



# Global and China Ocean Engineering Equipment Industry Report, 2010

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## ***This report***

- ◆ analyzes the status quo and development of the global and China's ocean engineering equipment industry
- ◆ Focuses on the market segments of ocean engineering equipment, such as drilling rig and production platform, also the key regions, such as Shanghai, Shandong and Jiangsu.
- ◆ Highlights the operation and development of major enterprises in ocean engineering equipment industry in worldwide and China.

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## Abstract

Ocean engineering equipment refers to the large-scale engineering equipment and auxiliaries applied in such fields as ocean resource exploration, exploitation, processing, storage & transportation, management, and logistics service. The main part of ocean engineering equipment currently is the exploitation equipment for ocean oil & gas resources. Supposing the annual average investment in exploiting global ocean oil & gas resources is US\$350 billion in the next 5 years, the annual average market capacity of ocean engineering equipment worldwide will exceed US\$70 billion across 2011-2015.

The manufacturers of ocean engineering equipment worldwide are centralized in the USA, Europe, Singapore, South Korea, etc.; of which, the USA and Europe highlight the R&D and construction of deepwater & ultra-deepwater high-tech platform equipment, and they monopolize the development, design and project contracting of ocean engineering equipment as well as the supply of crucial

corollary equipment; Singapore and South Korea give priority to medium and shallow waters platforms with mature technologies, and they take the lead in general assembly construction field. By contrast, Chinese companies are generally grouped as the third echelon that manufactures low-end products and mainly make profit from the processing business.

Chinese ocean engineering equipment industry started very late but it has progressed rapidly. It has in succession built multi-type FPSO and jack-up drilling rigs, accomplished the refitting and construction of overseas 6G semi-submersible drilling rig, and accepted the orders of domestic 3000-meter deepwater semi-submersible drilling rig and heavy lift cable layer vessel. At present, China holds 15% share in global ocean engineering equipment market and has become the rising star of the market.

## Ocean Engineering Equipment Orders Delivered by China, 2009-2010

Enterprise	Product	Delivery	Owner Nationality
<b>Yantai CIMC Raffles Offshore Limited (CIMC Raffles)</b>	cable layer vessel saipem 216	2009	Italy
	semi-submersible drilling rig "SS Pantanal"	2010	Brazil
	semi-submersible drilling rig COSLPIONEER	2010	China
<b>Dalian Shipbuilding Industry Co., Ltd (DSIC)</b>	NDA semi-submersible drilling rig	2009	USA
	"CNOOC 10" jack-up drilling rig	2009	China
	JU2000E-5 jack-up drilling rig	2009	USA
	CJ46 jack-up drilling rig "Offshore Oil 937"	2009	China
	"Shengli 10" jack-up drilling rig	2010	China
<b>COSCO (Nantong) Shipyard</b>	Deepwater semi-submersible offshore oil drilling & storage rig "Hope No.1"	2009	Norway
	"Nunce" 350 POB offshore platform life auxiliary barge	2009	Belgium
	"Caesar" ultra-deepwater cable layer vessel (refitting)	2009	USA
<b>COSCO (Dalian) Shipyard</b>	"PRYNEES VENTURE" FPSO (refitting)	2009	Japan
	"Bon Bateau" FPSO (refitting)	2009	Japan
	FPSO refitting of "Rising Sun" Ship	2010	Japan
<b>Shanghai Zhenhua Heavy Industries Co., Ltd.</b>	CNOOC 1200 heavy lift cable layer vessel	2009	China
	"Fortuna" heavy lift cable layer vessel	2010	Luxemburg
	3000-ton heavy lift cable layer vessel	2010	Singapore
	8000-ton floating crane ship "Suming 5"	2010	South Korea
	"Power" self-propelled crane ship	2010	China

<b>Offshore Oil Engineering Co., Ltd. (CNOOC Engineering)</b>	EPSO	2009	Japan
<b>Qingdao Beihai Shipbuilding Heavy Industry Co., Ltd. (BSIC)</b>	CNOOC No.62 operation platform	2009	China
	CNOOC No.33 submersible drilling rig	2009	China
	CNOOC No.8 jack-up drilling rig	2009	China
<b>China Merchants Heavy Industry Co., Ltd.</b>	"Offshore Oil 936" drilling ship	2009	China
<b>CSSC Guangzhou Huangpu Shipyard</b>	"Offshore Oil 605" multi-purpose workboat	2009	China
<b>China Oilfield Services Limited (COSL)</b>	jack-up drilling rig "Offshore Oil 921"	2010	/
	jack-up drilling rig "Offshore Oil 922"	2010	/

Source: China Shipping Industry Yearbook, ResearchInChina

Up to 2010, China has had over 20 ocean engineering equipment manufacturers which cluster in Bohai Bay, Yangtze River Delta, and Pearl River Delta and devote themselves to shipbuilding and ship-repairing. The first tier-I group consists of CIMC Raffles, Dalian Shipbuilding Industry Co., Ltd, Shanghai Zhenhua Heavy Industries Co., Ltd, Shanghai Waigaoqiao Shipbuilding Co., Ltd., COSCO Shipyard, China Merchants Heavy Industry (Shenzhen) Co., Ltd., BSIC, Shanghai Shipyard Co., Ltd., etc., which mainly engage in the construction of drilling rigs and floating production systems.

CIMC Raffles, the largest manufacturer of semi-submersible drilling rig in China, has consigned 2 semi-submersible drilling rigs in 2010 with 6 out of 8 backlog orders of semi-submersible drilling rigs nationwide and 5 backlog orders of jack-up drilling rigs. Superior in jack-up drilling rig field, DSIC delivered “Shengli 10” jack-up drilling rig to Shengli Offshore Drilling Company (SODC) in 2010 and has accepted 3 new orders including one DSJ-300 jack-up drilling rig and two JU2000 jack-up drilling rigs. As the first shipyard whose annual shipbuilding output breaks through 7 million DWT in China, Shanghai Waigaoqiao Shipbuilding Co., Ltd. has accelerated its development in ocean engineering equipment field in recent years, and its 6G 3000-meter deepwater

semi-submersible drilling rig with internationally advanced level was successfully undocked on February 26, 2010. Shanghai Zhenhua Heavy Industries Co., Ltd, the leading company in ocean engineering auxiliary equipment, consigned 2 cable layer vessels and 2 crane ships in 2010 with the received orders of 1 dredger and 2 cable layer vessels. COSCO (Nantong) Shipyard and COSCO (Dalian) Shipyard are marked by individual emphases, hereinto, the former underlines Sevan650 cylindrical rig, jack-up rig, and offshore platform life auxiliary barge, while the latter takes the lead in FPSO refitting field and is entitled as ‘China’s No.1 FPSO Refitting Shipyard’.

Ever since 2010, the Ministry of Industry and Information Technology of the People’s Republic of China has stepped up the constitution of Ocean Engineering Equipment Development Programme during the 12th Five-Year Plan Period with the objective of expanding the new capacity of 50 million tons of crude oil alongside China’s offshore continental shelf as well as setting up and putting into operation of two to three deepwater oil and gas fields; consequently, China will ask for more than 70 rigs and over 10 FPSOs in the next 5 years.

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