IHS Energy China Services

China is the world’s largest and fastest-growing energy market. As demand for oil, gas, power, and coal continues to surge ahead, so do opportunities for companies along the entire energy value chain.

As players—both domestic and international—proliferate in an increasingly dynamic marketplace and reforms create further space for non-state players, the Chinese energy market is also becoming highly complex and difficult to decipher.

Differences among the 31 Chinese provinces—many of which are the same size as a European country or a large US state—are more pronounced today than ever. The sheer size of China also means that events in a particular province can often have important global repercussions, in ways that were hard to imagine just a few years ago.

IHS Energy China Services provide critical insight for companies investing in China and for those who must anticipate China’s impact on energy markets around the globe. Together, these services bring unparalleled expertise providing integrated analysis covering gas, power, coal, and oil, coupled with regulatory and competitive insight.

Our China experts and analysts have been locally based in Beijing since the 1990s, witnessing and, indeed, being deeply involved in the phenomenal growth of the Chinese energy sector. Our China energy research is fully embedded in IHS Energy’s extensive network of global expertise and databases, with over 600 energy researchers based in more than 15 locations around the world. The research also benefits from IHS world-leading capabilities in economics, chemicals, automotive, and supply chain research, all of which have China-based teams providing research and analysis.

IHS Energy China Services comprise two modules, underpinned by integrated cross-fuel fundamentals and competition analysis.
China has now overtaken the United States to become the world’s largest net oil importer. Consumption patterns are changing, with consumer-driven growth in gasoline outpacing investment-driven growth in diesel, radically changing the landscape for refiners. China also sits on one of the world’s largest resources of shale gas—if even a small proportion of this enormous potential is realized, the market can be transformed. Other gas supply sources are also entering the market and competing for market share.

The IHS China Oil and Gas Service provides comprehensive, integrated insights into key trends driving oil and natural gas markets in China, covering fundamentals, company strategy, regulation, and policy.

**Oil market analysis:**
monthly briefings, quarterly briefings and outlooks, data tables, product price data tables, and strategic reports;

**Oil infrastructure:** detailed reports on Chinese oil infrastructure (bi-annual)

**Natural gas upstream:** Supply and cost outlooks (by source: key producing basins of conventional and unconventional gas, coal-to-gas, import sources)

**Natural gas market (overview):**
overview of national demand outlooks, citygate gas price outlooks, data tables and quarterly market briefings, and strategic reports

**National Oil Company analysis:**
detailed profiles of each NOC updated annually including; strategic analysis and; LNG procurement insights

**Provincial-level analysis:**
Provincial oil and gas insight; profiles covering regional oil and gas sectors

**Semi-annual China Services Workshops:**
half-day event conducted in a “roundtable” format, limited to 50 participants to maximize on discussions and exchanges

China unconventional gas resources

China’s oil refining capacity share by company, 2013
Key questions investigated:
• What are the key factors driving China’s oil demand?
• What are China’s gas supply sources for the future?
• How far and how quickly will the oil and gas market liberalization progress?
• How will the global gas market influence China’s gas imports?

Who will benefit from the service?
Integrated oil and gas companies – Key insight in oil and gas upstream and refined product markets, integrated with national oil company insights and policy analysis
E&P companies – Understanding the evolving political landscape, the strategies of NOCs and other key players, evolution in pricing mechanism, as well as midstream and downstream dynamics
Energy equipment and services – Upstream E&P and downstream refining sector analysis and market sizing for oil and gas equipment and services and insights on key players
Automotive companies – Key factors impacting gasoline and diesel demand, including policy changes, regulatory issues, and critical questions facing fuel suppliers. Considering future automotive energy sources and how they will interact with conventional fuels
Financial institutions – Short- and long-term market analysis and policy impact assessment on specific companies
The Chinese electricity market is already the largest in the world and is expected to double in size again by 2030. In natural gas, China is now the 3rd largest LNG buyer in the world, even though the fuel still represents only 5% of primary energy—enormous growth potential remains. Over half of the world’s coal is consumed in China, but growth has been slowing as policymakers seek to diversify primary energy supply and tackle pollution challenges.

The IHS China Gas, Power & Coal Service provides a comprehensive, integrated insight into key trends driving the evolution of China’s natural gas, power, and coal markets, covering fundamentals, company strategy, regulation, and policy.

**Electric power:** Data tables; quarterly market briefings; wholesale and retail price data; outlooks for provincial demand by sector, supply by technology, and system reserve margins; regional cost of generation; transmission infrastructure outlook; retail tariff outlooks (wholesale and retail for select provinces); and strategic reports

**Natural gas:** data tables; quarterly market briefings; outlooks for provincial demand by sector and regional supply by source; long-term citygate price outlooks; long-term industrial retail price outlooks; and strategic reports

**Coal:** supply and demand data tables, quarterly market briefings, price data tables, supply cost database (by production unit), price outlooks (Qinhuangdao and Guangzhou delivered), and strategic reports

**Company analysis:** gas and power utility profiles updated annually; strategic analysis; LNG procurement insights; company profiles include large power generators, e.g., Huadian Group and Guodian Group, as well as gas utilities, e.g., ENN Group and Beijing Gas.

**Policy and geopolitics:** carbon policy and carbon price outlooks; politics, policy, and regulatory strategic reports

**Provincial-level analysis:** Provincial-level long-term outlooks for gas and power; provincial gas, power, and coal insights; and provincial profiles (gas/power/coal)

**Semi-annual China Services Workshops:** half-day event conducted in a “roundtable” format, limited to 50 participants to maximize discussions and exchanges.
Key questions investigated:

• What are the fuel choices in China’s future power system?
• How will China’s natural gas midstream infrastructure develop to meet future demand?
• How will gas and power price reforms progress?
• How will resource imbalance and cost differential shape future power supply?

Who will benefit from the service?

Integrated oil and gas companies – Key insight in gas market fundamentals with a focus on regional and provincial gas demand drivers, policy trends, and utility insights

Energy equipment and services – Market sizing for key equipment and services in power, gas midstream and coal; utility insights to help identify key customers

Mining companies – Coal market analysis and outlooks and the role of coal in the overall energy mix and impacts on the global market

Large energy consumers – Understanding pricing trends and reforms to formulate energy procurement strategies

Power developers – Power market fundamentals and analysis: demand analysis, fuel mix, cost and tariff regulations, policy drivers and transmissions trends

Financial institutions – Short- and long-term market analysis and policy impact assessment on specific companies
IHS Energy China Services members may access our lead researchers and global network of experts directly by e-mail, phone or in person to address inquiries. Members are also invited to participate in our semi-annual China Services Workshops, as well as interactive webinars and other member events including the IHS Forum held several times a year around the world, where IHS experts present findings, lead discussions, and respond to questions. Webinars are recorded and remain online available for later reference.

IHS Connect, our innovative business and market intelligence platform.

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ABOUT IHS ENERGY

IHS Energy, a part of IHS (NYSE: IHS), is the industry’s authoritative provider of information, analytics, and insight to help clients to understand the interconnected, dynamic forces that shape energy markets and asset performance. Our experts and analytical tools enable clients to continuously improve their strategy and operations across the entire energy value chain, covering oil & gas, coal, power, and renewables.