

China Air Transport and Airport Industry Report, 2009-2010

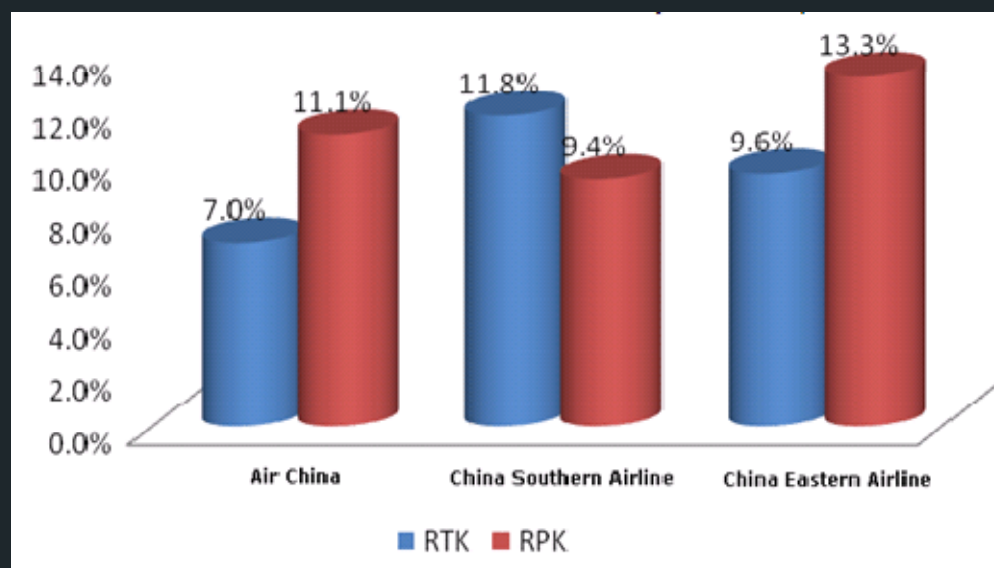


Thanks to the policies including the “Ten Measures” and the exemption of airlines from infrastructure construction funds implemented by Civil Aviation Administration of China (CAAC), China’s air transport industry recovered and realized brisk growth earlier than its global peers in 2009. The accumulated turnover totaled 42.7 billion ton kilometers, up 13.4% year on year, the volume of passenger traffic reached 230 million people, up 20.1% year on year, while the volume of cargo and mail traffic touched 4.455 million tons, up 9.1% year on year.

The report starts with the development environment of air transport industry, focusing on the overall development of air transport industry in China and worldwide. In particular, it studies the passenger transport market and the freight transport market as well as 14 leading airlines.

China's top three airlines include Air China, China Southern Airlines and China Eastern Airlines, which operate over 70% of the airplanes and generate over 75% of the revenue passenger kilometers (RPK) in the industry. China Eastern Airline, as one of the flagship airlines, grew rapidly in traffic in 2009 with its RPK placed top spot, up 13.3% year on year, while the RTK rose by 9.6%, only second to China Southern Airline.

YoY Growth of RTK & RPK of China's Top 3 Airlines, 2009



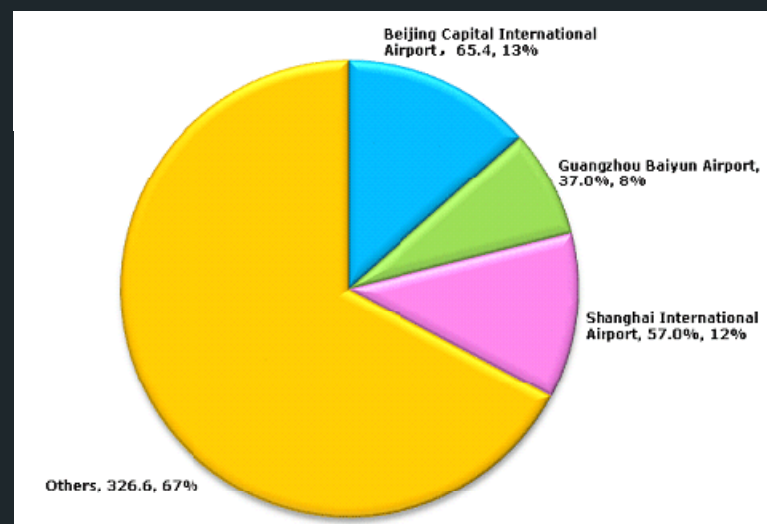
Source: ResearchInChina

In February 2010, China Eastern Airlines incorporated Shanghai Airlines. After the merge, the market share of China Eastern Airlines in Shanghai is expected to rise from 37% to 50% or more, which will greatly improve its competitiveness against the other two major airlines. Furthermore, its passenger load factor and income are expected to be boosted by the traffic created by Expo 2010 Shanghai.

