



Statistical Bulletin of Civil Aviation Industry Development in 2014

In 2014, main business indicators of China's civil aviation continued to show a steady and rapid growth.

I. Transport Aviation

1. Total Transport Turnover

In 2014, the whole industry accomplished a transport turnover of 74.812 billion ton-km in total, up by 7.639 billion ton-km or 11.4% from a year ago, among which, there was 56.034 billion ton-km of passenger traffic, up by 5.891 billion ton-km or 11.7% from 2013, and 18.777 billion ton-km of cargo and mail turnover, up by 1.748 billion ton-km or 10.3% from a year earlier (refer to Figure 1).

In 2014, the transport turnover on the domestic air routes reached 50.8 billion ton-km, up by 4.696 billion ton-km or 10.2% from a year ago, of which, 1.617 billion ton-km was attributable to Hong Kong, Macao and Taiwan air routes, which was 195 million ton-km more, or 13.7% higher than that of 2013; international air routes saw a transport turnover of 24.011 billion ton-km, up by 2.944 billion ton-km or 14.0% from a year ago.

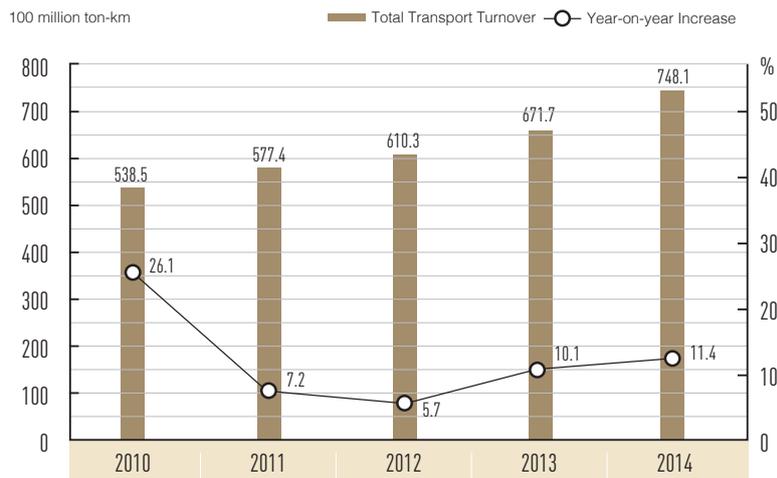


Figure 1 Total Transport Turnover of Civil Aviation 2010-2014

2. Passenger Traffic

In 2014, the whole industry transported 391.95 million passengers, up by 37.98 million or 10.7% from a year ago. The domestic air routes saw a traffic of 360.4 million passengers, up by 32.98 million or 10.1% from 2013, including 10.05 million on Hong Kong, Macao and Taiwan air routes, up by 1.01 million or 11.2%; whereas the international air routes witnessed a traffic of 31.55 million passengers, up by 5 million or 18.8% from 2013 (refer to Figure 2).

