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# Star Dots

Deeper outlook thought sense

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## Buffer against the energy crisis



The CNOOC LNG storage base in Yancheng. China's natural gas stockpiles are conspicuously important now, helping it cushion the shock from the closing of the Strait of Hormuz. — Qilai Shen/The New York Times

By KEITH BRADSHER

TWO rows of storage tanks the height of 20-storey buildings, filled with liquefied gas, help explain why China is better prepared than many countries to endure the interruption of gas supplies from the Middle East.

Each of the six tanks in Yancheng, an industrial port, holds enough natural gas to meet the household needs of Beijing's 22 million people for more than two months. Adjacent to them are four more tanks that are only slightly smaller.

The storage tanks are part of a huge effort by China over the past decade to accumulate stockpiles of all kinds of commodities, from pork and rice to rare-earth metals and coal, in case of a disruption of overseas supplies.

But the natural gas stockpiles — the world's largest above ground — are in Yancheng, with more giant storage tanks in southern China — are conspicuously important now.

They have helped China cushion the supply shock caused by the Middle East conflict even as its Asian neighbours, including India, Pakistan and Vietnam, are running low on natural gas.

China is the world's largest importer of natural gas and the largest consumer of fertiliser, much of which is made from natural gas. It also has the biggest chemicals industry, much of which requires natural gas as well.

The country has other supply options besides the storage tanks, which hold liquefied natural gas brought in by sea. It has constructed pipelines to gas fields in Central Asia and Russia.

China has developed coal-based process-

**“They’ve been thinking about this for a long time.”**

Geoffrey Garrett

es that can replace natural gas in making some kinds of chemicals. And it has more than doubled its domestic production of natural gas in the past decade through fracking and other technologies.

While the United States now leads the world in oil and natural gas production by a wide margin, China is the fourth-largest producer of natural gas, trailing only the United States, Russia and Iran.

China is the fifth-largest oil producer, behind the United States, Saudi Arabia, Russia and Canada.

Government data shows that natural gas imports through the Strait of Hormuz represented only 6.9% of the country's overall gas consumption last year.

Beijing's top leaders have long been preoccupied with their country's vulnerability to pressure from the US or Indian navies on their seaborne supply of oil and natural gas from the Middle East.

The country's programmes to develop solar and wind power and electric cars as

alternatives to oil all moved into high gear 20 years ago.

“They’ve been thinking about this for a long time,” said Geoffrey Garrett, the dean of the Marshall School of Business at the University of Southern California.

China's expansion of strategic stockpiles of fossil fuels is more recent, an effort pushed by its top leader, Xi Jinping. He has uttered dark warnings about the challenges facing the globe and the need for China to depend on commodities and technologies found within its borders.

In a speech in 2022, he called for China to “enhance coal, oil and gas storage capacity, promote the large-scale application of advanced energy storage technologies and improve the capacity for self-sufficient energy supply”.

China's natural gas reserves, together with imports from places that are not affected by the conflict in the Mideast, such as Australia, Turkmenistan and Russia, are ample for home heating and cooking.

Households, including residential electricity use, represent less than 15% of China's natural gas consumption.

China is also finishing its second consecutive warm winter, and residential gas demand has dropped steeply with the end of the heating season last month.

The country generates only 4% of its electricity from natural gas and can easily replace that with coal and, to some extent, renewable energy.

Natural gas is particularly difficult to store. The easiest approach is to keep it underground by pumping it into salt caverns or into previously exhausted underground natural gas fields near big cities. But China has a few of these caverns

and fields relative to its enormous population.

That has prompted it to pursue a technologically audacious strategy: storing enormous quantities of supercooled gas as a liquid in above-ground storage tanks.

The state-owned China National Offshore Oil Corp disclosed in December that it had built 18 of its largest size of storage tanks for liquefied natural gas — more than twice as many as the rest of the world combined.

Each of China's superlarge tanks, including the six at Yancheng, has a volume of 270,000 cubic metres.

The tanks hold liquefied natural gas at a temperature of -162°C. When the gas is allowed to warm gradually to room temperature through a system of pipes, it expands 600-fold.

China has one more tool to make sure it has enough natural gas: making less fertiliser for export.

While farmers in the United States, India and elsewhere have expressed concern about fertiliser shortages this spring, residents of villages near the Yancheng LNG storage tanks said they had plenty. At a nearby store, tall stacks of fertiliser were displayed for sale.

The store salesman, who gave his family name, Liu, said China's authorities had made sure that fertiliser is abundantly available and that prices do not rise too sharply.

“I stocked up quite a bit of fertiliser in advance — after all, there's a conflict going on in the Middle East,” he added. — ©2026 The New York Times Company

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