

中国航空工业要览



中国航空工业要览

SURVEY OF CHINESE
AVIATION INDUSTRY

2004

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内 容 提 要

2004年版《中国航空工业要览》是一部比较全面、系统地介绍中国航空工业及其飞机、发动机、机载设备和专业工具制造企业以及研究所、高等院校、专业公司、沿海外向型企业、中外合资企业、民营航空企业以及部分外商企业的概况、技术能力、主要产品、合作意向、通信联络等商务资料的中英文对照系列工具书。本书内容翔实、丰富,并附有部分单位的产品图片介绍,特别有助于国内外工商界及有关人士了解中国航空工业及其企事业单位信息,与之建立经济技术合作关系。

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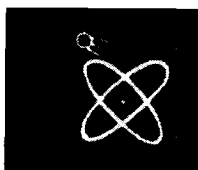
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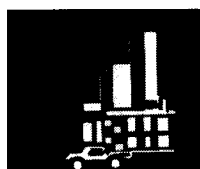
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前 言

FOREWORD

《中国航空工业要览》自 1989/1990 年版至 2002 年版出版发行以来,受到国内外航空界及有关部门的重视和欢迎,对反映中国航空工业企业事业单位的实力,提高航空企事业单位的知名度,增进外商与企业的业务联系与技术交流,起到了积极的作用。

《中国航空工业要览》2004 年版是反映中国航空工业最新面貌的面对国内外发行的书籍。新版《中国航空工业要览》在保持原有栏目设置的基础上,又新增了民营航空企业。对各企事业单位的情况介绍和各种数据也进行了全面的更新,更便于进行国际合作与交流,使之更趋完善。

本书在修订出版过程中得到了有关领导同志和各部门、各单位的大力支持,在此一并表示感谢。

Since the publication and distribution from the first edition of 1989/1990 to the year 2002 edition, this book, *Survey of Chinese Aviation Industry*, has been well received and highly valued worldwide by the aviation circle, as well as related industries and departments. It has provided a positive contribution in reflecting the existing strength of the Chinese aviation industry and its enterprises and institutions, in promoting their popularity to the public, and in enhancing their business links and technical exchanges with foreign firms and organizations.

The new edition of the year 2004 of *Survey of Chinese Aviation Industry* reflects the overall view of the Chinese aviation industry, and is distributed both at home and abroad as usual. This new edition keeps all columns, and introduces more non-government ran aviation enterprises. All introductions and data related to enterprises and institutions are updated. It becomes more useful and convenient for international cooperation and exchanges.

During the process of revising and publishing, strong supports have been received from related leaders, departments and units. Therefore, we would like to take this opportunity to express our sincere appreciation for their help.



中国航空工业概况

概 况

中国航空工业是中华人民共和国成立以后,在原来极其薄弱的基础上建立和发展起来的。经过 50 多年的建设,中国航空工业从小到大,从修理到制造,从仿制到自行研制,逐步形成了门类比较齐全,拥有科研、生产、教育等各个方面的工业体系,已成为中国国民经济中技术密集、基础雄厚的新兴产业之一。

中国航空工业的产品主要有军用飞机、民用飞机、战术导弹、航空发动机、机载设备以及非航空民用产品。

军用飞机包括歼击机、强击机、轰炸机、直升机、侦察机、教练机和无人驾驶飞机等。歼击机是中国航空工业产量最大的飞机品种,从第一代歼 5、歼 6,发展为第二代歼 7、歼 8 及其系列改型飞机,目前,第三代歼击机已进入装备系列;强击机有强 5 及其多种改型飞机;轰炸机有轰 5、轰 6、水轰 5 及改进改型飞机;歼击轰炸机有 FBC-1(飞豹);教练机有初级教练机初教 5、初教 6 和喷气教练机歼教 5、歼教 6、歼教 7、轰教 5、教 8 和通过国际合作的 K8 等;无人驾驶飞机主要有靶机和无人驾驶侦察机。中国航空工业还研制生产了多种型号的空空导弹、海防导弹和空地导弹。这些产品主要装备中国空军和海军。

