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Research Report on Chinese Liquefied Natural Gas (LNG) Industry, 2010-2011

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Abstracts

Natural gas as a kind of clean energy is becoming increasingly popular. Its proportion in the energy supply rises rapidly. Accordingly, the LNG industry becomes one of the energy sectors realizing the fastest growth. In recent years, the global LNG production and trade acquire growing vitality. LNG is becoming a new hotspot in the world oil & gas industry. Some large energy consumption countries pay growing attention to the import of LNG. Japan, South Korea, USA and Europe are all constructing LNG receiving stations on a large scale. International oil giants also take LNG business as their new profit growth point successively. It is forecast that LNG will become another hot energy product next to oil which will arouse the global competition.

Chinese natural gas industry is now in the peak period of development and enjoys fast growing development. This can be reflected from the growth of the verified deposits and annual production of natural gas. In 2009, the newly verified deposits of natural gas in China came to 723.40 billion m3. The average verified deposits of the past six years reached 510.50 billion m3. Presently, the annual average verified deposits equal the total deposits verified in 1949-1988. Furthermore, Chinese natural gas production was 85.17 billion m3 in 2009 and the daily average production is almost equivalent to the annual production of 50 years ago.

In 2009, China’s natural gas production maintained the upward trend. The natural gas consumption accounted for 3.4% in the energy consumption. The rapid growth trend was not affected by the economic crisis. Despite the slight decline of the production growth rate, the production was increased in general.

In 2009, the natural gas consumption in China amounted to 90 billion m3. The consumption proportion of natural gas in the primary energy of China increased from

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2.4% in 2000 to 4.1%. The consumption proportion of urban fuel gas in the natural gas of China continued to increase. The proportion of gas for industrial and chemical sectors sustained the decline trend, while the gas for power generation was raised. In brief, the consumption structure of natural gas becomes more reasonable.

In recent years, Chinese natural gas consumption market continues to expand, leading to the excessive development in the downstream market. As a result, the natural gas consumption capacity exceeds the production capacity.

The current low price of natural gas in China leaves a huge space for the growth in the long run. The ex-factory price of industrial natural gas in China is presently 33% of the crude oil price. By contrast, in countries with mature market economy, the price ratio of natural gas and crude oil is usually 0.65-0.80. As to the consumption terminal, based on the calorific value, the price of natural gas for civil use is only 81% of artificial coal gas, 50% of LPG, 48% of gasoline and 40% of electricity. It is predicted that the price growth rate of natural gas in China is about 60%-100% in the coming years.

The global natural gas exploitation industry will probably concentrate in the Middle East region represented by Saudi Arabia, Iraq and Kuwait. The LNG export of these countries to China will rise continuously.

In 2009, China imported 5.53 million tons of LNG, 65.8% increase over 2008. In 2010H1, the import volume came up to 4.08 million tons, rising by 100.2% YOY.

With the operation of LNG projects under planning, it is estimated that China will import over 10 million tons of LNG every year after 2010.

Foreign and private capitals are restricted in Chinese natural gas exploitation industry. Nevertheless, investors can enter the fields of dimethyl ether, coal bed gas and LNG since these fields are presently supported by the government and enjoy some preferential policies.

Through this report, readers can acquire more information:

Status quo of Chinese natural gas and LNG industry

Major LNG projects in China

China’s LNG import

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Supply and demand of natural gas in China

Development of Chinese natural gas and LNG industry by region

Development environment of Chinese natural gas and LNG industry

Prediction on the development of Chinese natural gas and LNG industry

Prediction on investment opportunities in Chinese natural gas and LNG industry

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