



中国国际航空货运发展的现状和政策选择

China's Approach for Its International
Air Cargo Transport Liberalization

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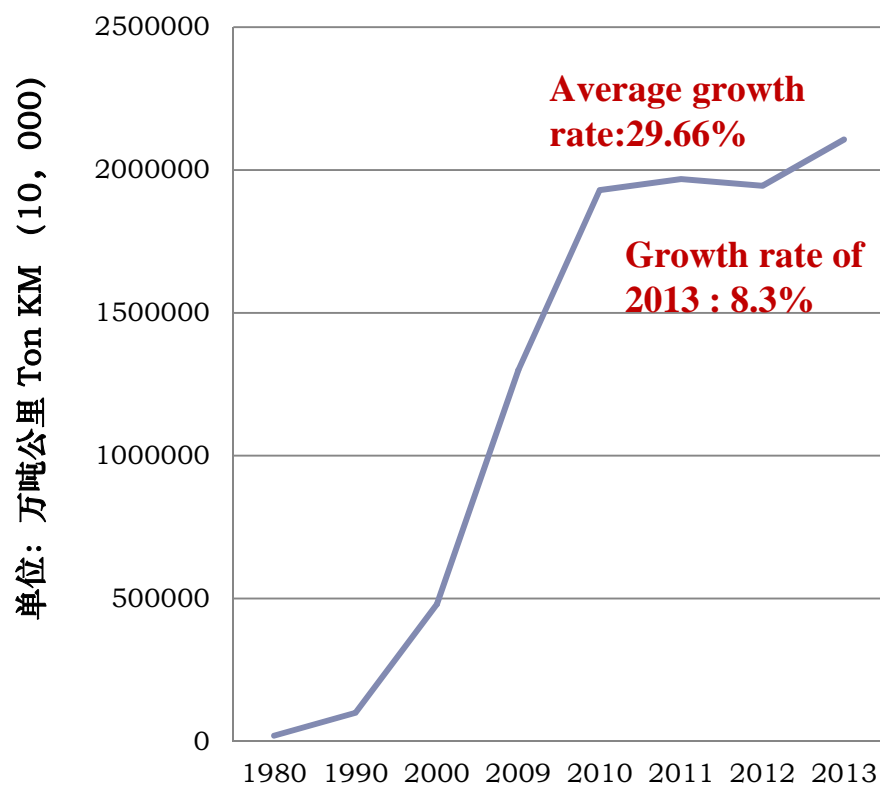
第一部分：中国国际航空货运的发展现状

Part I: Overview of China's International Air Cargo Transport Development

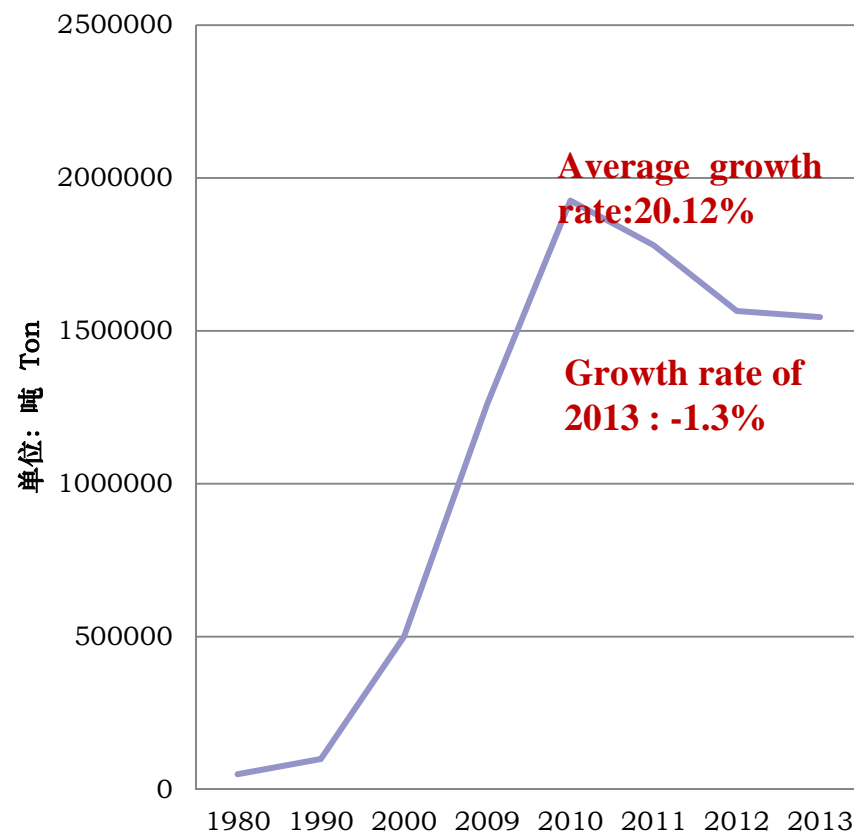
第一部分 (Part One)



国际周转量 Turnover



国际货邮量 Cargo



第一部分 (Part I)



2013年空运数据/Traffic Figures

运输总周转量

Total Traffic Turnover

67.172 billion ton kilometers

国际运输周转量

International Traffic Turnover

21.068 billion ton kilometers

货物运输量/cargo traffic

5.61 million tons

国际货物运输量

International Cargo Traffic

1.545 million tons

第一部分 (Part I)



- 2014年夏秋季，111家外航自55个国家和地区的104个城市飞我境内46个城市，每周2705个定期客货航班。其中货运每周436班。

As of the IATA 2014 Summer season, 111 foreign airlines operate a total of 2705 scheduled passenger/all-cargo flights per week from 104 cities in 55 countries and regions to 46 cities in China. 436 weekly flights are all-cargo services.