民用飞机有小型多用途机运 5、运 11、运 12、农 5,中短程旅客机运 7、新舟 60、涡扇支线客机 ERJ145 以及正在研制的 ARJ21,干线客机 MD-82、MD-90,中型运输机运 8,直升机直 5、直 8、直 9、直 11 及其改型机,以及超轻型飞机蜜蜂 2 号、蜜蜂 3 号、蜻蜓 5 号、蜻蜓 5 甲等,部分满足了国内专业航空和民航运输的需要。

除飞机和导弹外,中国航空工业还研制生产了航空发动机和机载设备。先后试制生产了活塞式、涡轮喷气式、涡轮风扇式、涡轮螺旋桨式和涡轮轴式发动机 25 种,装备了本国生产的各种飞机。机载设备已有 3000 多种定型生产,主要有飞机控制系统、武器火控系统、大气数据计算系统、座舱显示设备、仪表、传感器、电源系统、液压操纵系统、燃油供输系统、降落伞装备以及一部分元器件,基本上满足了国内飞机配套的需要。

改革开放以来,中国航空工业调整产品结构,利用航空技术优势,积极开发民用产品,将航空发动机改装为工业燃气轮机,为其他工业部门研制生产各种仪器、设备和关键零部件,还生产了汽车、摩托车、汽车零备件、新型纺织机械、轻工机械、环保设备和工业燃气轮机等 5000 多种产品。

随着生产的发展,中国航空工业已拥有一大批专业齐全、设备良好的航空企业和具有较强实力的航空科研机构。航空企业包括企业集团,飞机、发动机、机械设备公司和工厂以及锻铸、工具及机械制造工厂等。航空科研机构有中国航空研究院和一批专业设计研究所,可以进行飞机、发动机、仪表、电器、附件、武器的设计研究以及空气动力、结构强度、飞行、救生、光学机械、工艺、材料、计算技术、自动控制等方面的应用研究。近几年,科研试验手段进一步得到充实,改造和新建了先进的飞行试验实时数据管理系统、全机疲劳协调加载系统、发动机部件试验测试系统,以及各种类型的仿真试验设备和大型计算机等,基本能够适应新机研制和开展科学研究的需要。

人才培养是中国航空工业迅速发展的基础。北京航空航天大学、西北工业大学、南京航空航天大学、沈阳航空工业学院、南昌航空工业学院和郑州航空工业管理学院等 6 所高等院校,3 所大、中专学校和一大批技工学校作为航空专业院校,为航空工业的发展输送了大量人才。同时全国各类高等院校也为航空工业的发展输送大量人才。

中国航空工业在独立自主、自力更生的基础上,十分重视国际间的合作与交流,大力发展进出口贸易和技术引进工作。在 1979 年成立了中国航空技术进出口总公司,专门经营出口中国生产的飞机及其

Survey of the Chinese Aviation Industry



The Chinese aviation industry was set up on a very weak foundation left over at the founding of the People's Republic of China. Through its construction of more than 50 years, the Chinese aviation industry has grown from small scale to large scale, from repair to manufacture, and from license production to independent development. It has become one of the well-based and high-tech and burgeoning industries in the national economy, with a fairly comprehensive range of different disciplines and systems in R&D, production and education.

The main products of the Chinese aviation industry include: military aircraft, civil aircraft, tactical missiles, aero-engines, airborne equipment and non-aero civil products.

Military aircraft include: fighters, attack aircraft, bombers, helicopters, reconnaissance aircraft, trainers and UAVs. In terms of output, the fighters belong to the main variety of the Chinese aviation industry, such as J5 (or F-5) and J6 (or F-6) in the past, and they are replaced by the newly developed J7 (or F-7), J8 (or F-8) and their modified versions. Attack aircraft include Q5 (or A-5) and its derivatives. Bombers include H5 (or B-5), H6 (or B-6), SH5 (or water-based B-5) and their derivatives, and the fighter-bomber FBC-1 ("Flying Leopard"). Trainers include primary trainer CJ5 and CJ6, and jet trainers JJ5, JJ6 (or FT-6), HJ5 (or BT-5), JJ7 (or FT-7), J8 (or T-8) and K8, etc. Pilotless aircraft include drones and pilotless reconnaissance aircraft. The Chinese aviation industry has also developed and produced many types of air-to-air missiles, coastal defense missiles, and air-to-surface missiles. Most of these products have been put into service to the Air Force and Navy of PLA.

