

A-share Listed Papermaking Companies - Profiles and Financial Data

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Abstracts

By the end of September, 2016, there were 6,677 companies in the pulping, papermaking and paper product industry, including 52 pulping companies, 2,730 papermaking companies and 3,895 paper product manufacturers.

In 2016, the production volume of paper and paperboard reached 123.192 million tons, increasing by 3.1% over 2015. According to monthly statistics, the production volume of paper and paperboard in China kept stable in 2016. In Q1, production volume in January and February was not large due to the Spring Festival effects. In Q2, it did not change much. In Q3, it declined because many papermaking factories were shut down forced by the intensified environmental protection policies. Production volume picked up in September and the trend lasted to 2017. Based on the status of the industry, this indicates that China's papermaking industry is stepping out of the gloomy picture and will get better in 2017. In 2016, operation revenue of the papermaking and paper product industry in China was CNY 1,468.74 billion, increasing by 6.5%. Total profit was CNY 84.41 billion, increasing by 16.1% YOY.

In terms of varieties of paper, the demand for newspaper and office paper will keep declining with the increasing number of Internet users and higher level of automation in the office. However, the demand for uncoated printing and writing paper, coated printing paper, household paper, packaging paper, corrugating medium and paperboard will increase.

In terms of regional production volume, Shandong produced 21,706,400 tons of paper and paperboard in 2016, surpassing Guangdong to become the largest papermaking province in China after two years. Guangdong ranked the second with the production volume of 21,275,200 tons, followed by Zhejiang with 18,897.6 tons. Before 2014,

Shandong had been the No.1 producer of paper and paperboard for 19 consecutive years. In 2014, Guangdong overtook Shandong with 20.707 million tons of production.

Although China consumes the largest amount of paper and paperboard in the world, the annual consumption per capita is still low. This means China's papermaking has vast room to grow. In 2015, 29.5% of paper was made from wood and bamboo pulp, 65% from waste pulp and 5.5% from non-wood pulp. By contrast, 63% of paper produced outside of China is made from wood pulp. This also means China's papermaking has vast room to grow.

CRI selects 24 papermaking companies listed on A-share market in this report. The report provides readers with a quick guide to the profiles and financials of Chinese Papermaking companies being listed in the recent 10 years.

The report is composed of two parts: the first part is enterprise profiles and the second part is the operation status of these enterprises in the recent decade (presently 2006 to 2016, we will update it to the latest as time goes by).

The operation status is demonstrated from the following perspectives: (1) financial indexes, such as earnings per share, book value per share (BPS), sales per share, net cash flow per share, return on net worth and debt to asset ratio; (2) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (3) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (4) indexes on the balance sheet, such as liquid asset, fixed asset, current liability, non-current liability, capital reserve and shareholders' equity.

(1) Financial Indexes

Earnings per Share

Book Value per Share (BPS)

Sales per Share (SPS)

Net Cash Flow per Share from Operations

Net Cash Flow per Share (CNY)

Return on Net Worth

Net Profit Margin on Total Assets

Return on Invested Capital (ROIC) (%)

Gross Profit Margin on Sales (%)

Net Profit Margin on Sales (%)

EBIT Margin (%)

EBITDA Margin (%)

Debt to Asset Ratio (%)

Total Asset Turnover (times)

Cash/Operating Income Received from Sales of Goods or Services

YOY Growth Rate of Operating Revenue (%)

YOY Growth Rate of Operating Profit (%)

YOY Growth Rate of Net Profit Attributable to Shareholders of Parent Company (%)

(2) Summary of Income Statement

Gross Revenue (CNY, million)

Total Operating Costs (CNY, million)

Revenue (CNY, million)

Operating Profit (CNY, million)

Total Profit (CNY, million)

Net Profit (CNY, million)

Net Profit Attributable to Shareholders of Parent Company (CNY, million)

Non-recurring Items (CNY, million)

Net Profit Deducting Non-recurring Items (CNY, million)

R&D Costs (CNY, million)

Earnings Before Interest and Tax (EBIT) (Based on iFind) (CNY, million)

Earnings Before Interest, Taxes, Depreciation and Amortization (EBITDA)
(Based on iFind) (CNY, million)

(3) Summary of Balance Sheet

Liquid Asset (CNY, million)

Fixed Asset (CNY, million)

Long-term Equity Investment

Total Assets (CNY, million)

Liquid Liability (CNY, million)

Non-current Liability (CNY, million)

Total Liability (CNY, million)

Capital Reserve (CNY, million)

Surplus Reserve (CNY, million)

Undistributed Profit (CNY, million)

Shareholders' Equity (CNY, million)

Equity Attributable to Shareholders of Parent Company (CNY, million)

(4) Summary of Cash Flow Statement

Cash Received from Sales of Goods and Services (CNY, million)

Cash Flow from Operations (CNY, million)

Cash Paid to Purchase Fixed Assets, Intangible Assets and Other Long-term Assets (CNY, million)

Cash Paid for Investments (CNY, million)

Cash Flow from Investments (CNY, million)

Cash Received from Investors (CNY, million)

Cash Received from Borrowings (CNY, million)

Cash Flow from Financing (CNY, million)

Net Increase of Cash and Cash Equivalents (CNY, million)

Cash and Cash Equivalents, End of Period (CNY, million)

Depreciation and Amortization (CNY, million)

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