China Air Transport and Airport Industry Report, 2015-2018

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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

Since 2014, despite negative influence from slower economic growth at home and abroad and high-speed railway on Chinese aviation market demand, China's civil aviation passenger throughput still kept relatively rapid growth driven by tourist's leisure demand, and cargo & mail throughput rallied slightly driven by a pickup in exports. In the first eleven months of 2014, China's total civil aviation turnover, passenger turnover, and cargo & mail turnover reached 68.385 billion ton-kilometers, 580.181 billion passenger-kilometers, and 16.874 billion ton-kilometers, a year-on-year increase of 11.1%, 11.60%, and 8.8%, respectively.

However, the airlines suffered heavy exchange losses due to yuan depreciation against dollar. In the first three quarters of 2014, four big airlines all saw sharp decline in net income, with China Eastern Airlines falling the hardest, at 48.94%. Compared with significant drop in profits of the four big airlines since 2010, Spring Airlines, a representative of budget airlines, has enjoyed continuous increase in revenue and net income ever since 2011, with the latter recording a growth of 4.17% in the first three quarters of 2014.

To improve performance, the airlines in China have sought to make progress in two aspects since 2013: accelerate the opening up of international and regional routes; speed to expand into low-cost aviation industry.

Actively opening up new routes: In 2014, Air China added 12 routes (4 domestic ones and 8 international ones), totaling 33 international routes from 2012. In the same year, China Southern Airlines opened 9 new international routes, bringing the total newly-added international routes to 26 since 2012.

Speeding layout in low-cost aviation industry: In Mar. 2013, China West Air announced to transform into a low-cost carrier; in Jun. 2013, Hong Kong Express Airways announced its intention to transform into a low-cost carrier; on Jul. 2014, China Eastern Airlines announced its subsidiary China United Airlines to convert into a low-cost airline; on Jan. 21, 2015, Spring Airlines got its shares listed on the Shanghai Stock Exchange, becoming the first listed low-cost airline in China.

China Air Transport and Airport Industry Report, 2015-2018 focuses on the following:

- Development environment for air transport industry in China, covering economic environment, policy environment, and social environment;
- Operation status of air transport industry and low-cost aviation market in China;
- Operation status of airport transportation in China, including passenger throughput, cargo & mail throughput, and airplane takeoffs and landings;
- Overall economic results of air transport industry in China, encompassing revenues and total profits of companies in the industry;
- 16 major airlines in China, including financial situation, transport capacity, carrying capacity, load factor, development strategy, and performance forecast;
- 15 major transport airports in China, including financial situation, three production index, and performance forecast;
- Forecast on main data of China's air transport industry for 2015-2018.

Revenue and Net Income of Major China Airlines in the First Three Quarters of 2014 (Unit: RMB mln)

Airline	Net Income		Revenue	
	Amount	YoY Changes	Amount	YoY Changes
Air China	3,157	-22.26%	78,911	6.95%
China Eastern Airlines	2,058	-39.68%	68,735	2.42%
Hainan Airlines	1,888	-19.94%	27,801	10.05%
China Southern Airlines	1,256	-48.94%	81,827	9.95%
Spring Airlines	658	4.17%	5,576	9.85%

Source: Companies Mentioned Above, ResearchInChina

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Table of contents

Table of contents

Selected Charts

- Fluctuation of China Civil Aviation RPK around GDP Growth Rate, 1991-2014
- Laws, Regulations, and Policies Concerning China Air Transport Industry, 2011-2015
- Urban Household’s Per Capita Transportation Communication Expense in China, 1985-2013
- High Speed Rail VS Civil Aviation
- Number of China Civil Aviation Aircrafts, 2004-2013
- Number of Transport Aircrafts in China Civil Aviation Industry, 2006-2013
- Number of China Civil Aviation Airlines, 2004-2013
- China Civil Aviation Turnover and YoY Growth, 2006-2014
- China Civil Aviation Passenger Turnover and YoY Growth, 2007-2014
- China Civil Aviation Cargo & Mail Turnover and YoY Growth, 2007-2014
- China Civil Aviation Turnover (by Air Route), 2006-2014
- China Civil Aviation Passenger Traffic Volume and YoY Growth, 2007-2014
- China Civil Aviation Passenger Traffic Volume (by Air Route), 2010-2014
- China Civil Aviation Cargo & Mail Traffic Volume and YoY Growth, 2006-2014
- China Civil Aviation Cargo & Mail Traffic Volume (by Air Route), 2010-2014
- Daily Utilization Rate of China Civil Aviation Aircrafts, 2009-2014
- Passenger Load Factor and Overall Load Factor of China Civil Aviation Industry, 2010-2014
- Development Course of China Low-Cost Aviation Industry, 2003-2015
- Global Low-Cost Aviation Market Share, 2004-2014
- Number and Market Share of Low-Cost Airlines in the World (by Region), 2014
- Passenger Transport Volume of Global Low-Cost Airlines (by Region), 2014
- Development Difficulties of Low-Cost Airlines in China
- Introduction of Low-Cost Airlines in China
- Layout of Foreign Low-Cost Airlines in China
- Low-Cost Airline Share Changes in the World’s Major Markets, 2007-2014