Civil aircraft include: light weight multipurpose aircraft Y5, Y11, Y12, and N5; short/medium range passenger airplanes Y7, MA-60, ERJ145, and ARJ21 (under developing); trunk airliners MD-82 and MD-90 co-produced with the partner from U. S. A.; medium sized transport aircraft Y8; helicopters Z8, Z9, Z11 and their derivatives; and ultralight aircraft Mifeng2, Mifeng3, Qingting5, Qingting5A, etc. These civil aircraft have partially met the demands of domestic general aviation and civil air transportation.

The Chinese aviation industry has also developed and manufactured aero-engines and airborne equipment, including 25 models of aero-engines in piston, turbojet, turbofan, turboprop or turboshaft type, as well as over 3,000 kinds of airborne equipment, mainly consisted of flight control systems, fire control systems, air data computer systems, cockpit display systems, instruments, transducers, power supply systems, hydraulic systems, fuel systems, parachutes and some elements. These aero-engines and airborne equipment have basically met the needs of the home-made aircraft.

Since reform and opening up, the Chinese aviation industry has adjusted its product structure and actively developed civil products with its technical superiority. It converted some versions of aero-engines into industrial gas turbines. It developed and produced many kinds of instruments, equipment, and critical parts and components for other industries. It has produced over 5,000 kinds of civil products, such as automobiles and motorcycles and their parts and components, new types of textile machinery and light industry machinery, environmental protection equipment, and industrial gas turbines, etc.

The Chinese aviation industry has set up a number of enterprises and research institutes, which are well-equipped and complete in various specialties. The aviation enterprises include industrial groups, aircraft and aero-engine and airborne equipment companies and factories, as well as forging and casting, tooling and machinery factories. The research institutes include the Chinese Aeronautical Establishment (CAE) and a number of specialized design and research institutes for the design and development of aircraft, engine, instrument, electrical equipment, accessories, weaponry, and for applied research in aerodynamics, structural strength, flight, life-saving, optical apparatus, manufacturing technology, material, computing technology and automatic control, etc. In recent years, the test means have been improved, and some were updated or built, such as advanced flight test real-time data management system, coordinated loading system for fatigue test of complete aircraft, engine component test system, various simulation equipment, and mainframe computers, etc.; they have basically met the needs of new aircraft development and R&D.

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中国航空工业概况

配套的发动机、机载设备、地面设备以及各种民用机电产品,还承包国外飞机、发动机的零部件生产,并在深圳、珠海、广州、厦门、福州、上海、北京、杭州、哈尔滨、大连等地设立分支机构,在 30 多个国家和地区设立了代表机构,已同 100 多个国家和地区建立了贸易和合作关系;已经向 10 多个国家出口了飞机,近年来,又出口了技术含量更高的飞机生产线和相关制造技术;还有一批发动机、机载设备也已销往国外,有 15 家工厂为国外 20 多家厂商生产飞机、发动机零部件,如飞机的机头、各种舱门、垂直尾翼、副翼、中央翼,发动机的压气机盘、涡轮盘、齿轮、机匣、导向器叶片等。这些零部件质量优异,受到国外厂商的好评。

外贸出口的发展,促进了技术引进和国际科技合作。中国航空工业陆续从 10 多个国家引进了近 40 项重要的先进技术项目,例如,从英国罗·罗公司引进了斯贝发动机制造技术;从法国宇航工业公司和透博梅卡公司引进了“海豚”直升机及其发动机制造技术;与美国麦克唐纳-道格拉斯公司、波音公司合作生产 MD-82、MD-90 飞机;与法国、新加坡合作研制生产 EC120 直升机,与美国西科斯基等合作生产 S-92 直升机;还与其他一些国家的公司合作开发新的民用飞机和进行现有中国飞机的改型研制。此外,还引进了一批机载电子设备、先进的导航设备等。这些引进,对交易的双方都是有利的。在国际科技合作交流方面也得到了加强,中国航空工业已先后与德国、瑞典、法国、俄罗斯以及意大利等国的航空科研机构、大学建立了合作关系,推动了双方科学研究工作的开展。

根据九届全国人大确定的国务院机构改革方案,1999 年 7 月 1 日,在原中国航空工业总公司(AVIC)基础上组建的中国航空工业第一集团公司(AVIC I)和中国航空工业第二集团公司(AVIC II)在北京正式成立。航空工业进入了一个新的发展时期。