3. Cargo and Mail Turnover

In 2014, the whole industry transported 5.941 million tons of cargo

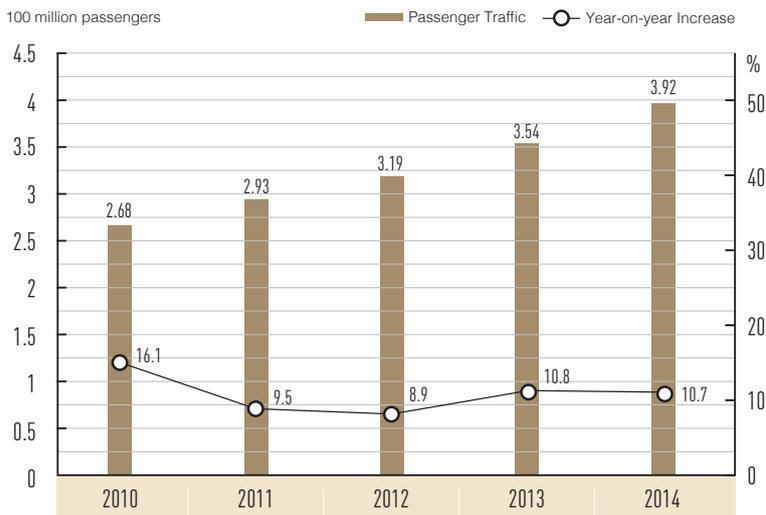


Figure 2 Passenger Traffic of Civil Aviation 2010-2014

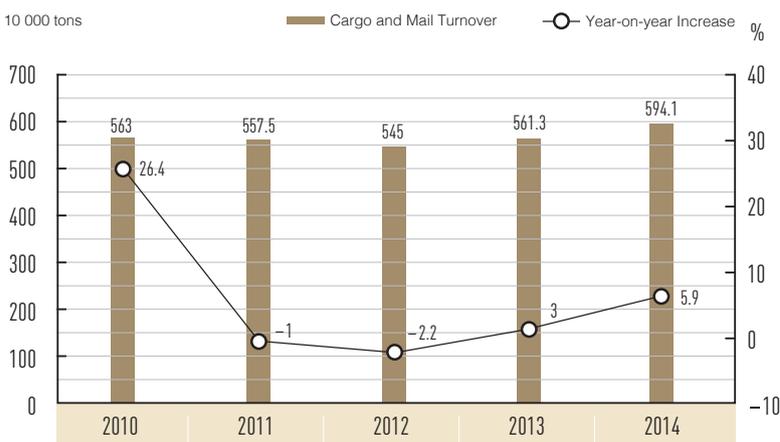


Figure 3 Cargo and Mail Turnover of Civil Aviation 2010-2014

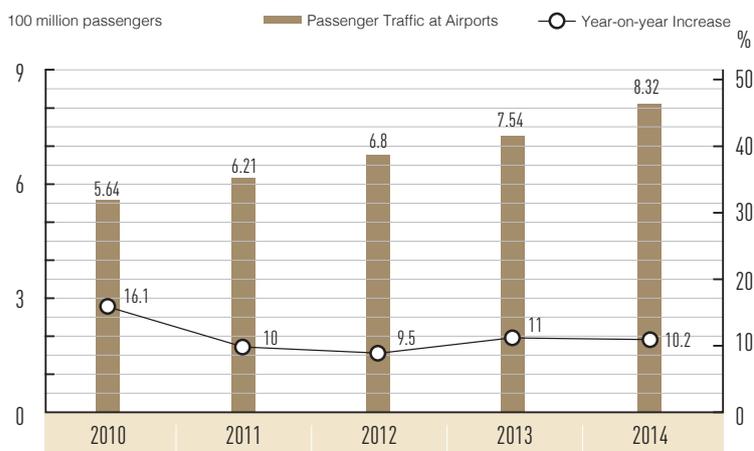


Figure 4 Passenger Traffic at Civil Aviation Transport Airports 2010-2014

and mail, up by 5.9% from a year earlier. 4.257 million tons of cargo and mail was transported on the domestic air routes, up by 4.7%, including 223 thousand tons on Hong Kong, Macao and Taiwan air routes, up by 12.5%; the international air routes saw a mail and cargo traffic of 1.684 million tons, up by 9.0% from 2013 (refer to Figure 3).

4. Airport Turnover

In 2014, the civil aviation transport airports nationwide realized a passenger throughput of 832 million, up by 10.2% from 2013 (refer to Figure 4).

In 2014, the transport airports in China recorded a cargo and mail turnover of 13.561 million tons, up by 7.8% from a year ago (refer to Figure 5).

In 2014, the transport airports in China witnessed 7.933 million aircraft movements, up by 8.4% from a year ago (refer to Figure 6).

In 2014, there were 64 transport airports whose annual passenger traffic topped 1 million, among which, the top three airports in Beijing, Shanghai and Guangzhou contributed 28.3% to the total airport traffic (refer to Table 1).

In 2014, there were 50 transport airports whose cargo and mail turnover exceeded 10,000 tons, among which, the cargo and mail turnover at the top 3 airports in Beijing, Shanghai and Guangzhou accounted for 51.3% of the total (refer to Table 2).

