

World Airlines 2011



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Armavia gave the Sukhoi Superjet its commercial debut, and the type is now in service with Aeroflot too

In the regional jet market there is no room to make sweeping generalisations. All airframers, from stalwarts Bombardier and Embraer to newcomers Comac of China, Japan's Mitsubishi Aircraft and Russia's Sukhoi, are at different stages in their regional jet programmes and are attracting varying levels of business. Comac, for instance, is trying to break into the market with China's first indigenously designed regional jet, the ARJ21, but has met with many disappointments.

The latest complication - involving the failure of two key components - surfaced during icing tests in Urumqi in Xinjiang province, according to a source. This will further jeopardise Comac's chance to receive type certification by year-end and could further delay first delivery to Chengdu Airlines - 48% owned by Comac and

40.9% owned by Sichuan Airlines. However, the ARJ21 faces further problems, according to Richard Aboulafia, vice-president of analysis at the Teal Group.

"The ARJ21 has become an interesting exercise in face-saving, but the programme itself can't be saved," he said. "It isn't the delays - sadly, that's standard these days. Rather, the aircraft's weight figures indicate a plane design that's gone horribly wrong. If anyone is forced by government fiat to operate it, they will be a very unlucky operator."

Home-grown regional jets from Mitsubishi and Sukhoi are on less rocky ground. On 5 April, Mitsubishi started assembly of the MRJ at Mitsubishi Heavy Industries. Development has also progressed on the Pratt & Whitney PW1200G geared turbofan that will power the MRJ. Ground-testing on the first test engine has been completed, with flight tests planned for early 2012. Japan's All Nippon Airways, which helped launch the MRJ programme, has a firm order for 15 aircraft and 10 options. Trans States Holdings in the USA has a firm order for 50 MRJs and 50 options. And this year, Hong Kong-based leasing company ANI Group Holdings inked a memorandum of understanding to buy five MRJs.



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Comac faces a tough challenge to meet a year-end target for ARJ21 certification

"The MRJ is a great platform. It continues to gain traction in the marketplace. They [Mitsubishi] are currently in discussions with a number of airlines," said P&W. The 90-seat MRJ90 is expected to enter service in 2014, and the MRJ70

will take to the air about a year later. Sukhoi's Superjet, meanwhile, has already entered service with two regional jets in operation at Aeroflot and one at Armavia.

While the Russian company has also signed a deal with Comlux to offer a VIP version of the Superjet, it has not been able to infiltrate the Western commercial market with a major order. "The jury is still out on the Superjet," said Aboulafia. "They've made admirable efforts to escape their post-Soviet origins, but that's a very tough heritage to live with, particularly with the persistence of an awful business environment in Russia.

"A successful service entrance will reassure non-former Soviet customers, but any problems will highlight the doubters' worst suspicions. The next six months will be key."

Just as native solutions are reaping different market results, so too are the regional jet industry's main players - Bombardier and Embraer. With a backlog that has shrunk to little more than a year's worth of production, Bombardier will slash output from January. The move follows the Canadian airframer's decision to cut its Q400 turboprop production, effective towards the end of this year.

Senior vice-president of sales Chet Fuller blames the dearth of orders on the economic crises in Western Europe and the USA, where the CRJ was predominantly sold. He concedes that next year "is going to be tough". Nonetheless, he remains optimistic, noting: "A large number of the CRJs, legacy CRJ100s/200s and Embraer ERJ-135s and ERJ-145s are starting to come out of the fleets so every one of those airplanes have to be replaced."

REGIONAL JET DATA CHECK					
	ARJ21	CRJ**	E-Jet	MRJ	Superjet 100
First flight	Nov 2008	May 1999	Feb 2002	Due Q1 2012	May 2008
First delivery	Due late 2011	Jan 2001	Mar 2004	Due Q1 2014	Apr 2011
Orders (total/2011)	189/2*	654/22	1,018/73	15/0*	168/13
Deliveries (total/2011)	0	593/19	770/73	0	3
Backlog	189	61	248	15	165
2011 monthly output	-	3.2	8.1	-	0.3

**CRJ700 first flight/delivery. NOTES: Bombardier's 2011 figures based on first half of fiscal year (Feb-Jul); aggregate of CRJ700/900/1000. Embraer's 20121 figures based on nine months to 30 September. SOURCE: Manufacturers/'Flightglobal ACAS database

Aboulafia believes Bombardier is letting the CRJ series fade out as it moves to the 110/130-seat, P&W PW1500G-powered CSeries, but asserts that "hope of a graceful fade out seems to be fading out too. Given its impressive past and respectable performance numbers, it should be selling better than it has been. It's quite possible that moving product development and sales resources to the CSeries is sending the CRJ to an early grave".

In contrast, and despite difficult market conditions including high fuel prices, Embraer is staying strong. The Brazilian airframer recently secured a six-strong order for E-190s from GE Capital Aviation Services and firmed up an order with Kenya Airways for 10 E-190s plus options on a further 16 E-Jets.

"I think the big reason why Embraer is doing better than Bombardier [in regional jet sales] is that the E-Jets are positioned so well in the 100-122-seat range, whereas the top line CRJ stops at 100 seats," said Forecast International aerospace analyst Raymond Jaworowski. "That may change. The CSeries is starting to be more successful, orders are starting to come in and Embraer, of course, has its own decision to make [on whether to re-engine its E-Jets or offer a clean-sheet design aircraft]". Embraer has said the company is likely to reveal its decision regarding a new aircraft in early 2012.

Source: <http://www.flightglobal.com/Features/world-airliners-2011/Regionals/new-breed/>