

Research Report on Civil Aircraft Import in China, 2019-2023

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Abstracts

According to CRI's analysis, with the development of China's economy, tourism and logistics industry, the demand for civil aircrafts is rising in China. In 2018, the air passenger volume and air freight volume in China reached 610 million and 7,385,000 tons respectively, representing YOY increases of 10.90% and 4.60% respectively.

The data released by the Chinese government shows that at the end of 2018, there were 60 air transport enterprises and 423 general aviation enterprises in China; the number of air routes totaled 4,206, including 3,420 domestic ones and 786 international ones. In 2018, 426 new aircrafts were introduced to Chinese airlines, including 72 to China Southern Airlines, 42 to China Eastern Airlines, 30 to Air China and 33 to Hainan Airlines. At the end of 2018, 15 Chinese airlines had a fleet of more than 50 aircrafts. Among them, Shunfeng is the only cargo airline. The number of civil aircrafts in service with Chinese airlines reached 3,615.

At the end of 2018, 13 Chinese airlines were operating 408 wide-body aircrafts, of which 236 or 57.80% were A330s; narrow-body aircrafts, the major force of civil aircrafts in China, totaled 2,871 in number. Airbus and Boeing had similar market shares. The number of regional airliners in China is small. At the end of 2018, 178 regional airliners were in service with Chinese airlines, including 10 ARJ21s, 38 CRJ900s, 105 E190s and E195s and 25 MA60s. Of them, the Embraer E-Jet family accounted for 59%.

In 2018, the number of ARJ21s in service with Chengdu Airlines increased by 6 to 10; the number of CRJ900s in service with China Express Airlines increased by 6 to 38; the number of E195s with Tianjin Airlines increased by 3 to 20.

At the end of 2018, there were 158 pure air freighters and eight pure cargo airlines in

China.

As Chinese enterprises can only manufacture a small number of regional airliners but are unable to develop and manufacture mainstream airliners, China relies heavily on civil aircraft imports. The major sources of China's civil aircraft imports are US company Boeing and European company Airbus.

IATA estimates that China will replace the US to be the world's largest aviation market in 2024. According to CRI, from 2019 to 2038, the demand for civil aircrafts in China will exceed 8,000 units and the market size of civil aircrafts will exceed USD 1.20 trillion. During this period, imported aircrafts will continue to dominate China's civil aircraft market. For global aircraft manufacturers, aircraft parts manufacturers and aircraft leasing companies, China will become one of the most important markets.

Topics Covered:

Environment of civil aircraft import in China

Analysis and forecast on demand for civil aircrafts in China

Civil aircraft import in China from 2014 to 2018

Analysis on import prices of civil aircrafts in China

Analysis on financing lease of aircrafts in China

China's import procedures for and import tariffs on civil aircrafts

Analysis on major civil aviation enterprises in China

Driving forces and market opportunities for civil aircraft import in China from 2019 to 2023

Forecast on civil aircraft import in China from 2019 to 2023

Contents

1 DEFINITION AND CLASSIFICATION OF CIVIL AIRCRAFTS

- 1.1 Definition of Civil Aircrafts
- 1.2 Classification of Civil Aircrafts
 - 1.2.1 Narrow-body Aircrafts
 - 1.2.2 Wide-body Aircrafts
 - 1.2.3 Giant Airlines
 - 1.2.4 Regional Airlines
 - 1.2.5 Air Freighters

2 ENVIRONMENT OF CIVIL AIRCRAFT IMPORT IN CHINA, 2019-2023

- 2.1 Economic Environment
 - 2.1.1 China's GDP and Disposable Income Per Capita
 - 2.1.2 Total Value of China's Imports and Exports
- 2.2 Policy Environment
 - 2.2.1 Policies on Civil Aircraft Import in China
 - 2.2.2 Provisions on China's Import Tariffs on Aircrafts

