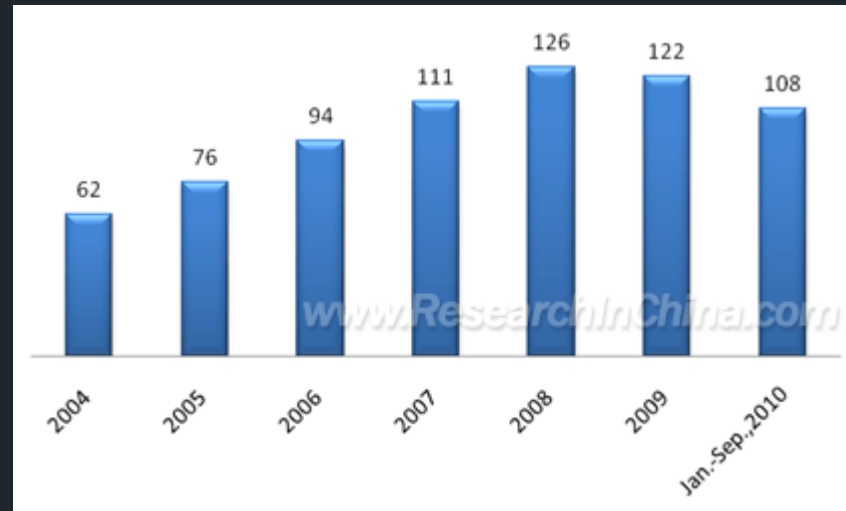


China Container Port Industry Report, 2010



Boosted by global economic recovery, China's shipping market has accelerated the pace of development. The container throughput of major Chinese ports achieved 108 million TEUs (Twenty-foot Equivalent Units) in the first three quarters of 2010. It's expected that the container throughput of Chinese ports will reach 134 million TEUs in 2010, up 9.8% year on year.

Container Throughput of Chinese Ports, 2003-2010 (million TEU)



Source: Ministry of Transport; ResearchInChina

From the perspective of coastal port, coastal ports achieved container throughput of 96.89 million TEUs in the first three quarters of 2010, of which, Shanghai Port seized the first place with throughput of 21.6 million TEUs, followed by Shenzhen Port and Qingdao Port. By August 2010, Shanghai Port (with total throughput of 19.067 million TEUs) has exceeded Singapore Port (19.011 million TEUs) for the first time to become the world's largest container port. It's expected that Shanghai Port will achieve container throughput of 27 million TEUs in 2010.

From the perspective of inland port, inland ports achieved container throughput of 10.63 million TEUs in the first three quarters of 2010. With regard to business operator, inland container transport enterprises are of various sizes, from mammoth shipping groups such as COSCO, China Shipping and Sinotrans to self-employed single-boat owners.

Container Throughput of China's Major Inland Ports, 2003-2010 (million TEU)



Source: Ministry of Transport; ResearchInChina

At present, there are three forms of investment in China's container ports:

First, domestic capital cooperates with port enterprises or builds and operates by itself; for example, Shenhua Group invested over RMB5 billion in Huanghua, Hebei to build a large coal export port; Baosteel Group built up a 250,000-ton ore transfer terminal, which is the largest of its kind in China, in Zhoushan, Zhejiang.

Second, joint venture; for example, Hong Kong Hutchison Whampoa invested in Shanghai, Shenzhen Yantian, Ningbo Beilun, Shantou, Zhuhai, Jiangmen, Xiamen and Nanhai ports; Singapore PSA in Dalian, Fuzhou and Guangzhou ports; British P&O in Qingdao and Shenzhen Shekou ports. In addition, China Merchants Holdings (International), Maersk, Encinal Terminals, Hong Kong Modern Terminals, Hong Kong Pacific Basin, Hong Kong Swire (Tai Koo), Kerry Properties (Hong Kong), Hong Kong Henderson, and Masahiro Trading Company Limited also invested in Chinese ports to operate container terminals.

Third, private capital participates in port construction and operation through shareholding structure reform or

Third, private capital participates in port construction and operation through shareholding structure reform or acquisition of state-owned capital. As China's private enterprises are in general weak, private capital investment is mainly concentrated in small and medium-sized coastal ports and inland ports. In large ports, private capital mainly focuses on businesses such as warehousing, freight forwarding, container truck transportation, customs clearance, and packaging. A large part of China's import and export goods is loaded and unloaded at private terminals, and about 60% of the loading and unloading equipment in coastal ports is owned and operated by private enterprises.

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