



China Filling Station and Gas Station Industry Report, 2018-2025

Feb. 2019

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

It is in recent years that ownership of motor vehicle, particularly automobiles has been soaring in pace with the development of national economy and the improvement of people's living standards in China. At the end of 2018, ownership of motor vehicle in China registered 327 million units including 240 million automobiles, and accordingly there were up to 110,000 filling stations and at least 9,000 gas stations across the country respectively.

In Chinese filling station market, state-owned enterprises, private firms and foreign companies coexist, among which state-owned enterprises represented by CNPC, Sinopec and CNOOC held a combined market share of approximately 52% in 2018, followed by private firms 45% share and foreign companies less than 3% share.

In June 2018, the Special Management Measures (Negative List) for Foreign Investment Access (2018) was issued, which officially abolished the restriction that foreign filling station in possession of over 30 chains should have shares be controlled by Chinese side. As a result, foreign companies like Shell and BP stated clear expansion plans in China in future. Elaborately, Shell is aggressive to operate an addition of 2,200 filling stations in China prior to 2025; BP expressed to add 1,000 filling stations in China over the next five years; Exxon Mobil and Total will follow suit and make their forays into the Chinese retailing market rapidly. In addition, private firms such as Shandong Dongming Petrochemical Group as well as state-owned enterprises like Sinochem Oil has expressed to either newly increase a great number of filling stations or develop the franchised ones successively. It is expected that in 2025 there will be a total addition of nearly 30,000 filling stations over the figure in 2018.

As its refined oil retailing market is fully opened up, China's reform of filling station will usher in a new stage. With the prevalence of the "filling station + convenience store + charging station/pile" model, related companies actively collaborate on promotional pilots of charging/battery-swap services in filling stations. Examples include cooperation between CNPC and FAW, Sinopec and BAIC BJEV, and CNOOC and Potevio/State Grid. In the upcoming years, China's filling stations will run at a "filling station + internet + N" model, becoming a service platform integrated with people, car and life.

Competitive Landscape of China Filling Station Market, 2018 & 2025E



Note: state-owned enterprises are four oil groups, i.e., Sinopec, CNPC, CNOOC and Sinochem Oil.

Source: ResearchInChina

In China, gas stations have a smaller scale than filling stations mainly because the country starts late in natural gas vehicle whose ownership is still less than 10 million units currently. Yet such clean eco-friendly vehicles are advocated by multiple policies. For instance, the Opinions on Accelerating the Use of Natural Gas which was issued in 2017, suggests expediting the development of natural gas vehicles and vessels; the Notice of Preferential Vehicle and Vessel Tax Policies for Energy-saving and New-energy Vehicles and Vessels which was launched in July 2018, specifies that natural gas vehicles should be listed as energy-saving vehicles where vehicle and vessel taxes are reduced by half. It is predicted that gas stations will mushroom in China in the near future along with the promotion and application of natural gas vehicles, numbering roughly 20,000 in 2025.

China Filling Station and Gas Station Industry Report, 2018-2025 highlights the following:

- ◆ China filling station industry (policies, market size, competitive pattern, chain operation and development trends);
- ◆ China refined oil market (supply and demand, import and export, price and development trends);
- ◆ China motor vehicle/automobile market (ownership, structure, and number of supporting filling stations);
- ◆ Global and China natural gas vehicle industry (policy environment, market size, gas station ownership and distribution, competitive pattern, development trends, etc.);
- ◆ Major Global and Chinese operators (Shell, BP, ExxonMobil, Total, Sinopec, CNPC, CNOOC, Sinochem Oil and Dongming Petrochemical) (operation, production and sales of oil and gas, number of filling/gas stations and distribution, non-oil business, development strategy, etc.).

