



Sustainability for Air Cargo Growth

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Market Analysis – Air Cargo

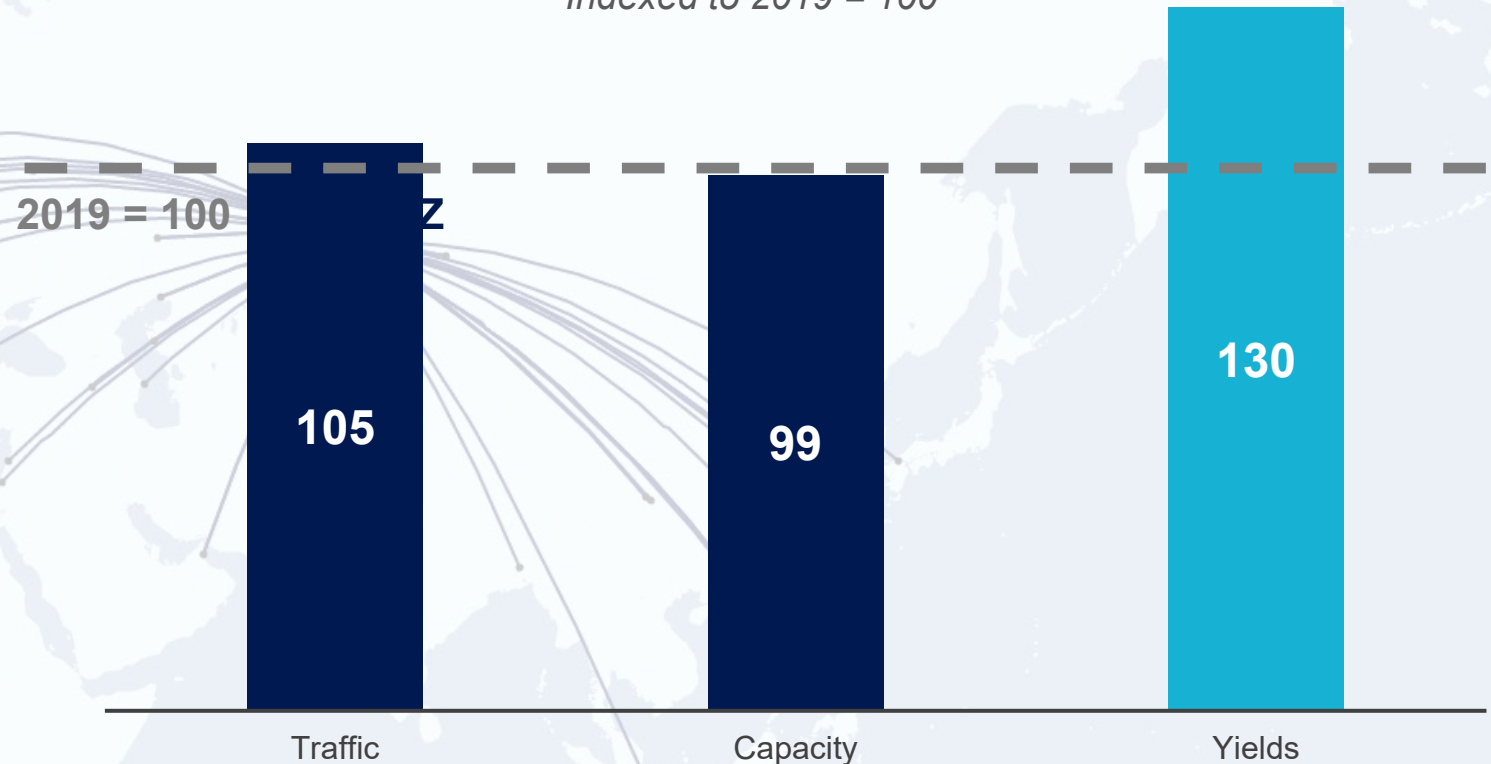
Boeing Commercial Airplanes

June 21, 2024

Central Asia is at the heart of the Europe-East Asia trade lane

- Traffic boosted by e-commerce volumes
- Supply and demand returning to balance
- Sixth-freedom carriers gaining market share
- Forecasted growth of 5.3% per year through 2042

