

Vietnam Aviation Comprehensive Report Q4/2019

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Abstracts

VIETNAM AVIATION INDUSTRY

Demand for customer and cargo transport in 2018 grew worldwide, but at the lowest rate in the last 4 years. The growth rate in the number of customers in 2018 was about 6.1%, which was equivalent to the average of the last 5 years, but lower than the strong growth of 2017 (7.2%). The global domestic air travel in 2018 increased 7.0% over 2017. In general, all markets witnessed growth, especially the Indian and Chinese markets.

According to data published by IATA, Vietnam is in the group of 5 markets with passengers traveling by air. The revenue of aviation industry continued to grow strongly over the years, the average growth rate in the period of 2010-2018 reached 15.5%.

Vietnam aviation industry has a low level of competition when the number of participating firms is much lower than other countries in the region. The number of Vietnamese planes continuously increased over the years with CAGR of 9.3% in the period of 2011-2018. In 9M/ 2019, VietJet Air ranked first in the number of flights operated with 377 flights per day, rising 14.1% over the same period last year.

The number of flights operated in Q1/2019 grew 7.2% over the same period in 2018 thanks to the entry of Bamboo Airline. In Q1/2019, the airlines' OTP punctuality dropped sharply, whose reason was attributed to the weather and technical problems of the airlines.

2018 was a special year when domestic airlines' growth rates all achieved higher than 2-digit due to the booming demand of passengers. According to VIRAC's estimates, in the period of 2017-2023, the annual growth rate of air passengers will reach 10.9%.

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