1. Overview of Filling Station Industry

1.1 Definition and Classification

1.1.1 Definition

1.1.2 Classification

1.2 Major Clients and Consumption Characteristics

1.3 Business Model and Strategy of Filling Stations at Home and Abroad

1.3.1 Business Model (By Entities)

1.3.2 Business Model of Filling Station in Europe (by Business)

1.3.3 Business Model of Filling Station in the United States (by Business)

1.3.4 Business Model of Filling Station in Japan (by Business)

1.3.5 Business Strategy of Filling Station in China

2. China Refined Oil and Filling Station Market

2.1 Refined Oil Market

2.1.1 Market Supply & Demand

2.1.2 Import & Export

2.1.3 Segmented Products

2.1.4 Prices

2.1.5 Operators

2.1.6 Development Trend

2.2 Filling Station

2.2.1 Related Policies

2.2.2 Status Quo

2.2.3 Chain Operation

2.2.4 Competition Pattern

2.2.5 Non-oil Business

2.2.6 Development Trends

3. China Motor Vehicle and Filling Station Market

3.1 Motor Vehicle Market

3.1.1 Ownership

3.1.2 Automobile

3.2 Filling Station and Motor Vehicle Market

3.2.1 Comparison between Filling Station and Motor Vehicle Numbers

3.2.2 Average Number of Motor Vehicles Served by Each Filling Station

4. Global and Chinese Gas Station Market

4.1 Market Overview

4.1.1 Overview

4.1.2 Natural Gas Station

4.1.3 LPG Station

4.1.4 Policy Environment

4.2 Natural Gas Vehicles

4.2.1 Global

4.2.2 China

4.3 Natural Gas Station

4.3.1 Global

4.3.2 China

4.4 Competition Pattern

4.4.1 Natural Gas Vehicles

4.4.2 Natural Gas Station

4.5 Development Prospect

5. Global Key Filling Station Enterprises Abroad

5.1 Shell

5.1.1 Profile

- 5.1.2 Operating Performance
- 5.1.3 Revenue Structure
- 5.1.4 Oil and Gas Production and Sales
- 5.1.5 LNG Business
- 5.1.6 Filling Station Business
- 5.1.7 Filling Station Business in China
- 5.2 BP
 - 5.2.1 Profile
 - 5.2.2 Operating Performance
 - 5.2.3 Revenue Structure
 - 5.2.4 Oil and Gas Reserves and Production
 - 5.2.5 Filling Station Business
 - 5.2.6 Filling Station Business in China
- 5.3 ExxonMobil
 - 5.3.1 Profile
 - 5.3.2 Operating Performance
 - 5.3.3 Revenue Structure
 - 5.3.4 Oil and Gas Production and Sales
 - 5.3.5 Filling Station Business
 - 5.3.6 Filling Station Business in China
- 5.4 Total
 - 5.4.1 Profile
 - 5.4.2 Operating Performance
 - 5.4.3 Revenue Structure
 - 5.4.4 Oil and Gas Production and Sales
 - 5.4.5 Filling Station Business
 - 5.4.6 Filling Station Business in China

6. Key Chinese Filling Station Enterprises

- 6.1 Sinopec
 - 6.1.1 Profile
 - 6.1.2 Operating Performance
 - 6.1.3 Revenue Structure
 - 6.1.4 Oil and Gas Output and Sales Volume
 - 6.1.5 Filling Station Business
 - 6.1.6 Non-oil Business
 - 6.1.7 Development Strategy
- 6.2 CNPC
 - 6.2.1 Profile
 - 6.2.2 Operating Performance
 - 6.2.3 Revenue Structure
 - 6.2.4 Gross Margin
 - 6.2.5 Oil and Gas Production and Sales
 - 6.2.6 Filling Station Business
 - 6.2.7 Non-oil Business
 - 6.2.8 Development Strategy
- 6.3 CNOOC
 - 6.3.1 Profile
 - 6.3.2 Operating Performance
 - 6.3.3 Revenue Structure
 - 6.3.4 Oil and Gas Production and Sales
 - 6.3.5 Filling Station Business
 - 6.3.6 Development Prospect
- 6.4 Sinochem Oil
 - 6.4.1 Profile
 - 6.4.2 Filling Station Business

