



China Air Transport and Airport Industry Report, 2011-2012

Nov. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

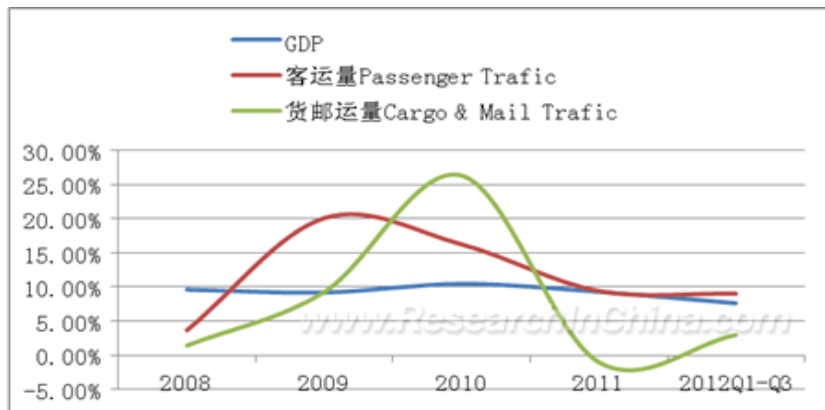
INFORMATION SOURCES

The primary information sources include Civil Aviation Administration of China, and National Bureau of Statistics of China etc.

Abstract

Impacted by the global economic slowdown, the total traffic growth of China's civil aviation industry decelerated in 2011. The passenger traffic was 293.17 million person-times, a year-on-year increase of 25.48 million person-times or 9.5% (in 2010 the growth rate was 16.27%); the cargo and mail traffic was 5.575 million tons, a year-on-year decrease of 0.98% (in 2010 the growth rate was 26.39%). In the first three quarters of 2012, as the Chinese economy showed an increasingly clear sign of recovery and stabilization, the passenger and freight traffic of China's civil aviation industry reached 239.2 million person-times and 3.9458 million tons respectively, up 9% and 3% year on year separately.

Growth Rate of Passenger and Cargo & Mail Traffic of China's Civil Aviation Industry and GDP Growth Rate of China, 2008-2012 (Unit: %)



Source: ResearchInChina China Air Transport and Airport Industry Report, 2011-2012

According to the ranking of airlines by passenger traffic in the first three quarters of 2012, China Southern Airlines ranks No.1 with 65.037 million person-times, followed by China Eastern Airlines with 55.181 million person-times, Air China with 37.242 million person-times, and Hainan Airlines with 16.71 million person-times. In the first three quarters of 2012, top four airlines accounted for 72.81% of the national total air passenger traffic.

China Air Transport and Airport Industry Report, 2011-2012 analyzes the supply & demand and market pattern of China's air transport market, and sheds light on the development of China's airport transport industry and the operation of major domestic airports.

In 2011, Chinese airports completed a passenger throughput of 620.537 million person-times, and a cargo & mail throughput of 11.578 million tons, up 10.0% and 2.57% year-on-year respectively. The four airports in Beijing, Shanghai and Guangzhou accounted for 32.0% of the total throughput of Chinese airports. In particular, Beijing Capital International Airport ranked No.1 in Asia and No.2 in the world with a passenger throughput of 79 million person-times; Guangzhou Baiyun International Airport ranked No.2 in China with a passenger throughput of 45 million person-times.

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