Selected Charts

- Low-Cost Aviation VS High Speed Railway
- Number of Civil Aviation Destinations and Airports in China, 2007-2013
- Number of Transport Airports in China (by Region), 2013
- Passenger Throughput and YoY Growth of Transport Airports in China, 2007-2014
- Passenger Throughput of Transport Airports in China (by Air Route), 2010-2013
- Number of Transports with Passenger Throughput Exceeding 1 Million Person-times in China, 2013
- Regional Distribution of China's Passenger Throughput, 2013
- Cargo & Mail Throughput and YoY Growth of Transport Airports in China, 2007-2014
- Cargo & Mail Throughput of Transport Airports in China (by Air Route), 2010-2013
- Regional Distribution of China's Cargo & Mail Throughput, 2013
- Aircraft Movements and YoY Growth of Airports in China, 2007-2014
- Revenue and Total Profit of Civil Aviation Enterprises in China, 2009-2014
- Structure of Revenue and Total Profit of China Civil Aviation Industry, 2013
- Revenue and Total Profit of Airlines in China Civil Aviation Industry, 2009-2013
- Revenue and Total Profit of Airports in China Civil Aviation Industry, 2009-2013
- Airlines Ranking (by Net Income) in China, Q1-Q3, 2014
- Airlines Ranking (by Revenue) in China, Q1-Q3, 2014
- Airlines Ranking (by Number of Aircraft Ownership) in China, H1 2014
- Key Chinese Airlines' Three Capacity Indices, 2014
- Key Chinese Airlines' Traffic Volume, 2014
- Key Chinese Airlines' Passenger Load Factors, 2014
- Revenue and Net Income of China Southern Airlines, 2009-2014
- Structure of Main Business Cost of China Southern Airlines, H1 2014
- Number of Aircraft Ownership of China Southern Airlines, 2009-2014
- Three Capacity Indices of China Southern Airlines, 2008-2014

Selected Charts

Selected Charts

- Carrying Capacity Indices of Hainan Airlines, 2009-2014
- Overall Load Factor of Hainan Airlines, 2008-2014
- Overall Load Factor of Hainan Airlines, 2014
- Revenue and Net Income of Hainan Airlines, 2015E-2018E
- Flight Lines of Cathay Pacific Airways and Its Affiliated Companies
- Revenue and Net Income of Cathay Pacific Airways, 2009-2014
- Structure of Operating Expenses of Cathay Pacific Airways, H1 2014
- Number of Aircraft Ownership of Cathay Pacific Airways, 2009-2014
- Capacity Indices of Cathay Pacific Airways, 2007-2014
- Carrying Capacity Indices of Cathay Pacific Airways, 2007-2014
- RPK Structure of Cathay Pacific Airways (by Region), 2014
- Overall Load Factor of Cathay Pacific Airways, 2007-2014
- Revenue and Net Income of Cathay Pacific Airways, 2015E-2018E
- Revenue and Net Income of Shandong Airlines, 2009-2014
- Fleet Type of Shandong Airlines, H1 2014
- Major Operating Indicators of Shandong Airlines, 2010-2014
- Overall Load Factor of Shandong Airlines, 2012-2014
- Revenue and Net Income of Shandong Airlines, 2015E-2018E
- Introduction of Spring Airlines
- Revenue and Net Income of Spring Airlines, 2011-2014
- Number of Aircraft Ownership of Spring Airlines, 2011-2014
- Flying Range of Spring Airlines' Airbus A320
- Capacity Indices of Spring Airlines, 2011-2015
- Carrying Capacity Indices of Spring Airlines, 2011-2015
- Overall Load Factor of Spring Airlines, 2011-2015E

