

## **China Oil And Gas Midstream - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The China Oil And Gas Midstream Market size in terms of installed base is expected to grow from 174.11 Million tonnes in 2025 to 250.59 Million tonnes by 2030, at a CAGR of 7.55% during the forecast period (2025-2030).

#### Key Highlights

- Over the long term, an increase in the adoption of renewable energy and the declining cost of lithium-ion batteries is expected to boost the Chinese oil and gas midstream market during the forecast period.
- On the other hand, environmental concerns and market volatility have caused concern in the sector, which may lead to the possible decommissioning of pipes during the forecast period.
- Nevertheless, digitalization and smart infrastructure are expected to provide an opportunity for the players in the midstream sector as new production fields would open new avenues for the development of oil and gas pipelines.

#### China Oil And Gas Midstream Market Trends

#### Transportation Sector to Witness Significant Growth

- Oil and gas midstream transportation is the movement of crude oil, natural gas, and refined petroleum products from production sites to consumers. It includes transportation by pipeline, truck, rail, barge, and ship.
- Crude oil, natural gas liquids, and its products are transported from the production facilities offsite temporary storage plants and transported to a large storage hub for refining. Once refined, end products of crude oil, such as LPG, jet fuel, gasoline, and diesel,

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are transported to end-users such as homes, factories, and gas stations.

- China's oil and gas midstream consists of oil and gas transportation, pipelines, and storage facilities. For instance, in December 2024, the China-Russia east-route natural gas pipeline, China's largest single-pipe natural gas transmission project, officially commenced full operations. Notably, all critical equipment and core control systems for the pipeline were produced domestically, from construction through to operation. Spanning 5,111 kilometers, the pipeline's annual transmission capacity is poised to peak at 38 billion cubic meters, benefiting approximately 450 million people along its route, as reported.
- Moreover, according to the National Bureau of Statistics, in 2023, China accounts for about 147,600 kms length oil pipeline and over 82,300 kms length of gas pipeline.
- PetroChina's crude oil production had a total of about 937.1 million barrels in 2023, while the gas pipelines had a full length of around 17,329 km. Overall, crude oil production increased in 2023 compared to the previous year.
- In May 2024, a PetroChina official projected that China's liquefied natural gas imports are poised to set new records. As the world's leading importer of this super-chilled fuel, China is anticipated to import between 78-80 million metric tons of LNG this year, primarily driven by demand from its industrial and commercial sectors. In 2023, China's gas consumption reached 394.5 billion cubic meters (bcm), marking a 7.6 percent increase from the previous year. The majority of the 28.2 bcm growth in demand came from industry and city gas, which encompasses both residential and transportation uses.
- Hence, the transportation segment is expected to witness significant growth during the forecast period due to the rising production of gas and growing investment in the sector.

#### Increasing Oil and Gas Consumption to Drive the Market

- China is the second-largest consumer of oil and gas and the sixth-largest producer of oil and gas globally. The energy market in the country is dominated by state-owned oil and gas companies that develop the country's domestic reserves, build and operate pipelines, and manage and fill its strategic petroleum reserves (SPR).
- The country's natural gas consumption amounted to 420 billion cubic meters (bcm) in 2024, an increase of roughly 6.5% compared to the previous year. The increasing consumption incentivizes the investors for the required increase in capacity and boosts future investments, thereby boosting the industry's growth.
- With the rising demand for natural gas, the country is planning to build 23 gas storage facilities by 2030, with an investment of around USD 8.5 billion. The completion of the storage facilities, along with the upcoming gas pipelines, is expected to boost the midstream sector in the country in the future.
- China's natural gas consumption is projected to hit 570 billion cubic meters (bcm) by 2030, with a plateau anticipated between 620 bcm and 610 bcm from 2035 to 2040. In its 2023 forecast, Sinopec indicated that China's consumption would stabilize at 610 bcm around 2040. Sinopec also projected a 6.6% year-on-year increase, bringing consumption to 458 bcm in 2025. Additionally, Sinopec revised its outlook, now anticipating a higher peak for China's carbon emissions from energy-related activities.
- In August 2024, China unveiled a gas field in the South China Sea, holding reserves exceeding 100 billion cubic meters. This find, authenticated by the China National Offshore Oil Corporation, could heighten tensions with nations like the Philippines and Vietnam. The Lingshui 36-1 gas field discovery adds another layer to the already intricate and contentious dynamics of the resource-abundant and strategically crucial South China Sea.
- Owing to such developments and increasing oil and gas consumption, the Chinese oil and gas midstream market is expected to grow further during the forecast period.

#### China Oil And Gas Midstream Industry Overview

The Chinese oil and gas midstream market is moderately consolidated. The major companies include (in no particular order) China National Petroleum Corporation, POSCO Holdings, PJSC Gazprom, PJSC Transneft, and China Petroleum & Chemical Corporation

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(Sinopec Group).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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