

Research Report on Chinese Waterway Transportation Industry, 2008-2009

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Abstracts

Chinese waterway transportation industry is severely attacked by the global financial crisis and the slowed growth of the global economy. In 2008Q4, the growth rate of Chinese port throughput continued to decline; the waterway transport price plummeted; some shipping enterprises suffered losses.

In 2008Q4, the growth rate of Chinese port cargo throughput decreased. From January to August, 2008, the growth rate of Chinese port cargo throughput reached 15.2%, slightly higher than the average level of 2007. The growth rate of the foreign trade cargo throughput came up to 12%. Nevertheless, since September 2008, the growth rate of Chinese port cargo throughput remained falling to only 5.2% in September-December, 2008. Moreover, the foreign trade cargo throughput began to reduce.

In January to November, 2008, Chinese waterway passenger transport volume and turnover reached 215 million persons and 6.563 billion person-kilometers, dropping by 1.1% YOY and 4.3% YOY respectively. Chinese waterway freight volume and turnover came up to 2.65 billion tons and 5.95305 trillion ton-kilometers, rising by 10.6% YOY and 4.2% YOY respectively. However, due to the slowing economic growth, their growth rates dropped by 2.1% YOY and 14.3% YOY separately. Moreover, owing to the global financial crisis, Chinese export container shipping market showed evident depression signs: the transport demand fell obviously; some ships lay idle; the comprehensive freight price continued to decrease. On December 26th, 2008, Shanghai Shipping Exchange declared China export container freight index to be 946.55, reducing by 19% compared with that of January 4th, 2008.

In 2008Q4, Chinese Yangtze River shipping market went into recession. In 2008Q4, the financial crisis aggravated its influence on Chinese real economy. Power and metallurgy

industries along the Yangtze River carried out production restriction and transport price reduction to cope with the financial crisis, buffeting the Yangtze River shipping market. The production and operation of port shipping enterprises and their confidence on the Yangtze River shipping macro economic development plummeted. In 2008Q4, the Yangtze River shipping prosperous index was 77.13 while the confidence index was 68.70, both falling into the depression range for the first time and being the lowest points since the beginning of Yangtze River shipping prosperous investigation in 2004.

In 2009H1, Chinese economy and the waterway transportation industry began to restore. In 2009H1, Chinese port passenger throughput reached 52.31 million with a YOY growth of 12.3%, revealing an obvious growth acceleration trend. The cargo throughput of Chinese ports (above designated size) totaled 3.27 billion tons with a YOY growth of 2.6%. The growth rate rose significantly compared with that in 2009Q1. Stimulated by the transportation of foreign trade ores and crude oil and domestic trade coal and mine construction materials, the growth rate of Chinese port cargo throughput increased month by month and maintained rising for 4 successive months. The growth rate of the domestic trade cargo throughput was much higher than that of the foreign trade. The container throughput of Chinese ports (above designated size) reached 55.9662 million TEU, falling by 11% YOY.

Chinese waterway passenger transport volume began to rise with the economic recovery. In 2009H1, Chinese waterway passenger transport volume and turnover reached 105 million persons and 3.255 billion person-kilometers, growing by 4.1% YOY and 9.1% YOY respectively. Their growth rates were increased by 7.1% YOY and 16.2% YOY separately. Chinese waterway freight volume stopped falling and started to rise. In 2009H1, Chinese waterway freight volume and turnover came up to 1.483 billion tons and 2.706761 trillion ton-kilometers, growing by 1.8% YOY and 9.2% YOY respectively. Their growth rates started to increase since May 2009 thanks to the economic recovery.

Chinese export container shipping market and the coastal bulk shipping market began to recover. In June 2009, Chinese export container freight index hit the lowest point. In the beginning of July 2009, it started to increase and reached 808.23 on July 31st. On July 29th, 2009, the coastal bulk freight index of Shanghai Shipping Exchange was 1074.20. In 2009Q2, the Yangtze River economy began to restore and the shipping prosperous status was improved. Thus, the Yangtze River shipping prosperous index reached 94.47 and the confidence index was 101.29. Chinese shipping enterprises are optimistic on the Yangtze River shipping prospect.