Selected Charts

- Fund-raising Projects of Spring Airlines
- Revenue and Net Income of Juneyao Airlines, 2011-2014
- Revenue Structure of Juneyao Airlines (by Segment), 2011-2014
- Number of Aircraft Ownership of Juneyao Airlines, 2011-2014
- Aircraft Type of Juneyao Airlines, end-Jun 2014
- Carrying Capacity of Juneyao Airlines, 2007-2014
- Structure of Passenger Traffic Volume of Juneyao Airlines, 2011-2014
- Passenger Load Factor of Juneyao Airlines, 2011-2014
- Revenue and Net Income of Shenzhen Airlines, 2011-2014
- Number of Aircraft Ownership of Shenzhen Airlines
- Capacity Indices of Shenzhen Airlines, 2010-2014
- Carrying Capacity Indices of Shenzhen Airlines, 2010-2014
- Overall Load Factor of Shenzhen Airlines, 2010-2014
- Total Revenue of Xiamen Airlines, 2002-2013
- Total Profit of Xiamen Airlines, 2002-2013
- Number of Aircraft Ownership of Xiamen Airlines, 2011-2014
- Carrying Capacity Indices of Xiamen Airlines, 2009-2014
- Overall Load Factor of Xiamen Airlines, 2011-2013
- Main Financial Indicators of Sichuan Airlines, 2009-2013
- Carrying Capacity of Sichuan Airlines, 2006-2014
- Passenger Carrying Capacity of China Express, 2007-2014
- Introduction of China United Airlines
- Carrying Capacity of China United Airlines, 2006-2014
- Carrying Capacity of China Postal Airlines, 2006-2013
- Revenue and Net Income of China Cargo Airlines, 2012-2014

Selected Charts

- Carrying Capacity of China Cargo Airlines, 2006-2013
- Number of Aircraft Ownership of Okay Airways, 2005-2015
- Carrying Capacity of Okay Airways, 2006-2014
- Three Major Indices of Main Airports in China, 2014
- Revenue and Net Income of Beijing Capital International Airport, 2008-2014
- Operating Expenses of Beijing Capital International Airport, H1 2014
- Three Production Indicators of Beijing Capital International Airport, 2007-2014
- Revenue and Net Income of Beijing Capital International Airport, 2015E-2018E
- Revenue and Net Income of Shanghai Airport, 2009-2014
- Structure of Operating Cost of Shanghai Airport, H1 2014
- Three Production Indicators of Shanghai Pudong Airport, 2009-2014
- Three Production Indicators of Shanghai Hongqiao Airport, 2009-2014
- Revenue and Net Income of Shanghai Airport, 2015E-2018E
- Revenue and Net Income of Baiyun Airport, 2008-2014
- Three Production Indicators of Baiyun Airport, 2008-2014
- Revenue and Net Income of Baiyun Airport, 2015E-2018E
- Revenue and Net Income of Shenzhen Airport, 2009-2014
- Three Production Indicators of Shenzhen Airport, 2007-2015
- Revenue and Net Income of Shenzhen Airport, 2015E-2018E
- Three Production Indicators of Chengdu Shuangliu International Airport, 2007-2014
- Three Production Indicators of Kunming Changshui International Airport, 2007-2014
- Three Production Indicators of Xi’an Xianyang International Airport, 2007-2014
- Three Production Indicators of Chongqing Jiangbei International Airport, 2007-2014
- Three Production Indicators of Hangzhou Xiaoshan International Airport, 2007-2014
- Three Production Indicators of Xiamen Gaoqi International Airport, 2007-2014

Selected Charts

- Three Production Indicators of Changsha Huanghua International Airport, 2007-2014
- Three Production Indicators of Nanjing Lukou International Airport, 2007-2014
- Three Production Indicators of Wuhan Tianhe International Airport, 2007-2014
- Three Production Indicators of Urumqi International Airport, 2007-2014
- Three Production Indicators of Qingdao International Airport, 2009-2014
- Main Operation Indicators in China's Civil Aviation Transportation Industry, 2013-2014
- Airports (Passenger Throughput >10 Million Person-times) in China, 2014
- New International Airlines of Major Airline Companies in China, 2012-2014
- Revenue and Total Profit of Civil Aviation Companies in China, 2015E-2018E
- Traffic Turnover of China's Civil Aviation, 2015E-2018E
- Passenger Traffic Volume of China's Civil Aviation, 2015E-2018E
- Cargo & Mail Traffic Volume of China's Civil Aviation, 2015E-2018E

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