



China Natural Gas and Shale Gas Industry Report, 2012-2015

July 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

Natural gas consists of conventional natural gas and unconventional natural gas. Shale gas is included in unconventional natural gas. Compared with conventional natural gas, shale gas is featured with low abundance, low porosity and permeability, low recovery ratio, but large reserves and long lifespan of single well.

The global shale gas resources are mainly distributed in North America and Asia, which accounted for 29% and 27% of the exploitable shale gas resources in 2011 respectively. The United States is the earliest and most successful country in the development of shale gas. In 2011, its shale gas output shared 27.8% of the country's natural gas output, thereby promoting its self-sufficiency rate of natural gas up to 94.4% and reducing its import volume significantly. The success of the United States has prompted the world's major countries to enhance shale gas exploration and development.

China has long been using coal as the main energy. In China's energy consumption, coal accounts for over 60%, while natural gas only occupies about 5%, far below the world average, so natural gas has huge development potentials in China. In recent years, China's demand for natural gas has witnessed rapid growth, but the output growth has been slow, leading to increasing dependency on the import of natural gas, which reached 26.2% in 2012. To reduce the risk incurred by the high dependency and ease the contradiction between supply and demand, China is accelerating the exploration and development of shale gas and other unconventional natural gas.

In 2012, China's potential volume of mineable shale gas hit 25 trillion cubic meters (excluding the shale gas in Qinghai and Tibet), almost same with that of China's land conventional natural gas. At present, China's shale gas industry is still in its infancy, with daily output of about 540,000 cubic meters. Main mining enterprises include PetroChina, Sinopec and Yanchang Petroleum. In 2015, the shale gas industry will enter a rapid development stage in the wake of the completion of China's potential shale gas resource survey. By 2020, shale gas will become an important part of China's natural gas energy, with an output of 100 billion cubic meters.

From 2011 to now, Ministry of Land and Resources of China invited bids for shale gas exploration rights twice and allowed private enterprises to participate in. In the second round of bidding, two private companies won the bids. The third round of bidding will be held in early 2014, and still open to small and medium private enterprises, providing equal opportunities for private capital.

As most core technologies of shale gas mining equipment are mastered by foreign enterprises, the cooperation with such enterprises will bring some market share quickly. The current development shows that oil service companies and oilfield equipment manufacturers such as SINO Geophysical and LandOcean specializing in data processing and interpretation, Jereh engaged in fracturing equipment and services, Tong Oil Tools focusing on composite penetrators and services are more likely to enjoy benefits.

China Natural Gas (Shale Gas) Industry Report, 2012-2015 covers the following aspects:

The global natural gas and shale gas reserves and distribution, status quo of shale gas exploration, and the shale gas development in the United States;
China's natural gas reserves and distribution, supply and demand, import and export, and development forecast;
China's shale gas reserves and distribution, bidding, exploration, competition pattern, development forecast;
Operation, oil and gas exploration and development, forecasting and outlook of six oil and gas exploration and development enterprises in China.

1 Overview of Shale Gas Industry

- 1.1 Overview
- 1.2 Mining Features
- 1.3 Classification
- 1.4 Industry Chain
- 1.5 Exploration and Development Process

2 Status Quo of Global Shale Gas Industry

- 2.1 Reserves and Distribution
- 2.2 Status Quo of Exploration
- 2.3 Shale Gas Development in USA
 - 2.3.1 Technological Breakthrough
 - 2.3.2 Development Course
 - 2.3.3 Supply and Demand
 - 2.3.4 Experience

3 Status Quo of China Natural Gas Industry

- 3.1 Energy Consumption Structure
- 3.2 Resource Advantages
- 3.3 Reserves and Distribution
- 3.4 Supply
- 3.5 Demand
- 3.6 Import and Export
 - 3.6.1 LNG
 - 3.6.2 Piped Natural Gas
- 3.7 Development Forecast
 - 3.7.1 Supply and Demand
 - 3.7.2 Consumption Structure

4 Status Quo of China Shale Gas Industry

- 4.1 Development
- 4.2 Policy
- 4.3 Bidding
- 4.4 Resource Reserves
- 4.5 Exploration
- 4.6 Competition Pattern
- 4.7 Potential Risk
- 4.8 Development Forecast

