China Ship Equipment Industry Overview, 2016-2020

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Abstracts

Description

The ship equipment industry is a major part of the comprehensive strength of the shipping industry. The ship equipment manufacturing industry mainly concentrates in coastal areas including Jiangsu, Shanghai, Liaoning, Zhejiang, Shandong and Fujian. Problems of the backward ship equipment industry become increasingly serious and prevailing with the rapid development of the shipping industry in China.

The shipbuilding industry is later in starting and inferior in development than that of developed shipbuilding countries like Japan and South Korea. The total volume of the shipbuilding ranks the highest in the world for ten consecutive years while the technology and the ship equipment loading rate are low. The local matching rate of developed countries reaches over 70% while that of China is less than 50%.

At present, the bottleneck of the ship equipment industry is the largest barrier of China to become a shipbuilding power with the direct influence of the matching rate on the shipbuilding profit margin, which needs researches. The total export value of the ship equipment was USD 3.03 billion with a decrease of 4.7% YOY while the total import value of that was USD 4.43 billion with a decrease of 8.1% YOY in China in 2015.

The ship equipment is mainly manufactured through the introduction of licenses and the cooperation with foreign enterprises due to the lack of core technologies in China. The equipment R&D mainly depends on government investment while the independent one is insufficient. Ship equipment manufacturers are committed to the expansion of production capacity instead of the independent R&D for rapid development. The innovation ability of them in China is inferior to that in Japan and South Korea.

According to CRI, the number of ship equipment manufacturers was over 500 by the end of 2015. Meanwhile, the total market share of top 5 enterprises including Hudong Heavy Machinery Co., Ltd., Wuhan Marine Machinery Plant Co., Ltd. and CSSC Marine Power Co., Ltd. was about 12%, leading to a fully competitive status of the industry. Numerous ship equipment manufacturers are large in product homogeneity which leads to the overcapacity and cutthroat competition. Meanwhile, redundant building projects also exist in partial fields of advantage products.

According to CRI, the sales revenue of the ship equipment industry increased from CNY 85.2 billion in 2011 to CNY 105.5 billion in 2012 while it experienced a decline in 2013 and 2014 and recovered in 2015. Generally, the sales revenue of ship equipment enterprises is increasing. The ship equipment industry was slump from 2013 to 2014 with a decrease for three consecutive years, which was a great influence on the development of this industry. New orders in the shipbuilding industry increased with the international rising oil prices especially in terms of oil tankers, leading to the demand growth for relevant equipment and the whole ship equipment industry.

CRI estimates that there is certain development space for the ship equipment industry in China in the next few years.

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

- Definition and Classification of Ship Equipment
- Research Methods of the Report
- Development Environment of Ship Equipment Manufacturing Industry in China
- Supply and Demand Status of Ship Equipment in China
- Import and Export Status of Ship Equipment in China
- Competition Status in Ship Equipment Industry in China
- Analysis on Top 5 Enterprises in Ship Equipment Industry in China
- Development Opportunities and Driving Forces Faced by Ship Equipment Industry in China
- Price Trend of Raw Materials and Products of Ship Equipment in China

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Prediction on Development of Ship Equipment Industry in China

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