

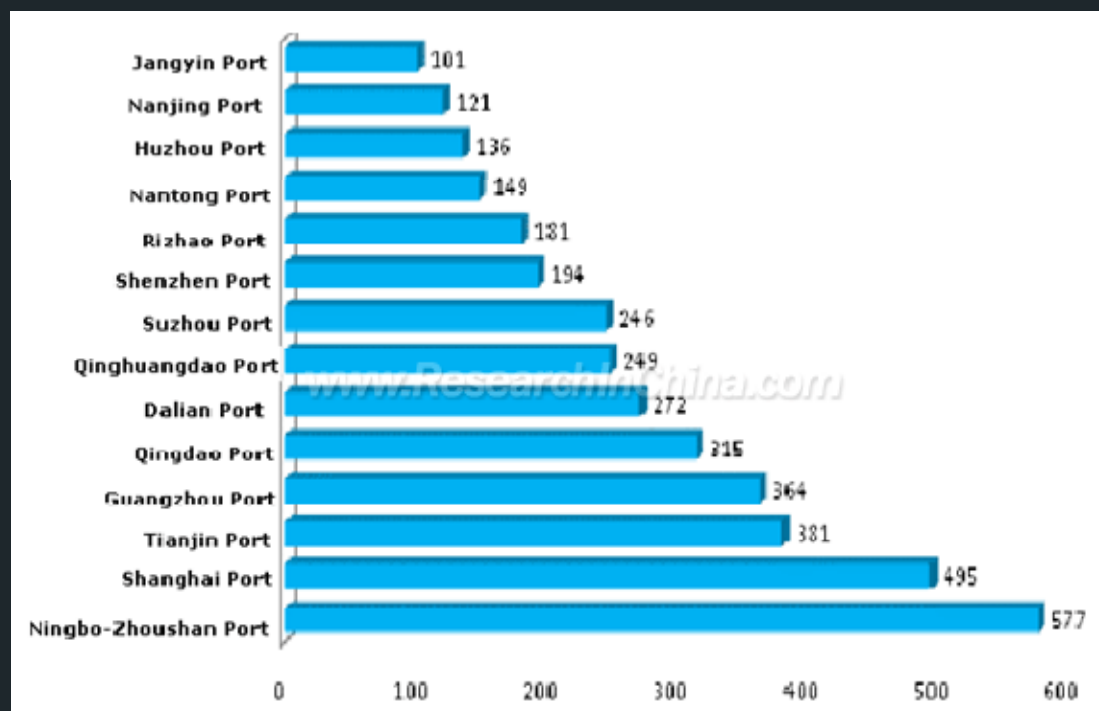
China Port Industry Report, 2009-2010



With the recovery of global economy, China's port industry has witnessed robust growth since the year of 2010. In the first half of 2010, cargo throughput of China's ports above designated size accomplished 3.9 billion tons, up 18.9% year-on-year; the foreign trade throughput realized 1.23 billion tons, up 21.1% year-on-year; and the container throughput hit 68.702 million TEUs, a 22.3% YoY rise. In fact, such growth tendency emerged as early as the second half of 2009.

In 2009, the cargo throughput of China's ports was 7.657 billion tons with a YoY growth of 9%, and the number of ports with the cargo throughput surpassing 100 million tons increased from 16 to 20. In particular, Ningbo-Zhoushan port achieved the best performance with the cargo throughput of 577 million tons in 2009.

Cargo Throughput of Major Ports in China, 2009

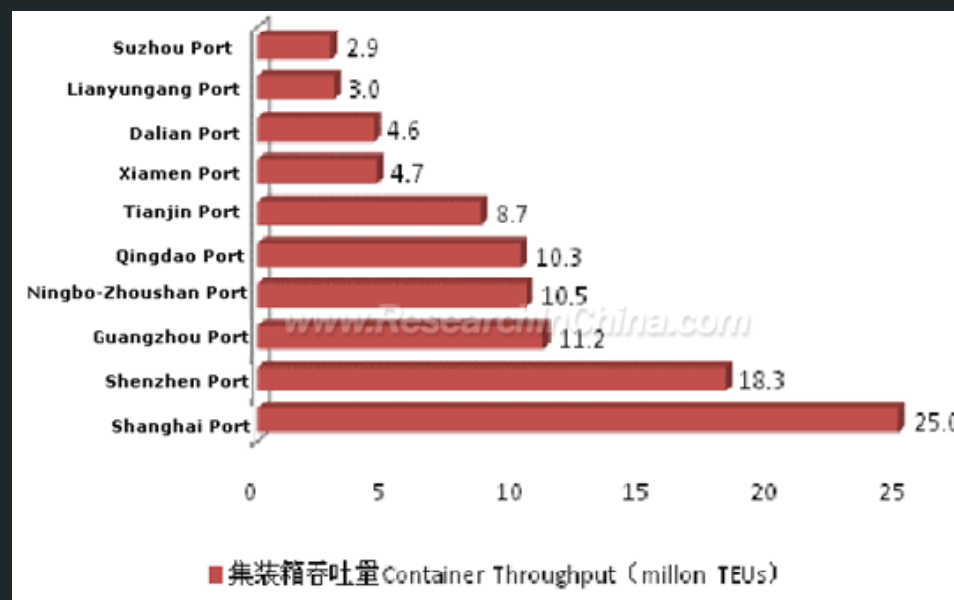


Source: Ministry of Transport of PRC; ResearchInChina

Due to the economic meltdown, the container throughput fell somewhat. In 2009, the container throughput of China's ports was 122 million TEUs, a decrease of 4.6% from a year earlier. Elaborately, the container throughput of coastal ports dropped 5.6%, while that of inland river ports grew 5.4%.

In 2009, there are 16 ports with the container throughput exceeding one million TEUs. Among these, Shanghai Port and Shenzhen Port held top two positions with the throughput of 25 million TEUs and 18.25 million TEUs respectively.

Top 10 Ports with the Container Throughput Surpassing One Million TEUs, 2009



Source: Ministry of Transport of PRC; ResearchInChina

In terms of regional distribution, the cargo and container throughput in China's southeast coastal ports falls while the construction and throughput of pan-Bohai ports is on the rise. Backed up by the national policy, the development of pan-Bohai economic zone will boost the remarkable progress of the local ports.

The boom of pan-Bohai Rim is accompanied by cut-throat competition. Cases in point include Tianjin Port Development Holdings merging with Tianjin Port Holdings, and PDA Corporation holding stake in Jinzhou Port, marking the first step towards regional integration.

Starting with the status quo of China's ports, this report makes an in-depth analysis of the overall operation of the port industry and the development of major ports during 2009-2010, introduces the regional planning of coastal ports and sheds light on 18 key port enterprises.

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