

# CHINA CIVIL AVIATION REPORT

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## Progression

China Enters a New Age of Development,  
the Eleventh Five-Year Plan

***RNP Navigation System Implemented at  
Lhasa, First in China***

***Jet Fuel Surcharge Extended  
Indefinitely***

***US Air Carriers Have to Wait for New  
Flight Right Negotiations***

***And More***



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Please contact:

**Eugene Reindel**

Senior Consultant

945 University Avenue, Suite 201

Sacramento, CA 95825 USA

011.916.568.1116

[ereindel@hmmh.com](mailto:ereindel@hmmh.com)



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# Contents

**Aviation Headlines** **2**



**Civil Aviation News** **4**

**Feature Article** **6**

**China's Tenth Five-Year Plan recap, and the future of aviation development**

**CAAC Corner** **11**

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**Publisher**  
Francis Chao

**Productions Director/Writer**  
George Chao

**Chief China Correspondent**  
Lili Wang

**China Staff Writer**  
Jing Fang

**Layout and Graphics Design**  
Zhang Lin  
Emeng Hu

**Editor**  
Bill Wine  
**Technical Editor**  
David Rodenhaver

To contact CCAR or Subscribe, please contact: [Info@ChinaCivilAviation.com](mailto:Info@ChinaCivilAviation.com) or visit: [www.ChinaCivilAviation.com](http://www.ChinaCivilAviation.com)

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# Aviation Headlines

March 2006



## AVIC I to Produce A320 Doorframes

The Shanghai Aircraft Manufacturing Factory signed a contract with European aircraft maker Airbus to produce the door frames of the front cargo compartment for the A320 series airlines on February 20th. The contract was established between the EU and the China Aviation Industry Corporation (AVIC I), and stipulates that the Shanghai Aircraft Manufacturing Factory will manufacture 1,000 doorframes at an estimated USD16-million. The output is specified at a maximum of 16 door frames per month.

This is the first cooperative production project between the Shanghai factory and Airbus. Subcontract operations at the Shanghai Aircraft Manufacturing Factory was initiated in 1979, and the factory has produced parts for companies such as Boeing.

Airbus has a long history of cooperative projects with China. Since 1990, Airbus has partnered with many of AVIC I's subsidiary factories in the production of various aircraft parts.

## Feilong Special Aviation Company Becomes First GA Operator to Pass CCAR Part 135

On February 21st, the CAAC issued the first certificate granting a general aviation company the right to operate passenger and cargo transport for profit. Gao Zonglu, Vice Director of the Northeast China Regional Administration of the CAAC, awarded the first CCAR Part 135

operating certificate to Yin Shijun, General Manager of Feilong Special Aviation Company. CAAC Minister Yang Yuanyuan congratulated the Feilong Special Aviation Company for completing the CCAR Part 135 operating certificate examination.

The CCAR Part 135 grants general aviation operators the right to operate and manage small-sized business transport aircraft, and is a giant step in further opening the door for general aviation operators in China. The regulation pertains to scheduled flights of aircraft and helicopters with fewer than 19 seats, as well as unscheduled flights of cargo planes and helicopters with fewer than 30 seats.

Feilong Special Aviation Co. is located in Harbin, the capital of the northeastern Heilongjiang Province, and was founded in 1981. It became the first local general aviation company with the approval of the CAAC, and currently operates 49 aircraft.



## Jet Fuel Surcharge Extended Indefinitely

China's National Development and Reform Commission announced on February 17th that the airline jet fuel surcharge will be extended a second time to offset continued high fuel costs. The newest extension retains the original provisions, but has no definite time limit.



Because of the continued increase in international oil prices and its negative effect on airline profits, China issued the original jet fuel surcharge in June, 2005. The regulation allowed all local carriers to impose a fuel surcharge on domestic routes between August 1st and December 31st, 2005. In late November, the NDRC and CAAC issued the first extension of the regulation, effective until March 31st, 2006.

The jet fuel surcharge for flights covering a distance of less than 800 kilometers is RMB20, while passengers on flights of over 800 kilometers are subjected to a surcharge of RMB40 per passenger.