Europe-East Asia air cargo performance 2024 YTD
Indexed to 2019 = 100



Long-term drivers of freighter demand

Trade, GDP and industrial production

3.0%
World trade



2.6%
World GDP



2.2%
Industrial production



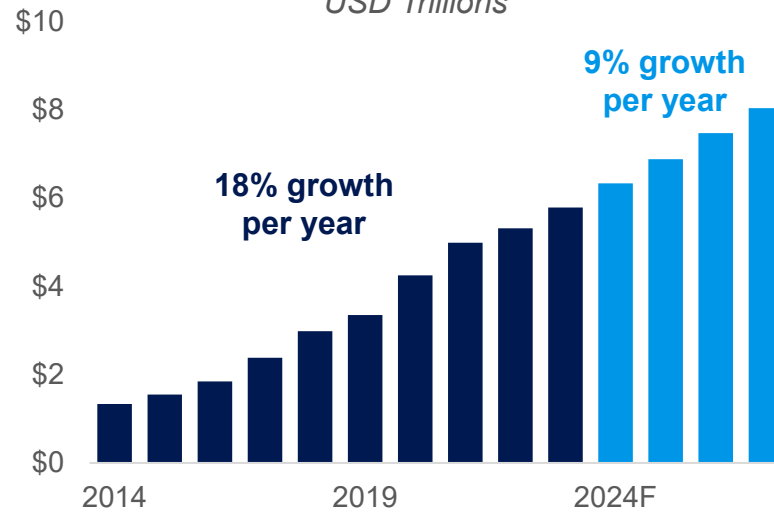
Central Asia GDP growth

3.3%

per year

E-commerce growth