5 Major Companies in China Oil and Gas Exploration and Development Industry

- 5.1 SINO Geophysical
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 Gross Margin
 - 5.1.5 R & D
 - 5.1.6 Data Processing and Interpretation
 - 5.1.7 Anticipation and Outlook
- 5.2 LandOcean
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Revenue Structure
 - 5.2.4 Gross Margin
 - 5.2.5R & D
 - 5.2.6 Clients
 - 5.2.7 Data Processing and Interpretation

- 5.2.8 Anticipation and Outlook
- 5.3 Jereh
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Revenue Structure
 - 5.3.4 Gross Margin
 - 5.3.5 R & D
 - 5.3.6 Oilfield Equipment and Services
 - 5.3.7 Anticipation and Outlook
- 5.4 Shandong Molong
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Revenue Structure
 - 5.4.4 Gross Margin
 - 5.4.5R & D
 - 5.4.6 Clients and Suppliers
 - 5.4.7 Oil & Gas Equipment and Services
 - 5.4.8 Anticipation and Outlook
- 5.5 HBP
- 5.6 Tong Oil Tools

- Classification of Natural Gas Resources
- Natural Gas Industry Chain
- Natural Gas Exploration and Development Process
- Natural Gas Development Sectors
- Global Natural Gas Reserves and Geographical Distribution, 2011
- Geographical Distribution of Global Conventional Natural Gas Resources, 2011
- Global Distribution of Mineable Shale Gas Resources (by Region), 2011
- Global Distribution of Mineable Shale Gas Resources (by Country), 2011
- Shale Gas Exploration and Development in Some Countries, 2013
- Shale Gas Development Course in USA
- Natural Gas Output and YoY Growth Rate in USA, 2003-2012
- Sources of Natural Gas by Proportion in USA, 2011
- Natural Gas Consumption and Self-sufficiency Rate in USA, 2003-2012
- Natural Gas Import and Export Volume in USA, 2003-2011
- Global Energy Consumption Structure, 2011
- China's Energy Consumption Structure, 2010-2012
- Comparison between Natural Gas and Other Energy Emissions (Equivalent Heating Value)
- Volume of Oil and Natural Gas Resources in China, 2011
- Volume of Natural Gas Geological Resources and Mineable Resources in China, 2011
- Natural Gas Basic Reserves and Reserves in China, 2007-2011
- Geographical Distribution of Natural Gas Basic Reserves in China, 2011
- China's Natural Gas Planning and Strategy
- Natural Gas Output and YoY Growth Rate in China, 2001-2012
- Natural Gas Output (by Region) in China, 2010-2012
- Natural Gas Apparent Consumption and Self-Sufficiency Rate in China, 2008-2012

- Downstream Natural Gas Consumption Structure In China, 2011
- LNG Import Volume and Value in China, 2008-2013
- Average LNG Import Price in China, 2008-2013
- Import Origins of LNG and Proportion in China, 2012
- Major Cities Importing LNG and Their Import Volume Proportion in China, 2012
- Natural Gas Pipeline Construction in China, 2012
- Import and Export Volume of Piped Natural Gas in China, 2008-2013
- Average Import and Export Price of Piped Natural Gas in China, 2008-2013
- Natural Gas Supply and Demand in China, 2012-2016E
- Downstream Natural Gas Consumption Structure In China, 2015E
- Shale Gas Development Course in China
- Goals of China's Shale Gas "Twelfth Five-Year" Planning
- Results of the Second Round of Shale Gas Exploration Right Tenders in China, 2012
- Shale Gas Exploration Progress in China
- Shale Gas Geological Resources Potential and Geographical Distribution in China, 2012
- Mineable Shale Gas Resources Potential and Geographical Distribution in China, 2012
- Shale Gas Development Companies And Blocks in China, 2011
- Shale Gas Exploration & Exploitation Demonstration Areas and Distribution of More than 20 Horizontal Shale Gas Wells in China, 2012
- Competition Pattern of Chinese Oilfield Service Market, 2012
- Oil Service Companies and Their Service Areas of CNPC, CNOOC and Sinopec
- Oil and Gas Exploration Companies and Their Business in China
- Oil and Gas Development Companies and Their Business in China
- Overseas Oil and Gas M & A Cases of Chinese Enterprises, 2012
- Revenue and Net Income of SINO Geophysical, 2008-2013

