China Papermaking Industry Report, 2009

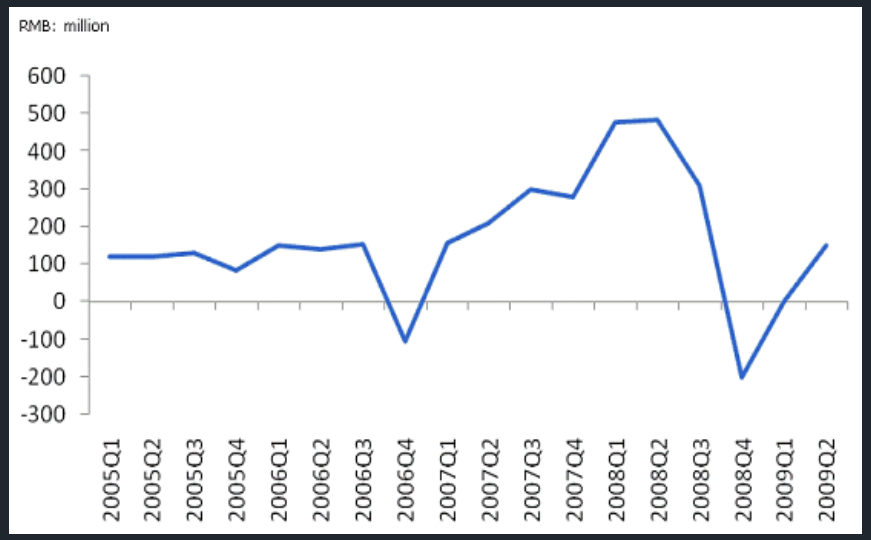
In 2008, the papermaking industry was affected by the international financial crisis. For all kinds of paper products, the growth rate of production and consumption apparently dropped. In 2008, the output of paper and paperboard in China totaled 79.8 million tons, with the consumption of 79.35 million tons.

As the external environment improves, China papermaking industry in 2009 turns better than that in 2008Q4, but the indicators were still inferior to those of the same period in 2008. During January to June of 2009, the papermaking industry gained the total revenue of RMB22.355 billion, down 19.3% year-on-year; the gross profit margin was 14.7%, down 4.8%; the net profit reached RMB393 million, down 82.9%.

Taking Chenming Paper as an example. From 2005 to 2009, Chenming achieved the most profit in the first and second quarters of 2008. Benefiting from industry policies and the measure of eliminating backward production capacity, gross profit margins rose greatly in the first two quarters of 2008, and even hit the peak in the second quarter; however, affected by economic adjustment, shrinking demand and falling prices, the consolidated gross profit margin began to drop in the third quarter, and then fell to 8.84% in the fourth quarter of 2008

Within January to June of 2009, the output of machine-made paper of Chenming amounted to 1.4516 million tons, down 8.43% year-on-year; the sales volume reached 1.5193 million tons, down 0.16%; the sales/output ratio was 104.66 %, the total revenue was RMB6.675 billion, down 21.95 %; the total profit was RMB238 million, down 82.31%.

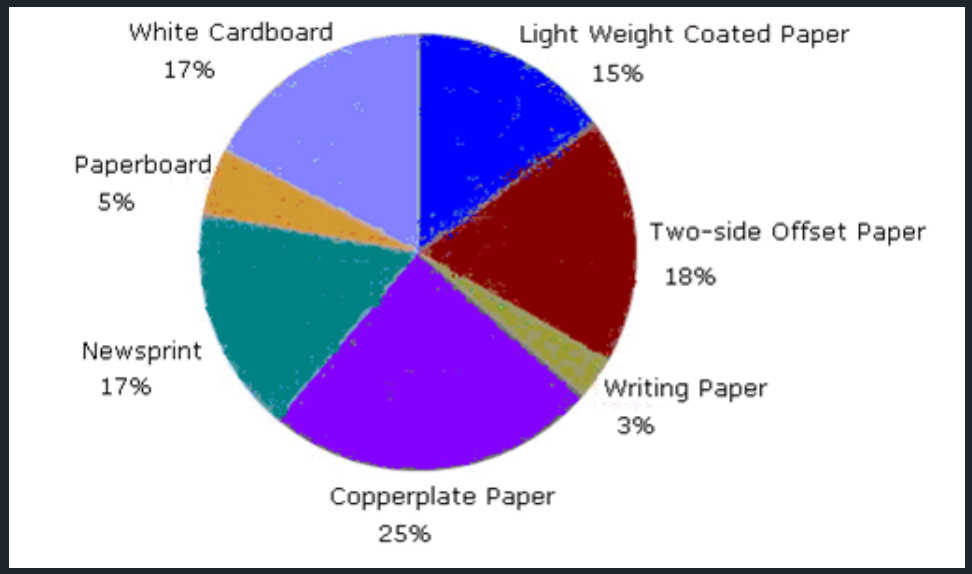
Quarterly Profit of Chenming Paper, 2005-2009



Source: ResearchInChina

Chenming has a lot of dominant products, each of which accounts for similar percentage of the total revenue. In Jan. to Jun. of 2009, copperplate paper accounted for 25% of total business revenue, two-side offset paper 18%, white cardboard 17%, newsprint 17%, and light weight coated paper 15%. The majority of the main business profit was sourced from copperplate paper, which brought about RMB200 million of prime operating profit and generated the gross profit margin of 15.75% from January to June in 2009. Copperplate paper has strong profitability.

Business Revenue Structure of Chenming Paper, 2009



Source: ResearchInChina

Based on the data published by National Bureau of Statistics of China, China Paper Association and China Customs, the Report analyzes the current development of China papermaking industry, operation of key Chinese papermaking companies, and predicts development trends of the industry in the future.

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