Global retail e-commerce sales
USD Trillions



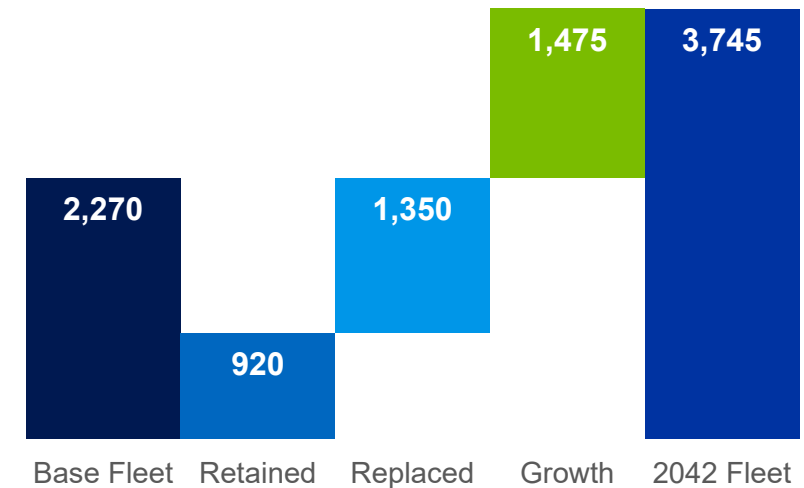
Central Asia e-commerce growth

20-30%

per year

Fleet replacements and growth

Global freighter fleet

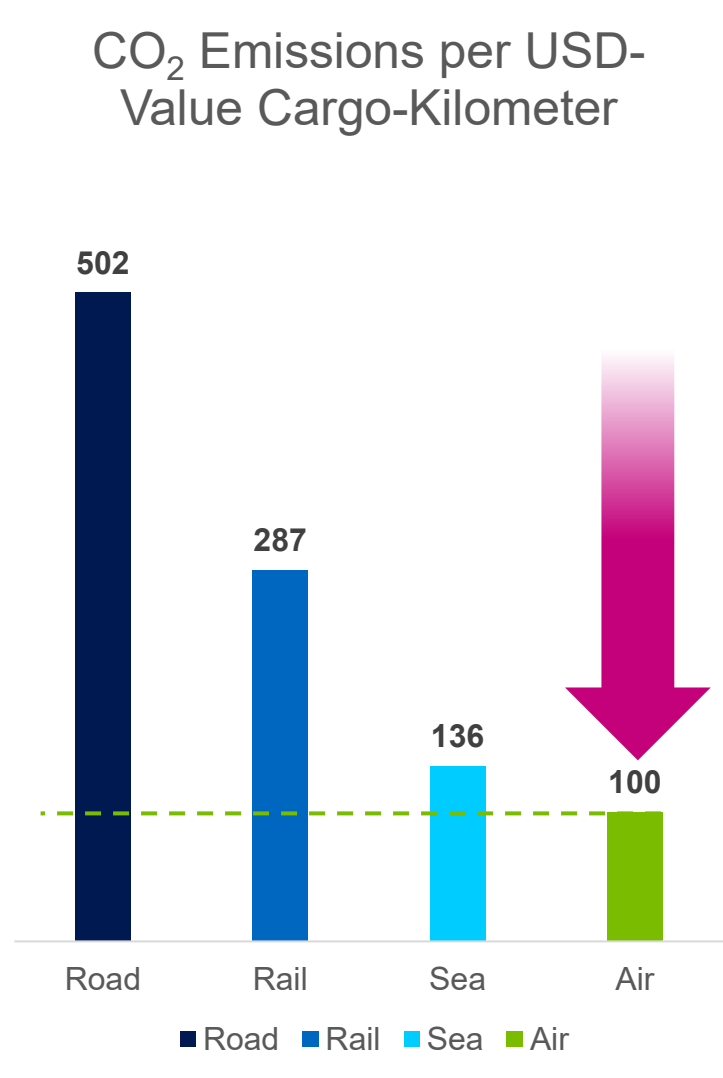
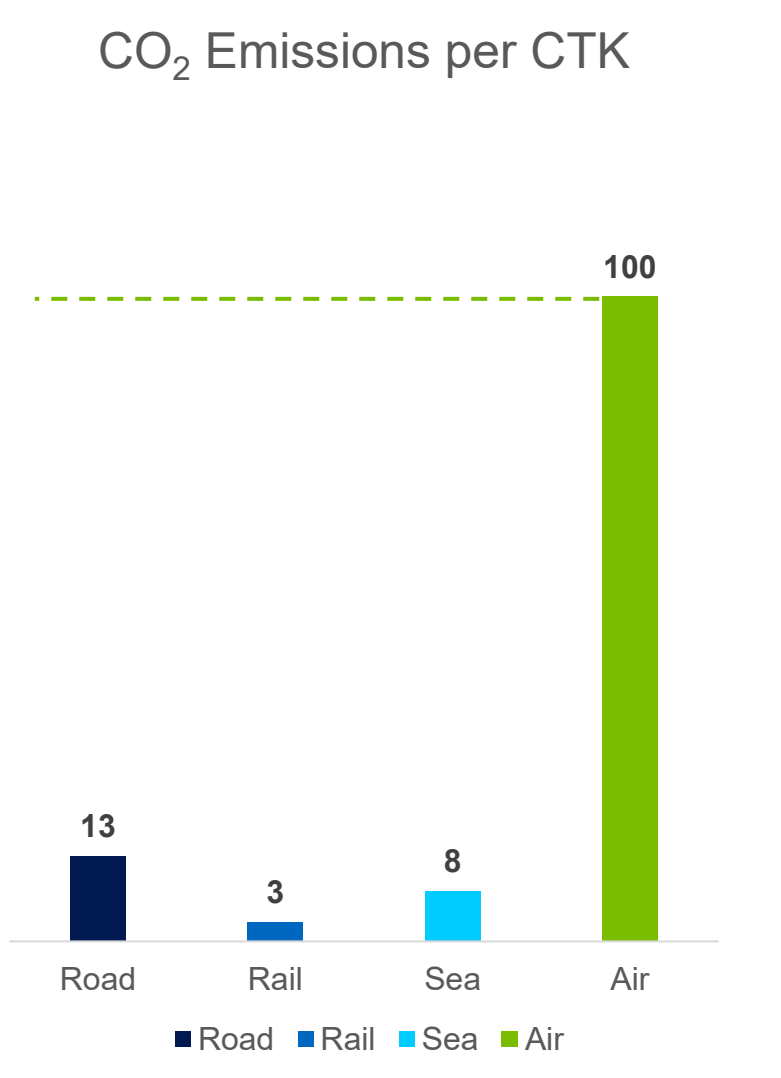
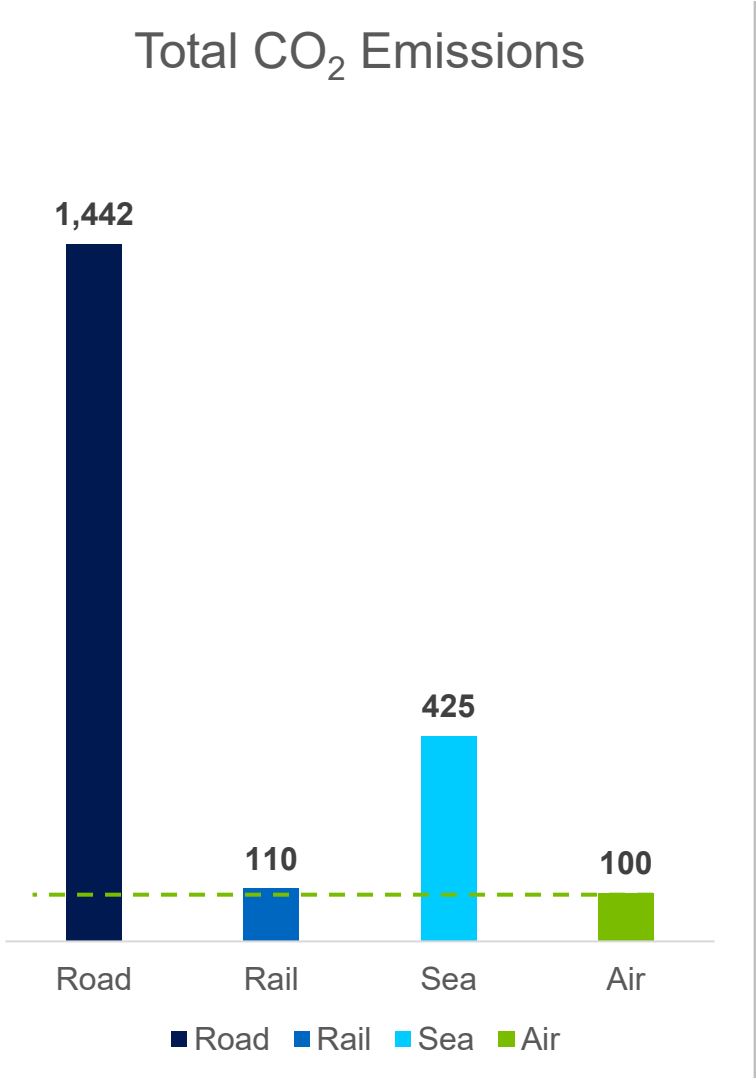


Central Asia freighter replacements

~70%

of today's in-service fleet

Air cargo has the lowest emissions per unit value of cargo moved



SOURCE: ITF Transport Outlook 2021, S&P GTAS

Four pillars of sustainable aviation



**Fleet
Renewal**



**Operational
Efficiency**



**Renewable
Energy**



**Advanced
Technology**

The most efficient freighter family for every segment

777-8F

777F

767-300F

767-300BCF

737-800BCF



Large Widebody

Intercontinental markets:

- Long-range
- Large volume
- High-density
- Efficiency and versatility

Medium Widebody

Express/regional markets:

- Hub-and-spoke
- High-value
- Time-sensitive
- Express/e-commerce

Standard Body

Intra-regional markets:

- Shorter-range
- Lower utilization
- Domestic operations
- Emerging markets



15-30%
Reduction
in CO₂

10-60%
Smaller
Noise Footprint

The Boeing Freighter Family is cleaner and quieter

Boeing Converted Freighters are more environmentally friendly

Providing passenger airplanes second lives as freighters



Reduce waste

Reuse airplanes

Repurpose

More years of service

Recycle

Serviceable components

Boeing Converted Freighters are more efficient



15-20%
Reduction in CO₂

CAEP/8
Compliant NO_x

10-30%
Smaller Noise Footprint

