



**China Air Transport and Airport Industry Report,
2010-2011**

Jun 2011

This report

- ◆ **Analyzes the development environment of china air transport industry.**
- ◆ **Focuses on the transportation situation & revenue classification of Chinese airports.**
- ◆ **Highlights the operation of major Chinese airlines and airports.**

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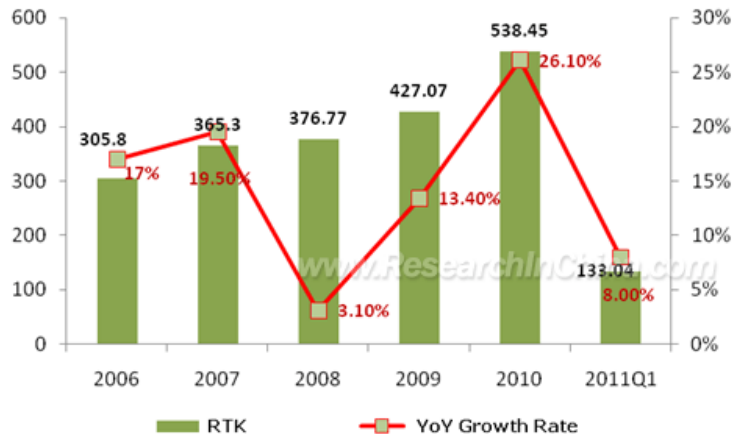
Abstract

Benefiting from China's steady economic growth, China aviation industry took the lead in the global recovery. In 2010, it completed an RTK (Revenue Ton Kilometer) of 53.845 billion ton-km, up 26.1% year on year. In Q1 2011, due to the rising international oil prices, the instability in the world and Japan's earthquake, the RTK of China aviation industry only grew by 8.0% year on year, much less than the growth rate of 32.2% in Q1 2010.

In 2010, by average monthly passenger traffic and fleet scale, China Southern Airlines, China Eastern Airlines and Air China International ranked top 3, with average monthly passenger traffic of 5,814,800, 4,926,500 and 4,350,700 respectively, and fleet scale of 422 aircrafts, 348 aircrafts and 393 aircrafts separately. Other airlines occupied very small shares in both passenger traffic and fleet scale in the industry.

RTK and YoY Growth Rate of China Civil Aviation, 2006-2011

(Unit: 100 million ton-km)



China Southern Airlines: It has the most aircrafts and annual passenger traffic in China aviation industry. In 2010, its passenger traffic ranked first in Asia and third in the world. In 2010, it achieved net profit of RMB5.805 billion, up 1521.5% from RMB358 million in 2009.

China Eastern Airlines: In 2010, China Eastern Airlines and Shanghai Airlines merged, so that the operation scale was larger. Coupled with the driving force of Shanghai World Expo, the transportation revenue gained by China Eastern Airlines in 2010 grew by 81.49% to RMB68.47 billion. However, in Q1 2011, the transportation revenue only grew by 16.63% year on year.

Air China International: It has the most assets and traffic in China aviation industry. In 2010, it achieved net profit of RMB12.208 billion, up 142.75% year on year; in Q1 2011, it achieved net profit of RMB1.671 billion, down 23.04% year on year.

In 2010, the throughput of Chinese airports touched a record high level. The passenger throughput reached 564,312,000, up 16.1% from last year; cargo and mail throughput was 11.29 million tons, up 19.4% from last year. Chinese airports are divided into three categories: first, three hub airports, including Beijing Capital International Airport, Shanghai Pudong Airport and Guangzhou Baiyun Airport; second, 17 major airports in Chengdu, Kunming, Xi'an, Urumqi, Wuhan and other cities; third, other types of airports.

In 2010, the number of airports in China increased. The passenger throughput of three hub airports accounted for 27.6% of the total throughput, declining slightly. The passenger throughput of Beijing Capital International Airport accounted for the highest 13.1%, while Guangzhou Baiyun Airport 7.3 % and Shanghai Pudong Airport 7.2%.

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