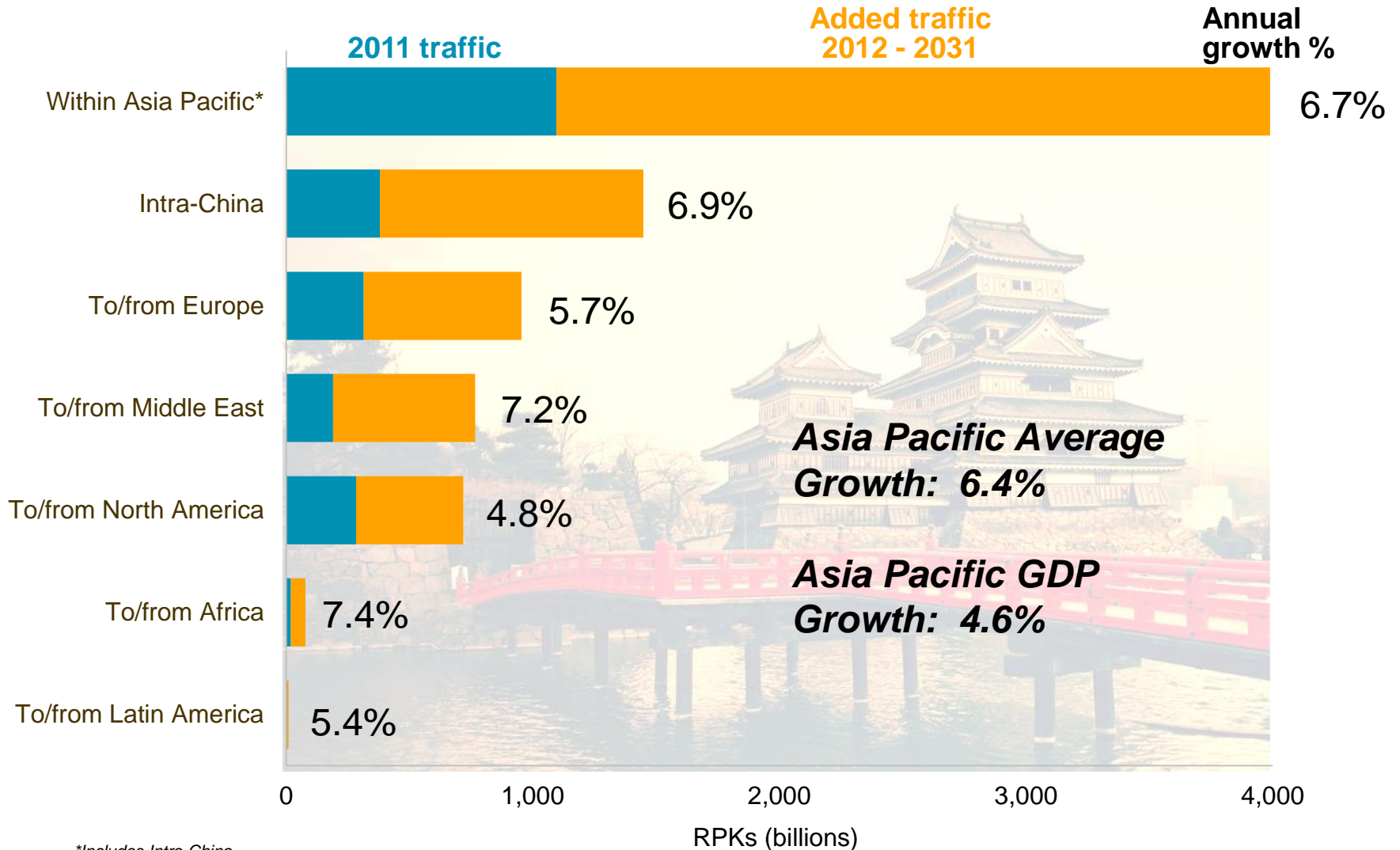
Market value by region

2012–2031

Region	\$B
● Asia Pacific	1,700
● Europe	970
● North America	820
● Middle East	470
● Latin America	260
● C.I.S.	130
● Africa	120
World Total	\$4,470B



