

波音 - 中国携手合作 及民航市场近况

Boeing in China & Aviation Market Update

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波音与中国：45 年的跨世纪携手合作伙伴关系

Boeing and China: partnership for over 45 years

深入、全面、持续扩展的合作

Deep, broad and growing collaborations



机队及保障服务

工业合作

环保项目

专业培训

社会公益

Fleet &
Support

Industrial
Cooperation

Environmental
Initiatives

Training &
Development

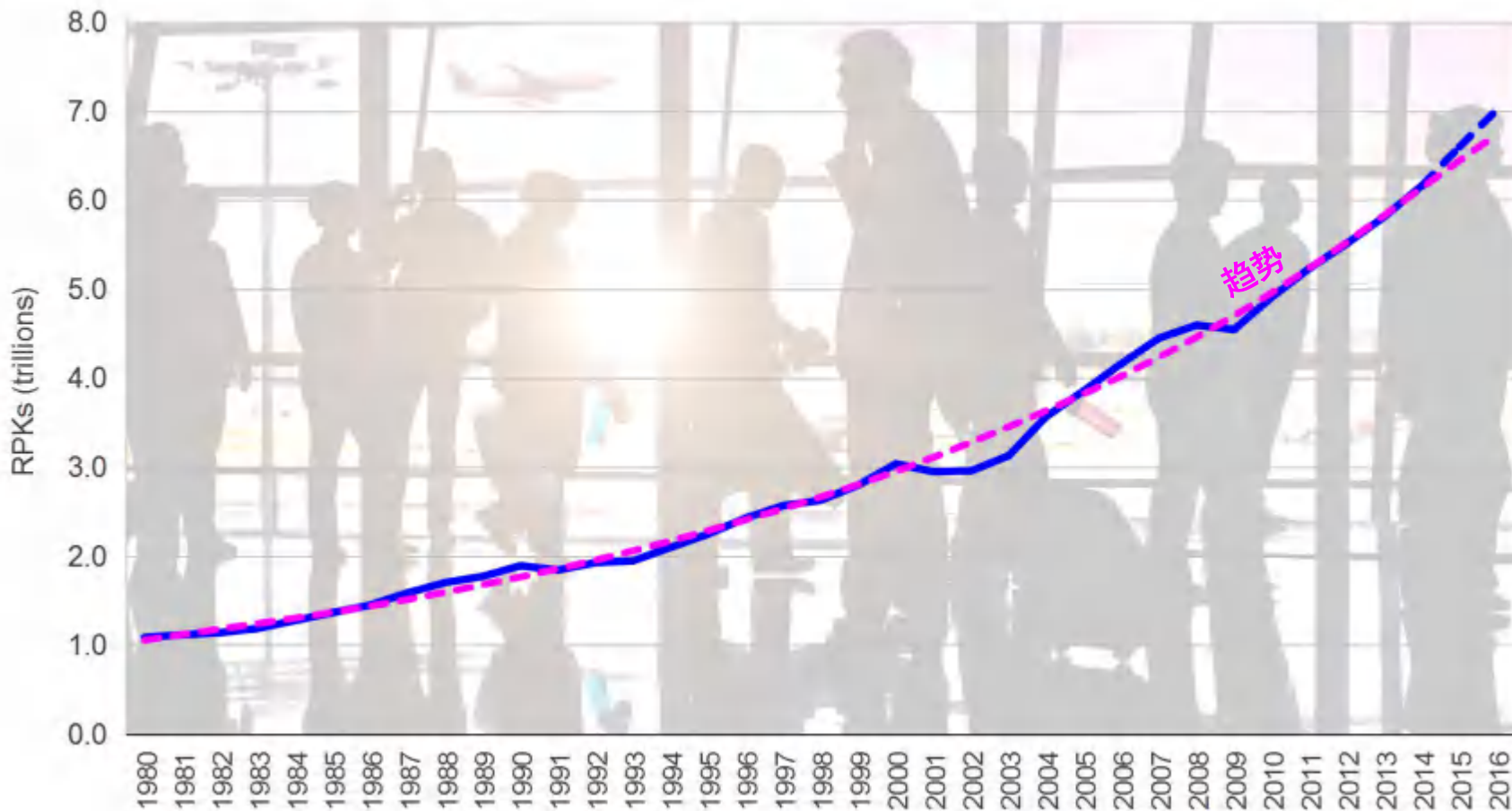
Corporate
Citizenship

年投资总额近 10 亿美元

市场预期将保持稳健的增长

