

ASG: Bizav/genav Fleets in China GBA Top 400

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Business and general aviation fleets have grown to encompass 244 fixed-wing aircraft, 160 helicopters, and seven other aircraft in the Greater Bay Area (GBA) of China, but airspace and other restrictions continue to limit the industry's growth there, according to a new report from the Asian Sky Group.

Timed for release in concert with the Zhuhai Airshow this week, the *Greater Bay Area Aviation Report* focuses on one of the top economic regions within China, made up of Hong Kong and Macau, as well as nine cities in Mainland China's Guangdong province (Guangzhou, Shenzhen, Zhuhai, Foshan, Zhongshan, Dongguan, Huizhou, Jiangmen, and Zhaoqing).

This report follows on to ASG's first *China GA Report* released last year and comes as the Chinese government "continues to place a high emphasis on GA and in particular its possible application in one of China's highest producing economic regions, the Greater Bay Area," said ASG managing director Jeffrey Lowe.

The GBA region encompasses a population of 67 million, with 14.5 million in Guangzhou and 12.5 million in Shenzhen. On track to overtake the U.S. economy by 2030, China on a whole has experienced 7 percent GDP growth consistently over the past five years. The GBA has contributed 12 percent to its GDP, produces 48 percent of the country's total exports, and host 12 percent of tourists. "It is the fastest-growing province in China, many times exceeding 16 percent growth," the report adds.

As far as business aviation and GA, Hong Kong and Shenzhen have the largest aircraft fleets in the GBA. Nearly 54 percent of the 52 operators solely fly business jets. Another quarter operate only helicopters, while 10 percent are dedicated to turboprops and pistons. Business jets account for 83 percent, or 202, of the fixed-wing aircraft there. Gulfstream alone accounts for 94, or 47 percent, of those, while the Bombardier fleet has reached 71, or 35 percent. The preference for long-range aircraft remains, accounting for 62 percent of the business jet fleet.

Airbus has taken a 31 percent market share with 49 helicopters there, while Sikorsky follows at 24 percent, or 38 helicopters. Medium helicopters are the preferred size, comprising 43 percent of the GBA fleet.

The region is home to 42 pistons and turboprops, 22 of which (52 percent) are Cessna models. Cirrus and Diamond follow with eight (19 percent) and seven (17 percent), respectively. Single-engine turboprops make up 52 percent of this fleet.

Fifteen airports and 19 helipads are operational in the area. Of the airports, seven are dedicated to air carriers, six to helicopters and two to general aviation. The region houses just four fixed-base operations two in Mainland China and one each in Hong Kong and Macau.

The Civil Aviation Administration of China (CAAC) last year relaxed regulations to simplify the permit process and make it easier for GA companies to establish, ASG said. In addition, some flight paths were modified. This year the CAAC unveiled plans for a three-level service system for low-altitude flights by 2020.

The CAAC, the company added, is making progress by simplifying the procedures and loosening the strict regulations on non-commercial aircraft registrations, operation permit applications and infrastructural approvals, and the Chinese government has emphasized the development of an airport network in its 13th Five-Year Plan, running through 2020.

But ASG said the industry believes this doesn't go far enough. "GA operators are faced with restrictions regarding parking and slots, which are prioritized for commercial aviation," the company noted, and said airspace policies still "haven't offered much in the way of relief for operators."

GBA has been suggested as one of the first regions to be able to open low-altitude airspace, that airspace "isn't truly open," ASG said. "While the Greater Bay Area presents ample opportunity for all segments of GA, it is unlikely to materialize without significant low-altitude airspace reform."

This is complicated by restrictions in Hong Kong and Macau, the company added. "A truly integrated region requires integration across the board."

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