6.5 Dongming Petrochemical

6.5.1 Profile

6.5.2 Operation

6.5.3 Filling Station Business

7. Summary and Forecast

7.1 Market

7.1.1 Filling Stations

7.1.2 Gas Stations

7.2 Company

7.2.1 Local Companies

7.2.2 Foreign-funded Companies

- Classification of Filling Station by Grade
- Consumption Characteristics and Habits of Filling Station Clients
- China's Refined Oil Production and YoY Growth, 2010-2018
- China's Refined Oil Production, 2018-2025E
- China's Refined Oil Output Structure, 2010-2018
- Output Structure of Refined Oil by Company in China, 2017-2018
- China's Refined Oil Apparent Consumption and YoY Growth, 2006-2018
- China's Refined Oil Apparent Consumption, 2018-2025E
- China's Refined Oil Apparent Consumption Structure, 2010-2018
- General Trade Export Quota of Refined Oil in China, 2017-2019
- General Trade Export Quota of Refined Oil in China (by Product), 2017-2019
- General Trade Export Quota of Refined Oil in China (by Company), 2018-2019
- Net Exports of Refined Oil in China, 2012-2018
- Exports of Refined Oil in China, 2012-2018
- Exports of Refined Oil in China by Product, 2016-2018
- Imports of Refined Oil in China, 2012-2018
- Imports of Refined Oil in China by Product, 2016-2018
- China's Diesel Production and YoY Growth, 2010-2018
- China's Diesel Apparent Consumption and YoY Growth, 2010-2018
- China's Diesel Production by Region, 2017-2018
- China's Gasoline Production and YoY Growth, 2010-2018
- China's Gasoline Apparent Consumption and YoY Growth, 2010-2018
- China's Gasoline Production by Region, 2017-2018
- China's Kerosene Production and YoY Growth, 2010-2018
- China's Kerosene Apparent Consumption and YoY Growth, 2010-2018

- China's Kerosene Production by Region, 2017-2018
- Price Change of Refined Oil in China, 2018
- Wholesale Price Trend of Diesel and Gasoline in China, 2017-2018
- Oil Price in Major Cities of China, Jan. 15, 2019
- Number of Oil Enterprises with Operation Qualification Approved by Ministry of Commerce in China, 2007-2018
- Major Enterprises with Operation Qualification Approved by Ministry of Commerce in China, 2018
- Four Stages of Opening of Filling Station in China
- Number of Filling Stations in China, 2017-2025E
- Number of Filling Stations in China by Company Type, 2017-2025E
- Number of Stores and YoY Growth of Filling Station Chains in China, 2010-2018
- Business Area and YoY Growth of Filling Station Chains in China, 2010-2018
- Number of Employees of Filling Station Chains in China, 2010-2018
- Revenue and YoY Growth of Filling Station Chains in China, 2010-2018
- Competitive Patten of Filling Station Market in China, 2017-2018
- Entry Time and Layout Area of Foreign Companies in China Filling Station Market
- China's Motor Vehicle Ownership and YoY Growth, 2010-2018
- China's Automobile Ownership and YoY Growth, 2010-2018
- China's Ownership of Small Passenger Vehicles and Private Vehicles (Private Small/Mini Passenger Vehicles), 2014-2018
- NEV Ownership in China, 2014-2018
- Ownership of Motor Vehicle and Automotive (Including NEV) in China, 2018-2025E
- China's Automobile Sales Volume and YoY Growth, 2011-2025E
- China's Passenger Car and Commercial Vehicle Sales Volume, 2011-2025E
- China's New Energy Vehicle Sales Volume and YoY Growth, 2013-2025E
- China's New Energy Vehicle Sales Volume Structure (by Technology), 2014-2025
- Number and CAGR of Filling Stations, Motor Vehicles, Automobiles and Civilian Automobiles in China, 2011-2025

- Number of Motor Vehicles, Automobiles and Civilian Automobiles Served by Each Filling Station in China, 2011-2025E
- Advantages and Disadvantages of LNG and CNG
- Advantages and Disadvantages of LNG and CNG Vehicles
- Classification of Natural Gas Station
- Policies on Natural Gas Vehicle/Station in China, 2016-2019
- Major Countries' Timeline of Ban on Sales of Petrol Vehicles
- Global Natural Gas Vehicle Ownership and YoY Growth, 2010-2025E
- Global Top 10 Countries by Natural Gas Vehicle Ownership, 2017
- Global TOP10 Countries by Proportion of Natural Gas Vehicle Ownership in its Total Vehicle Ownership, 2017
- China's Natural Gas Vehicle Ownership and YoY Growth, 2011-2018
- China's LNG and CNG Vehicle Ownership, 2011-2018
- LNG Heavy Truck Output in China, 2010-2018
- Number of Global Natural Gas Stations and YoY Growth, 2010-2018
- Number of Natural Gas Stations by Region Worldwide, 2018 (Jan.-Nov.)
- Global Average Quantity of Natural Gas Vehicles Served by Each Natural Gas Station, 2010-2018
- Number of Natural Gas Stations in China and YoY Growth, 2010-2018
- Number of CNG and LNG Gas Stations in China, 2011-2018
- Average Quantity of Natural Gas Vehicles Served by Each Natural Gas Station in China, 2011-2018
- China's CNG Vehicle Ownership by Region, 2017
- LNG Heavy Truck Output by Manufacturers in China, 2017-2018
- Natural Gas Station Development Planning in Major Provinces of China
- China's Natural Gas Vehicle Ownership, 2017-2025E
- China's Natural Gas Station Ownership by Fuel Type, 2017-2025E
- Revenue and YoY Growth of Shell, 2010-2018
- Shell's Main Business