Resilient, growing market expected to continue

5% 长期增长率 5% long-term growth rate



RPKs = Revenue Passenger Kilometers

SOURCE: ICAO scheduled traffic / 2016E IATA December 2016

43 亿

乘客数
passengers carried

+6.0%

RPK 增长率
RPK growth

3.2%

经济增长
economic growth

~81%

客座率
load factor

\$38B

净利润
net profit

+4.5%

FTK 增长
FTK growth

2018 年将持续强劲增长
Strong growth expected in 2018

SOURCE: BCA Market Analysis with data from IATA, IHS Markit

中国市场增长率达全球平均速率 2 倍

China growing 2X global rate

重组使 GDP 增速放缓，航空业受益

Transition slows GDP growth, benefits aviation

6-7%

GDP 增长的驱动力发生变化

Shifting GDP growth drivers

14%

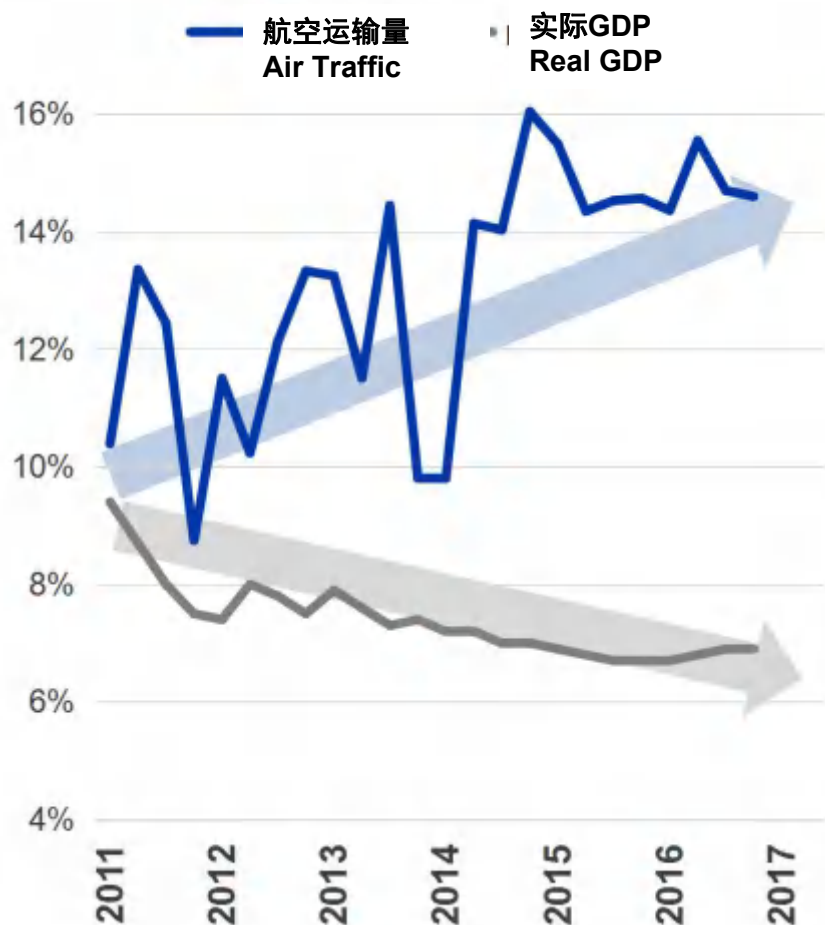
航空市场需求保持旺盛

Continued strength in aviation demand

350+

中国市场飞机交付数量处于历史高位

Record airplane deliveries to China



中国航空公司是波音的最大客户

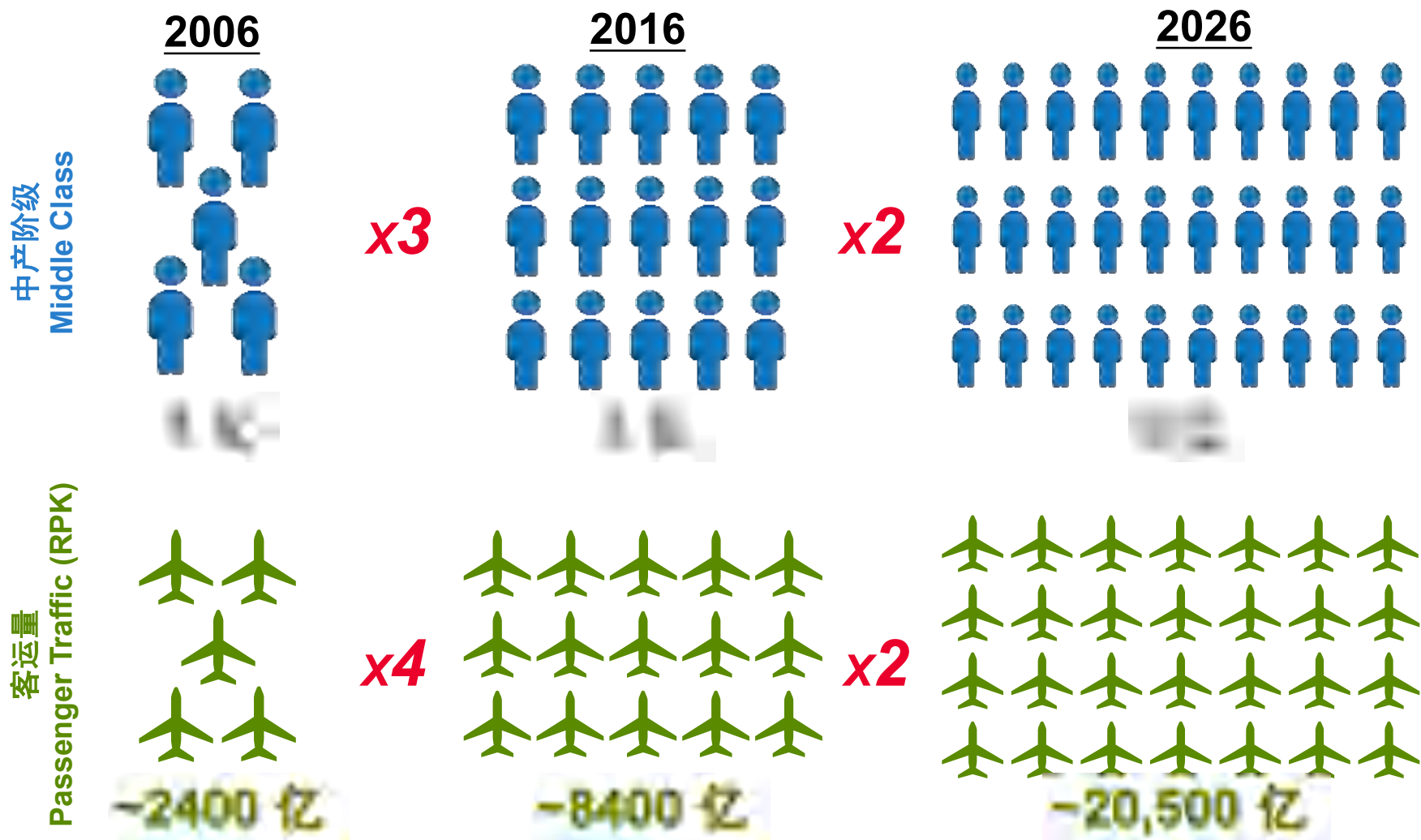
Chinese airlines are Boeing's largest customer

自 2013 以来波音交付的每 4 架飞机中就有一架是给中国客户的
One out of every 4 deliveries has gone to a Chinese airline since 2013