## China Releases 2005 Airport Statistics

The Planning, Development and Finance Department of the CAAC

released its report on the status of China's airport infrastructure in 2005 on February 27th, outlining the major statistics of China's airport sector last year.

The report shows that, at the end of 2005, there were 135 certified operational airports and 133 cities opened to scheduled flights. The new cities include Anshun, located in the Guizhou Province; Yuncheng, of Shanxi Province; Manzhouli, of the Inner Mongolia Autonomous Region; and Zijiang, of the Hunan Province. In addition, the airport recovery program in 2005 saw the reopening of Beijing's Nanyuan Airport, Shanxi Province's Datong Airport, and the Qingyang Airport in Gansu Province.

In 2005, China's airport infrastructure saw a traffic throughput of 284.351-million person time, an increase of 17.5% over that of 2004. Of the total, 253.795-million person times were attributed to domestic travel, while 30.556 were on international flights. Collectively, the airports fulfilled a cargo/mail throughput of 6.331-million tons, an increase of 14.6% over the previous year. Total takeoffs and landings for 2005 was 3.057-million.



Of the 135 airport facilities, 42 facilitated a passenger throughput of over 1-million person times, while seven airports exceeded the 10-million mark. The three busiest facilities remained Beijing, Shanghai

and Guangzhou, occupying 37.3% of the total passenger throughput.

## Asia-Pacific Countries Gather to Discuss Aviation Security

With the current rate of expansion in the Chinese aviation sector, aviation security management has steadily emerged as an important topic of focus. On February 28th, about one-hundred participants from the Asia Pacific region, including Vice Minister of the CAAC, Wang Changshun, met at the 8th FAA/Asia-Pacific Bilateral Partners Dialog in Shanghai to exchange ideas about increasing the aviation safety management of the region.

Vice Minister Wang stated that the rapid development of China's civil aviation transport brings forth serious challenges in aviation security management, and that it will take some determination to reach the international standard. The current rate of sector development has made it difficult to recruit experienced personnel such as pilots and air crews to keep up with the equipment growth.

The premise of the FAA/Asia-Pacific Bilateral Partners Dialog is to create a platform for active discussion on improving aviation security. Participating members are countries within the Asia Pacific region that have signed bilateral airworthiness agreements with the FAA. China was inducted into the group in October, 1991, after the signing of a limited bilateral airworthiness agreement with the US.

This is the first meeting to be held in China.



# Civil Aviation News



## RNP Navigation System Implemented at Lhasa, First in China

On March 1st, an Air China - Southwest Branch Boeing 757-200 successfully implemented a Required Navigation Performance (RNP) system at Tibet's Lhasa Airport. According to CAAC officials, the RNP technology is a very compatible system to navigate the complicated terrain around airports such as Lhasa. Upon successfully introducing the RNP navigation system in Tibet, the CAAC will establish an RNP flight procedure and airworthiness certification.

The Required Navigation Performance technology utilizes the aircraft's onboard navigation equipment and GPS, allowing crews to navigate difficult departures and approaches without the need to reference ground-based navigation aids.

The successful implementation of RNP is the culmination of a two-year project among the CAAC, Boeing, and Air China. For the past 41 years, Lhasa airport has only been able to support one-way departures, but with the introduction of the RNP system,



the airport can now institute two-way runway operation as well as night flying.

Upon certification approval, the Southwest Branch of Air China is planning to initiate night flights at Lhasa Airports. Eventually, all aircraft flying the Tibet air route will have to be equipped with the RNP navigation system.

On March 20th, a new regulation to relax China's domestic air route and flight management regulations will be put into effect. The CAAC recently announced that the new Regulation on China Civil Aviation Domestic Air Routes and Flight Operation Permission has been passed and will effectively allow all airlines and airports to negotiate and arrange new air routes individually, without clearance from the CAAC. An examination committee will be established to review newly established air routes, but future regional route negotiations can now be initiated directly between airports and airlines. The CAAC did add, however, that certain airports with tight resources or extremely large flight flows will still need to obtain CAAC approval.

The new regulation will not have restrictions on the number of airlines and routes that an airport can



accommodate, but the top 20 airports in the country will still need to receive CAAC approval.

Aimed at encouraging leading enterprises to focus on alternative airports, the new regulation is intended to increase sector security, service, and development of the industry by promoting competition and new route formulation.

