

China Bitumen Tanks & Terminals Research 2009

Table of Contents

PREFACE

1. OVERVIEW

1.1 Latest Progress in Bitumen Tanks & Terminals Construction

1.2 Major Bitumen Tanks in China

Map: Distribution of Major Bitumen Tanks in China

1.3 Bitumen Terminals in China

Map: Distribution of Major Bitumen Jetties in Eastern China

2. KEY BITUMEN TANKS & TERMINALS FACILITIES IN CHINA

2.1 Northern China

2.1.1 Status Quo of Bitumen Tanks & Terminals Facilities

Map: Distribution of Bitumen Tanks & Terminals in Northern China

Table: Major Bitumen Tanks & Terminals in Northern China

2.1.2 Breakdown on Key Bitumen Tanks & Terminals Facilities

2.1.3 Bitumen Turnover at Key Jetties in the Past Five Years

2.2 East China

2.2.1 Status Quo of Bitumen Tanks & Terminals Facilities

Map: Distribution of Bitumen Tanks & Terminals in East China

Table: Major Bitumen Tanks & Terminals in East China

2.2.2 Breakdown on Key Bitumen Tanks & Terminals Facilities

2.2.3 Bitumen Turnover at Key Jetties in the Past Five Years

2.3 South China

2.3.1 Status Quo of Bitumen Tanks & Terminals Facilities

Map: Distribution of Bitumen Tanks & Terminals in South China

Table: Major Bitumen Tanks & Terminals in South China

2.3.2 Breakdown on Key Bitumen Tanks & Terminals Facilities

2.3.3 Bitumen Turnover at Key Jetties in the Past Five Years

2.4 Southwest & Central China

2.4.1 Status Quo of Bitumen Tanks & Terminals Facilities

Map: Distribution of Bitumen Tanks & Terminals in Southwest & Central China

Table: Major Bitumen Tanks & Terminals in Southwest & Central China

2.4.2 Breakdown on Key Bitumen Tanks & Terminals Facilities

2.4.3 Bitumen Turnover at Key Jetties in the Past Five Years

3. BITUMEN TANKS AT CHINESE REFINERIES

3.1 Overview of Bitumen Tanks in Chinese Refineries

Chart: Distribution of Bitumen Tank Capacity - By Refinery Ownership

3.2 Breakdown of Refinery Bitumen Tank Capacity - By Ownership

3.2.1 Sinopec

Table: Bitumen Tanks Owned by Sinopec' s Refineries

3.2.2 CNPC

Table: Bitumen Tanks Owned by CNPC' s Refineries

3.2.3 CNOOC

Table: Bitumen Tanks Owned by CNOOC' s Refineries

3.2.4 Independent Refineries

Table: Bitumen Tanks Owned by Independent Refineries

3.3 Utilizations of Existing Bitumen Tanks and Forecasts on Capacity Expansions

4. BITUMEN COMMERCIAL TANKS IN CHINA

4.1 Commercial Tanks in Northern China

4.1.1 North China

Table: Bitumen Commercial Tanks in North China

4.1.2 Northeast China

Table: Bitumen Commercial Tanks in Northeast China

4.1.3 Northwest China

Table: Bitumen Commercial Tanks in Northwest China

4.2 Commercial Tanks in East China

4.2.1 Yangtze River Delta

Table: Bitumen Commercial Tanks in Yangtze River Delta

4.2.2 Shandong

Table: Bitumen Commercial Tanks in Shandong

4.3 Commercial Tanks in South China

Table: Bitumen Commercial Tanks in South China

4.4 Commercial Tanks in Central China

Table: Bitumen Commercial Tanks in Central China

4.5 Commercial Tanks in Southwest China

Table: Bitumen Commercial Tanks in Southwest China

4.6 Top Ten Commercial Bitumen Storage Companies

- 4.6.1
- 4.6.2
- 4.6.3
- 4.6.4
- 4.6.5
- 4.6.6
- 4.6.7
- 4.6.8
- 4.6.9
- 4.6.10
-

5. BITUMEN TANKS OWNED BY HIGHWAY PROJECT OWNERS

5.1 Overview of Bitumen Tanks Operated by Project Owners

Map: Distribution of Bitumen Tank Owned by Highway Project Owners

5.2 Breakdown of Bitumen Tanks Operated by Project Owners

5.2.1 Northern China

Table: Bitumen Tanks Owned by Project Owners Based in Northern China

5.2.2 East China

Table: Bitumen Tanks Owned by Project Owners Based in East China

5.2.3 South China

Table: Bitumen Tanks Owned by Project Owners Based in South China

5.2.4 Southwest China

Table: Bitumen Tanks Owned by Project Owners Based in Southwest China

5.2.5 Central China

Table: Bitumen Tanks Owned by Project Owners Based in Central China

6. OVERVIEW OF BITUMEN TANKS EXPANSIONS IN THE PAST FIVE YEARS

6.1 China Overview

Chart: Bitumen Tanks Expansions in China in the Past Five Years

6.2 Bitumen Tanks Expansions in China – by Region

Chart: Bitumen Tanks Expansions in Major Regions in the Past Five Years

6.3 Elasticity of Bitumen Tank Capacity Growth vs. Bitumen Apparent Consumption

Chart: Elasticity of Bitumen Tank Capacity Growth vs. Bitumen Apparent Consumption in the Past Five Years

