



China Air Transport and Airport Industry Report, 2013-2016

Feb. 2014

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

In January-November 2013, China's civil aviation industry completed total traffic turnover of 61.6 billion ton kilometers, up 10.3% YoY; passenger transport volume of 326 million people, up 11.0% YoY; cargo and mail traffic of 5.067 million tons, up 2.4% YoY. Compared to the falling tendency in 2011 and 2012, growth rate recovered slightly in 2013.

Under the comprehensive action of "sluggish macro-economy" superimposed by "structural impact brought by high-speed rail", the overall effectiveness of Chinese aviation industry continues to decline. For the first quarters of 2013, net income of China's three major state-owned airlines witnessed year-on-year decrease: Air China fell by 3.69% YoY to RMB4.061 billion; China Eastern Airlines RMB3.621 billion, a slight decline of 0.23%; China Southern Airlines RMB2.46 billion, down 7.69% YoY. But Hainan Airlines embraced double-digit growth in net income, which rose 28.44% YoY to RMB2.184 billion.

In order to improve their performance, Chinese airlines since 2013 have been looking for breakthroughs mainly through two ways: to accelerate the open-up of international and regional airlines and to tap into low-cost aviation field. Among them, China Eastern Airlines, Hainan Airlines, Spring Airlines, Juneyao Airlines, etc. have made layout in the low-cost airline business, and many foreign low-cost airlines are also planning to seize the Chinese market.

So far, there is only Spring Airlines that has opened the low-cost airline operating model in China. Founded in 2004, Spring Airlines has boasted 40 Airbus A320-200 aircrafts as of January 2014; volume of passenger traffic reached 8.847 million persons-times in January-October 2013, a year-on-year increase of 14.69%.

Development Course of China Low-Cost Aviation Industry, 2003-2013

Time	Main Events
2003	Thai AirAsia entered China
2004	AirAsia entered China in June
2005	Mainland China's first low-cost airline - Spring Airlines was founded; Tigerair entered China in May
2007	Cebu Pacific entered China in September
2009	Jetstar Asia Airways entered China in December
2010	Eastar Jet entered China in April
2012	China Eastern Airlines announced the establishment of Hong Kong's first low-cost airline with Jetstar in March; Jeju Air entered China in June; Scoot Airline entered China in August.
2013	SpiceJet Airlines entered China; Western Airlines and Hong Kong Express Airways announced their transition to low-cost airlines; Juneyao Airlines submitted an application to build low-cost airline (in possession of 34 aircrafts); China United Airlines brewed transition to low-cost airline (in possession of 25 aircrafts).

Source: ResearchInChina

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