This is part of the CAAC's ongoing effort to gradually relax permission management for domestic route formulation.

### **New Shanghai Terminal Control Facility Approved**

At the Shanghai Terminal Control Area Airspace Plan Examination Meeting on February 10th, the Air Traffic Management Bureau (ATMB) of CAAC announced that during the "Eleventh Five-Year" Plan, a new civil aviation terminal control center would be established in Shanghai.

According to the national unified plan for aviation development over the next five years, Shanghai area airports, including Hongqiao, Pudong and Hanzhou, are scheduled to establish a total of eleven new runways. The current CAAC air traffic management for the area will not be

able to handle the new influx of traffic. Thus the ATMB of CAAC, along with the East China ATMB, will establish a new terminal control center in the region to optimize airspace structure and resource deployment. The new air traffic management network will be established with Shanghai as the point of focus.

A recent East China ATMB report shows that factors constricting aviation growth in the area include airport distribution, air transport flow and airspace structure in the Shanghai, Hangzhou and Ningbo Airports.

The new civil aviation terminal control center was presented to ATMB's expert panel on February 10th, in Nanchang, and they approved, and put forth suggestions to further develop, the plan.

### **Wenshan Puzhehei Airport Undergoes Final Inspection**

The Wenshan Puzhehei Airport in Yanshan County, Yunnan Province, is undergoing its final certification and approval process before officially opening for operation. Construction of the facility began on April 28th, 2004, at an estimated RMB262.67-million provided by the CAAC and the Yunnan Provincial government. The airport is built according to 3C

regulations, but is expected to be upgraded to a 4C facility in the future. Wenshan Puzhehei Airport features a 2,400-meter runway (45 meters wide) and a 3,200-square-meter terminal building, and is expected



to accommodate up to 150,000 passengers per year in 2010.

This past January, the Flight Calibration Center of CAAC successfully completed Wenshan Puzhehei Airport's flight calibration procedure. Currently, the facility is preparing for a CAAC test flight in March. If successful, the facility will obtain the Airport Operating License and be permitted to open for operation.

Presently, Wenshan Puzhehei is making final adjustments to its security inspection procedures, baggage consignment and entrance passageway apparatus. Upon completion, Wenshan Airport will be the 11th civil airport operating in the Yunnan Province.

## **News Briefs**

**February 14th** – Shandong Airlines received approval from the National Development and Reform Commission to purchase six new Boeing 737s. The airline says that they expect delivery on the six new aircraft between 2007 and 2008.

**February 17th** – The CAAC has announced that it will award the second established Chinese-Foreign joint venture, Great Wall Airlines, a Public Air Transport Enterprise Operating License. Headquartered at Shanghai Pudong, the new airline is expected to launch early next year.



# China's Tenth-F

Written by: George Chao

Chinese aviation development is measured in half-decades. Since the inception of the “Five-Year Plan” ideology over fifty years ago, every half-decade has been a time of reflection and planning for the next five years in development. The idea of continual progress is at the core of the “Five-Year” program, and with the end of 2005 marking the conclusion of the “Tenth Five-Year Plan,” let’s revisit the past five years of Chinese civil aviation development and look into what’s in store for the next half-decade.

From 2000 to 2005 (the Tenth Five-Year Plan period), the Civil Aviation Administration of China (CAAC) had three fundamental goals: to assert China as a great civil aviation nation; to focus on the keys to development and growth; and to

establish reforms which will bring the industry on par with international standards. While five years may not be long enough to complete all the tasks on the “to-do” list, it is enough time to carve out significant progress, and guide the industry in the right direction for future progress.

The CAAC recently published final statistics of Chinese civil aviation growth during the last five years, and judging by the stats, it is easy to see that the CAAC’s determination to establish China as one of the premier aviation nations has paid off. In the Tenth Five-Year Plan, passenger and mail cargo turnover increased over 113% from the previous five-year plan, with total passenger and cargo also experiencing a staggering increase of 105.7% and 91.2%, respectively.

