

China Shipbuilding Industry Overview, 2016-2020

<https://marketpublishers.com/r/C4D29A15433EN.html>

Date: August 2016

Pages: 30

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

ID: C4D29A15433EN

Abstracts

Description

Shipbuilding is closely related to industry, transportation, mining, economy growth and trade volume as a base of the national economy. Therefore, the shipbuilding industry is typically periodic with high sensitivity towards external economic policies. The downstream demand for cargo transportation increases significantly with the sales of raw materials and finished products so it stimulates the profits of shipbuilding enterprises and vice versa .

Enterprises of South Korea possess advantages in high-end shipbuilding market, while those of China occupy higher shares in conventional market with advantages of scale and cost and those of Japan possess advantages of equipment technologies.

China becomes a leading power of shipbuilding after the international transfer of this industry with low technologies. At present, the shipbuilding industry is transferring towards the second phase in China, which refers to high technology and support equipment. Ships already built or under construction cover those of chemicals, ro-ro or passengers, liquefied petroleum gas (LPG), large-scale containers and ocean petroleum platforms, leading to a structure transfer. Meanwhile, the global ship supporting industry transfers towards China in diversified ways such as overall transfer of partial industries, the transfer of manufacturing procedures, centers, R&D as well as procurement.

Shipbuilding enterprises are large in number but low in concentration rate in China. Most of them are small in scale, backward in technologies and weak in risk resistance ability except certain competitive ones in the international competition. According to CRI, the aggregate completion amount of top 5 shipbuilding enterprises accounted for about one third in China in 2015.

The development of shipbuilding is closely related to the maritime transport industry. The increase of import and export of China significantly promotes the international maritime transport industry as strategic buyers of global energy and raw materials. The absolute value of total import and export value as well as cargo throughput capacity of major ports increased from 2011 to 2014. However, the former declined due to the slump global economy while the latter remained increasing in 2015.

New orders of shipbuilding account for 30% to 50% of that of the globe in China each year. Shipbuilding completion amount, new orders and handheld orders respectively accounted for 38.3%, 34.0% and 36.2% by compensated gross tons as three leading indexes in the world in 2015.

The shipbuilding completion amount was 41.84 million DWT with an increase of 7.1% YOY in China in 2015. New orders were 31.26 million DWT with a decrease of 47.9 % YOY. Handheld orders of the shipbuilding industry were 123.04 million DWT with a decrease of 12.3 % YOY by the end of 2015. The proportion of exported ships were 88.6%, 88.6% and 95.7% respectively in national shipbuilding completion amount, new orders and handheld orders in 2015.

The globe is slump in economic recovery and trade increase in 2016. The global ocean shipping is blocked in recovery due to the intensified excess capacity and markets of three mainstream ship types will remain slump. Structural opportunities only exist in luxurious cruises, feeder container ships, special and official vessels in a short term.

China is expected to become the global shipbuilding center with certain development space due to advantages of industry chain and costs in the next few years.

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

Definition and Classification of Shipbuilding

Research Methods of the Report

Supply and Demand Status of Shipbuilding Industry in China

Analysis on Export of Shipbuilding in China

Analysis on Top 5 Shipbuilding Enterprises in China

Development Opportunities and Driving Forces Faced by Shipbuilding Industry in China

Risks and Challenges in Development of Shipbuilding Industry in China

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Analysis on Prices of Shipbuilding in China

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