

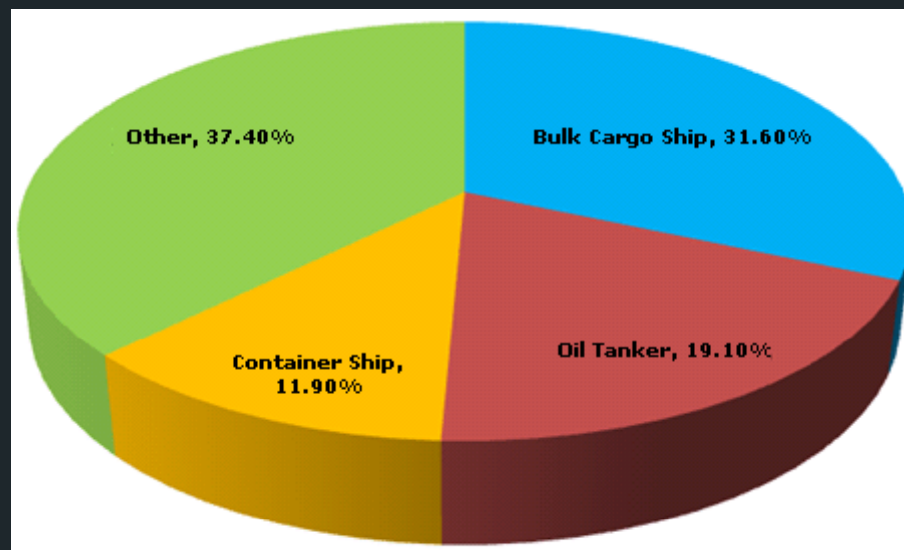
China Shipbuilding Industry Report, 2009-2010



China's shipbuilding industry still kept steady growth in 2009 even if the recessed markets of international shipping and shipbuilding. Chinese accomplished shipbuilding output reached 42.43 million DWT in 2009, up 47% yr-on-yr and accounting for 34.8% in the world's total, ranking the second place. Promoted by policies like export buyer's credit, Chinese shipbuilding enterprises contracted new orders of 26 million DWT, a 61.6% share of global new vessel orders, and ranking the first place worldwide.

Of the three leading hull forms, oil tanker and container ship markets were in the downturn in 2009, while the bulk cargo carrier market performed actively, and 170,000-ton bulk ship, 57,000-ton bulk ship, and second-hand bulk ship were highlighted. In addition, the bulk cargo ship was also the main force in export trade, and China's export of bulk cargo ships achieved USD8.97 billion in 2009, taking 31.6% of the total export value.

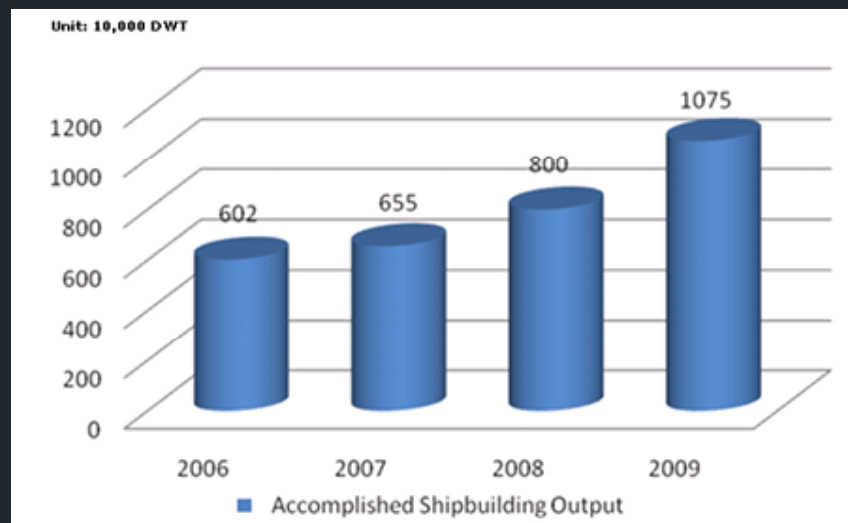
- **Export Share of Three Main Ship Types. 2009**



Source: China Association of the National Shipbuilding Industry, ResearchInChina

There were 11 shipbuilding enterprises each with over one million DWT of accomplished shipbuilding output in China in 2009. China State Shipbuilding Corporation (CSSC) witnessed an accomplished shipbuilding output of 170 ships in 2009 exceeding 10 million DWT for the first time and reaching 10.75 million DWT; with an increase of nearly three million DWT yr-on-yr. CSSC ranked No.1 among Chinese shipbuilding enterprises and was in the world's top three shipbuilding groups.

Accomplished Shipbuilding Output of China State Shipbuilding Corporation, 2006-2009



Source: China Association of the National Shipbuilding Industry, ResearchInChina

Both the main business revenue and profit of shipbuilding industry maintained a fast growth rate of over 30% in such provinces and municipalities as Jiangsu, Shandong, Fujian, Anhui, Hubei and Chongqing in 2009, in particular, Jiangsu province performed most outstandingly, with an accomplished shipbuilding output of 15.46 million DWT with a yr-on-yr growth rate of 73.9%, ranking the first position in China, accounting for 36.4% in China's total, as well as 12.6% of the world's total.

Although China's shipbuilding industry made remarkable achievements under the guidance of a series of policies like China's Shipbuilding Industry Adjustment and Boosting Plan in 2009, there is still not a clear sign of recovery in China's economy in 2010. Therefore, the shipbuilding enterprises should be cautious of industry risks caused by overcapacity, and external risks like order cancellations, inadequate order and difficulty in bank credit.

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