Asia Pacific air travel growth exceeds world average



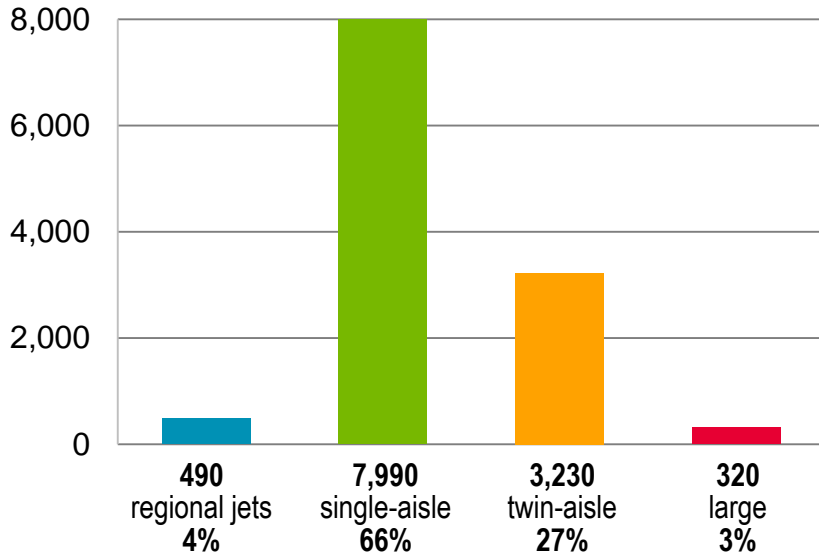
*Includes Intra-China



Asia Pacific will need 12,030 new airplanes valued at \$1.7 trillion

Airplane deliveries: 12,030

2012 - 2031



Market value: \$1.7 trillion

2012 - 2031

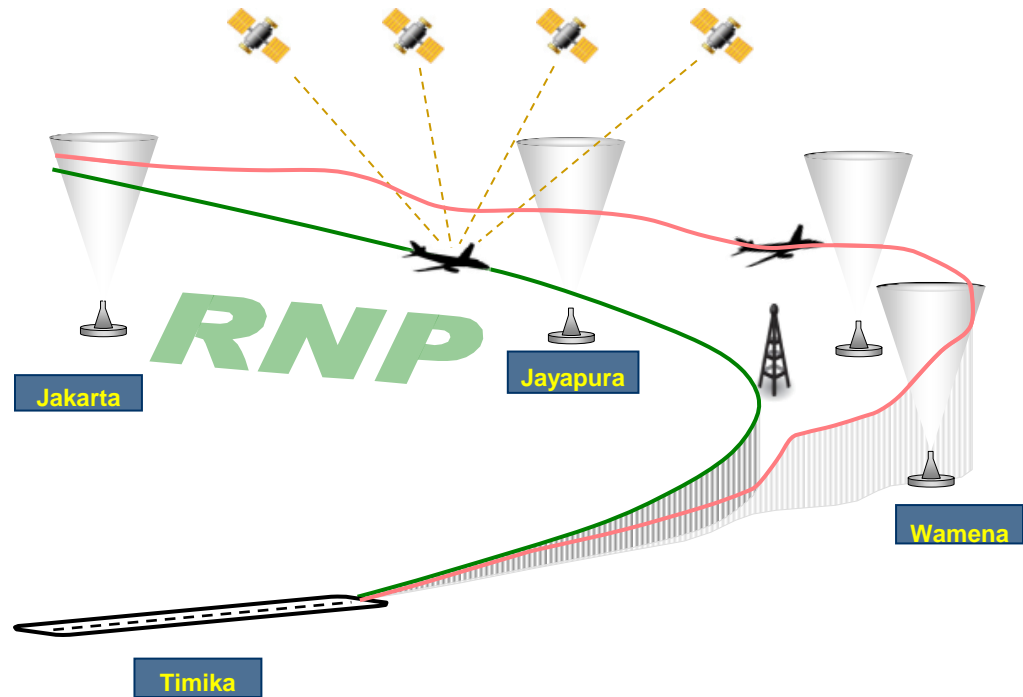
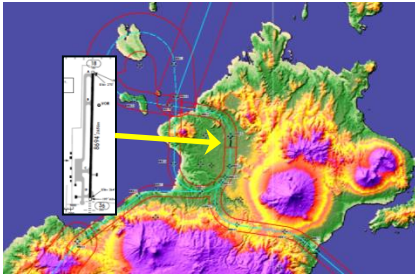


Boeing Supports Customer Profitability with Fuel-Efficient Aircraft



Enhancing Industry Efficiency and Safety

- Optimizing flight paths
- Greater efficiency & capacity
- Vertical guidance & cockpit avionics



Boeing collaboration in Asia-Pacific supports efficiency, growth

Supporting People Development

By 2031, Asia Pacific will need 185,600 new pilots and 243,500 new aircraft technicians to support record aviation industry growth



Significant challenge and opportunity for development



Enabling aviation industry growth requires:

- **Fuel efficient aircraft to support airline profitability**
- **Modern air traffic management and safety systems**
- **Human resource development of pilots and technicians**

Keynote Session

Ralph “Skip” Boyce

President of Boeing
Southeast Asia,
Former US Ambassador to
Thailand

