2007-2008年中国加油站行业研究报告

China Gas Station Industry Report，2007-2008

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摘要

随着中国经济的快速发展，国内汽车保有量也迅速增长。2007 年国内汽车保有量已经达到 5696 万辆，预计到 2020 年会超过 1 亿辆。这同时也意味着，中国汽车后市场的规模正在快速增长，汽车消费者对加油站的经营和服务也提出了新的需求。

图：2000－2007 年全国加油站数量及其份额

	中国石化		中国石油		其他	
	数量	份额	数量	份额	数量	份额
2000	20259	30.0%	11350	16.8%	36000	53.2%
2001	24062	31.6%	12102	15.9%	40000	52.5%
2002	24000	32.8%	13160	18.0%	36000	49.2%
2003	24506	31.5%	15231	19.6%	38000	48.9%
2004	26581	31.7%	17403	20.7%	40000	47.6%
2005	27367	31.3%	18164	20.8%	42000	48.0%
2006	28801	32.7%	18207	20.7%	41000	46.6%
2007	28976	31.9%	18846	20.8%	43000	47.3%

目前国内加油站竞争主要在石油、石化两大集团之间，以及两大集团与其他内资和合资加油站之间进行。两大集团之间的竞争正在由过去以企业为中心开始向以消费者为中心的营销观念转化，双方之间的竞争由过去的价格竞争向品牌竞争转化。

加油站非油业务发展在国外已进入成熟阶段。BP、道达尔、壳牌等石油公司在欧洲开展非油业务的加油站占总数的 85%，美国便利店加油站也占到总数的 85%。非油业务的利润占加油站总利润的比例高达 20%到 40%。

加油站非油业务在中国才刚刚起步，存在巨大的发展空间。截至 2007 年底，中石油共有 2940 座加油站不同程度开展了非油业务，全年实现销售收入 6.55 亿元。

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Abstract

China's total vehicle quantity has increased rapidly in tandem with its fast economic development. China had a total of 56.96 million vehicles in 2007 and is expected to have more than 100 million vehicles in 2020. It implies that the scale of China's auto aftermarket is increasing rapidly and China auto consumers have made a new demand for the operation and service of gas station.

China Total Number of Gas Stations and Market Shares, 2000-2007

	Sinopec		CNPC		Others	
	Qty.	Shares	Qty.	Shares	Qty.	Shares
2000	20259	30.0%	11350	16.8%	36000	53.2%
2001	24062	31.6%	12102	15.9%	40000	52.5%
2002	24000	32.8%	13160	18.0%	36000	49.2%
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At present, China's competition of gas station industry mainly exists between its two giants, China Petrochemical Corp. or Sinopec Group and China National Petroleum Corporation or CNPC, which are also faced with competition from other domestic oil product companies and joint venture oil product companies. The competition between the two oil giants focuses on the change of their marketing concepts, which is experiencing a shifting from a company-oriented marketing to a consumer-oriented one and a shifting from price competition to brand competition.

Non-oil product business in gas stations overseas has already stepped into a maturity.

	The number of gas stations offering non-oil product business service run by BP, TOTAL and Royal Dutch Shell etc. in Europe accounts for 85% of the total. The number of gas station/convenience store in the United States of America accounts for 85% of the total. Non-oil product business profit of gas stations amounts to 20% to 40% of the total. China's non-oil product business of gas stations is just in its infancy and still has a great space for development. By the end of 2007, 2,940 gas stations run by CNPC have offered non-oil product business service in varying degrees with their combined sales revenue reaching CNY655 million in the full year of 2007.
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