Through this report, readers can acquire more information:

- Operation of Chinese waterway transportation industry, 2008-2009
- Operation of Chinese waterway passenger transport market, 2008-2009
- Operation of Chinese waterway freight transport market, 2008-2009
- Operation of Chinese container shipping market, 2008-2009
- Operation of Chinese coastal bulk cargo market, 2008-2009
- Operation of Chinese inland shipping market, 2008-2009
- Investment in Chinese waterway transportation market, 2008-2009

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- Research institutes concerning Chinese waterway transportation industry
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Contents

OVERALL OPERATION OF CHINESE TRANSPORTATION INDUSTRY, 2008-2009

- Main Factors Affecting Chinese Transportation Industry
 - + Macro Economy
 - + Industrial Production
 - + Fixed Asset Investment
 - + Foreign Trade

OVERALL OPERATION OF CHINESE TRANSPORTATION INDUSTRY, 2008-2009

- Passenger Transport Volume
- Freight Volume
- Rapid Growth of Fixed Asset Investment in Chinese Transportation Industry

PRODUCTION OF CHINESE WATERWAY TRANSPORTATION INDUSTRY, 2008-2009

- Operation of Chinese Ports, 2008-2009
 - + Port Passenger Throughput
 - + Port Cargo Throughput
 - + Port Container Throughput
 - + Port Throughput of Key Goods and Materials
- Operation of Chinese Shipping Market, 2008-2009
 - + Waterway Passenger Transport Volume
 - + Waterway Freight Volume
 - + Container Shipping Market
 - + Coastal Bulk Cargo Shipping Market
- Shipping Market Quotations in Chinese Key Waters, 2008-2009
 - + Yangtze River Shipping Market
 - + Pearl River Shipping Market

OVERVIEW OF GLOBAL SHIPPING MARKET, 2008-2009

- International Container Shipping Market
- International Dry Bulk Shipping Market
- Crude Oil Shipping Market

POLICIES IN CHINESE WATERWAY TRANSPORTATION INDUSTRY, 2009

- Chinese State Council Passed the Adjustment and Revitalization Plan of Ship Industry
- Chinese Central Government Will Invest RMB 43 Billion for Systematic Harnessing of Yangtze River Mainstream Waterway
- Port Infrastructure Construction Will Be Carried out All over China
- Shanghai Issued Related Policies and Implementing Opinions on Promoting Shipping Center Construction

Selected Charts

SELECTED CHARTS

Chart Chinese Total Passenger Transport Volume, 2008-2009

Chart Chinese Total Passenger Turnover, 2008-2009

Chart YOY Growth of Chinese Total Freight Volume, 2008-2009

Chart Chinese Total Freight Volume, 2008-2009

Chart Chinese Total Freight Turnover, 2008-2009

Chart Proportions of Freight Turnover by Different Transport Means, 2008

Chart Accomplishment of Highway and Waterway Construction Investment over China, 2008-2009

Chart Chinese Port Passenger Throughput, 2008-2009

Chart Passenger Throughput and Growth in Main Chinese Ports, 2008-2009

Chart Foreign Trade Cargo Throughput and Growth in Chinese Ports, 2008-2009

Chart Cargo Throughput and Growth in Main Chinese Ports, 2008-2009

Chart Foreign Trade Cargo Throughput and Growth in Main Chinese Ports, 2008-2009

Chart Chinese Top 10 Ports in Container Throughput, 2008-2009

Chart Chinese Waterway Passenger Transport Volume and Turnover, 2008-2009

Chart Chinese Waterway Freight Volume and Turnover, 2008-2009

Chart China Foreign Trade Export Container Freight Index, 2008-2009

Chart Chinese Coastal Bulk Cargo (Coal) Freight Index, January-July 2009

Chart Chinese Yangtze River Dry Bulk Freight Index, 2009H1

Chart Change of Baltic Freight Index, January-July 2009

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