3 ANALYSIS ON SUPPLY OF CIVIL AIRCRAFTS IN CHINA

- 3.1 Production of China-made Civil Aircrafts
- 3.2 China's Reliance on Civil Aircraft Imports

4 DEMAND FOR CIVIL AIRCRAFT IMPORTS IN CHINA

- 4.1 China's Tourism Industry
- 4.2 China's Aviation Industry
- 4.3 Financing Lease of Aircrafts

5 ANALYSIS ON AIRCRAFT IMPORT IN CHINA, 2015-2018

- 5.1 Scale of Aircraft Import in China
 - 5.1.1 Import Volume of Civil Aircrafts in China
 - 5.1.2 Import Value of Civil Aircrafts in China
- 5.2 Analysis on Civil Aircraft Imports by Type in China

6 ANALYSIS ON IMPORT PRICES OF CIVIL AIRCRAFTS IN CHINA

- 6.1 Average Import Price of Civil Aircrafts in China
- 6.2 Import Prices of Civil Aircrafts by Type in China

7 MAJOR SOURCES OF CHINA'S CIVIL AIRCRAFT IMPORTS

- 7.1 Boeing
 - 7.1.1 Profile of Boeing
 - 7.1.2 Operation Performance of Boeing
- 7.2 Airbus
 - 7.2.1 Profile of Airbus
 - 7.2.2 Operation Performance of Airbus

8 ANALYSIS ON MAJOR CIVIL AVIATION ENTERPRISES IN CHINA

- 8.1 Air China Limited
 - 8.1.1 Enterprise Profile
 - 8.1.2 Operation Performance
- 8.2 China Eastern Airlines Corporation Limited
 - 8.2.1 Enterprise Profile
 - 8.2.2 Operation Performance
- 8.3 China Southern Airlines Company Limited
 - 8.3.1 Enterprise Profile
 - 8.3.2 Operation Performance
- 8.4 Hainan Airlines Holding Co., Ltd.
- 8.5 Shenzhen Airlines Co., Ltd.
- 8.6 Shanghai Airlines Co., Ltd.
- 8.7 Xiamen Airlines Co., Ltd.
- 8.8 Sichuan Airlines Co., Ltd.
- 8.9 Shandong Airlines Co., Ltd.
- 8.10 Spring Airlines Co., Ltd.

9 PROSPECT OF CIVIL AIRCRAFT IMPORT IN CHINA, 2019-2023

- 9.1 Major Factors Influencing Civil Aircraft Import in China
 - 9.1.1 Favorable Factors
 - 9.1.2 Unfavorable Factors
- 9.2 Forecast on Civil Aircraft Import in China, 2019-2023

9.3 Forecast on Major Types and Sources of China's Civil Aircraft Imports, 2019-2023

Selected Charts

SELECTED CHARTS

Chart Major Narrow-body Aircrafts in China

Chart Major Wide-body Aircrafts in China

Chart Major Giant Airliners in China

China's GDP and Disposable Income Per Capita, 2014-2023

Chart Air Passenger Volume and Air Freight Volume in China, 2013-2018

Chart China's Policies on Civil Aircraft Import

Chart China's Import Tariffs on Aircrafts

Chart Import Volume of Civil Aircrafts and Number of Registered Civil Aircrafts in China, 2014-2018

Chart Top 10 Chinese Airlines in 2018 by the Number of Newly-introduced Aircrafts

Chart Import Volume of Aircrafts with Unladen Weight Above 2 Tons, 2015-2018

Chart Import Value of Aircrafts with Unladen Weight Above 2 Tons, 2015-2018

Chart Classification of China's Civil Aircraft Imports by Unladen Weight

Chart Average Import Price of Aircrafts with Load Capacity Above 2 Tons, 2015-2018

Chart Profile of Boeing

Chart Profile of Airbus

Chart Top 10 Civil Aviation Enterprises in China in 2018

Chart Profile of Air China Limited

Chart Profile of China Eastern Airlines Corporation Limited

Chart Forecast on Import Volume of Civil Aircrafts in China, 2019-2023

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