

China Ship Repair Industry Overview, 2016-2020

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Abstracts

Description

Ships are often deformed and damaged for various external and human forces, leading to the failure of normal technical conditions. The damage is mainly classified into tangible and intangible types which influence the depletion and damage degrees, normal technical conditions, operation and safety of ships. Therefore, these defections should be eliminated to maintain and recover normal technical conditions and prevent further damage and depletion of ship components. The Baltic Sea Index slightly influences the ship repair industry. Ship owners must repair ships periodically even the freight volume is small. They may not build new ships when the freight is down.

The ship repair is specifically classified in terms of reasons, ranges and intervals in accordance with the Regulations of Ship Repair and Ship Repair Meeting Minutes issued by China Ministry of Communications.

The development of the ship repair industry is closely related to the reserve of ships. According to statistics from National Maritime Affairs Bureau of China, the total number of registered operating ships was 230,883 with a capacity of 177.7 million DWT, of which international navigation ones was 1,283 with a capacity of 27.7 million DWT by the end of 2014. A large number of foreign ships are repaired and modified for low prices in China every year.

After years' development, ship repair enterprises expand in areas such as Liaoning, Tianjin, Shandong, Jiangsu, Zhejiang, Fujian and Guangdong. The ship repair industry forms a competition pattern of three clusters including Bohai Bay Economic Rim centered with Dalian, Yangtze River Delta centered with Zhoushan and Pearl River Delta centered with Guangzhou.

According to CRI, the number of ship repair enterprises was over 100 in 2015. The aggregate market share of top 5 enterprises was only about 14% including Shanghai Huarun Dadong Dockyard Co., Ltd., China Shipping Industry Co., Ltd. and CSSC Chengxi Shipyard (Guangzhou) Co., Ltd. with a low concentration rate. Years' intense competition exerts adverse effects on the long-term development of the ship repair industry, leading to low price orders as major means of certain enterprises to occupy market shares.

The main business revenue of ship repair enterprises increased from CNY 15.13 billion in 2011 to CNY 25.57 billion in 2013 while that declined from 2014 to 2015.

The demand for global large-scale ocean engineering equipment, special vessel repair and modification was slump from early 2015 so certain ship repair capacity transferred to conventional market. Meanwhile, the demand of major crude oil import increased with low oil prices, which led to a surging market of crude oil transportation. Repair business of oil tankers became a major growth point in the industry for the pull of the demand side in 2015. Another market opportunity of the ship repair industry refers to the repair business of cruises with the support of Chinese government.

In terms of the global market, major repair objects were passenger ships and bulk freighters before. With the transforming of maritime logistics pattern and varieties, some specialized vessels with high performance will replace conventional ones while shipping ones will become diversified and complicated. Meanwhile, the large number of container ships will lead to the reduction of conventional bulk freighters. The demand for liquefied gas carriers will increase with the restructuring of energies together with expanded application of natural and petroleum gas. Therefore, the gross volume of the global ship repair industry will grow with a larger scale and high technologies.

According to CRI, the demand for repair business of oil tankers will increase with the international oil prices from 2017 to 2020. Meanwhile, the repair business of cruises will be another growth point with the promotion of Chinese government. Therefore, the ship repair industry is expected to develop positively from 2017 to 2020.

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

Definition and Classification of Ship Repair

Research Methods of the Report

Development Environment of Ship Repair Industry in China

Analysis on Supply and Demand in Ship Repair Industry in China

Competition Status in Ship Repair Industry in China

Analysis on Top 5 Enterprises in Ship Repair Industry in China

Development Opportunities and Driving Forces Faced by Ship Repair Industry in China

Risks and Challenges in Development of Ship Repair Industry in China

Costs and Prices of Ship Repair Industry in China

Prediction on Development of Ship Repair Industry in China

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