



**China Warehousing Industry
Report, 2010-2011**

Aug. 2011

This report

- ◆ **Analyzes the environment and development of China warehousing industry .**
- ◆ **Focuses on the sub-sectors and Logistics Park Projects under Construction in warehousing industry .**
- ◆ **Highlights the operation of key warehousing enterprises .**

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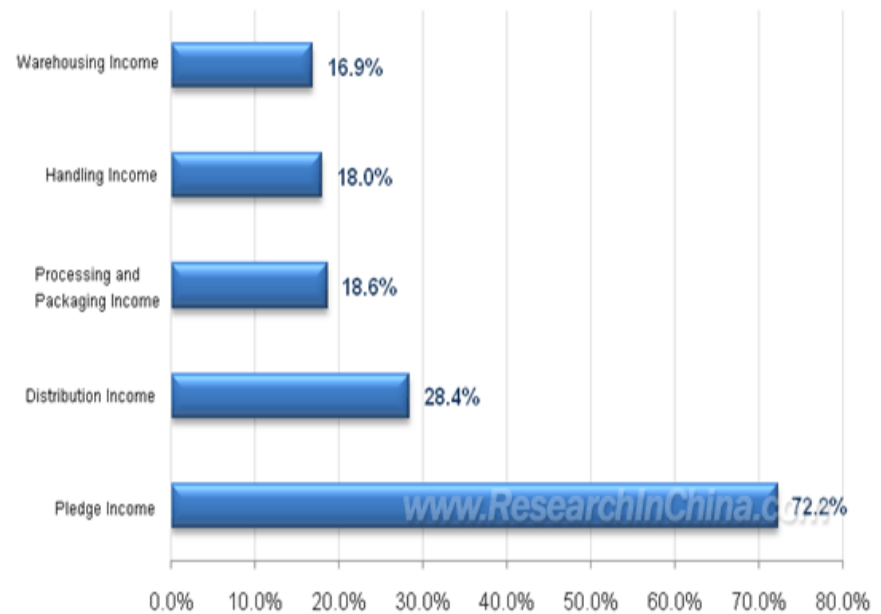
Abstract

In 2010, the operating income of China's key warehousing enterprises (152) soared to RMB37.949 billion from RMB22.516 billion in 2009, up 68.5% YoY. In spite of impact from the global financial crisis during 2008-2009, the market size of warehousing industry recovered since entering 2010, following a slight decline in 2009.

In 2010, fueled by the national cold chain logistics development planning, the market size of China low-temperature warehousing industry grew significantly; among cold storage enterprises above designated size, the cold storage capacity of "China Top 30 Cold Storage Enterprises" reached 8.5514 million cubic meters, an increase of nearly 31%. Meanwhile, the market size of China grain warehousing industry also increased somewhat; the total storage capacity and the effective storage capacity of the national grain warehousing enterprises increased by 28.313 million tons and 24.698 million tons respectively over the previous year, up 7.8% and 7.6%.

Since 2010, Chinese warehousing enterprises have maintained strong momentum for expansion and development. A number of market segment leaders such as Zhuhai Xin Heng Quetta International Chemical Storage Inc., Jiangsu Feiliks International Logistics Inc., Zhangjiagang Free-trade Science and Technology Co., Ltd., JiangSu XinNing Modern Logistics Co., Ltd., Shenzhen Feima International Supply China Co., Ltd are speeding up their expansion pace.

Operating Income Growth Rate of China's Key Warehousing Enterprises, 2010 (By Sector)



Source: China Association of Warehouse and Storage; ResearchInChina

In 2010, the transfer income of chemical goods warehousing of Zhuhai Xin Heng Quetta registered RMB 89.96 million, up 9.4% YoY, accounting for 52% of its total operating income. Currently, the total tank capacity of Zhuhai Xin Heng Quetta is 684 thousand cubic meters, which is expected to be expanded to 1.189 million cubic meters after overall production plus the projects under construction and planned.

By the end of June 2011, Jiangsu Feiliks International Logistics Inc. has a total warehouse space of 170 thousand square meters, and in the same year the new added warehouse capacity hit 30 thousand square meters, a considerable increase. In 2010, the integrated logistics revenue of Feiliks amounted to RMB 338 million, taking 31.4%; the basic logistics revenue got to RMB 850 million, a share of 68.6%.

A number of large time-honored enterprises also present robust development, e.g. Zhongchu Development Stock Co., Ltd, in 2010 its operating income of warehousing business reached RMB306 million, up 25% YoY. Until the end of 2010, Zhongchu had owned a logistics base of more than 6.4 million square meters nationwide, including 2.44 million square meters of self-owned land, mainly distributed in large and

medium sized cities like Shanghai, Tianjin, Nanjing, Wuxin, Qingdao, etc.

This report analyzes the status quo, development environment, related policies, investment and financing conditions, corporate operation as well as segments of China warehousing industry.

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