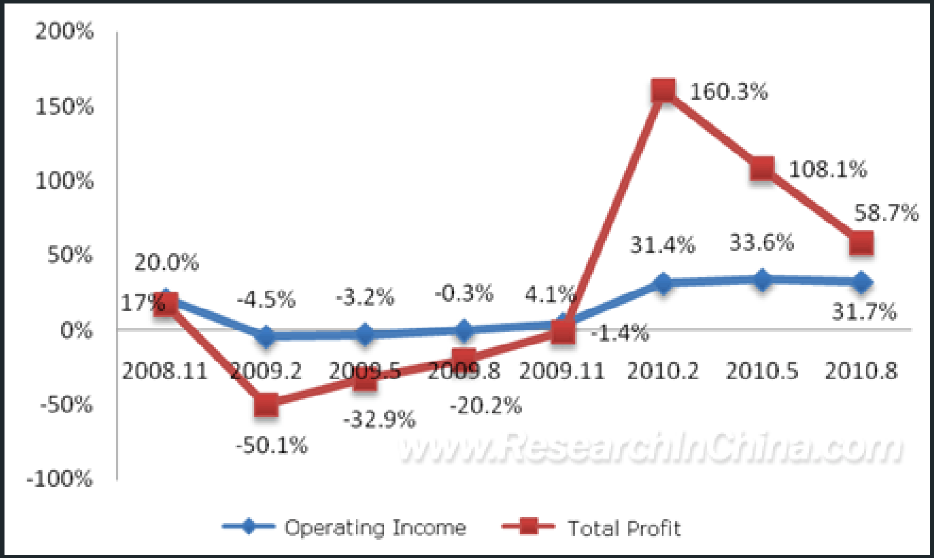
China Papermaking Industry Report, 2010

In 2009, under the active macroeconomic policy control of the government, China’s papermaking industry on the whole overcame such difficulties as shrinking demand, reduced capacity utilization and augmented product inventories resulted from the financial crisis, and started rising gradually. In 2010, the industry has accelerated the pace of development and seen substantial growth in various economic indicators. The whole industry achieved operating income of RMB361.2 billion and total profit of RMB20.5 billion in the first eight months of 2010, up 31.67% and 58.66% year on year respectively.

Growth of Operating Income and Total Profit of China's Papermaking Industry, 2008-2010



Source: National Bureau of Statistics of China; ResearchInChina

Overall, China's papermaking industry has experienced the following changes in 2010:

- The revenue and industrial sales output value have risen sharply year on year;
- The costs have climbed due to the rise in the prices of raw materials such as wood pulp;
- The packaging paper industry has grown rapidly driven by the growing export demand;
- The elimination of backward capacity has been intensified, and 4.65257 million tons of capacity was eliminated in August 2010;
- The production concentration has increased, and the top 30 papermaking enterprises (by output) are expected to account for more than 40% of the total industry output in 2010.

From the perspective of regional development, in 2010, China’s papermaking industry is still concentrated in eastern and central regions, mainly including Shandong, Henan, Guangdong, Zhejiang and Jiangsu. In the first three quarters of 2010, top ten regions by output of machine-made paper & paperboard, liner board and paper products respectively achieved total output of 62.2423 million tons, 9.2134 million tons and 27.5602 million tons respectively, accounting for 84.81%, 83.43% and 79.06% of the total output respectively. The regional concentration of paper products decreased while machine-made paper & paperboard’s increased year on year.

Under the influence of such factors as policies for backward capacity elimination, rising raw material prices and RMB appreciation, China's papermaking industry will see a fall in the output and a rise in demand and prices. From the perspective of specific products, the low-grade cultural paper with straw pulp as the main raw material is the object of backward capacity elimination in 2010; medium and high-end cultural paper, as the substitute for low-grade cultural paper, will see a rise in both output and prices; packaging paper will witness a substantial increase in the demand as a result of the rapid development of downstream industries such as electronics and communications, household appliances, food, pharmaceuticals, household chemicals, textile, tobacco and alcohol.

China's Top Ten Papermaking Regions by Output, Q1-Q3 2010 (Unit: 10,000 tons)

	Machine-made Paper and Paperboard		Liner Board		Paper Products	
	Region	Output	Region	Output	Region	Output
No.1	Shandong	1,243.00	Henan	229.11	Guangdong	764.69
No.2	Guangdong	1,049.77	Zhejiang	146.80	Zhejiang	565.05
No.3	Zhejiang	1,035.06	Shandong	135.37	Jiangsu	332.19
No.4	Jiangsu	867.27	Hebei	105.50	Shandong	263.52
No.5	Henan	732.59	Anhui	79.63	Henan	227.35
No.6	Fujian	309.27	Hunan	54.56	Fujian	162.10
No.7	Hebei	300.34	Fujian	50.62	Hebei	129.68
No.8	Hunan	276.56	Sichuan	49.03	Sichuan	112.07
No.9	Sichuan	244.25	Jiangsu	35.80	Hubei	102.72
No.10	Anhui	166.10	Shanghai	34.92	Liaoning	96.64
Total		6,224.23		921.34		2,756.02
Share in Total Output		84.81%		83.43%		79.06%

Source: National Bureau of Statistics of China; ResearchInChina

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