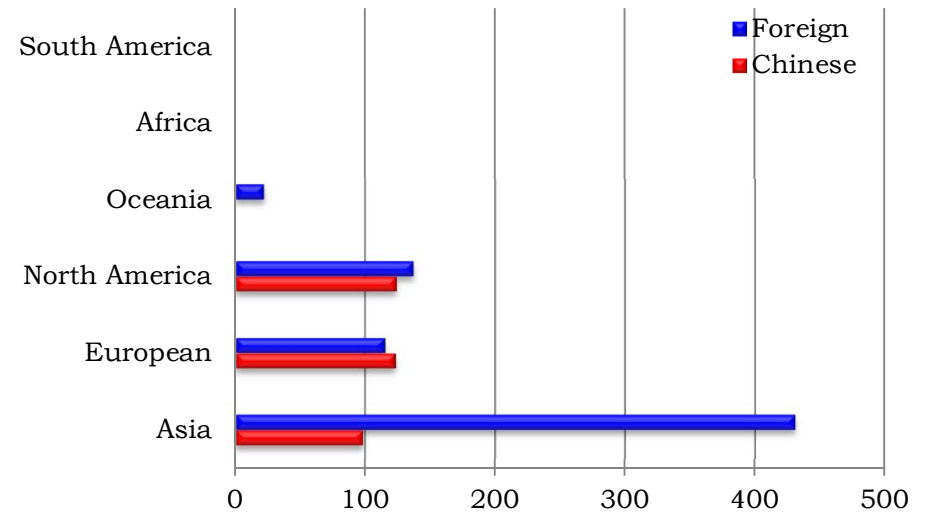
- 2014年夏秋季，中国19家航空公司自中国47个城市飞往49个国家和地区的120个城市，每周2854个定期客货航班。其中337个定期货运航班。

At the same time, 19 Chinese airlines are designated to operate a total of 2854 scheduled passenger/all-cargo flights per week from 47 Chinese cities to 120 cities in 49 countries and regions. 337 weekly flights are all-cargo services.

Weekly flights of All-Cargo



Region	Chinese	Foreign	Sum
Asia	98	431	529
European	123	115	235
North America	124	137	261
Oceania	0	22	22
Africa	0	0	0
South America	0	0	0
Sum	337	436	773



根据2014年夏秋季数据，从国际货运航班数量来看，亚洲是我第一大航空运输市场，欧洲位居第二，其余依次为北美洲、大洋洲。

According to the statistics in IATA 2014 Summer season, Asian market is the biggest one for China, and North American market ranks second, which is followed by European and Oceania markets.



第二部分：中国国际航空货运市场准入的法律框架

Part II: A More Liberalized Approach for China's International Air Cargo Market Access

- 与115个国家/地区组织签署了政府间航空运输协定。
So far, China has signed or initialed Air Service Agreement with 115 countries/regions.
- 根据2014年夏秋航季航班计划统计，中外空运企业共执行了69个双边航空运输协定。
As of the IATA 2014 Summer season, Chinese and foreign airlines have executed 69 Air Service Agreements.

115个双边协定中

- 86个协定包含多家指定条款
86 ASAs with multiple airlines designation
- 27个协定采用开放的航线表
27 ASAs with open route schedule
- 21个协定货运三四种业务权不限
21 ASAs have introduced unlimited capacity entitlements for 3rd and 4th freedom traffic rights for all cargo services
- 8个协定开放货运第五业务权
8 ASAs have liberalized 5th freedom traffic rights for all cargo services
- 中美协定允设立货运枢纽，给予货运第七种业务权
ASA with U.S. has liberalized the 7th freedom traffic right

第二部分 (Part II)



目前，中国对外开放的航空口岸达55个，其中25个可起降747机型。

Now up to 55 Chinese airports are open to international and regional air services. Among them 25 are capable of accommodating B747 aircraft or aircraft of equivalent category.

第二部分 (Part II)



在市场准入方面，航空货运在开放第三、四、五种业务权的同时，也在个别双边航权安排中引入第七业务权。

In terms of market access, CAAC undertakes to gradually liberalize the 3rd, 4th and 5th freedom traffic rights for cargo transportation. In certain individual bilateral arrangements the 7th freedom traffic right has also been introduced for cargo hub operation.

第二部分 (Part II)



在运价管理方面，中方采取灵活开放的态度，可以应对方要求采用始发国原则或双不批准原则

In terms of tariff regulation, China takes an open and flexible attitude, and may adopt the principle of “country of origin” or “double disapproval” at the request of bilateral partners.

