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China Aviation Industry Opportunity Analysis

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Abstracts

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Aviation industry in China began way back in 1951 with some domestic travel and agricultural services being their primary goals. Greater growth happened much later in the mid seventies. The industry posted major growth in its revival phase between 1977 and 1996. After 1996, there was a general period of growth in the economy and this reflected in the volume of general aviation operations and services that have increased throughout China each year. It has shown double digit growth in aircraft numbers and in the number of flight hours since 2001 while consumer aviation has been growing at a rate of 21% since 1996.

In recent years China has emerged as dominant player in global aviation sector driven by supportive government policy framework. The extent of contribution from the aviation sector can be derived from the fact that from 2008 to 2013, the total throughput, passenger throughput and the cargo & mail throughput in China had respectively grown more than 15%, 16% and 13% year-on-year whereas the average global growth was around 5%-6% in all segments year-on-year. China's civil aviation system is the second largest global aviation system after the US while the total transportation throughput and the passenger throughput of China's civil aviation is ranked fifth. The aviation growth seen in China is the highest growth in the world in this sector. In the global market, China is the second largest national air travel market and also the fastest growing. To meet the demand of the market, China buys more than 100 new passenger jets every year and this forms more than a tenth of the world’s total demand. While this indicates a huge domestic market, the country is keen to develop and promote its local manufacturers of aircrafts.

It is expected thatChinawould spend about a quarter of a trillion dollars in the next few years, to build the aerospace industries in the country. It is expected to be the biggest

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market for the aircraft giants Boeing and Airbus, even though the country has a strong focus on localizing manufacture of aircrafts. With more than two-thirds of the worldwide airports now under construction being inChinanow, the country has laid out ambitious plans and investment targets in the field.

“China Aviation Industry Opportunity Analysis” research report discusses following aspect related to aviation industry in China:

Aviation Industry Overview

Civil, Commercial & Defence Aviation Overview

Ongoing Aircraft Developments in Aviation Industry

Civil & Commercial Aviation Fleet Strength

Industry Emerging Trends

China Civil Aviation Law

Opportunities & Issues to be Resolved

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China's civil aviation industry revenue was more than xx Billion Yuan in 2013 while it touched more than xx Billion Yuan in profit. Though there has been some action in the recent times and plans have been announced, China's general aviation can be said to be currently in its infancy stages. A comparison with a mature market/ country such as US brings out the contrast. For instance China has xx civil airports and most of its general aviation airports still in the pipeline whereas U.S. has xx civil airports and xx general aviation (GA) airports.

In terms of aircrafts, the number of GA aircraft currently in China is only about 0.4 percent of the number of GA aircraft in the United States and Chinese general aviation has an economic impact that is only at xx percent of that of the United States and Chinese GA generates only xx of what GA in US does. Moreover China has a xx ratio with respect to General Aviation aircraft vis-à-vis commercial aviation aircraft and this is far much lower than the international average of 33:1. All these figure indicate an early stage market but also point to the potential and the amount of business opportunities in general aviation.

China has indicated ambitious plans for the aviation sector in the country which includes an investment of a quarter of a trillion dollars over the next few years. More than two-thirds of the airports now under construction globally are in China and to complement this China is encouraging home-grown rivals to Airbus and Boeing in the civil aviation space. The 12th Five-Year Plan period (2011-15) is expected to see rapid expansion in China's civil aviation industry. This will be driven by investment in the industry that will exceed US$ xx Billion from 2011 to 2015 with more than xx Billion Yuan investment in civil aviation infrastructure during the five years.

In recent times, civil aviation growth in China has been steady and capacity supply growth has been higher than usual. This scenario has led to slight oversupply, with the result that both passenger load factor and fare level have fallen and for the first 11 months of 2012, the overall passenger load factor dropped by xxpercentage YOY to touch xx%.This has been more so on domestic routes while the fare level leveled off. Incomparison, international operators lowered fare level to draw in passengers. This resulted in passenger load factor going up or staying steady, though the fare level substantially came down.

Capacity supply is expected to rise steadily at about xx%, so that passenger load factor

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will remain steady leading to rise in fare levels. The market players in China derive much of their profits from premium class domestic travel which is a strong market segment. This, to some extent, compensates for the money they lose on most international routes especially to international rivals where Chinese carriers have just xx% of the international and xx% of the cargo market.

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