

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

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