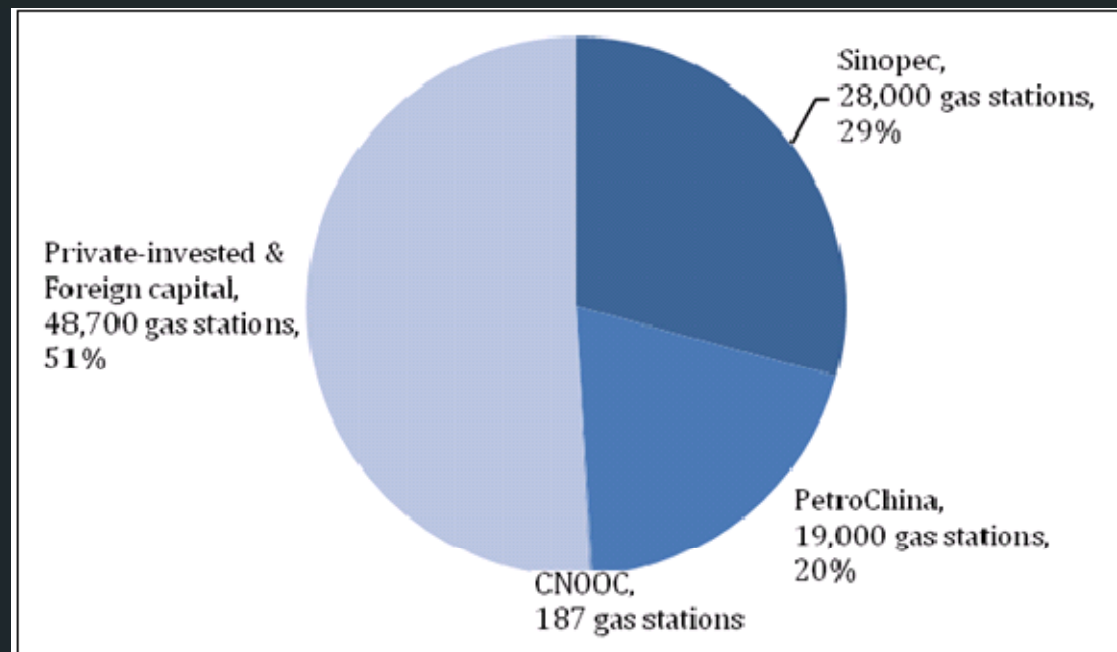


China Gas Station Industry Report, 2009



As of the end of 2008, there had been 96,000 gas stations in China, of which Sinopec and PetroChina respectively boasted of 28,000 and 19,000 units, while CNOOC had only 187 gas stations, the number of the three above accounted for around 50% of China's total. The rest are foreign-owned and private-invested, approximately 48,700 units.

China's Gas Station Industry Layout, 2008



Source: ResearchInChina

In May, 2009, the number of gas stations in China registered 97,000, and the competition layout was nearly the same as the year of 2008. However, As PetroChina and Sinopec loosen the control on wholesale volume of private gas stations, the oil refineries in Shandong province and other places have successively returned to work, providing the relatively lower priced oil source for private gas stations. In Oct, 2009, the number of private gas stations had boosted up to 30,000 in the area that Sinopec dominated, which caused its oil products market share to drop to 50% from 60%. This poses a threat to the two giants, PetroChina and Sinopec, the competition in Chinese refined oil retail market becomes increasingly intensive.

According to the 11th Five-year Plan Period, 90 million-ton/year oil refining facilities will put into operation in China before 2010, and a crude oil processing capacity of over 54 million tons a year had put into production around 2008-2009. With the completion of scheduled production capacity, the mounting pressure of supply and demand will at length exert great effect on China's refined oil retail market in the future.

The report makes an in-depth study of China's gas station industry development, main regional markets, and key gas station corporations (including Sinopec, PetroChina, CNOOC and Shell, BP) in China, such as operation, gas station distribution, strategy and latest developments. The report can be taken as a reference to judge the future investment value and risks of China's gas station industry.

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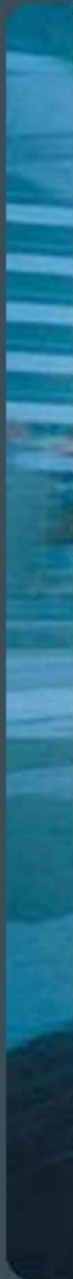
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