In 2014, Beijing Capital International Airport posted a traffic of 86 million

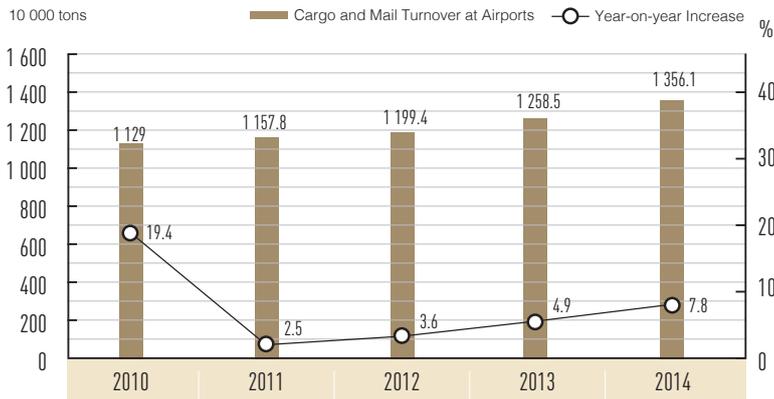


Figure 5 Cargo and Mail Turnover at Civil Aviation Transport Airports 2010-2014

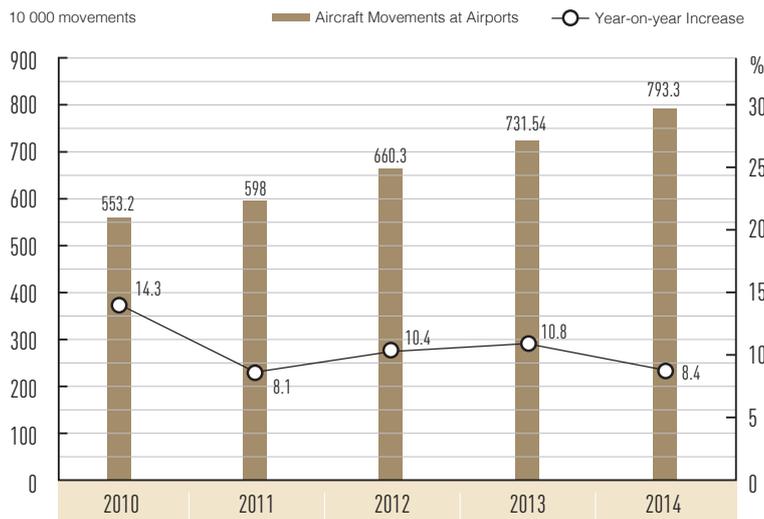


Figure 6 Aircraft Movements at Civil Aviation Transport Airports 2010-2014

Table 1 Number of Airports with Passenger Traffic Exceeding 1 Million in 2014

| Annual Passenger Traffic | Number of Airports | Increase from 2013 | Percentage of Total (%) |
|---------------------------------|--------------------|--------------------|-------------------------|
| More Than 10 Million Passengers | 24 | 0 | 76.2 |
| 1~10 Million Passengers | 40 | 3 | 19.1 |

Table 2 Number of Airports with Cargo and Mail Turnover Exceeding 10 000 Tons in 2014

| Annual Cargo and Mail Turnover | Number of Airports | Increase from 2013 | Percentage of Total (%) |
|--------------------------------|--------------------|--------------------|-------------------------|
| 10 000 Tons or Above | 50 | 0 | 98.5 |

passengers, staying at the second place in the world for five straight years; Shanghai Pudong Airport realized a cargo and mail turnover of 3.182 million tons, ranked the third in the world for 7 years in a row.

5. Transport Aircraft Fleet

By the end of 2014, the civil aviation industry had had 2 370 transport aircraft on registry, 225 more than 2013.

6. Number of Airports

By the end of 2014, there had been 202 certified transport airports in China, up by 9 from 2013. 2014 saw the addition of Heilongjiang Fuyuan Airport, Hubei Shennongjia Airport, Qinghai Delingha Airport, Shanxi Lüliang Airport, Jilin Tonghua Airport, Guangxi Hechi Airport, Sichuan Aba Airport, Guizhou Liupanshui Airport and Hu'nan Hengyang Airport. Besides, the relocation of Shaanxi Hanzhong Airport was completed. Shaanxi Ankang Airport and Xinjiang Qiemo Airport ceased operation.

7. Air Route Network

By the end of 2014, there had been 3 142 scheduled flight routes in China, with a mileage of 7.0311 million km including the overlapped distance or 4.6372 million km excluding the overlapped distance.

By the end of 2014, there had been 198 Chinese cities with domestic scheduled flights (excluding Hong Kong, Macao and Taiwan). Chinese airlines operated scheduled international flights to 123 cities of 48 countries; the domestic

Table 3 Number and Mileage of Scheduled Flight Routes in China 2014

| Indicator | No. |
|--|--------|
| Number of Air Routes | 3 142 |
| Domestic Air Routes | 2 652 |
| Including: Hong Kong, Macao and Taiwan Air Routes | 114 |
| International Air Routes | 490 |
| Air Route Mileage Including Overlapped Distance (10 000 km) | 703.11 |
| Domestic Air Routes | 485.32 |
| Including: Hong Kong, Macao and Taiwan Air Routes | 18.63 |
| International Air Routes | 217.79 |
| Air Route Mileage Excluding Overlapped Distance (10 000 km) | 463.72 |
| Domestic Air Routes | 287.00 |
| Including: Hong Kong, Macao and Taiwan Air Routes | 17.93 |
| International Air Routes | 176.72 |