- Shell's Revenue Structure (by Business), 2016-2017
- Shell's Revenue Structure (by Business), 2018(Jan.-Sept.)
- Shell's Revenue Structure (by Region), 2015-2017
- Key Projects of Shell, 2018-2020
- Shell's Oil and Gas Production Available for Sale, 2015-2017
- Shell's Crude Oil and Natural Gas liquids Production Available for Sale (by Region), 2015-2017
- Shell's Natural Gas Production Available for Sale (by Region), 2015-2017
- Shell's Proved Developed and Undeveloped Oil and Gas Reserves, 2015-2017
- Shell's Proven Crude Oil and Natural Gas Reserves (by Region), 2015-2017
- Price of Oil and Gas Worldwide, 2015-2017
- Shell's LNG liquefaction Volumes and Sales Volume, 2013-2018
- Shell's LNG liquefaction Volumes by Region.2015-2017
- Shell's LNG Customers, 2017
- Shell's LNG liquefaction plants, LNG regasification terminals and GTL plants, 2017
- Filling Station and Related Business Plan of Shell Worldwide, 2018
- Filling Station Plan of Shell in China, 2018
- Revenue and Net Income of BP, 2015-2018
- BP's Revenue Structure (by Business), 2015-2018
- Upstream Business Model of BP
- Key Financial Indicators of BP's Upstream Business, 2015-2017
- Downstream Business Model of BP
- Key Financial Indicators of BP's Downstream Business, 2015-2017
- Key Financial Indicators of BP's Other Business, 2015-2017
- BP's Reserves and Production, 2015-2017
- BP's Proven Crude Oil and Natural Gas Reserves, 2015-2017

- BP's Output of Crude Oil and Natural Gas, 2015-2017
- BP's Retail Business, 2017
- Number of BP's Filling Stations (by Region), 2010-2017
- BP's Petrochemicals Production Capacity in China
- Filling Station Layout and Planning of BP in China, 2018
- Global Operations of ExxonMobil
- Key Financial Indicators of ExxonMobil, 2015-2017
- Key Financial Indicators of ExxonMobil by Segment, 2013-2017
- ExxonMobil's Proven Oil and Gas Reserves (by Region), 2013-2017
- ExxonMobil's Net Liquids Production (by Region), 2013-2017
- ExxonMobil's NET Natural Gas Production Available For Sale, 2013-2017
- ExxonMobil's Fuels Marketing Sales, 2017
- Number of ExxonMobil's Filling Stations (by Region), 2013-2017
- Global Business Presence of Total, 2018
- Total's Key Financial Indicators, 2013-2018
- Total's Revenue Structure (by Business), 2013-2018
- Total's Revenue Structure (by Region), 2013-2017
- Total's Combined Liquids and Gas Production, 2012-2017
- Total's Liquids Production (by Region), 2012-2017
- Total's Liquids Production (by Region), 2012-2017
- Total's Petroleum Product Sales (excluding trading and bulk sales) by Region, 2012-2017
- Total's Petroleum Product Sales (excluding trading and bulk sales) by Product, 2012-2017
- Total's LNG Business (by Region)
- Total's LNG Sales Volume (by Region), 2012-2017
- Total's Pipeline Gas Sales Volume (by Region), 2012-2017

- Total's Service Station Business
- Number of Total's Filling Stations (by Region), 2012-2017
- Exploration and Exploitation Output of Sinopec, 2015-2018
- Refining Output of Sinopec, 2015-2018
- Refined Oil Sales Volume of Sinopec, 2015-2018
- CNOOC's Revenue and Net Income, 2010-2018
- CNOOC's Revenue Structure (by Business), 2010-2018
- CNOOC's Proven Crude Oil and Natural Gas Reserves, 2011-2017
- CNOOC's Output of Petroleum and Natural Gas (by Product), 2011-2017
- CNOOC's Sales Volume of Petroleum and Natural Gas (by Product), 2011-2017
- Number and YoY Growth of CNOOC's Filling Stations, 2010-2018
- Revenue of Dongming Petrochemical, 2015-2018
- Average Number of Natural Gas Vehicles Served by Natural Gas Station in China, 2017-2025E
- Three Major Oil Groups' Number of Filling Stations, 2016-2018
- Filling Station Layout and Future Plan of Foreign Brands in China, 2018

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 801, B1, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)2,800 USD
- Hard copy 3,000 USD
- PDF (Enterprisewide license)..... 4,200 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: