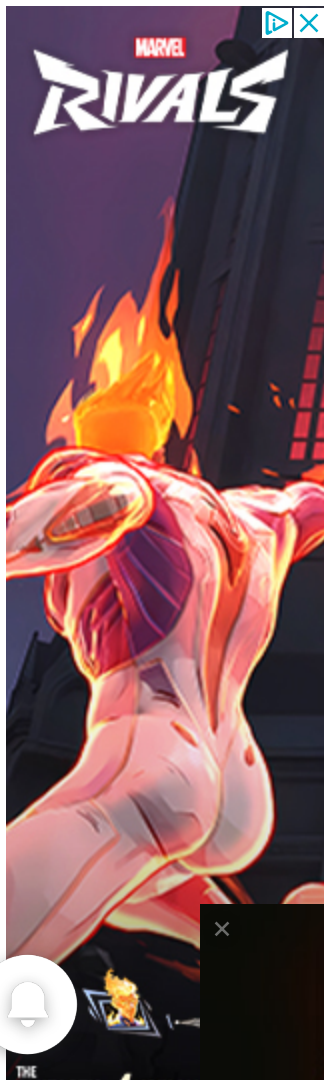




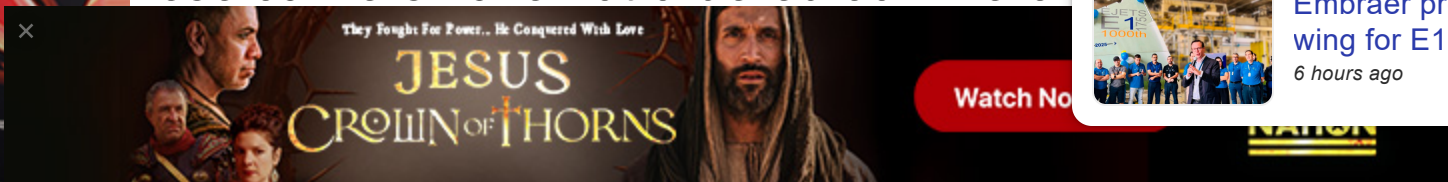
TRANSPORT

Despite rising stocks, Embraer is unlikely to benefit from China's blockade of Boeing

Ricardo Meier
April 17, 2025



Chinese carriers have not ordered commercial



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only 2% of the backlog. Boeing models are practically not competing with Brazilian jets



Boeing and Embraer aircraft

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The suspension of deliveries of Boeing commercial aircraft **ordered by the Chinese government** has caused euphoria in the stock market regarding **Embraer**.

In the view of analysts, the trade war initiated by the United States may benefit the manufacturer of the E1 and E2 jets in the Chinese market.

Without Boeing, local airlines would be left to choose between Airbus, the Chinese COMAC and Embraer.

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Boeing completion and delivery center in Zhoushan, China (Boeing)

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However, this narrative does not find substance for several reasons, the most important of which is that China has become less and less dependent on Boeing aircraft.

Since the crisis caused by the two 737 MAX accidents between 2018 and 2019, Chinese airlines have avoided the company's jets. The last order registered was in 2021, even before relations between the US and China reached their current point.

For this reason, today there are only 130 aircraft pending delivery in Boeing's backlog, as [AirInsight](#) rightly pointed out.

The vast majority of these are 737 MAX aircraft, but they include 21 777Xs ordered by Hong Kong's Cathay Pacific, which is somewhat outside the reach of Xi Jinping's government.

COMAC already produces a replacement for the 737, the C919, which is on a ramp-up in production. Widebodies are missing, but the only alternative here is Airbus, at least for many years until the C929 enters service.



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E195-E2 and E190-E2 (Embraer)

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Competing with home-made jets

Therefore, there is not much that Embraer can offer as an alternative to Boeing. The only aircraft that marginally compete are the 737 MAX 7 and the E195-E2, but even they have a different profile.

The Boeing carries more passengers and further, but has a higher cost per seat. On the other hand, it is equipped with Leap-1 engines, similar to those of the C919, while the E2s use the PW1000G GTF, which have been experiencing an availability crisis.



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COMAC C919 aircraft from China Southern and Air China (COMAC)

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Embraer's dispute is with the state-owned manufacturer COMAC and, although the Brazilian planemaker argues that the E2 is a perfect complement to the C909 (ARJ21) and C919 duo, there have been no orders to date.

Like Boeing, Embraer is also in a drought regarding orders from Chinese airlines, despite the E2 family being certified by the CAAC, the country's aviation authority.

This scenario could change and Embraer has done its part by appointing an experienced executive to lead the company's commercial office in the region, but this depends more on lengthy negotiations than being an option for Boeing.

737 MAX

Boeing

China

E2

Embraer

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