



Global and China Aeroengine Industry Report, 2010-2011

May 2011

This report

- ◆ **Analyzes Chinese aero-engine market environment.**
- ◆ **Focuses on the operation of Chinese civil aero-engine industry.**
- ◆ **Highlights the operation of global and Chinese key aero-engine enterprises.**

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Abstract

The global aerospace market grows at an annual rate of about 10%. Most of demand comes from Asia, the Middle East and Latin America, while some from the United States and Europe for the purpose of updating and upgrading. From 2010 to 2029, the global civil aviation market will need about 150,000 aeroengines valued USD 801.4 billion. These engines will also create after sales services valued about USD 650 billion in their service time. GE, P & W and RR monopoly the R & D of large civil aircraft engines. China has not installed a trunk liner or feeder liner with the engines made in China.

China's annual output of civil aeroengines is very small. The engine delivery amount was only RMB 9.1 million in 2009, and is expected to be nearly RMB 12 million in 2011.

In 2010, AVIC Commercial Aircraft Engine Co., Ltd started to construct its R & D base. The launch of the large aircraft engine development project marked the formal start of China's civil engines. Following the United States, Britain, Russia and France, China has become the world's fifth country committed to the independent R & D of aeroengines. With the increasingly powerful economic strength, China has paid more attention to the aeroengine industry and provided support policies.

Xi'an Aero-Engine has huge potential. It can integrate the engine assets of Shenyang Liming Aero-engine, Harbin Dongan Engine and Chengdu Engine. By product, Shenyang Liming is the most promising one.

After integrating related assets in 2009, AVIC Aero-Engine Controls became the only domestic enterprise engaged in the R &D and sale of aeroengine control systems.

Compared with engines, aeroengine parts have higher output value in China. In 2010, the output value was estimated to be RMB 2.6 billion, up 37.5% year on year. Meanwhile, aeroengine component subcontracts brought RMB 609 million to Sichuan Chengfa Aero-Science & Technology, up 115% year on year, accounting for 53.19% of the total revenue.

Beijing Cisri-Gaona Materials and Technology grasped the majority of market shares in the field of aeroengine superalloy.

With the development of China aviation industry, the output value of aeroengine maintenance and service has increased. Sichuan Haite High-Tech is the only listed aircraft maintenance company of China, and its aeroengine maintenance business maintains a gross margin of 45-55%. Global aeroengine giants have set up maintenance joint ventures in China, which will threaten the current status of Sichuan Haite High-Tech.

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