

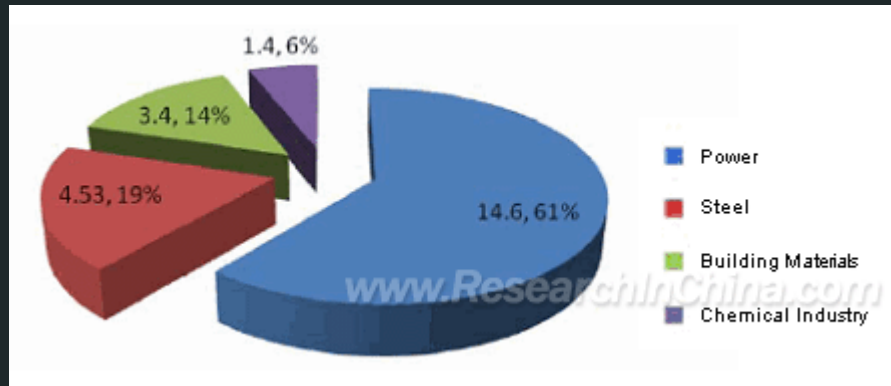
China's Coal Industry and Key Companies, 2008



Coal has always been the principal energy in China. Considering the slim possibility that the industries like steel and cement show the fundamental reversion in a short period, so it is difficult for coal industry to perform in the first half and even the full year 2009 as the same prosperity in 2008.

In 2008, the coal demand amounted to 2.67 billion tons in China, and 1.46 billion tons of which was consumed by electric power industry, 453 million tons in steel metallurgy, 340 million tons in building materials, and 140 million tons in chemical industry, accounting for 86.89% of China's total coal demand.

Coal Demand Amount (100 mln tons) and Ratio of Four Key Industries, 2008



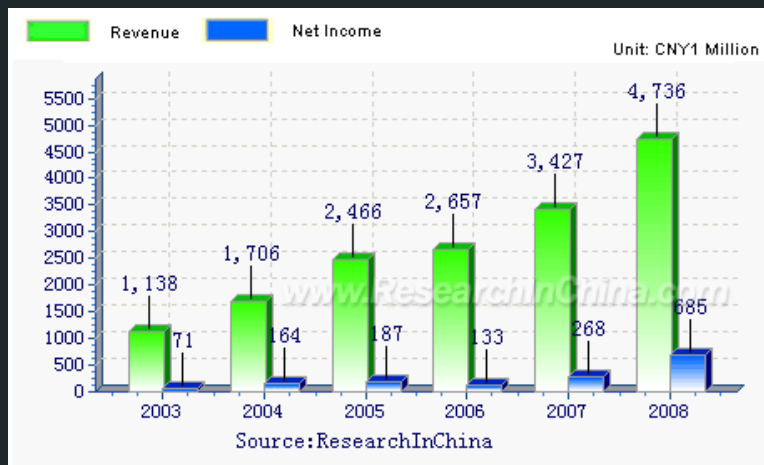
Source: China National Coal Association

China's raw coal output was 2.716 billion tons in 2008, up 7.65% year-on-year, among which, the raw coal produced in county coal mines reached 994 million tons, rising 3.65% year-on-year, and accounting for 36.6% in the total, down 1.5 percentage points year-on-year. The growth in coal output in 2008 was mainly contributed to the output increase of state-owned key coal mines (up 11% year-on-year) and state-owned local coal mines (rising 6.4% year-on-year).

Firstly, the report introduces China's coal industry development, and then it analyzes coal market layout from two aspects, demand and supply. Lastly, it gives a full picture of 22 key coal companies, including their operation and operating revenue, project investment, main business structure, latest trend and future trend.

Here, take Taiyuan Coal Gasification Co., Ltd for example

Revenue and Net Income of Taiyuan Coal Gasification Co., Ltd, 2003-2008



Source: ResearchInChina

Recent Investments of Taiyuan Coal Gasification Co., Ltd

Date	Investment Project	Planned Investment (CNY10,000)	Unit
Feb 21, 2008	Purchased part of equities of Shanxi Lingshi Huayuan Coal Co., Ltd	18,421	CNY
Sep, 18, 2007	Acquired assets and land property right of Taiyuan City Gas Project Gas Source Plant	66,334	CNY
Mar 17, 2007	Acquired Donghe Wash Coal Plant	2,920	CNY

Revenue of Taiyuan Coal Gasification Co., Ltd by Product, 2008

Product	Revenue (CNY1 mln)	Profit (CNY1 mln)	Gross Profit Margin (%)
Coke	2859.24	1447.87	50.63
Raw Coal	849.99	186.47	21.93
Clean Coal	603.15	390.96	64.81
Chemical Industrial Products	168.40	20.70	12.29
Middling Coal	111.58	28.55	25.59
Other	73.35	-1.52	-2.06
Coal Gas	69.56	-230.70	-331.66

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