Impacted by the weakened capacity of international service, Air China experienced a comparatively slow growth in RTK and RPK in 2009. However, with the robust recovery of international service in 2010, Air China increased its passenger load factor to 69.2% in the first quarter of the year, surpassing China Eastern Airlines (68.0%) and China Southern Airlines (67.6%).

Moreover, this report sheds light on the development of China's airports in 2009 as well as the operation of 14 key airports. By the end of 2009, the passenger throughput of China's 166 airports touched 486 million person-times, up 19.8% year on year; while the cargo and mail throughout reached 9.456 million tons, increasing by 7.0%. In particular, Beijing Capital International Airport, Guangzhou Baiyun International Airport and Shanghai International Airport ranked the top 3 in terms of passenger throughput.

Passenger Throughput and Proportion of China's Top 3 Airline Hubs, 2009 (Unit: Million People)



Source: CAAC; ResearchInChina

Table of Contents

- **1. Development Environment of China Air Transport Industry**
 - 1.1 Economic Environment
 - 1.2 Policy Environment
 - 1.3 Social Environment
- **2. Air Transport Industry in China and Worldwide**
 - 2.1 Global Air Transport Industry, 2009-2010
 - 2.1.1 Transport Capacity Supply
 - 2.1.2 Passenger and Freight Traffic Volume
 - 2.1.3 Regional Transport
 - 2.1.4 Development of Airlines
 - 2.2 China Air Transport Industry, 2009-2010
 - 2.2.1 Transport Capacity Supply
 - 2.2.2 Passenger and Freight Traffic Demand
 - 2.2.3 Development of Airlines
 - 2.3 Competition in China and Worldwide
- **3. China Air Transport Segment Markets**
 - 3.1 Passenger Transport Market
 - 3.1.1 Passenger Traffic
 - 3.1.2 Turnover of Passenger Traffic
 - 3.2 Freight Transport Market
 - 3.3 Air Travel Price Index
 - 3.3.1 Air Travel Price Index in China
 - 3.3.2 Air Travel Price Index in the World
 - 3.3.3 Regional Air Travel Price Index
- **4. Transport Conditions of China's Airports**
 - 4.1 Flight Destination Cities and Airports in China
 - 4.2 Airport Throughput
 - 4.3 Sorties
 - 4.4 Throughput Distribution
 - 4.4.1 Passenger Throughput
 - 4.4.2 Cargo & Mail Throughput

- **5. Operation of Leading Airlines in China**

- 5.1 Competition Pattern

- 5.2 Air China

- 5.2.1 Basic Information

- 5.2.2 Financial Situation

- 5.2.3 Airplane Ownership

- 5.2.4 Capacity

- 5.2.5 Traffic

- 5.2.6 Load Factor

- 5.2.7 Corporate Strategy

- 5.3 China Eastern Airlines

- 5.3.1 Basic Information

- 5.3.2 Financial Situation

- 5.3.3 Capacity

- 5.3.4 Traffic

- 5.3.5 Load Factor

- 5.3.6 Development Strategy

- 5.4 China Southern Airlines

- 5.4.1 Basic Information

- 5.4.2 Airplane Ownership

- 5.4.3 Capacity

- 5.4.4 Traffic

- 5.4.5 Load Factor

- 5.4.6 China Southern Airlines Xinjiang Branch

- 5.5 Hainan Airlines

- 5.5.1 Basic Information

- 5.5.2 Capacity

- 5.5.3 Traffic

- 5.5.4 Load Factor

- 5.5.5 Corporate Strategy

- 5.6 Cathay Pacific Airways

- 5.6.1 Capacity

- 5.6.2 Traffic

- 5.6.3 Load Factor

- 5.6.4 Corporate Strategy

- 5.7 Other Airlines

- 5.7.1 Sichuan Airlines

- 5.7.2 Shenzhen Airlines

- 5.7.3 Shandong Airlines

- 5.7.4 Xiamen Airlines

- 5.7.5 China United Airlines

- 5.7.6 China Postal Airlines

- 5.7.7 China Cargo Airlines
- 5.7.8 Spring Airlines
- 5.7.9 Okay Airways
- 5.7.10 Juneyao Airlines