中国中产阶层的壮大带动航空需求增长

Middle class expansion driving demand growth



SOURCE: IATA/TDM Oxford Economics / CAAC / BCA Market Analysis

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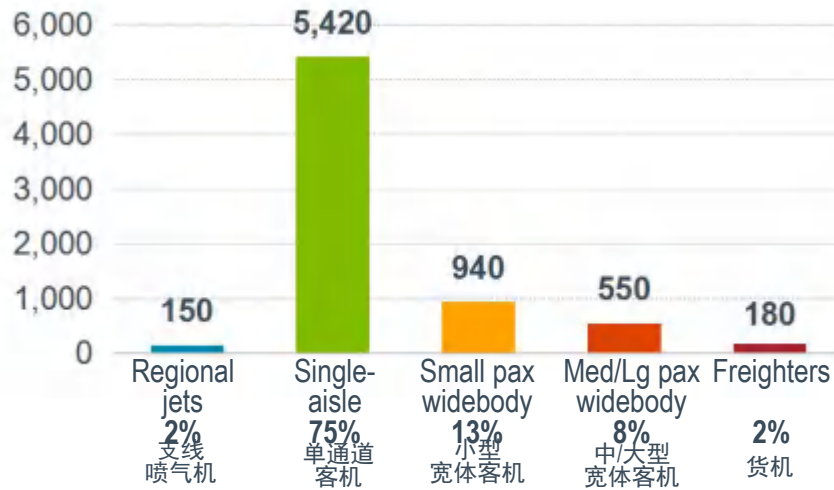
中国将需要 7,240 架新飞机满足市场发展的需求