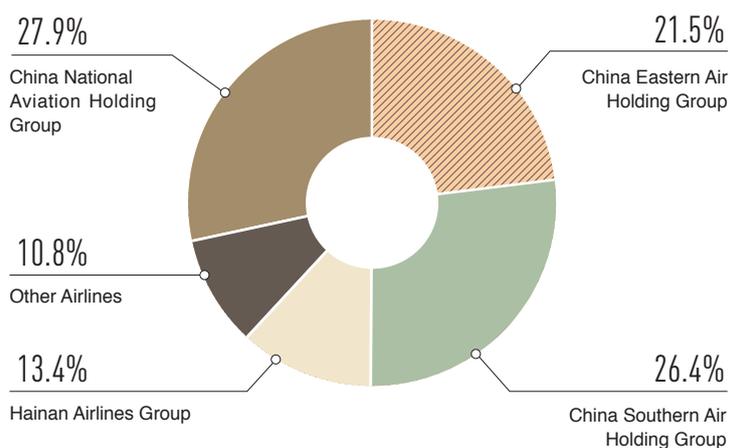


Figure 7 Proportions of Total Transport Turnover by Airlines (Groups) in 2014

airlines operated scheduled flights to Hong Kong in 37 mainland cities and to Macao in 11 mainland cities and to Taiwan in 43 mainland cities.

8. Foreign Relations

By the end of 2014, China had already signed 116 bilateral air service agreements with different countries and regions, up by 1 from 2013, which included the agreements signed with 43 Asian countries as well as the China-ASEAN Air Service Agreement and those with 23 African countries, 36 European countries, 9 American countries and 4 Oceania countries.

9. Operations of Transport Airlines (Groups)

By the end of 2014, there had been a total of 51 transport airlines in China, with a net addition of 5 to the number of 2013. By the type of ownership, there had been 38 state-holding companies as well as 13 private and privately-holding companies. Among the 51 transport airlines, there were 6 all-cargo airlines, 11 joint-venture airlines and 5 publicly listed companies.

China National Aviation Holding Group recorded 1.904 million flight hours and a total transport turnover of 20.84 billion ton-km, up by 10.4% from a year earlier; it carried 95 million passengers, up by 7.6% from 2013 and 1.666 million tons of cargo and mail, up by 6.8% from 2013.

China Eastern Air Holding Group posted 1.639 million flight hours and a total transport turnover of 16.10 billion ton-km, up by 3.7% from a year earlier; it carried 84 million passengers, up by 5.9% from 2013 and 1.363 million tons of cargo and mail, 3.2% less than in 2013.

China Southern Air Holding Group chalked up 2.023 million flight hours and a total transport turnover of 19.76 billion ton-km, up by 13.0% from a year ago; it carried 101 million passengers, up by 9.8% and 1.432 million tons of cargo and mail, up by 12.2% from 2013.

Hainan Airlines Group registered 1.075 million flight hours and a total transport turnover of 9.99 billion ton-km, up by 18.9%; it carried 60 million passengers, up by 16.9% from a year ago and 727 thousand tons of cargo and mail, up by 11.4% from 2013.



All the other airlines altogether realized 1 million flight hours and a total transport turnover of 8.11 billion ton-km, up by 18.2% from a year earlier; they carried 52 million passengers, up by 20.7% from a year ago and 753 thousand tons of cargo and mail, up by 5.3% from 2013.

II. General Aviation

1. Flight Hours

In 2014, the whole general aviation industry posted 675 thousand flight hours, up by 14.2% from a year earlier, including 84 300 hours of industry aerial operations, down by 12.6% from 2013; 38 200 hours of agriculture and forestry operations, up by 12.0%; and 552.5 thousand hours of other general aviation operations, up by 20.0% from 2013.

2. General Aviation Enterprises

By the end of 2014, the general aviation enterprises had been granted the general aviation operation licenses.

3. Aircraft Fleet Scale

By the end of 2014, the general aviation enterprises had had a total of 1 798 airworthy aircraft on registry, including 486 aircraft for training.

