

# China Filling Station and Gas Station Industry Report,2015-2018

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## Abstracts

### Filling Stations

By the end of 2014, China had run a total of 99,000 filling stations, each of which served 1,456 civilian cars; Shandong, Hebei, Henan, Guangdong and Jiangsu ranked top five by the number of filling stations, especially Shandong province had 10,000 ones (it also held the most civilian cars in China with a fast growth rate). In terms of the number of civilian cars served by a filling station, Beijing, Zhejiang, Tianjin, Guangdong and Jiangsu saw each filling station support more than 2,000 civilian cars, particularly Beijing even witnessed 4,900.

Regarding enterprises, Sinopec occupies 31.0% of filling stations in the country, remaining first by number. As of the end of 2014, it had possessed 30,551 filling stations, including 30,538 self-operated ones and 13 franchised ones.

Since Sinopec took the lead to introduce private capital to the field of refined oil products in February 2014, state-owned oil and gas giants (PetroChina, CNOOC, etc.) have been constantly promoting mixed ownership reforms. Sinopec sells its 29.99% stake of its sales companies to realize its mixed ownership reform. PetroChina deepens the reform to the highly monopolized oil and gas exploitation field. As more capital rushes into the oil and gas industry, particularly in the marketing field, the operating modes (such as startup, acquisition, leasing, joint ventures and franchising, etc.) and service modes (introduction of the Internet, open platforms for partners, penetration in all life services) of filling stations will be further optimized, new business models will mushroom, and the filling station industry will seize higher profit margins.

### Gas Stations

Before 2012, China's natural gas vehicles were mainly CNG ones. Given LNG vehicles are widely accepted by virtue of environmental friendliness, economical efficiency, security and other features, Shandong, Xinjiang, Hebei, Guangdong, etc. have boosted and popularized LNG vehicles (including heavy trucks, city buses, highway buses) since 2012. Thanks to the wide promotion of LNG vehicles and the maturity of technologies about LNG gas stations, the number of Chinese LNG gas stations jumped from 241 in 2011 to 2,500 in 2014. In October 2012, Natural Gas Utilization Policy defined dual-fuel and LNG vehicles as priority natural gas applications for the first time, stipulated that for the construction of gas stations used for priority projects, and local governments were allowed to issue incentive policies concerning land, financing, charges, etc.. In the future, natural gas stations, particularly LNG gas stations, will maintain rapid growth.

Currently, the world is prompting clean energy (natural gas, etc.) and new energy vehicles (battery electric vehicle, plug-in hybrid electric vehicle, fuel cell vehicle, etc.). In the next decade, traditional fuel vehicles, clean energy vehicles and new energy vehicles will coexist. More and more filling stations will further enrich the energy structure, deploy 'oil + gas', 'oil + electricity', 'oil + gas + electricity' and other modes, and transfer towards integrated energy service stations.

The report highlights the followings:

Overview of the filling station industry (including definition, classification, major clients and consumption habits, business models and strategies of filling stations at home and abroad, etc.)

Chinese refined oil and filling station market (embracing gasoline and diesel output and sales volume; price trend; refined oil enterprises; number, distribution and competition pattern of filling stations; etc.)

Chinese motor vehicle and filling station market (involving sales volume and ownership of automobiles; the number of motor vehicles and automobiles served by each filling station)

Global and Chinese gas station market (such as market overview; natural gas vehicle ownership; number, competition pattern and development prospect of natural gas stations, etc.)

Analysis (revenue, revenue structure, net income, gross margin, refined oil sales

volume, filling station business, etc.) on leading companies (Shell, BP, Sinopec, PetroChina, etc.) in global and China filling station industry.

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