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Report on Operations of China's Civil Aviation Transport Industry 2011-2012

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Abstracts

Since reform and opening up, China's civil aviation industry has developed rapidly and become one of the most important civil aviation markets growing the fastest in the world.

In 2010, China's civil aviation industry completed the total transport turnover of 53.85 billion ton-kilometers, increasing by 11.14 billion ton-kilometers by 26.10% over 2009, among which the passenger turnover was 35.96 billion ton-kilometers, increasing by 5.87 billion ton-kilometers by 19.50% over 2009; the cargo and mail turnover was 17.89 billion ton-kilometers, rising by 5.27 billion ton-kilometers by 41.70% over 2009.

By the end of 2010, there had been 43 transport airline companies, which were divided into 35 state-owned holding companies, 8 non-state owned holding enterprises, 11 professional freight airline companies, 16 Sino-foreign airline joint ventures and 5 listed companies according to different categories.

By the end of 2010, there had been 1,597 final-term registered transport aircrafts in China's civil aviation industry, increasing by 180 over 2009; there had been a total of 175 civil transport airports, rising by 9 over 2009, which all launched scheduled flights.

By the end of 2010, there had been a total of 1,880 airlines of scheduled flights in China. The airline length calculated by repeat distance was 3.98 million kilometers and that calculated by non-repeat distance was 2.77 million kilometers.

By the end of 2010, there had been 111 general airline companies with the general airline company business certificate. In 2010, the flight time of the general aviation industry was 139,800 hours, ascending by 12.90% over 2009.

In 2010, the cumulative operating revenue of China's civil aviation industry was CNY 411.50 billion, rising by 37% over 2009, among which the operating revenue of airline companies was CNY 299.90 billion, increasing by 40% over 2009 and that of airports was CNY 41.70 billion, increasing by 22% over 2009.

China's civil aviation industry developed at a high speed, but there are still defects in the development. One of the major conflicts lies in liberalization of international air transport and weakness of overall international capability of China's civil aviation industry. Statistics show that in China's aviation passenger transport market, the market share of China's domestic airline companies reduced from 45.30% in 2005 to 44% in 2010; in China's aviation freight market, although the market share of China's domestic aviation companies increased from 23.90% in 2005 to 32%, it was still less than 1/3 of international aviation fright market.

At present, in China, there are no airline companies possessing the capability to establish two or more hubs interiorly, and various major busy airports have no enough resources for the hub network establishment of 2 airline companies simultaneously. Due to the absence of a large-scale aviation hub network and the support of domestic airline network effect, the international competitiveness of China's aviation companies is directly affected.

It is predicted that in the next few years, with China's economic growth, China's civil aviation industry will maintain rapid development and general aviation will see favorable market prospects. The market competition of China's civil aviation industry will become more intense and China's domestic civil aviation enterprises will face the competition from international airline companies, high-speed railways and other modes of transport.

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