One of the goals set in 2000 for the next five years of aviation development in China included finding and focusing on the keys to development and growth, which the CAAC carried out in the form of new equipment and facilities. In the last five years, Chinese civil aviation has added a fleet of 336 aircraft, increasing its total fleet number to 863 aircraft. Subsequently, RMB 94.7-billion in total investments was utilized in new airport construction and existing facility renovation, bringing the total number of airports at the end of 2005 to 135 facilities. The CAAC, however, did





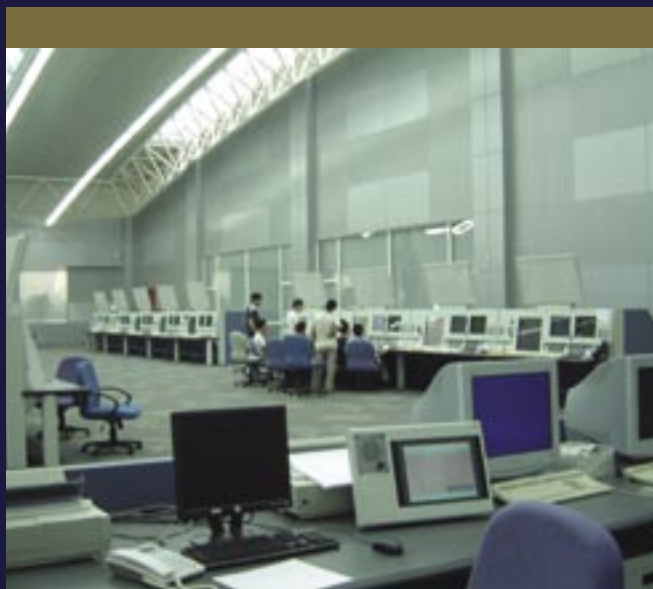
# Five Year Plan recap, and the future of aviation development

not stop at new planes and airports. One of the crowning jewels of the Tenth Five-Year Plan was establishing three state-of-the-art regional ATC Centers in Beijing, Shanghai and Guangzhou, and then restructuring the air traffic management through the facilities to create a unified ATC network. With new aircraft and support structures in place, Chinese civil aviation managed to log over 10.43-million flight hours, an increase of over 70% from the previous five-year plan.

“Reform” was one of the most utilized buzzwords of the Tenth Five-Year Plan, and it showed up in all aspects of Chinese aviation, from airline operations to investing possibilities. System reform and a favorable attitude towards investment dominated the last half-decade,

from private airlines being allowed to establish themselves amongst state-owned giants such as Air China and China Eastern, to the restructuring of the CAAC management system and everything in between. The dynamic characteristic of the Chinese aviation sector often moved too fast for even many insiders to follow. One of the most significant reforms of the past five years was the redistribution of all airports to local government jurisdiction, with the exception of Lhasa, Tibet and Beijing Capital Airports. The results of this reform are still felt today, as many local governments look to turn their local airport into the next big revenue generator. Many reforms with slightly less worldwide implications were also passed in the Tenth Five-Year Plan. For example, the CAAC issued the reform to give airlines the power to independently confirm ticket prices--well, kind of. The airlines now have the power to set their own prices--granted, however, that it's marked down within the range of 25-45% from a nationally benchmarked price set by the CAAC. However, to avoid the unnecessary undercutting of prices, low price fares and tourism routes are still governed by CAAC-set prices.

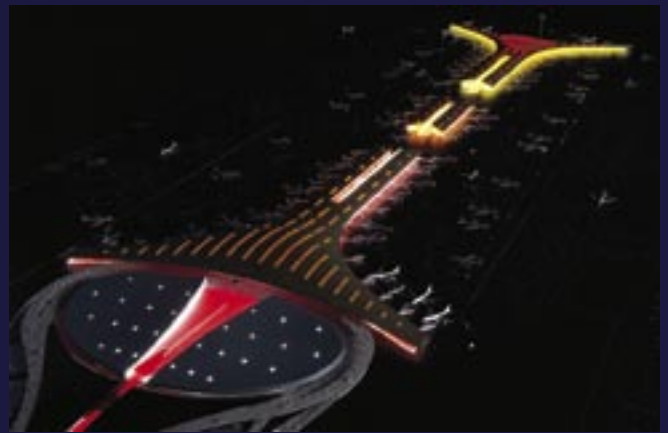
The numerous reform programs in the previous five-year plan were part of a greater goal to