6.4 Bitumen Tank Capacity Growth vs. Bitumen Price Trend

Chart: Bitumen Tank Capacity Growth vs. Bitumen Price Trend in the Past Five Years

7. NEWLY-BUILT & DEBOTTLENECKING BITUMEN TANKS PROJECTS IN THE COMING FIVE YEARS

7.1 Bitumen Consumption Forecast

Chart: Forecast of China's Bitumen Consumption in the Coming Five Years

7.2 Forecast of Expressway Mileage Growth

Chart: Forecast of China's Expressway Mileage Growth in the Coming Five Years

7.3 Supply/Demand Balance of Bitumen Tank Facilities

Chart: Forecast of Bitumen Tank Capacity in 2008-2009

7.4 Bitumen Tank's Role in Winter-Filling

7.5 The Impact of Advanced Stockpiling on Bitumen Tank Construction

7.6 Forecast of Bitumen Tank Expansions

Chart: Forecast of Bitumen Tanks Expansion Projects in China in the Coming Five Years

8. GOVERNMENT POLICIES' IMPACT ON BITUMEN TANK EXPANSIONS

8.1 Government's Stimulus on Domestic Consumption

8.1.1 Consumption Stimulus Policies in 2009

8.1.2 Government Policies Related to Road Construction

8.2 The Impact of Consumption Stimulus Policies on Roads Construction

8.2.1 Expressways

8.2.2 Rural Roads

8.2.3 Municipal Roads

8.2.4 Airport Runways

8.3 The Impact of Consumption Stimulus Policies on Bitumen Tank Construction

9. FEASIBILITY STUDY OF BITUMEN TANK CONSTRUCTION

9.1 Cost Analysis of Bitumen Tank Construction

Table: Cost Analysis of Construction of A Typical Bitumen Tank in China

9.2 Bitumen Storage Charges

Table: Storage Charges of A Typical Bitumen Tank in China

9.3 Bitumen Tank Turnover Rate

10. RISKS IN BITUMEN TANKS & TERMINALS INVESTING & BUILDING

- 10.1 Return on Investment
- 10.2 Policy Threshold
- 10.3 Capital Chain

11. CHINA' S BITUMEN TANK & TERMINAL INDUSTRY AMID ECONOMIC RECESSION

- 11.1 Economic Recession's Impact on Bitumen Storage Industry
 - 11.1.1 Impact on Capital Flow
 - 11.1.2 Impact on Bitumen Demand
 - 11.1.3 Policies Adjustments
- 11.2 Economic Recession's Impact on Bitumen Terminal Industry
 - 11.2.1 Impact on Capital Flow
 - 11.2.2 Impact on Bitumen Transfer Demand
 - 11.2.3 Policies Adjustments

APPENDICES

- A1. Profile of China Bitumen Tanks and Terminals
- A2. Breakdown on Bitumen Tanks and Terminals in South China
- A3. Breakdown on Bitumen Tanks and Terminals in East China
- A4. Breakdown on Bitumen Tanks and Terminals in Northern China
- A5. Breakdown on Bitumen Tanks and Terminals in Central China
- A6. Breakdown on Bitumen Tanks and Terminals in Southwest China
- A7. China's Bitumen Tank Expansions (2004-2008)
- A8. China's Investments in Transportation (2004-2008)
- A9. China's Expressway Mileage Growth (2004-2008)
- A10. China's Expressway Construction Plans (2009-2012)
- A11. China's Crude Oil Output/Imports/Exports/Apparent Consumption (2004-2008)
- A12. China's Bitumen Output/Imports/Exports/Apparent Consumption (2004-2008)
- A13. China's Crude Oil Output - By Region (2008)
- A14. Top Ten Bitumen Producers in China (2008)
- A15. China's Bitumen Production- By Region (2008)
- A16. China's Demand for Modified Bitumen (2008)
- A17. China's Modified Bitumen Production Capacity (2008)
- A18. China's Crude Oil Imports/Exports - By Region (2008)
- A19. China's Bitumen Imports/Exports - By Region (2008)
- A20. Distribution of China's Bitumen Production Capacity -By Region
- A21. Top Ten Bitumen Importers in China (2008)