

China Ocean Engineering Equipment Industry Overview, 2016-2020

<https://marketpublishers.com/r/C213872CED4EN.html>

Date: August 2016

Pages: 31

Price: US\$ 1,800.00 (Single User License)

ID: C213872CED4EN

Abstracts

Description

The output volume of ocean petroleum accounts for over one third in the globe while that accounts for 85% in China. The output volume of crude oil and natural gas increased to 214.56 million tons and 134.61 billion cubic meters respectively with an increasing absolute value by the end of 2015 compared to that of 2011, and increased by 1.48% and 3.42% respectively compared to that of 2014. The ocean engineering equipment industry is increasing in importance as a platform and tool to obtain maritime resources.

The ocean engineering equipment is usually classified internationally into three types including offshore oil & gas development equipment, other maritime resource development equipment and maritime floating body structure. Meanwhile, offshore oil & gas development equipment is the major part including various drilling platforms, production platforms, oil storage ships, offloading vessels, floating cranes and diving boats.

It includes drilling platforms, production devices and ocean engineering auxiliary vessels with a respective market share of 45%, 20% and 35% in the equipment manufacturing industry.

The ocean engineering equipment industry is long in chain and wide in range. The R&D and design as well as the supply of raw materials are in the upstream, while the equipment manufacturing is at the core and petroleum drilling together with production is in the downstream mainly providing surveying, drilling, production and other services for oil companies. Enterprises in developed countries possess unique advantages in

R&D and design while those in China possess advantages in manufacturing.

The ocean engineering equipment manufacturing industry forms three clusters including Bohai Rim, Yangtze River Delta and Pearl River Delta with strong industrial bases, perfect supporting industries and complete industry chains. The special ocean engineering as well as petroleum drilling and production equipment manufacturing industry grew rapidly from 2011 to 2014. The demand of petroleum drilling enterprises for ocean engineering equipment declined with oil prices with a decreased sales revenue of CNY 59.63 billion in 2015 compared to that of the corresponding period in 2014.

Offshore Oil Engineering Co., Ltd., owned by China National Offshore Oil Corporation, possesses advantages with over 80% of the domestic ocean engineering in China. In addition, most of the newly built FPSO and building work of semi-submersible drilling ships are undertaken by ocean engineering departments of large-scale enterprises such as Shanghai Waigaoqiao and Dalian Shipyard. According to CRI, the market concentration rate of top 5 ocean engineering manufacturers reached about 90% in China in 2015, which was high. The number of export orders is growing in the ocean engineering equipment manufacturing industry with technologies.

CRI estimates that deepwater offshore oil and gas reserves will be developed with the recovery of oil prices due to the output volume decline of oil and gas in land and shallow waters in the next few years. It is estimated that capital expenses of global FPS will increase to USD 80 billion to USD 100 billion with new orders of about 100 while half of them are FPSO from 2016 to 2020. The demand above are mainly from major manufacturers of deep water petroleum such as Angola, Brazil, Nigeria and the U.S.A. China ocean engineering equipment manufacturing industry is expected to develop rapidly with the transfer of international one towards Asia as well as domestic conditions and basis to carry on it.

Through this report, the readers can acquire the following information:

Definition and Classification of Ocean Engineering Equipment

Research Methods of the Report

Development Environment of Ocean Engineering Equipment Manufacturing Industry

Analysis on Supply and Demand of Ocean Engineering Equipment in China

Export Status of Ocean Engineering Equipment in China

Competition Status of Ocean Engineering Equipment Industry in China

Analysis on Top 5 Enterprises of Ocean Engineering Equipment Industry in China

Development Opportunities and Driving Forces Faced by Ocean Engineering Equipment Industry in China

Analysis on Costs and Prices of Ocean Engineering Equipment Industry in China

Prediction on Development of Ocean Engineering Equipment Industry in China

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