- **6. Operation of Major Airports in China**

- 6.1 Competition Pattern
- 6.2 Beijing Capital International Airport (BCIA)
 - 6.2.1 Number of Flights
 - 6.2.2 Passenger Throughput
 - 6.2.3 Cargo & Mail Throughput
 - 6.2.4 Sorties
- 6.3 Shanghai Airport
 - 6.3.1 Financial Situation
 - 6.3.2 Passenger, Cargo and Mail Throughput
 - 6.3.3 Development Tendency
- 6.4 Guangzhou Baiyun International Airport
 - 6.4.1 Financial Situation
 - 6.4.2 Passenger Throughput
 - 6.4.3 Cargo & Mail Throughput
 - 6.4.4 Sorties

- 6.5 Shenzhen International Airport
- 6.6 Other Airports
 - 6.6.1 Chengdu Shuangliu International Airport
 - 6.6.2 Kunming Wujiaaba International Airport
 - 6.6.3 Xi'an Xianyang International Airport
 - 6.6.4 Hangzhou Xiaoshan International Airport
 - 6.6.5 Chongqing Jiangbei International Airport
 - 6.6.6 Xiamen Gaoqi International Airport
 - 6.6.7 Wuhan Tianhe International Airport
 - 6.6.8 Changsha Huanghua International Airport
 - 6.6.9 Nanjing Lukou International Airport
 - 6.6.10 Qingdao Liuting International Airport
- **7. Air Transport and Airport Industry Prospect, 2010**
 - 7.1 Factors Affecting China Air Transport Industry, 2010
 - 7.2 Development of Air Transport Industry, 2010
 - 7.3 Development of China's Airport Industry, 2010

Selected Charts

- Fluctuation of Civil Aviation Passenger Turnover Volume around the GDP Growth in China, 1991-2009
- Proportion of Civil Aviation Passenger Turnover Volume in Total Transportation Turnover, 1990-2009
- Global Top 4 Civil Aircraft Suppliers
- Orders and Deliveries of Boeing, 2000-2010
- Orders and Deliveries of Airbus, 2000-2009
- International Passenger Traffic Trend, 2005-2010
- International Freight Traffic Trend, 2005-2010
- YoY Growth of RPK in Leading Regions Worldwide by Month, 2009-2010
- Passenger Transport of Delta Air Lines, 2007-2009
- Passenger Transport of United Airlines, 2007-2009
- Passenger/Freight Transport of American Airlines, 2007-2009
- Passenger Transport of British Airways, 2007-2009
- Passenger/Freight Transport of Finnair, 2007-2009
- China Civil Airplane Orders and Deliveries, 2003-2009
- China Civil Aviation Passenger/Freight Transport, 2008-2010
- Net Profit of Top 3 Airlines, 2005-2009
- China Civil Aviation Passenger Traffic and Growth, 2005-2009
- China Civil Aviation Passenger Traffic and Growth by Month, 2008-2010
- China Civil Aviation Passenger Traffic Growth by Air Route, 2007-2010
- Monthly Growth Rate of China Civil Aviation Passenger Traffic by Air Route, 2008-2010
- China Civil Aviation Passenger Turnover and YoY Growth, 2005-2010

- YoY Growth of Passenger Turnover by Month, 2008-2010
- China Civil Aviation Freight & Mail Traffic and Growth, 2005-2010
- China Civil Aviation Freight Traffic by Air Route, 2007-2010
- Monthly Growth of China Civil Aviation Freight Traffic by Air Route, 2009-2010
- Composite Air Travel Price Index of Domestic Service of China Civil Aviation, 2008-2010
- Air Travel Price Index of Domestic Long-haul Service of China Civil Aviation, 2008-2010
- Air Travel Price Index of Domestic Medium-to-long-haul Service of China Civil Aviation, 2008-2010
- Air Travel Price Index of Domestic Regional Service of China Civil Aviation, 2008-2010
- Air Travel Price Index of International Service (Excluding Asia) of China Civil Aviation, 2008-2010
- Air Travel Price Index of Asia and Hong Kong & Macao Service of China Civil Aviation, 2008-2010
- Number of Flight Destination Cities and Airports in China, 2006-2009
- Regional Distribution and Proportion of Domestic Airports, 2009
- Passenger Throughput and Growth in China, 2006-2009
- Cargo & Mail Throughput and Growth in China, 2006-2009
- Sorties and YoY Growth of China, 2006-2009
- Proportion of Passenger Throughput in Major Cities, 2009
- Regional Distribution and Proportion of Cargo & Mail Throughput, 2009
- RPK Proportion of Three Types of Airlines, 2007
- Revenue Composite and Proportion of Air China by Region, 2009
- Airplane Ownership of Air China by Type, 2009
- Airplane Quantity of Air China by Ownership, 2009
- Main Indicators of Transport Capacity of Air China, 2008-2010