establish China as one of the premier aviation nations in the world. But the CAAC understood that in order to be classified as an ICAO Class I nation, it would take more than an internal adherence to the ICAO standard. During the Tenth Five-Year Plan, Chinese civil aviation took a welcome approach to international cooperation and successfully signed new bilateral air agreements with 42 countries, increasing the total number of bilateral air agreements to 98. China also relaxed its flight right policies, encouraging international operations within its borders. The highlight of China's new flight right policy was the installation of new fifth flight freedom rights in Haikou, Nanjing and Xiamen. However, perhaps the most influential international policy revision came in mid-2002, when the CAAC announced the New Regulation on Foreign Investment in Civil Aviation policy, which greatly relaxed foreign investment regulations. In the two-and-a-half-year period following the policy revision, a total of approximately USD 2.35-billion in international investments has been injected into the Chinese civil aviation sector.

### **The next chapter in civil aviation development**

The Tenth Five-Year Plan planted the seed for tremendous growth, as evidenced by the record increases in China's aviation statistics. It seems that China has made significant strides in its vow to become one of the world's great aviation nations. However, as the transition to the Eleventh Five-Year Plan (2005-2010) is realized, the CAAC



has announced that it will embark on a different focus for the upcoming half-decade.

While the goal of becoming a great aviation nation remains the same, the means of attaining the goal has evolved. In the Eleventh Five-Year Plan, the CAAC has outlined a plan to utilize science and technology as the driving force of aviation growth in China. According to the CAAC, the new five-year plan will utilize “Modern communications, accurate location, computer networks and computer-assisted decisions, and advance along the way of integration and innovation, introduction and digestion and renovation, will allow Chinese and foreign passengers to enjoy more convenient, safe and comfortable air travel.”

The CAAC has publicized that the upcoming five-year plan will include a resolute plan to establish a new civil aviation air transport system utilizing state-of-the-art technology, updated air traffic management ideas, and a new air traffic management system highly capable of adapting to different conditions and situations in the aviation sector. The new air traffic management system will reportedly integrate air traffic information with



weather conditions for real-time information transfer. Acquisition of equipment and upgrading/constructing new facilities remains a top-notch priority, and airworthiness and adherence to the international ICAO standard continues to be a focus.

Although the goals have been presented, successfully getting to the prize may require more than just solid planning. The CAAC has noted several international factors that may pose a hindrance to the development of Chinese aviation. Just as the rest of the world continues to keep an eye on oil prices, China is also closely monitoring oil price fluctuations. At the same time, properly trained personnel--such as pilots and air traffic controllers--and lower-level management availability are also topics of much discussion. The rapid development of the civil aviation sector brings forth a demand for qualified personnel that the current local training facilities are unable to support. And although China has begun to seek the help of international training facilities, a new network of training programs must be established to ensure continued growth.

Despite the CAAC's worries, the next few years is shaping up to be a very dynamic period for aviation development in China. As the international presence increases, the structure and operation of the industry should continue to be refined. The Eleventh Five-Year Plan will also witness China spotlighted at the center of the world's attention, as events such as the Olympics in Beijing, the Shanghai World Expo, and the Guangzhou Asia Games all place the focus on China's recent economic boom. How this will eventually play out, it's difficult to predict; but based on the momentum of the Tenth Five-Year Plan, China has a very solid foundation to achieve its goals.

## Market Stats:

Tenth-Five Year Plan Average (2000-2005)

Increase from Ninth-Five Year Plan (1995-2000)

