

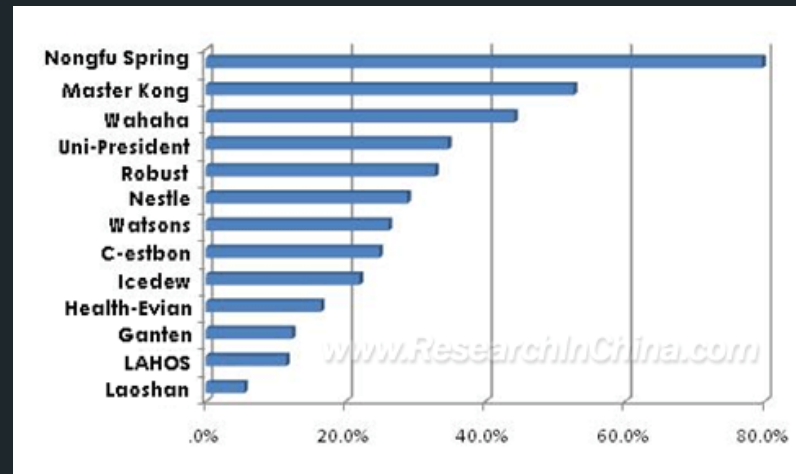
# China Drinking Water Industry Survey Report, 2010



Cooperated with 1diaocha.com, ResearchInChina surveyed 600 consumers in mainland China concerning the consumption features of drinking water industry in August 2010. The main contents were as follows: habit of drinking bottled (barreled) mineral water, awareness of bottled (barreled) water brands, considerations while buying bottled (barreled) water, channels to know bottled (barreled) water, motivations to buy bottled water, bottled water price options, where to buy bottled water, which type of barreled water is more acceptable, and the highest acceptable price of barreled water.

With regard to brand awareness of bottled water, Nongfu Spring took the lead with approximately 80% consumers' recognition, followed by Master Kong and Wahaha, respectively with over 40% consumers' recognition, and Uni-President, Robust and Nestle. The six brands played an important role in bottled drinking water market, and other bands were relatively less known to consumers.

## Awareness of China's Major Bottled Water Brands



Source: ResearchInChina

Regarding to where to buy bottled water, above 70% consumers selected the supermarket and convenience store. In addition, the community store was also an important option, while the other channels such as newsstand enjoyed a lower rate. Thus, it can be concluded that the consumers will take two factors into consideration while buying bottled water: for convenience, such as convenience store and community store, and for low price, like supermarket.

The TV ad was the most important channel for consumers to know the barreled water, accounting for approximately 70%, followed by suggestion from a friend, recommendation by sellers and Internet ad, each covering over 40%.

Based on the survey, we have made an in-depth analysis of consumption features of current drinking water industry, delving into the consumption feature by gender, age, occupation, income, etc.

### Revenue of Top 8 Wafer Manufacturers Worldwide (USD mln)

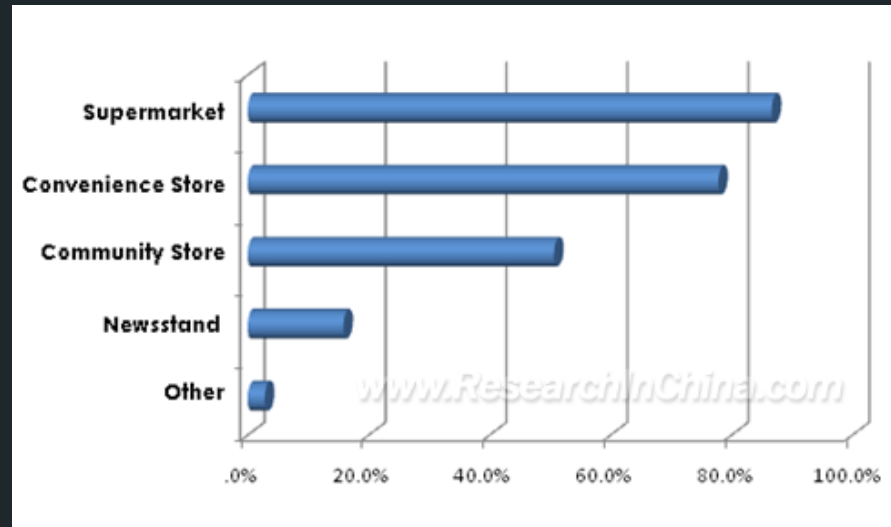
	Revenue in 2009	Revenue in 2010 H1
SolarWorld	1,413	807
LDK Solar	908	788
REC	933	597
Green Energy Technology (GET)	279	218
Sino-American Silicon Products	252	265
PV CRYSTALOX	331	149
Comtec Solar Systems	74	63
Solargiga Energy	68	77

Between 2008 and 2009, considerable amounts of solar polysilicon capacities were released, resulting in the oversupply which made the spot price plummet from USD500 to USD50. The price dive of polysilicon spurred the capacity expansion of downstream solar cell industry, which, in turn, stimulated the explosive demand for polysilicon. Meanwhile, the low price of polysilicon propelled polysilicon manufacturers to control capacity expansion and reduce output.

According to customs statistics, China's import volume of polysilicon reached 3,731 tons in August, up 78.8% year on year and 1.33% month on month. The accumulative import volume hit 26,745 tons from January to August, up 109% over the same period of 2009. The export volume of polysilicon touched 190 tons in August, and the accumulative export volume was 1,536 tons from January to August.