China needs 7,240 airplanes for market demand

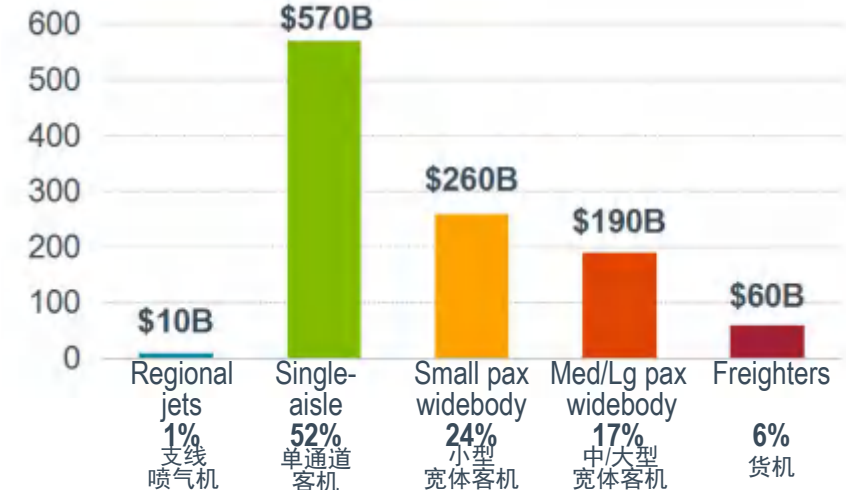


飞机交付量 Airplane deliveries: 7,240

2017 - 2036



市场价值 Market value: \$1.09 万亿美元



中国远程航线增长最快

Fastest Long-haul growth

中国航空公司在远程航线市场的运力份额 Chinese carriers' capacity share

2012

37%

#1

2017

51%

航空公司 Airline	增长率 Growth rate
中国航空公司 Chinese	20+%
外国航空公司 Foreign	8%

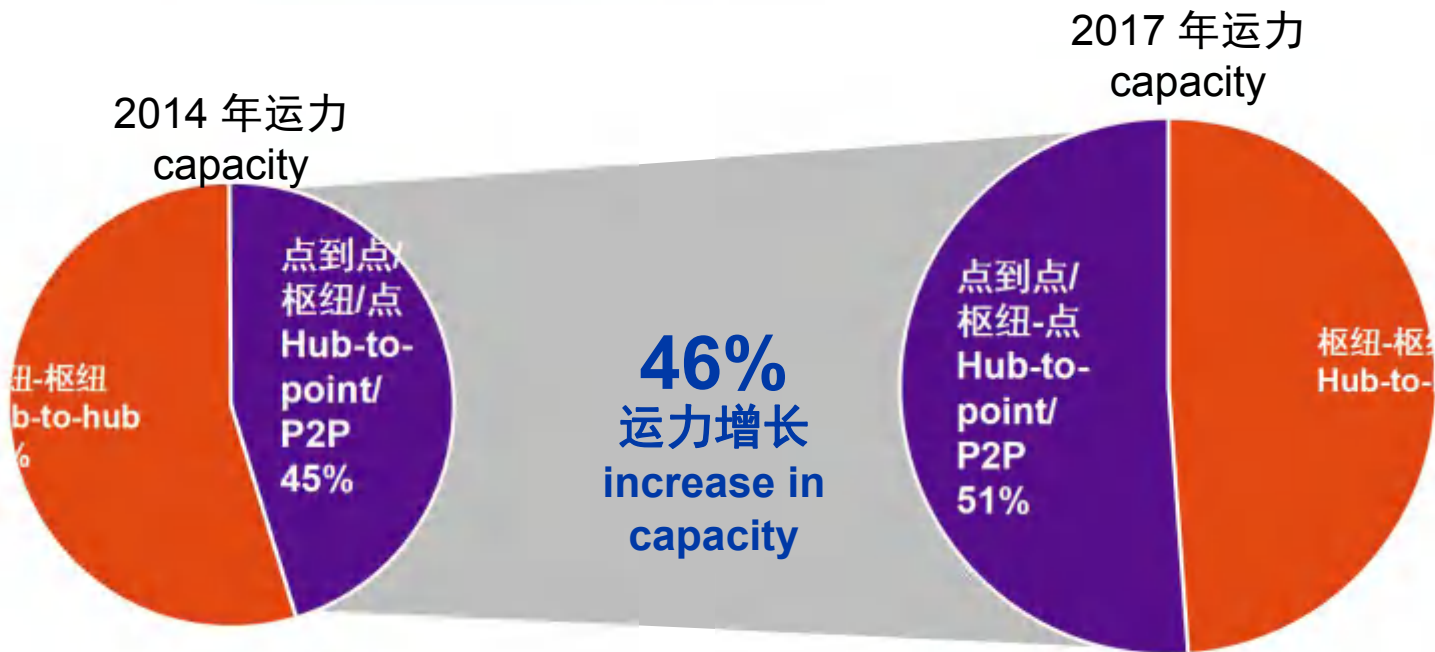
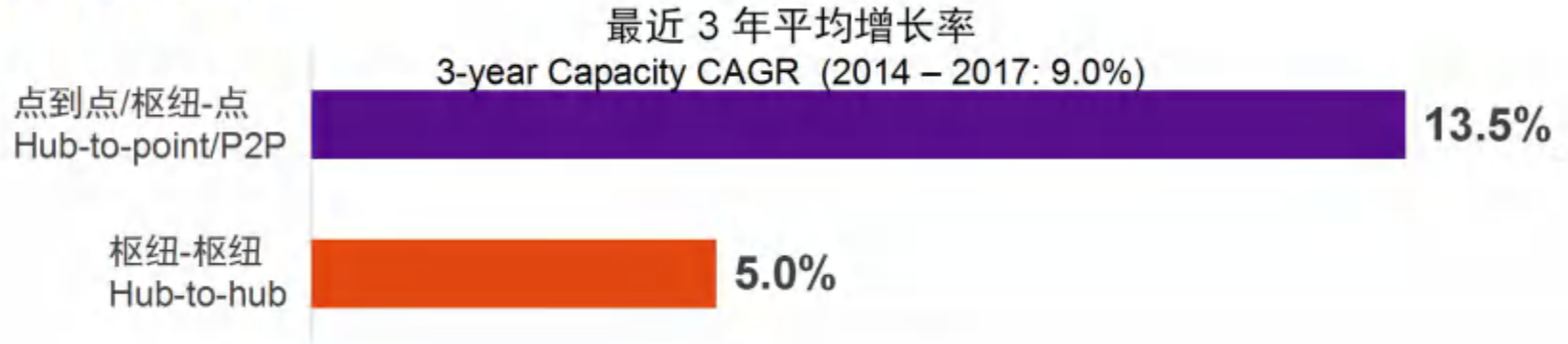


<10%

的中国公民持有护照
Chinese citizens
holding passport

中欧航线中二线市场增速达到大型枢纽市场的2.5倍

China-Europe services linking secondary cities grew 2.5X faster than hub-to-hub services



为所有市场提供最大价值

More value in **ALL** markets

最高效

Most efficient planes

最强能力与灵活性

Most capable and flexible planes

最受乘客青睐

Passenger preferred experience

最全面的服务保障

Services that delivers advantages



747



777



767



787



737



787-10:

更高效的宽体机，为中欧市场带来更多价值

more **efficient** widebody airplane, for more

profitable China-Europe market

波音与中国：携手共建民航新时代

Boeing and China: partnership continues into the new era



