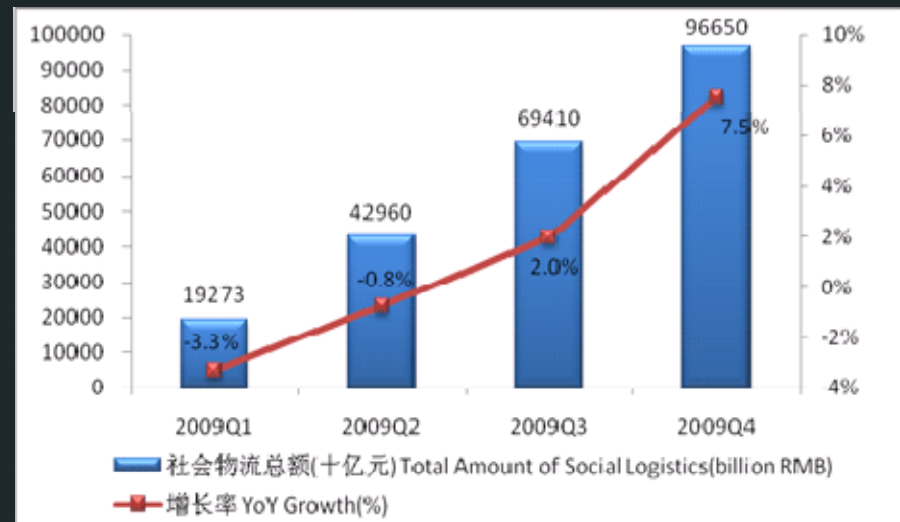


China Logistics Industry Report, 2009-2010



The total social logistics in China valued RMB96.65 trillion in 2009, up 7.5% over the same period of previous year. In each quarter of 2009, the total amount of social logistics grew at an increasing speed, and the increasing trend surpassed the declining trend in Q3 of 2009, leading to the cumulative growth rate of 2%. This shows that China logistics industry tended to be stable and rebound with the economic recovery. The total social logistics in China valued RMB25.9 trillion in Q1 2010, increasing by 20.8% according to comparable prices. In 2010, China logistics industry will maintain rapid growth.

Total Amount and Growth Rate of Social Logistics by Quarter (Cumulative), 2009

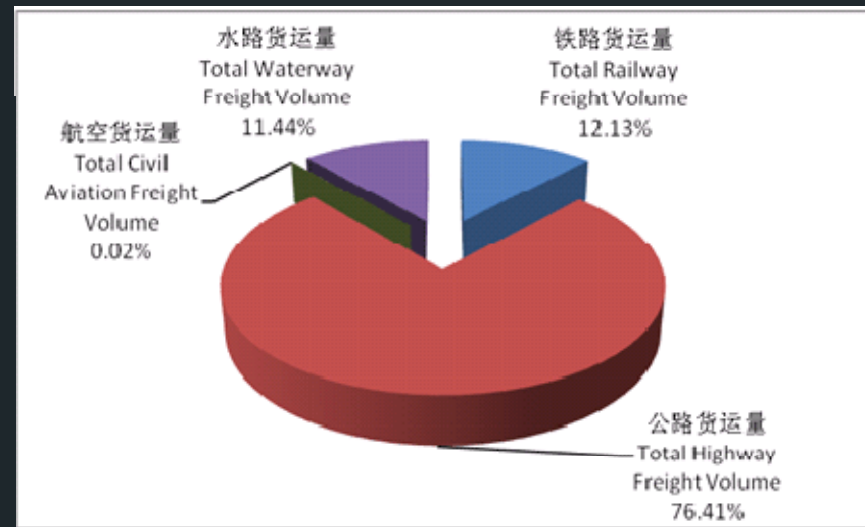


Source: China Federation of Logistics & Purchasing

In 2009, China delivered 27.44 billion tons of cargos, up 12.2% year on year; delivered 11918.85 billion ton-km, up 15.2% year on year. In terms of transport mode, road is still the main force. In 2009, the road freight volume was 20.97 billion tons, accounting for 76.41% of the total freight volume; railway and waterway accounted for 12.13% and 11.44% respectively; only 0.02% was attributable to aviation.

In 2010, China plans to spend RMB700 billion on railway infrastructure construction, and build 450 km railway track, which is higher than the 2009 level. Railway construction can greatly improve rail freight capacity. Coupled with low transport costs and considerable freight volume, railway transport will grab an increasingly larger share of the total freight volume in the future.

Freight Volume of Various Modes of Transport in China, 2009



Source: ResearchInChina

This report introduces the status quo and future development direction of railway transportation, road transportation, aviation transportation and waterway transportation. It analyzes the development trends and representative enterprises in the fields of automotive logistics, steel logistics, petrochemical logistics, pharmaceutical logistics, coal logistics and home appliance logistics.

Finally, this report studies 17 representative integrated logistics enterprises to gain an in-depth understanding of China logistics industry.

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