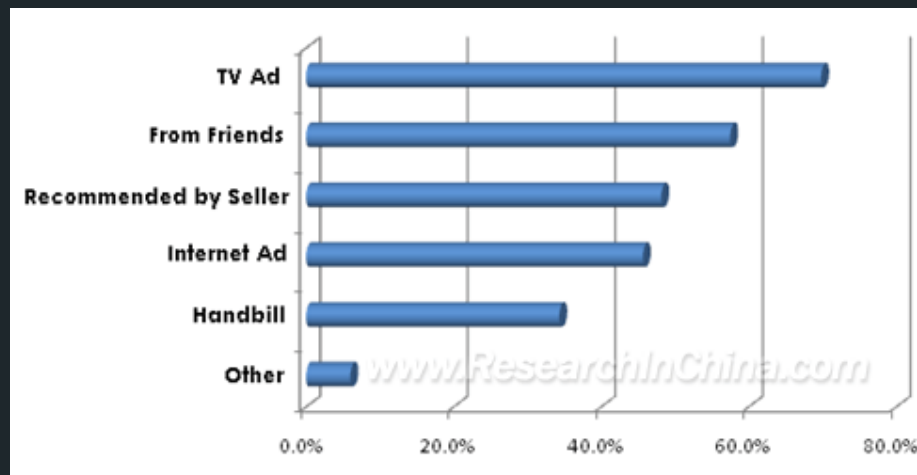
In 2010, polysilicon has been in short supply again, and the spot price has been soaring, to almost USD100 in recent days. However, with governments' reduction in solar subsidies and polysilicon manufacturers' capacity expansion, further polysilicon price hikes are unlikely to occur, and the prices are expected to fluctuate between USD70 and USD150.

### Consumers' Options to Buy Bottled Water



Source: ResearchInChina

### Channels of Consumers to Know Barreled Water



Source: ResearchInChina

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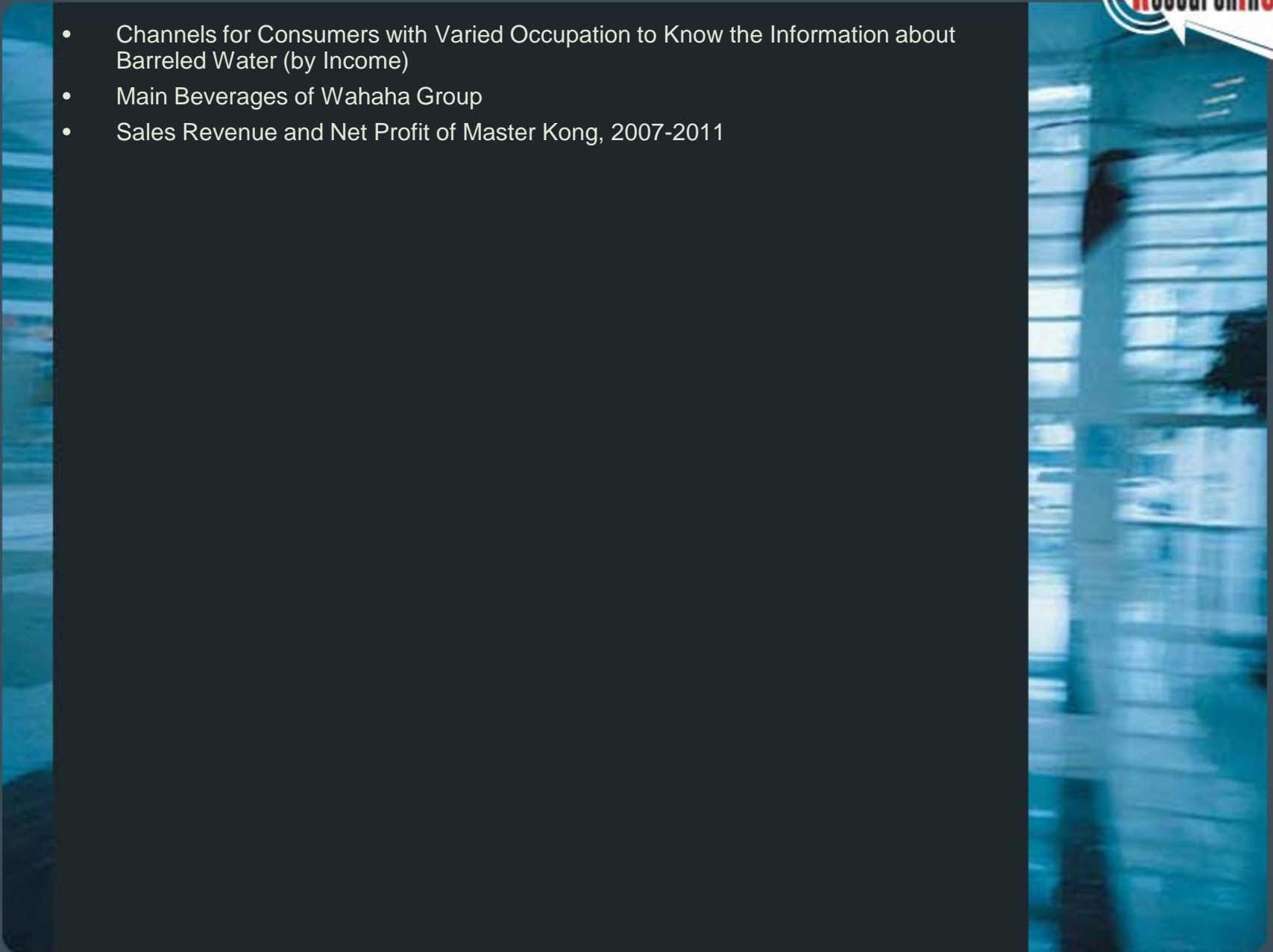




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