Canadian private aircraft fleet continues to grow

By Adam Hunt

The Canadian private civil aircraft fleet continued to grow in 2012, but at a rate that was the lowest seen since 2003 and worse than at any time during the recession of 2008-10.

In 2008 the fleet grew at 3.2%, in 2009 by 2.2% reflecting the recession, in 2010 increased to 2.3% and in 2011 up to 2.5%. In 2012 it was down to just 1.96%.

The numbers seem to indicate the recession is still with us, especially with regard to aircraft sales. As in recent years the fact that the fleet has continued to grow and not shrink is probably due to the persistently high asking prices for used aircraft in Canada.

Aircraft asking prices in Canada should be lower than they are, with the Canadian dollar near par against the U.S. dollar, but Canadian asking prices remained consistently higher than U.S. prices this past year, encouraging cross-border aircraft shopping and driving up the overall number of aircraft registered in Canada.

In 2012 the total Canadian civil fleet increased in size by 593, compared to 772 in 2011. In 2012 the private segment of the fleet accounted for 92% of the growth seen, increasing by 544, while the commercial aircraft fleet increased by 56 aircraft, a substantial drop over 2011's commercial fleet increase of 94 aircraft.

The state fleet, those aircraft owned by the various levels of government in Canada, continued to shrink this past year by seven aircraft, with the decrease made up of five helicopters and two airplanes.

Basic Ultralights

For the last number of years BULAs have been the second quickest growing area of private aviation, after certified aircraft, but in 2012 they moved into the number one spot, probably reflecting their low purchase and operating costs. In 2012 the category increased by 191 aircraft and accounted for 35% of the private fleet growth. There were 5,627 BULAs registered at the end of 2012.

Certified Aircraft

For the past few years, certified aircraft have been leading the growth in private aircraft numbers for Canada, but they lost that lead last year. The numbers increased in 2012 with 172 certified aircraft added, down from 2011's total of 228. The new additions to the certified fleet were made up of 167 airplanes and 11 balloons, offset by the loss of five helicopters and one glider.

Certified aircraft accounted for 32% of the private fleet growth. There were 16,106 private certified aircraft at the end of 2012, out of a total of 28,271 private aircraft registered.

Amateur-built

Amateur-built aircraft were in the number three slot again in 2012, increasing by 98, down from an increase of 137 in 2011. The aircraft added last year were made up of 95 airplanes, six helicopters and two balloons, while the number of gyroplanes decreased by five. Amateur-built made up 18% of the aircraft added to the private fleet in 2012.

Amateur built aircraft now number 3,979 in Canada and include a wide variety from fixed wing airplanes, helicopters, gliders, gyroplanes to balloons, airships and even one ornithopter.

Owner Maintained

The O-M category added 37 aircraft last year, up from the 27 added in 2011 and moving it into fourth spot ahead of advanced ultralights. By the end of 2012, there were 583 O-M aircraft on the registry, made up of 571 airplanes and 12 gliders. O-M aircraft made up 7% of the aircraft added to the private fleet in 2012.

This category has suffered from low numbers of aircraft being moved from the certified category ever since the American FAA announced that O-M aircraft will never be allowed to fly in U.S. airspace or sold in the USA. Overall this category seems to be sort of staggering along with minimal interest from owners.

Advanced Ultralights

Advanced Ultralights dropped to fifth place for growth in 2012, increasing their numbers by only 27 airplanes, compared to an increase of 28 in 2011, 39 in 2010 and 42 in 2009. Their growth in numbers in 2012 made up 5% of the private fleet increase and brought the total number of AULAs on the civil register to 1,176. By the category definition, all AULAs are powered fixed wing aircraft.

The AULA category was introduced in 1991 and therefore 2012 was its 21st year. The category has increased its numbers at an average of 56 aircraft per year and so can hardly be considered the success that was anticipated when it was started. As in

the past four years, the number of AULAs added in 2012 was well below the average from its earlier years. This trend is mostly likely linked to the high price of some new AULAs and their American counter-parts, Light-Sport Aircraft.

Commercial Fleet

In 2012 the commercial aircraft fleet increased by 56 aircraft to bring it to 7,011. The numbers show an increase of 20 airplanes, 39 helicopters, offset by a decrease of three balloons. The biggest commercial fleet growth was in twin-engine aircraft, with 34 added, versus 23 singles and four four-engine aircraft. Two three-engine aircraft left the fleet - prossibly Boeing 727s being retired.

In round numbers, at the end of 2012 the private fleet made up 80% of the aircraft in Canada, up from 79% last year, with the commercial fleet at 20% and the state fleet at 0.7%.

Imports, Exports and Pilots

Aircraft imports into Canada in 2012 numbered 753, which was down from 861 in 2011, but still well below the 968 imported during the pre-recession days of 2008. In 2012, 731 aircraft were exported, giving a difference of just 22 favouring imported aircraft over those exported.

Transport Canada seems to have stopped publishing pilot licencing statistics in 2011, so a new analysis of pilot population numbers will have to wait until TC makes those numbers available again. The most recent numbers available from 2008-11 show a loss of 2.2% of the pilot population over those three years, an average of 0.7% loss per year.

Looking at 2013

As 2013 commences, the usual large global economic factors are at play and have the potential to negatively impact aviation in Canada. These include the risk of war in the Middle East with the likely disruption of world oil markets, as well as the ongoing U.S. and European economic woes.

World oil prices ended 2012 at U.S. $90.80 for North America (WTI) and U.S. $110.62 for Europe (Brent). These were virtually unchanged from a year ago, showing the careful balance between poor economic conditions reducing oil demand and associated prices and economic recovery increasing demand and prices. Poor economic conditions result in less flying, but with world oil production stagnant now for eight years economic growth increases demand for this limited resource and results in higher oil prices and the inevitable reduction in flying hours. Some aviation surveys done in 2012 point to high fuel prices being the largest factor in pilots flying less.

Note: Data for this report was taken from the Transport Canada Civil Aircraft Register and reflects the difference between the number of aircraft registered in Canada on Dec. 31, 2011 and Dec. 31, 2012. These statistics reflect the net number of aircraft built and imported, minus the number destroyed, scrapped and exported. Just because an aircraft is registered in Canada does not mean it is being flown and therefore the number of registered aircraft should not be confused with the amount of flying activity.

Photo caption:

Basic Ultralights increased by 191 aircraft in Canada last year. According to Transport Canada there were 5,627 BULAs registered at the end of 2012. *Photo courtesy Eric Dumigan*