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TAJUK ARTIKEL	ENERGY SECURITY INTACT DESPITE DISRUPTIONS		
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Energy security intact despite disruptions

Diversified supply routes underpin Beijing's confidence

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BEIJING: China's energy security is expected to remain fundamentally unaffected by the United States-Israel attack on Iran, which has cast a shadow on maritime operations through the Strait of Hormuz, a vital international waterway for oil and gas shipments, according to industry experts.

China's robust energy framework with diversification strategies, along with its massive strategic reserves and expanding land-based supply routes, has created "a shield of resilience" capable of weathering significant maritime disruptions, they said.

Their comments came as the attack, which entered its third day on Monday, renewed concerns over potential disruptions to crude shipments through the arterial maritime link.

Foreign Ministry spokeswoman Mao Ning said at a daily news briefing that the Strait of Hormuz and its surrounding waters are important international corridors for goods and energy trade, and maintaining security and stability in the area serves the common interests of the international community.

Lu Ruquan, president of the China National Petroleum Corp Economics and Technology Research Institute, said that while "a prolonged blockade would undoubtedly roil global markets, it is unlikely to disrupt significantly China's overall oil supply or import stability".

The confidence of the world's largest energy consumer is anchored in a multi-faceted strategy that prioritises emergency stockpiles and a wide array of import channels, he said.

"China's long-standing policy of global diversification allows it to lean on established partners across the Atlantic and in Africa.

"Suppliers such as Brazil, Nigeria and Angola, all of which have historically been cornerstone sources of Chinese imports, provide a geographical counterweight to Middle East dependency," Lu said.

According to data and analytics platform



Robust framework: Tugboats assisting an LNG tanker dock at a port in Yantai, Shandong province. China's oil and gas supplies and reserves are anchored in a strategy that prioritises emergency stockpiles and a wide array of import channels. — Reuters

Kpler, this global energy artery registered the movement of more than 14 million barrels per day in 2024, constituting up to a third of the world's total crude exports by sea.

The Strait of Hormuz is also vital for global liquefied natural gas (LNG) exports, and according to Kpler, around 80% of LNG shipments passing through the waterway are bound for Asia.

Major oil and gas producers in the Middle East use the waterway to transport energy from the region, and about three-quarters of the barrels go to China, India, Japan and South Korea, it added.

He Ning, an analyst at investment firm Kaiyuan Securities, said that in 2024, these four economies collectively received approximately 69% of all crude and condensate flows through the Strait of Hormuz.

As the world's leading crude importer, China remains at the heart of this demand, with a total import volume of 11 million barrels per day in 2024, he said, noting that about 4.78 million of these barrels, or

43.5%, came through the key waterway.

Lu, from the research institute, said that while the sheer scale of these figures is triggering market concerns, China's structural preparedness could effectively mitigate any vulnerability to the volatile situation in the Middle East.

China's resilience is structural, he said, noting that non-Hormuz routes, including those from Saudi Arabia and Iraq through the Red Sea and the Mediterranean Sea, could offer viable alternatives to ensure the physical flow of oil if maritime "choke points" are restricted.

Internal safeguards provide the next layer of protection. According to the research institute, China has actively built its strategic energy reserves, with the combined volume of strategic and commercial stocks providing at least 90 days of crude oil import coverage at the 2024 level.

This buffer is designed specifically to absorb short-term supply shocks and prevent domestic price volatility during international contingencies, it said. — China Daily/ANN