当前,中国航空工业在改革、开放政策的指引下,正在进一步加强与世界各国航空界的交流与合作,不断提高航空科学技术水平,保持高技术发展的势头,提高各种军用飞机的性能,研制各种民用飞机,加快直升机的产业化,提高市场竞争能力,继续大力发展和出口航空产品以及机电产品,发展前景将越来越广阔。

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There are 6 aeronautical universities or colleges, including Beijing University of Aeronautics and Astronautics (BUAA), Northwestern Polytechnical University (NPU), Nanjing University of Aeronautics and Astronautics (NUAA), Shenyang Institute of Aeronautical Engineering (SIAE), Nanchang Institute of Aero-Technology (NIAT) and Zhengzhou Institute of Aeronautics (ZIA), etc. Besides, there are 3 institutions of higher education, secondary specialized schools and a large number of technician schools. They have trained a great number of qualified personnel for the development of Chinese aviation industry. At the same time, many universities and colleges nationwide have educated a great number of intelligent persons for Chinese aviation industry.

On the basis of independence and self-reliance, the Chinese aviation industry attaches great importance to international cooperation and exchange, and vigorously develops export trade and technology import. The China National Aero-Technology Import & Export Corporation (CATIC) was founded in 1979, and it has been engaged in exporting the Chinese-made aircraft and engines, airborne equipment, ground equipment and various kinds of electromechanical products. It has also undertaken subcontract production projects to supply parts and components for foreign aircraft and aero-engines. CATIC has set up its domestic subsidiaries at Shenzhen, Zhuhai, Guangzhou, Xiamen, Fuzhou, Shanghai, Beijing, Hangzhou, Harbin and Dalian; and it has also set up representative offices in over 30 countries and regions. CATIC has developed its trade and cooperation relations with more than 100 countries and regions. It has exported aircraft to a dozen of countries, as well as advanced aircraft production line and related technology of manufacturing, and it has also exported a number of aero-engines and airborne equipment. There are 15 Chinese factories now producing various parts and components for 20 or more foreign aircraft and aero-engine manufacturers, and these products include aircraft nose section, various doors, vertical tail, aileron, center wing, compressor disk, turbine disk, gear, casing and guide blade, etc. These components are excellent in quality, and have won praises from foreign companies.

The development of foreign trade and export has promoted the introduction of foreign advanced technology and international technical cooperation. About 40 items of advanced technologies have been introduced to the Chinese aviation industry from a dozen of countries, such as the manufacturing technology of Spey engine from Rolls-Royce of UK, the manufacturing technology of Dauphin helicopter and its engine from Aerospatiale and Turbomeca of France, the co-production of MD-82 and MD-90 airplanes with McDonnell Douglas and Boeing of USA, the joint development and production of EC 120 helicopter with the partners from France and Singapore, and the joint production of S-92 helicopter with Sikorsky of USA. The Chinese aviation industry has also cooperated with some foreign companies for the joint development of some new types of civil aircraft, and for the modification and further development of some types of existing Chinese-made aircraft. At the same time, some foreign avionics and navigation equipment have also been introduced to China. All these introduction projects are beneficial to both sides of trade. The Chinese aviation industry has also strengthened the international scientific and technical cooperation, and has established cooperative relationships with many research institutes and universities of Germany, Sweden, France, USA, Russia and Italy, etc. These cooperation activities have promoted the academic development of both sides.

According to the reorganization plan of the State Council and determined by the 9th National People's Congress, the China Aviation Industry Corporation I (AVIC I) and the China Aviation Industry Corporation II (AVIC II) were established in Beijing on July 1 of 1999, on the base of the former Aviation Industries of China (AVIC). Since then, Chinese aviation industry has come into a new development era.

Under the guidance of reform and opening up policies, the Chinese aviation industry is now further strengthening its tie with the international aviation circle, for the aims of constantly raising its technical level and keeping its momentum of high-tech development. The performances of its military aircraft are being improved, a number of commercial aircraft are under development, speed the industrialization of helicopter and strengthen its market competitive ability, and the export of its aero products and electromechanical products is being greatly promoted. The development prospect of the Chinese aviation industry is getting brighter.