III. Transport Efficiency and Financial Performance

1. Transport Efficiency

In 2014, the average daily use rate of transport aircraft on registry industrywide stood at 9.51 hours, down by 0.02 hours from 2013. Specifically, the average daily use rate of large and medium-sized

aircraft was 9.74 hours, down by 0.02 hours from a year earlier, whereas that of small-sized aircraft was 6.36 hours, down by 0.24 hours from 2013.

In 2014, the passenger load factor for scheduled flights averaged 81.4%, up by 0.3 percentage points from 2013.

In 2014, the load factor for scheduled flights averaged 71.9%, down by 0.3 percentage points from 2013. (Refer to Table 4)

Table 4 Passenger Load Factor and Load Factor for Scheduled Flights in 2014

| Indicator | Value (%) | Increase from 2013 (Percentage Point) |
|---|-----------|---------------------------------------|
| Passenger Load Factor of Scheduled Flights | 81.4 | 0.3 |
| Domestic Air Routes | 82.0 | 0.3 |
| Including: Hong Kong, Macao and Taiwan Air Routes | 77.2 | 1.3 |
| International Air Routes | 79.1 | 0.0 |
| Load Factor of Scheduled Flights | 71.9 | -0.3 |
| Domestic Air Routes | 73.3 | -0.3 |
| Including: Hong Kong, Macao and Taiwan Air Routes | 64.0 | 0.7 |
| International Air Routes | 69.2 | 0.0 |

Table 5 Flight Irregularity Causes in 2014

| Item | % of the Total | Growth from 2013(%) |
|---|----------------|---------------------|
| Causes of Flight Irregularity for All Airlines | 100.0 | |
| Including: Airlines | 26.4 | -11.0 |
| ATC* | 25.3 | — |
| Weather | 24.3 | 2.5 |
| Others* | 24.0 | — |
| Causes of Flight Irregularity for Major Airlines | 100.0 | |
| Including: Airlines | 25.9 | -11.2 |
| ATC* | 24.0 | — |
| Weather | 24.8 | 2.7 |
| Others* | 25.3 | — |

* indicates the grouping types which were newly added in 2014 or whose definitions were hugely different from the previous ones, thus with no available year-on-year growth data.

2. Financial Performance

In 2014, financial reports showed that the whole industry made 618.96 billion yuan in business revenue, up by 8.2% from 2013, and 28.89 billion yuan in profit, up by 3.54 billion yuan from a year earlier, of which, airlines made 421.56 billion in business revenue, up by 8.6% from a year earlier, and 17.45 billion yuan in profit, up by 1.19 billion yuan from 2013; airports made 70.27 billion yuan in business revenue, up by 11.8% from 2013, and 7.34 billion yuan in profit, up by 2.8 billion yuan from 2013; support businesses made 127.13 billion yuan in business revenue, up by 4.8% from 2013, and 4.1 billion yuan in profit, down by 450 million yuan from a year earlier.

IV. Aviation Safety and Service Quality

1. Aviation Safety

In 2014, China civil aviation maintained a stable safety situation. There was no transport aviation accident, with a 5-year rolling value of the major transport aviation accident rate per one million hours standing at 0.03 (0.22 for world average). There were 4 general aviation accidents with 3 fatalities, down by 9 accidents and 3 fatalities year over year.

From August 25, 2010 to the end of 2014, transport aviation had been operating safely for 52 months, with an accumulated 28.12 million safe hours.

2014 saw 324 incidents, up by 11.5% year on year, among which, there were 11 severe transport aviation incidents,

with the rate of severe incidents per 10 000 flight hours standing at 0.014.

In 2014, out of the 51 transport airlines, 41 were free of human-factor incidents.

2. Flight Regularity Rate

In 2014, passenger airlines in China operated 3.126 million flights in total, among which, there were 2.137 million regular flights and 0.937 million irregular flights, with an average flight regularity rate of 68.37%.

In 2014, major airlines operated 2.589 million flights in total, among which, there were 1.789 million regular flights and 0.766 million irregular flights, with an average flight regularity rate of 69.09%.

In 2014, the average delay of passenger flights in China was 19 minutes, down by 2 minutes on a year-on-year basis.

3. Passenger Complaints

In 2014, CAAC, CAAC regional administrations, CAAC Consumer Affairs Center and China Air Transport Association accepted 1 920 flight passenger complaints in total, down by 127 or 6.2% from 2013. Refer to Table 5 for flight irregularity causes and classifications in 2014.

