



**China Refueling Station Industry Report,
2011-2012**

Jun 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include CAAM International Association for Natural Gas Vehicles, and National Development and Reform Commission etc.

Abstract

In 2011, there are more than 1,400 natural gas vehicle refueling stations in over 80 cities throughout 30 provinces, autonomous regions and municipalities of China. LNG refueling stations have attracted the greatest attention, of which skid-mounted ones have achieved the rapidest development. In 2011, the number of skid-mounted LNG refueling stations reached 330 in China.

Number of Skid-mounted LNG Refueling Stations and Vehicles & Vessels in China, 2010-2011

	2010	2011
LNG-powered Heavy-duty Trucks	6,800	17,500
LNG-powered Buses	1,950	5,100
Skid-mounted LNG Refueling Stations	160	330
LNG-powered Vessels	7	90

Source: ResearchInChina " China Refueling Station Industry Report, 2011-2012"

Since 2010, most regions in Chinese mainland have sped up the construction of natural gas refueling stations. For instance, Xinjiang will build up 464 refueling stations, 1 reserve depot, 1 peak-shaving station, 8 LNG plants and 10 CNG primary fueling stations in 2010-2015.

When it comes to refueling station operators, CNPC, Sinopec and CNOOC, China's three oil giants, are accelerating their expansion. CNPC plans to set up 126 LNG refueling stations in Henan Province, 122 LNG refueling stations along the "five vertical and three horizontal" national and provincial highways and 720 LNG refueling stations in Shandong Province by the end of 2015. CNOOC plans to complete the construction of 1,000 LNG refueling stations in 2011-2015.

In terms of refueling station constructors, domestic enterprises have developed rapidly in the past two years. Presently, Zhangjiagang Furui Special Equipment, Chengdu Huaqi Houpu Machine Electricity Technology and Yantai Jereh Oilfield Services Group have witnessed significant growth in the market share of their products, but they still rely on imports for some key equipment. Foreign-funded companies such as Chart Industries have boosted their layout in Chinese mainland since 2005, and by virtue of high product quality and strong after-sales support, their product prices are higher than those of domestic enterprises.

It is in the report that covers the followings:

1. Analysis and forecast of overall size and market segment size of Chinese filling station industry;
2. Analysis and forecast of market competition, costs and demand of refueling station industry in China;
3. Analysis of operating status, development planning and key projects of refueling station industry in major regions of China;

4. Analysis of operation and refueling station construction business of major refueling station constructors in China;
5. Analysis of operation, refueling station projects and development planning of main refueling station operators in China.

Furui Special Equipment: At the end of 2008, the company reached a cooperative framework agreement with Xinjiang Guanghui, according to which, the latter will purchase at least 3,000 sets of LNG vehicle cylinders and gas supply systems, and 20 sets of skid-mounted refueling stations from the former every year. In late 2009, the company concluded a cooperative framework agreement with CNPC Kunming Sales Branch to set up 51 refueling stations in Kunming before December 2012.

ENN Energy: In 2011, the company built up and operated a total of 46 natural gas vehicle refueling stations, including 27 CNG refueling stations and 19 LNG refueling stations. As of 2011, the company had set up 238 vehicle refueling stations in 59 cities of China, including 20 cities where it has no urban gas projects.

Xinjiang Guanghui: The company has set up 75 refueling stations in Xinjiang, Gansu and Ningxia, etc., is constructing 8 refueling stations and plans to build 52 refueling stations. In 2011, the fueling volume of the company's refueling stations totaled 95.057 million cubic meters.

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