

Research Report on China's Natural Gas and Liquid Natural Gas (LNG) Industry, 2013-2017

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Abstracts

In 2011, the output of China's natural gas reached 102.531 billion cubic meters, increasing by 6.9% YOY; the apparent consumption was 130.71 billion cubic meters, with an increase of 20.5% YOY. In 2011, the import volume of China's natural gas reached 31.39 billion cubic meters, rising by 89% YOY; the export volume reached 3.21 billion cubic meters, decreasing by 20.9% YOY. In 2011, the total imported LNG in China was 12.2126 million tons, up by 30.71% YOY. Among it, the import volume from Australia was 3.6381 million tons, down by 7.16% YOY; the import volume from Qatar was 2.33 million tons, increasing by 92.29% YOY; the import volume from Indonesia was 1.9855 million tons, with a rise of 16.69% YOY. In 2011, the foreign independence of China's natural gases reached 21.56%, increasing by about 10 percentage points over 2010.

Since 2011, according to the trend of international crude oil prices, the ex-factory of industrial products of China's oil and natural gas exploitation industry remains relatively high. Together with continuously rising demand for oil and gas, the rapid increase in sales revenue of the industry is ensured. In 2011, the sales revenue was CNY 1.246649 trillion, increasing by 29.19% YOY. Although the growth rate reached nearly 30%, the growth rate of sales revenue slightly declined over 2010.

China's energy structure is characterized by "abundant coal resources, poor oil resources and short gas resources". The foreign dependence of oil and gas is increasingly high. In 2011, the foreign dependence of natural gas rose by 10%. The huge demand for oil and gas in China drives enterprises to strengthen efforts in the exploration and development of oil and gas. In terms of oil, China strengthens the expansion towards deep sea field in recent years; as for natural gas, it makes certain achievements in western regions; in addition, the exploration and development of

unconventional oil and gas such as shale gas and coal bed gas also intensify. Meanwhile, the government also introduces a series of supporting policies to intensify the exploration and development of related oil and gas resources. It is expected that the exploration and development of China's oil and gas will usher in important opportunities for growth in the next years. Enterprises involved in exploration and development industries of oil and gas will benefit from it.

In 2011, intense political unrest occurred in Middle East & North Africa areas with the most abundant oil and gas resources in the world. The international cooperation of China's oil and gas industry confronted unprecedented difficulties. Under the background, the overseas M&A businesses of China's oil enterprises sharply dropped, with the purchase value of about USD 18 billion. However, overseas oil and gas output maintained the rapid growth in Chinese enterprises. In 2011, equity output of China's oil and gas overseas firstly surmounted 80 million tons, with the total output equal to about 85 million tons of oil, increasing by over 10% YOY. In recent years, China's oil and gas demand is still predicted to maintain huge gaps, and the trade demand for oil and gas is relatively large. However, restricted by unrest in international oil and gas markets and the production capacity of domestic refineries, there is large pressure on imports of oil and gas in 2012.

It is expected that the consumption of natural gas in China will surpass 150 billion cubic meters in 2012, and the growth rate of natural gas apparent consumption will be over 20%. In 2012, the output of China's natural gas will reach around 110 billion cubic meters, and the total import volume will exceed 45 billion cubic meters. The proportion of import volume in the total consumption will rise to 30%.

In China's natural gas industry, retail prices of natural gas are likely to be lower than cost prices because the ex-factory of natural gas is fixed by the central government, while the retail prices are formulated by local governments. Upstream and downstream integration enterprises can completely avoid such risks, but pure downstream enterprises may suffer losses.

With the development of China's economy and improvement in urbanization levels, the demand for natural gas and LNG in China is expected to maintain the rapid increase in the coming years. Nowadays, firewood and coal are still used as fuels in over half of Chinese facilities. The huge market space for natural gas and LNG is obvious.

As for China's market, there are many investment opportunities for exploitation, trade and equipment manufacture enterprises of natural gas and LNG. In the exploitation field

of China's natural gas, non-state-owned capital is subject to many limitations. However, private and foreign-funded enterprises are accessible to invest in shale gas, coal bed gas and LNG fields which are currently encouraged by China's government and provided with certain preferential policies.

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