V. Investment in Fixed Assets

In 2014, China civil aviation made investment in fixed assets to the

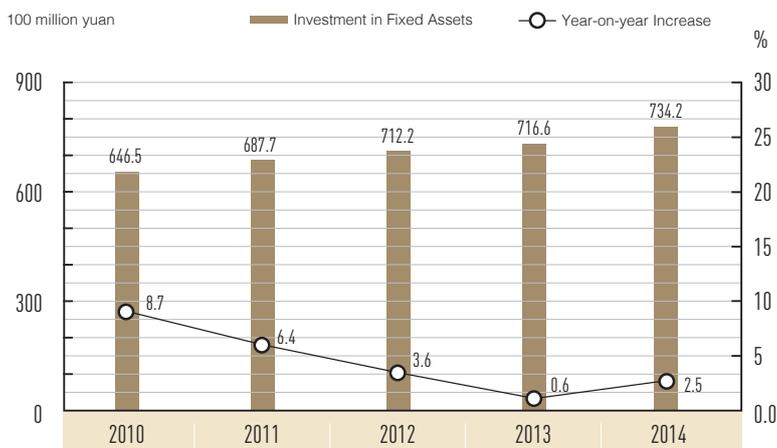


Figure 8 Investment in Civil Aviation Infrastructure Development and Technological Upgrading 2010-2014



tune of 150.82 billion yuan, of which, 73.42 billion yuan went to civil aviation infrastructure development and technological upgrading, up by 2.5% from 2013.

Investment in infrastructure development and technological upgrading can be classified as follows:

1. Airport Construction

In 2014, the airport system made investment in fixed assets worth 56.08 billion yuan, up by 10.5% from a year earlier. There were 13 key construction projects, among which, the expansions of Nanjing Lukou Airport, Nanning Wuxu Airport and Tianjin Binhai Airport were completed, follow-up constructions for the expansions of Guangzhou Baiyun Airport, Chongqing Jiangbei Airport, Wuhan Tianhe Airport, Harbin Taiping Airport, Changsha Huanghua Airport, Zhengzhou Xinzheng Airport and Yinchuan Hedong Airport were in smooth progress, and the construction of a new airport in Beijing, the expansion of the aircraft movement area of Pudong Airport and expansion of Lanzhou Airport were inaugurated.

2. ATM Construction

In 2014, the ATM system made investment in fixed assets to the tune of 2.39 billion yuan, down by 560 million yuan from a year earlier. The 2 key construction projects, i.e. Urumqi Regional Control Center and Shenyang Regional Control Center, were smoothly under way.

3. Others

In 2014, other civil aviation divisions made investment in fixed assets worth 14.95 billion yuan in total, down by 3.01 billion yuan from 2013, which included 1.98 billion yuan for civil aviation information system development, 530 million for scientific R&D and education, 240 million for security system, 30 million for fuel supply system, 190 million for aircraft service and maintenance, 2.19 billion for transport service, 1.89 billion for public facilities and 7.9 billion for other systems.

VI. Energy Conservation and Emission Reduction

In 2014, airlines used temporary air routes for about 385 thousand flights, cutting flight distance by over 12.95 million km, jet fuel consumption by 69 900 tons and CO₂ emissions by about 220 thousand tons.

In 2014, China civil aviation continued to push forward the ad hoc substitution of bridge-borne (including remote stands) equipment for APU at airports with throughput exceeding 5 million passengers. By the end of 2014, 9 airports across China had seen their bridge-borne equipment put into service, which brought forth significant environmental and financial benefits. Statistics showed that the 9 airports saw their jet fuel consumption cut by about 364 200 tons, equivalent to 1.147 4 million tons of CO₂ and 2.549 billion yuan in cost (for a price of 7 000 yuan/ton for jet fuel) since their adoption of the bridge-borne equipment.

VII. Education and Science & Technology

In 2014, the enrollment by universities and colleges directly under CAAC totalled 19 974 students, among which, 1 045 were postgraduate students, 16 745 undergraduates and junior college students, and 2 184 adult students.

In 2014, the number of registered students at universities and colleges directly under CAAC stood at 61 570, among which, there were 3 377 postgraduates, 52 186 undergraduates and junior college students, 5 484 adult students, and 523 secondary polytechnic students.

In 2014, universities and colleges directly under CAAC graduated 14 947 students in total, among which, there were 652 postgraduates, 11 457 undergraduates and junior college students, 583 secondary polytechnic students and 2 255 adult students.

In 2014, China civil aviation inspected and accepted a total of 40 scientific and technological achievements. ■