第二部分 (Part II)



- 在规范外方承运人设立办事处、汇兑及雇用人员等商务权利方面，中方采取符合国际惯例的普遍做法。

With regard to doing-business-rights of foreign airlines, China follows the international practice and is prepared to provide conveniences in terms of setting up representative offices, employing third country personnel, converting and remitting revenues, etc.



第三部分：发展中国国际航空货运的
政策思考

Part III Policy Reflections on China's
International Air Cargo Development

Policy Summery



2003年以来/Since 2003

2003年，中国民航在国际民航组织第五次全球航空运输大会上首次表明以“积极、渐进、有序、有保障”的方式开放我国国际航空运输市场的立场。从那时起，中国国际航空运输政策开始做出重大调整。

CAAC announced at the 5th ICAO Air Transport Conference in 2003 that China was to pursue international air transport liberalization in an “active, progressive, orderly and secured manner” , which marked CAAC’ s major adjustment of its international air transport policy.

第三部分 (Part III)



八项政策要点

CAAC' s international air transport policy adjustment is characterized by eight guidelines:

- 主动顺应全球国际航空运输市场开放的发展趋势

CAAC shall actively follow the international trend of air transport liberalization.

- 配合国家总体外交外贸政策，支持国家对外开放和经济社会发展目标

CAAC' s international air transport policy is to support China' s overall foreign policy and is meant to promote the nation' s open up initiative as well as its economic and social development goals

第三部分 (Part III)



- 兼顾国家利益、公众利益和行业利益

CAAC' s international air transport policy shall take into account national interest, interest of the general public and interest of the airline industry at the same time.

- 全力满足国家\地方外贸和旅游业发展对国际航空运输的需要

CAAC' s international air transport policy shall be decided to meet the ever increasing need of trade and tourism both in national and regional levels.

- 特别注意发展中国西部、东北部和中部对外航空联系，全方位加强国际航空运输互联互通

CAAC' s policy design should pay special attention to helping develop international air links in China' s west, northeast and central parts, so as to facilitate China' s international air connectivity in all directions.

第三部分 (Part III)



- 促进我国航空枢纽建设
CAAC' s international air transport policy should facilitate China' s air hub construction.
- 提升航空运输行业整体实力和竞争力
Such policy should be helpful to enhance international competitiveness of China' s airline industry.
- 追求合作共赢，不以中方航空公司的市场利益为政策的唯一考量
Such policy aims to achieve a win-win situation, and shall not take Chinese airlines' market interest as the sole consideration.

Challenges in China's Int'l Air Transport Development



中国民航在发展国际航空货运方面面临三方面的困难和挑战

Chinese airline industry is faced with threefold difficulties and challenges in the international air cargo transport development.

- 国内航空运输与国际航空运输发展不平衡问题突出，国际航空运输落后于国内航空运输。中国国内航空运输尚未完成放松管制。中国对于支持国际航空运输发展的配套政策尚未完全到位（自身因素）

There is an outstanding imbalance between China's domestic air transportation and international air transportation, with the latter lagging far behind the former in terms of capacity input and network development. Deregulation of domestic air services has not been finalized. Supporting policies to facilitate China's international air transport development are not fully in place yet.

- 基础设施的短缺不能满足国际航空运输快速发展的需要。2013年，24个机场的旅客吞吐量超过千万；约21个机场容量已饱和。其中以北京、上海、广州三大国际机场的问题最为凸出。（自身因素）

Infrastructure constraints become important impediments to the rapid growth of both domestic air transportation and international air services. In 2013, 24 Chinese airports have handled more than 10 million passengers each. Nearly 21 Chinese airports have become saturated in terms of capacity and landing slots. PEK, PVG and CAN are most severely affected.

- 对方或第三方所施加的不公平的政策环境带来的问题和挑战（外在因素）

Unfavorable policy environment of bilateral partners or third party countries may pose challenges to China's international air transport growth. For example, such unilateral measures as the ETS, visa restrictions by certain bilateral partners or third countries, may pose important barriers affecting continued growth of international air services.

第三部分 (Part III)



政策选择/Policy Choice

由于存在内在或外在的各种因素带来的困难和挑战，在资源和政策环境尚不完全具备或支持的情况下，中国民航在发展国际航空运输方面应继续坚持“积极、渐进、有序、有保障”的方针，根据市场发展需要和保障能力大小开放国际航权，特别优先考虑开放国际货运航权以满足消费大众和国家\地方经济发展的需求，并确保行业的健康发展

Owing to various difficulties and challenges from both within China and out of China, CAAC is left with not many policy options but to continue to uphold the existing policy to pursue international air transport liberalization in an active, gradual, orderly and secured manner with priority to international air cargo market access.

CAAC' s international air transport policy is tasked with the clear goal to meet the growing demand of the travelling and shipping public. and to support national and regional economic development. It is also important for the CAAC to ensure sound and sustainable development of China' s airline industry by promoting liberalization in accordance with the market demand as well as the resources and capacity available.



谢谢

THANK YOU