**Total passenger and mail/cargo turnover – 26.13 billion ton-km 113.3%**

**Total Passengers – 138 million 105.7%**

**Total Cargo – 3.067 million tons 91.2%**

**Total Flight Hours – 10.43 million 70%**

**GA Flight Hours – 336,000 59%**

**Number of Aircraft in Operation – 863 +336**

**Fixed Asset Investment – RMB94.7 billion +RMB3 billion**

**Oil Storage Capability – 1.66 million cubic kilometers**

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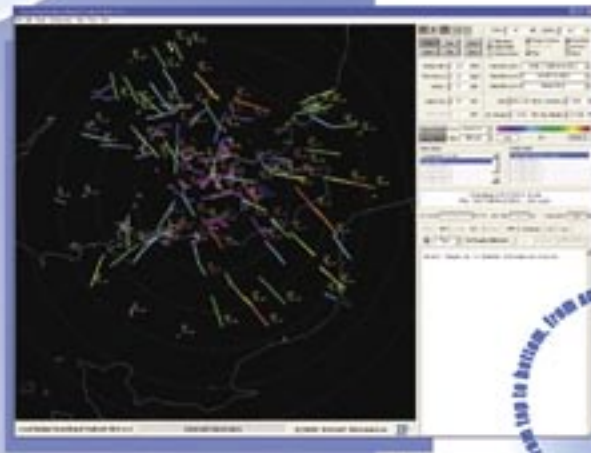
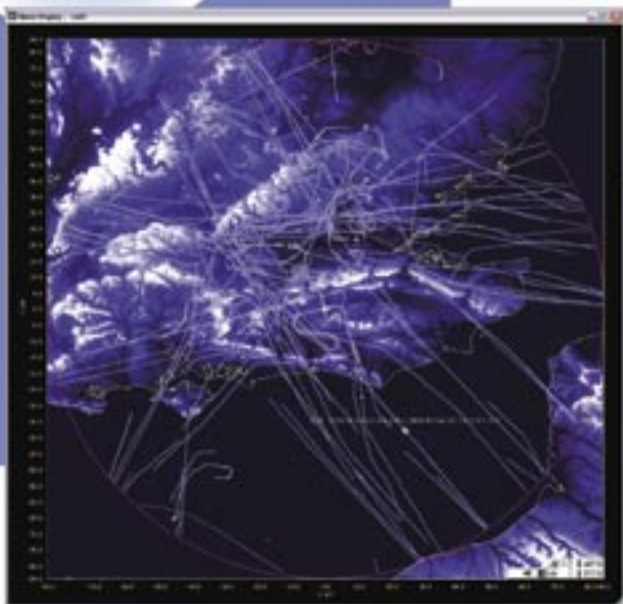
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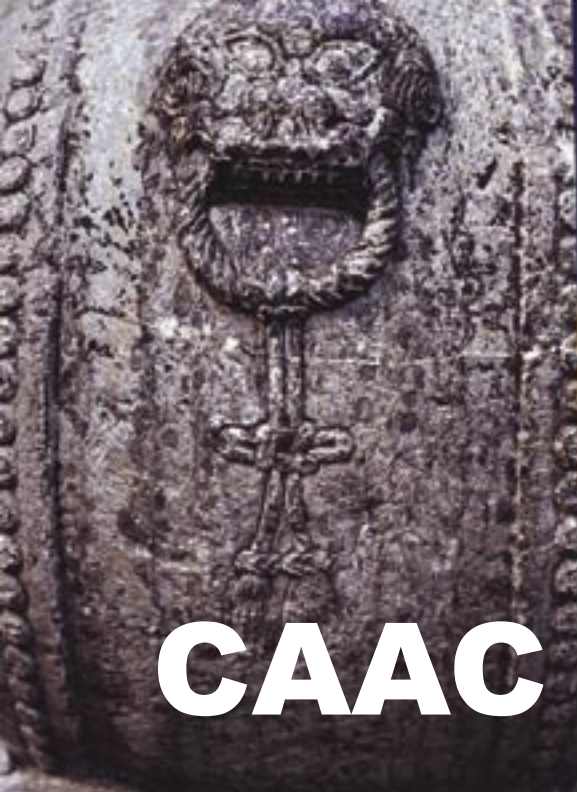


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# CAAC Corner

## US Air Carriers Have to Wait for New Flight Right Negotiations

The CAAC has announced that the China-US aviation flight right negotiations, originally planned to take place in January, 2006, will be delayed until further notice. A CAAC official commented, "We don't know how long it will be delayed. However, the opening of new flight freedoms with the US is currently more urgent."



To date, five US airlines, including United and UPS, have used up all available flight right expressed in the 2004 US-China flight right agreement. On the contrary, Chinese carriers have yet to utilize half of the allotted flight

rights established in 2004 due to an insufficient fleet and limited air routes. Although the 2004 aviation agreement gave the US airlines unprecedented aviation freedom within China's borders, it quickly became apparent that the regulation revision would not completely satisfy US demand for China air routes.

