



China City Commercial Bank Market Report, 2010-2011

May 2011

This report

- ◆ **Analyzes the overview of China banking industry.**
- ◆ **Focuses on the development of Chinese city commercial banks and operation of Chinese city commercial banks**
- ◆ **Highlights the competition of city commercial banks in Bohai Economic Rim, Yangtze River Delta, Pan-Pearl River Delta, Northeast Economic Zone Western China Economic Zone, and Central China Economic Zone.**

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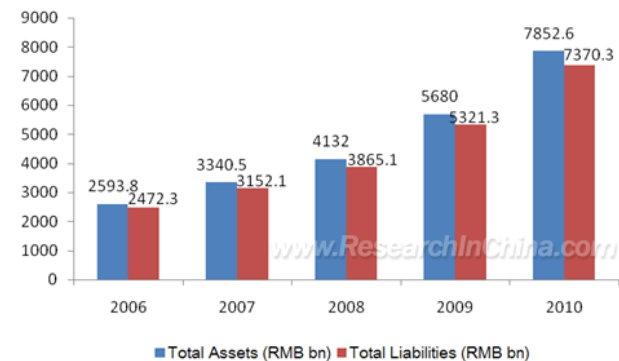
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Abstract

According to the statistics of China Banking Regulatory Commission, 62 city commercial banks set up 103 branches in places other than their home cities in China in 2010; over 40 city commercial banks made plans to go public.

From 2006 to 2010, the total assets and liabilities of Chinese city commercial banks increased from RMB2693.8 billion and RMB2472.3 billion in 2006 to RMB7852.6 billion and RMB7370.3 billion in 2010 respectively, with the compound annual growth rate of 24.8% and 24.4% separately. The share of city commercial banks in the total assets and liabilities of Chinese banking institutions increased from 5.9% in 2006 to 8.3% in 2010.

Assets and Liabilities of Chinese City Commercial Banks, 2006-2010



Source: China Banking Regulatory Commission

With the rapid growth of assets, the asset quality of Chinese city commercial banks has been improved. As of the end of 2010, the non-performing loan balance of Chinese city commercial banks reached RMB32.56 billion, the non performing loan rate was 0.9% and has been declining year by year.

The profitability of Chinese city commercial banks remained stable. In 2010, the Return on capital (ROC) of Chinese city commercial banks was 15.87%, and the Return on assets (ROA) was 1.00%.

This report not only analyses the overall operation of Chinese city commercial bank industry, but also introduces the business scale, asset quality, loan distribution and development planning of Top 50 Chinese city commercial banks (ranking by the total assets).

Bank of Beijing: As of the end of 2010, the total assets reached RMB733.21 billion; the total deposits RMB557.724 billion; the total loan RMB334.732 billion; the non-performing loan rate 0.69%. By the total assets, Bank of Beijing ranked first.

Bank of Tianjin: As of the end of 2010, the total assets reached RMB203.85 billion; the total deposits RMB162.29 billion; the total loan RMB78.44 billion; the non-performing loan rate 1.02%. By the total assets, Bank of Tianjin ranked eighth.

Bank of Shanghai: As of the end of 2010, the total assets reached RMB566.775 billion; the total deposits RMB409.522 billion; the total loan balance RMB298.436 billion; the non-performing loan rate 1.12%. By the total assets, Bank of Shanghai ranked second.

Bank of Chongqing: As of the end of 2010, it had 84 branches; the total assets reached RMB108.239 billion; the total deposits RMB73.856 billion; the total loan RMB52.968 billion; the non-performing loan rate 0.36%. By the total assets, Bank of Chongqing ranked seventeenth.

Bank of Kunlun: As of the end of 2010, the total assets reached RMB82.604 billion, 21 times the assets before the reorganization; the total liabilities RMB76.1 billion, 300% higher than the level in early 2010; the total net assets RMB6.504 billion, 100% higher than the level in early 2010. By the total assets, Bank of Kunlun ranked thirty-eighth.

Chongqing Three Gorges Bank: As of the end of 2010, it had 31 branches, with the total assets of RMB45.64 billion. It plans to increase its capital to RMB5 billion in 2-3 years. By the total assets, Chongqing Three Gorges Bank ranked thirty-ninth.

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