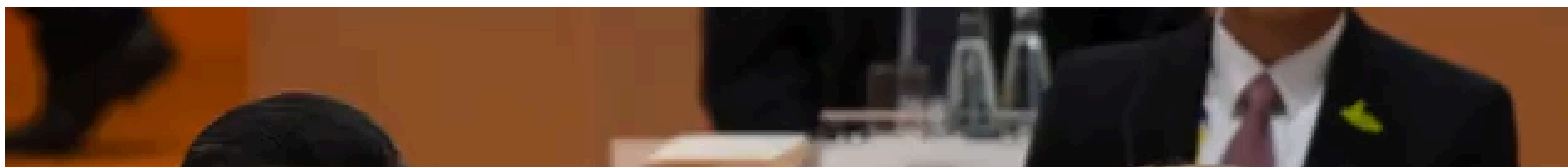




What China's Reported Boeing Boycott Means for the Company

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Boeing has reportedly been launched into the center of the U.S.-China trade war, adding to the difficulties already facing America's largest aircraft manufacturer.

before accepting delivery of orders that have already been placed.

Boeing declined to comment on the reports when contacted by *Newsweek*.

China's U.S. embassy spokesperson Liu Pengyu told *Newsweek* he was not aware of the specific situation involving Boeing but said, "China has repeatedly made its position clear: there are no winners in a tariff or trade war. Imposing tariff hikes, resorting to pressure and coercion, these are not the right way to engage with China. We urge the U.S. side to give up its wrong approach of maximum pressure and instead resolve differences through dialogue based on equality, mutual respect, and mutual benefit."

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A woman walks by models of Boeing Co. aircraft, including the manufacturer's Boeing 777X, at the Dubai Air Show in Dubai, United Arab Emirates, Wednesday, Nov. 17, 2021. (**JON GAMBRELL/AP PHOTO**)

In the short term, a pause or halt to deliveries to China could take a toll on Boeing's bottom line. According to analysis by equity research firm Bernstein, cited by *The Wall Street Journal*, a halt in deliveries to China could result in a roughly \$1.2 billion hit to the company's cashflow this year.

Commercial aviation expert Addison Schonland told *Newsweek* that the immediate impact on Boeing is unlikely to be significant, as China has not ordered a new Boeing product since September 2021, and the country's civil aviation authority "has slowed Boeing's deliveries to China for some time."

However, a halt to Chinese deliveries would add to the threats Boeing already faces as a result of Trump's tariff policies and the foreign retaliation these have resulted in.

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A security guard stands at the entrance of the Boeing flight services facilities near the Shanghai Pudong International Airport in Shanghai on April 16, 2025. **HECTOR RETAMAL/AFP VIA GETTY IMAGES**

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While Boeing CEO Kelly Ortberg said in late January that the company's U.S.-based manufacturing operations meant he was "not too worried" about the impact of the Trump administration's trade measures, he recently expressed concern that retaliatory actions by America's trading partners could hurt the export-reliant company.

"Eighty percent of the commercial airplanes we deliver are outside of the United States so free trade is very important to us," Ortberg said during recent [Senate](#) hearing on aviation safety.

"We really are the ideal kind of an export company where we're outselling internationally. It's creating U.S. jobs, long-term high value U.S. jobs," he added. "So it's important we continue to have access to that market and we don't get in a situation where certain markets become closed to us."

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and one or more other countries could have a material adverse impact on our financial position, results of operations and/or cash flows."

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President and CEO of Boeing Kelly Ortberg testifies before the Senate Commerce, Science, and Transportation Committee in the Dirksen Senate Office Building on April 02, 2025 in Washington, DC. **WIN MCNAMEE/GETTY IMAGES**

strategy.

In its commercial market outlook for 2024 to 2043, Boeing anticipated making 8,830 deliveries to China, accounting for around 20 percent of all global deliveries over this period.

However, the company may only need to focus on the short term, according to Schonland, founder of the aviation media and analysis firm AirInsight.

"This trade spat will go away after some time," he said. "Boeing has customers outside China who are eager for new airplanes."

Given its existing, seven-year order backlog, Schonland said he expects Boeing to continue to work as normal and produce "as many aircraft as possible."

He added that the real challenge would be for China, which has limited alternatives for outfitting its airlines' fleets, given production issues also facing Boeing-rival Airbus, and the constrained capacity of the state-owned Commercial Aircraft Corporation of China, which "struggles more than anyone to make airplanes."

Nevertheless, Trump has been urged to step in and change course given the challenges the trade war may pose to Boeing—a U.S.-based manufacturer and major exporter which by all accounts embodies his vision of the consummate American company.

"Boeing is the U.S.'s largest exporter, as such, we are not surprised by China's move; however, we do see this as unsustainable," [Bank of America](#) aerospace and defense analyst Ronald Epstein wrote in a note on Tuesday, cited by [Fortune](#).

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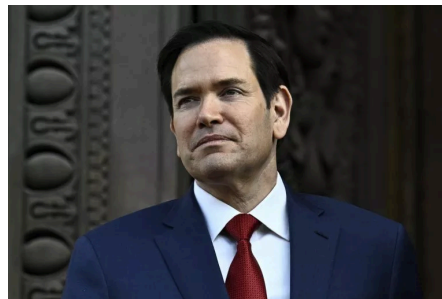
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