In order to address this issue, the CAAC has reported that it will contact each carrier in order to bring more domestic airlines into the China-US flight right negotiations.

## ATMB Outlines Focus for Improving China's Air Traffic Management

In an effort to increase air traffic management in Chinese aviation, the Air Traffic Management Bureau of the CAAC has announced that it will put into effect the "Systematic Promotion of Study and Applications of New Technology" as the core of their future

aviation management strategy.

On February 8th, the directors of the Air Traffic Management Department and the Airspace Department of the ATMB met in Nanchang to discuss cooperation of the two departments in systematically promoting studies and applications of several new technologies in order to establish new regulations and progressive technology. The two departments touched on the terminal control and air traffic management technology program for Beijing, Shanghai, and the Pearl River Delta, agreeing that airspace organization and resource deployment must be optimized.

The two ATMB parties agreed that, by using techniques such as multi-runway operation, runway interval landing, ATC data chain clearance and arrival and departure taxis, both runway and terminal area capacity would be increased. It was also reported that a cooperative program will be installed to continue to develop radar control interval application. Flight information automation, as well

as the implementation of China's World Geodetic System 1984 (WGS-84), will be subject to further research in the future. Lastly, regional navigation technology will be developed and adopted in the Beijing-Shanghai, Yabulai-Urumqi, and Chengdu-Lhasa air routes.

Members of the ATMB feel that the research and application of the new ATC ideas and technologies will have a significant effect in improving air traffic management services and the general development of the civil aviation sector.

## CAAC Plans to Extend Fifth-Freedom Right to Hong Kong

The CAAC has announced that it will soon implement a number of "progressive liberalization measure" during the "Eleventh Fifth-Year" plan, including offering fifth-freedom right to Hong Kong-



based airlines to a number of mainland Chinese cities to ensure Hong Kong's position as a pivotal aviation hub.

Statistics show that 70% of the cargo exported to Europe and America via Hong Kong originated from China's Pearl River Delta area. The result of new fifth-freedom right will

not only allow Hong Kong to maintain its international air cargo transport hub position, but also promote future air transport development.

Hong Kong-based airlines including Cathay Pacific and Dragon Airlines have already applied with the CAAC for fifth-freedom right.

Hong Kong International Airport remains one of the most important international passenger and freight hubs in the world. And while the mainland aviation industry continues its rapid expansion, the majority of the development is still in domestic routes. With the new fifth-freedom right, foreign airlines entering China will be able to de-plane at designated airports in China at the same time that new passengers and cargo board, and then depart for Hong Kong.

## Flight Calibration Center of CAAC Introduces Two New Citations

On February 17th, the Flight Calibration Center of CAAC acquired two Citation 560XLS jets equipped with advanced calibration equipment to be put into operation. The two jets will join the CAAC's previous fleet of six calibration aircraft, including two Citations and four King Air Turboprops. The jets will be used for calibration and navigation work in over 150 airports, including domestic-civil, military-civil and Hong Kong/Macao airports.

In order to ensure the accuracy of



airport navigation equipment, that equipment is calibrated at least once a year. With the current rate of growth, the CAAC is anticipating a drastic increase in the demand of calibration aircraft. In 2002, the total flight hours of the Flight Calibration Center of CAAC was 2,600; but in 2005, the flight hours jumped to 3,700. The Flight Calibration Center's bottom line has also witnessed a drastic jump. The Center has witnessed profit increases of over 15% per year, and held over RMB70-million in capital at the end of 2005.

Navigation equipment calibration is undoubtedly more dangerous than normal flight. The first seven minutes after takeoffs and last eight minutes before landings are the most critical in navigation equipment calibration, yet the most dangerous in terms of operating the aircraft. Moreover, China is also home to some of the most difficult airports to operate into or out of, such as Lhasa, Chamdo Bangda, Jiuzhaigou, and Diqing Airports.

Panyi, the Director at the Flight Calibration Center of CAAC, said that, during the "Eleventh Five-Year Plan," the center will initiate five new calibration aircraft equipped with the latest calibration equipment.






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