



Global and China Marine Diesel Engine Industry Report, 2010

Feb. 2011

This report

- ◆ **Analyzes the status quo and development of the global and China's marine diesel engine industry.**
- ◆ **Focuses on the market segments of marine diesel engine ,such as Supply & Demand and import & export , also low-speed marine diesel engine and medium-speed marine diesel engine.**
- ◆ **Highlights the operation and development of major enterprises in marine diesel engine industry in worldwide and china.**

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Abstract

Thanks to the fast development of shipbuilding industry, recent years have seen stable advancement of marine diesel engine industry. As of 2009, the global market scale of marine diesel engine industry had hit 55.5 million horsepower (equivalent to USD 12 billion). In 2010, the shipbuilding completion worldwide reached 146 million deadweight tonnages, and the minimum market scale of global marine diesel engine industry of the year surpassed 60 million horsepower according to a ratio of 2.2:1.

With the marine diesel engine industry becoming more and more mature in the world, South Korea, Japan and China have been coming to the fore. Thus far, South Korea has become the world's largest low-speed marine diesel engine producer, with 57% share in the global market. As for Japan, it has taken a leading position in the medium-speed marine diesel engine market, with 10% market share. When it comes to China, the improving shipbuilding

capacities and the widening gap between demand and supply in the marine diesel market makes it possible to become the most important marine diesel market in the world.

This report highlights the supply & demand, import & export, market segments and key enterprises in China's marine diesel engine market while shedding light on the current status and competition pattern of the global marine diesel engine industry.

China's burgeoning growth in shipbuilding industry has stimulated the high-speed development of marine diesel engine market, with the output and apparent consumption

growing by around 30%. The same is true of import demand. For example, China imported marine diesel engines from more than 20 countries including South Korea, Japan, Germany and Finland worth USD 2.33 billion cumulatively in the first eleven months of 2010, exceeding the total import value in 2008.

Meanwhile, the scale of Chinese marine diesel engine manufacturers is expanding, and the number of manufacturers has increased from several in 2005 to over 20, represented by low-speed marine diesel engine heavyweights such as HU DONG HEAVY MACHINERY, DALIAN MARINE DIESEL, YICHANG MARINE DIESEL ENGINE and CSSC-MES DIESEL, and medium-speed marine diesel engine giants like ZHENJIANG CME, SHAANXI DIESEL ENGINE HEAVY INDUSTRY, ANQING CSSC MARINE DIESEL and WEICHAH HEAVY MACHINERY.

Since low-speed marine diesel engine has higher technical requirements, its manufacturing in China is only concentrated in a few enterprises. HU DONG HEAVY MACHINERY, DALIAN MARINE DIESEL, YICHANG MARINE DIESEL ENGINE and CSSC-MES DIESEL occupied 93.6% of China's low-speed marine diesel engine market in 2009.

Output and Output Proportion of Key Low-Speed Marine Diesel Engine Enterprises in China, 2009

| Enterprise | Output of Low-Speed Marine Diesel Engines | | Output Proportion by Power |
|------------------------------|---|-----------|----------------------------|
| | Unit | 10,000 KW | |
| HU DONG HEAVY MACHINERY | 87 | 110.5 | 30.0% |
| DALIAN MARINE DIESEL | 72 | 96.0 | 26.0% |
| YICHANG MARINE DIESEL ENGINE | 52 | 36.4 | 9.9% |
| CSSC-MES DIESEL | 32 | 102.2 | 27.7% |
| Others | 35 | 23.9 | 6.4% |
| Total | 278 | 369.0 | 100.0% |

Source: China Shipping Statistics Yearbook; ResearchInChina

By contrast, due to lower technical threshold, there are many more medium-speed marine diesel engine manufacturers in China, including ZHENJIANG CME, SHAANXI DIESEL ENGINE HEAVY INDUSTRY, ANQING CSSC MARINE DIESEL, WEICHAO HEAVY MACHINERY, SHANGHAI DIESEL ENGINE, GUANGZHOU DIESEL ENGINE, HENAN DIESEL ENGINE INDUSTRY, JIANGSU ANTAI POWER MACHINERY and ZIBO DIESEL ENGINE. Among these, ZHENJIANG CME has long been in the leading position, with the output of medium-speed marine diesel engines in 2007 and 2008 breaking 300 units and 450 units respectively. And in 2009 when encountered flagging economy worldwide, ZHENJIANG CME still delivered 430 units. In particular, the delivery jumped to 600-odd units in 2010.

In addition, this report focuses on four global leading marine diesel engine manufacturers, including MAN Group, Wartsila, Caterpillar and Hyundai Heavy Industries, and analyzes the production, operation, R & D and development strategy of 12 homegrown marine diesel engine enterprises at length.

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