The China Independent Refinery Report provides essential information and data covering China’s independent refinery sector with comprehensive historical data, accurate market analysis on the development of this sector in the past, present and future. This report will also present the key developments in terms of infrastructure and technologies of independent refiners for up to 10 years.

**OVERVIEW**

As China is one of the world’s largest crude consumers, its independent domestic refiners are playing a more important role in the oil refining sector. Total crude distillation unit (CDU) capacity of independent refiners is expected to reach 180m tonnes/year in 2014, accounting for 25% of total CDU capacity in China. This increase in capacity was brought about by recent government policies and regulations. The three major state-owned refineries – China National Petroleum Corporation (CNPC), Sinochem Group and China National Chemical Corporation (ChemChina) – are now cooperating with the independent refiners on refinery acquisition, feedstock supply and oil procurements.

This report addresses all of the following questions:

- Where and who are the independent refiners – what is their composition?
- What is the capacity of independent refineries against major state-owned refineries?
- What is the development trend and how is this affected by government policy changes?
- Do independent refineries present worthwhile investment opportunities?

**Key Features of the Report:**

- Up-to-date listing of independent refinery capacities, margins and run rates – broken down by key regions in the country
- Information on feedstock supply sources and import levels
- Insight into China’s major state-owned refineries
- Information on commercial oil terminals, jetties and oil pipelines
- Commentary on hot issues and policy changes

With over 30 years of experience in the industry, ICIS is recognised domestically and internationally as a leading source of market information. Our coverage of the Chinese market provided by our local experts, combined with the expertise of our global analytical team, ensures that market players receive unrivalled and independent insight on the refineries market.
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Enquire about the China Independent Refinery Report
The China Refinery Feedstock Report offers a comprehensive analysis and forecast up to 2020 on the feedstock supply/demand. It will also analyse feedstock supply gaps of oil companies, interregional trade and economic efficiency of different feedstock. The report also aims at helping overseas national oil companies, international oil companies, international crude traders, downstream users and investment banks understand China’s key demand for refining feedstock and seize market opportunities.

OVERVIEW

China has plans for new and expanded refining projects in the pipeline, which will boost demand for refining feedstock. The country is projected to import over 400m tonnes of crude (crude is a refining feedstock) by 2019 and its dependency of imported crude will exceed 63%. This change then raises the question: What is the future for China’s refinery feedstock? And how does this impact my business?

This report addresses all of the following questions:

• Which crude specifications do Chinese users prefer? Will these preferences change?
• Where does China buy crude and how much are buyers willing to pay?
• Where is the demand for refinery feedstock coming from?
• Does China present future investment opportunities?

Key Features of the Report:

• A detailed breakdown of refinery feedstock supply/demand by company and region
• Specifications on crude processed by major state-owned and independent refineries
• Comparison of feedstocks – high/low-sulphur crude and fuel oil
• Commentary on hot topics and China’s crude market policies

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**Enquire about the China Refinery Feedstock Report**
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- Angola
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- Russia
- Iraq
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- Venezuela
- Kazakhstan
- U.A.E
- Kuwait
- Others
The ICIS China Independent Refiner’s Fuel Quality Report offers accurate data and in-depth analysis of the fuel quality of independent refiners and the feasibility of expanding domestic refining units in China. This report also presents notable insights into fuel upgrade technologies and a timeline of the refining unit expansion projects currently scheduled within the country.

OVERVIEW

Rapid capacity expansions in China’s independent refinery sector over the past five years have led to huge increases in crude oil demand. Limited by China’s import regulations against crude licenses, many independent refiners have upgraded their refining technologies to increase their production capacity and avoid being penalised by the thresholds. These upgrades have also led to improvements in the quality of gasoil and gasoline. However, this poses several challenges; firstly to international market players, who are currently exporting fuel oil into China due to the supply/demand imbalances for feedstocks; secondly, to independent refiners who must determine the acceptability of gasoline and gas oil on the international trading scene.

The ICIS China Independent Refiners’ Fuel Quality Report is a must-have resource for market players closely monitoring the current status of fuel quality in independent refineries in China as it serves as a guide when building your commercial strategies.

This report addresses all of the following questions:

- Is China a demand centre for imported fuel oil?
- What is the potential of independent refineries’ product and plant upgrades?
- Are there investment opportunities in independent refiners in future?
- Will the development of independent refineries accelerate China’s capacity to export refined oil?

Key features of the report:

- Current status and forecast of China’s fuel quality in independent refineries
- Feasibility of expanding independent refining units in China
- Likely impact of crude tax quotas on refining feedstocks for the next five years
- Schedule of China’s refinery unit expansions and fuel upgrade technology
- Feedstock supply to China’s independent refineries

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