- Revenue of SINO Geophysical (by Product), 2010-2012
- Revenue Breakdown of SINO Geophysical (by Product), 2010-2012
- Revenue Breakdown of SINO Geophysical (by Region), 2010-2012
- Revenue Breakdown of SINO Geophysical (by Region), 2010-2012
- Gross Margin of Main Products of SINO Geophysical, 2011-2012
- R & D Expenditure and % in Total Revenue of SINO Geophysical, 2010-2012
- Revenue and Net Income of SINO Geophysical, 2011-2015E
- Revenue and Net Income of LandOcean, 2008-2013
- Revenue of LandOcean (by Product), 2010-2012
- Revenue Breakdown of LandOcean (by Product), 2010-2012
- Revenue Breakdown of LandOcean (by Region), 2010-2012
- Revenue Breakdown of LandOcean (by Region), 2010-2012
- Gross Margin of Main Products of LandOcean, 2010-2012
- R & D Expenditure and % in Total Revenue of LandOcean, 2010-2012
- Revenue Contribution of Top 5 Clients of LandOcean, 2010-2012
- Names and Revenue Contribution of Top 5 Clients of LandOcean, 2012
- Revenue and Net Income of LandOcean, 2011-2015E
- Revenue and Net Income of Jereh , 2008-2013
- Revenue of Jereh (by Product), 2010-2012
- Revenue Breakdown of Jereh (by Product), 2010-2012
- Revenue Breakdown of Jereh (by Region), 2010-2012
- Revenue Breakdown of Jereh (by Region), 2010-2012
- Gross Margin of Main Products of Jereh, 2010-2012
- R & D Expenditure and % In Total Revenue of Jereh, 2010-2012
- Revenue and Sales Volume of Oilfield Equipment of Jereh, 2011-2012

- Revenue and Wells of Oilfield Equipment Services of Jereh, 2011-2012
- Revenue and Net Income of Jereh, 2011-2015E
- Revenue and Net Income of Shandong Molong, 2008-2013
- Revenue of Shandong Molong (by Product), 2010-2012
- Revenue Breakdown of Shandong Molong (by Product), 2010-2012
- Revenue Breakdown of Shandong Molong (by Region), 2010-2012
- Revenue Breakdown of Shandong Molong (by Region), 2010-2012
- Gross Margin of Main Products of Shandong Molong, 2010-2012
- R & D Expenditure and % in Total Revenue of Shandong Molong, 2010-2012
- Revenue Contribution of Top 5 Clients of Shandong Molong, 2010-2012
- Names and Revenue Contribution of Top 5 Clients of Shandong Molong, 2012
- Procurement Amount and Proportion of Top 5 Suppliers of Shandong Molong, 2010-2012
- Names, Procurement Amount and Proportion of Top 5 Suppliers of Shandong Molong, 2012
- Revenue and Net Income of Shandong Molong , 2011-2015E
- Revenue and Net Income of HBP, 2008-2013
- Revenue of HBP (by Product), 2010-2012
- Revenue Breakdown of HBP (by Product), 2010-2012
- Revenue Breakdown of HBP (by Region), 2010-2012
- Revenue Breakdown of HBP (by Region), 2010-2012
- Gross Margin of Main Products of HBP, 2010-2012
- R & D Expenditure and % in Total Revenue of HBP, 2010-2012
- Revenue and Net Income of HBP, 2011-2015E
- Revenue and Net Income of Tong Oil Tools, 2008-2013
- Revenue of Tong Oil Tools (by Product), 2010-2012
- Revenue Breakdown of Tong Oil Tools (by Product), 2010-2012

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- Revenue Breakdown of Tong Oil Tools (by Region), 2011-2012
 - Revenue Breakdown of Tong Oil Tools (by Region), 2011-2012
 - Gross Margin of Main Products of Tong Oil Tools, 2010-2012
 - R & D Expenditure and % in Total Revenue of Tong Oil Tools, 2010-2012
 - Revenue Contribution of Top 5 Clients of Tong Oil Tools, 2010-2012
 - Names and Revenue Contribution of Top 5 Clients of Tong Oil Tools, 2012
 - Procurement Amount and Proportion of Top 5 Suppliers of Tong Oil Tools, 2010-2012
 - Names, Procurement Amount and Proportion of Top 5 Suppliers of Tong Oil Tools, 2012
 - Revenue and Net Income of Tong Oil Tools, 2011-2015E

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