- Transport of Air China, 2008-2010
- Passenger Traffic of Air China by Month, 2008-2010
- Passenger Traffic of Air China: Domestic Flight vs. International Flight, 2008-2010
- Freight Traffic of Air China by Month, 2008-2010
- Freight Traffic of Air China by Air Route, 2008-2010
- Overall Load Factor, Passenger Load and Freight Load Factor of Air China, 2008-2010
- Passenger Load Factor and Freight Load Factor of Air China: Domestic Flight vs. International Flight, 2008-2010
- Transport Capacity of China Eastern Airline, 2008-2010
- Transport Capacity of China Eastern Airlines by Air Route, 2009
- Traffic of China Eastern Airlines, 2008-2010
- Traffic of China Eastern Airlines by Air Route, 2009
- Load Factors of China Eastern Airlines, 2008-2010
- Load Factors of China Eastern Airlines by Air Route, 2009
- Airplane Ownership of China Southern Airlines, 2008-2009
- Transport Capacity of China Southern Airlines, 2008-2010
- Passenger Transport Capacity of China Southern Airlines by Air Route, 2008-2009
- Freight & Mail Transport Capacity of China Southern Airlines by Air Route, 2008-2009
- Traffic of China Southern Airlines, 2008-2010
- RPK of China Southern Airlines by Air Route, 2008-2010
- RTK of China Southern Airlines by Air Route, 2008-2010
- Load Factor of China Southern Airlines, 2008-2010
- Airplane Introduction Plan of Hainan Airlines, 2010-2012
- Transport Capacity of Hainan Airlines, 2008-2010

- RPK Market Shares of Hainan Airlines, 2006-2010
- Passenger Traffic of Hainan Airlines, 2006-2009
- Passenger Load Factor of Hainan Airlines by Quarter, 2006-2010
- Passenger Throughput of Hainan Airport and Haikou Airport by Quarter, 2006-2009
- Market shares of Hainan Airlines in Haikou, Sanya and Beijing
- Flight Quantity and Growth of Cathay Pacific Airways, 2007-2010
- Transport Capacity of Cathay Pacific Airways, 2007-2010
- ASK Distribution of Cathay Pacific Airways in Major Regions, 2009
- Traffic of Cathay Pacific Airways, 2007-2010
- RPK Proportion of Cathay Pacific Airways by Region, 2009
- Passenger Load Factor and Freight Load Factor of Cathay Pacific Airways, 2007-2010
- Operating Revenue and Net Profit of Shandong Airlines by Quarter, 2009-2010
- Passenger/Freight Traffic and Growth of Xiamen Airlines, 2007-2009
- Proportion of Passenger Throughput in Three Types of Airports in China, 2007
- Number of Flights of Beijing Capital International Airport, 2007-2010
- Passenger Throughput of Beijing Capital International Airport, 2007-2009
- Composition of Passenger Traffic and Proportion of Beijing Capital International Airport, 2009
- Cargo & Mail Throughput of Beijing Capital International Airport, 2007-2010
- Cargo & Mail Throughput and Growth of Beijing Capital International Airport by Month, 2009-2010
- Sorties and Growth of Beijing Capital International Airport by Month, 2009-2010
- YoY Growth of Three Major Production Indices of Shanghai Airport, 2008-2010
- Main Business Revenue and Total Profit of Guangzhou Baiyun International Airport by Quarter, 2008-2010

- Passenger Throughput of Guangzhou Baiyun International Airport by Month, 2009-2010
- Cargo & Mail Throughput of Guangzhou Baiyun International Airport by Month, 2009-2010
- Sorties of Guangzhou Baiyun International Airport by Month, 2009-2010
- YoY Growth of Three Major Production Indices of Shenzhen International Airport, 2009
- Three Major Production Indices of Chengdu Shuangliu International Airport, 2007-2009
- Three Major Production Indices of Kunming Wujiaba International Airport, 2007-2009
- Three Major Production Indices of Xi'an Xianyang International Airport, 2007-2009
- Three Major Production Indices of Hangzhou Xiaoshan International Airport, 2007-2009
- Three Major Production Indices of Chongqing Jiangbei International Airport, 2007-2009
- Three Major Production Indices of Xiamen Gaoqi International Airport, 2007-2009
- Three Major Production Indices of Wuhan Tianhe International Airport, 2007-2009
- Three Major Production Indices of Changsha Huanghua International Airport, 2007-2009
- Three Major Production Indices of Nanjing Lukou International Airport, 2007-2009
- Three Major Production Indices of Qingdao Liuting International Airport, 2007-2009



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