



Global and China Marine Diesel Engine Industry Report, 2011

Apr. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), WIND . China Custom and China Marine Industry Yearbook etc.

Abstract

The marine diesel engine is crowned as the “heart” that provides power for the vessel, falling into low-speed, middle-speed and high speed marine diesel engines. Presently, the world’s two prominent marine diesel engine brands are MAN and Wartsila, of which the former is regarded as the low-speed marine diesel engine tycoon, while the latter is the middle-speed titan.

The new vessel orders worldwide witnessed steep drop in 2011, causing the bleak demand for marine diesel engine. The order book of MAN Diesel & Turbo saw a year-on-year increase of 6.2%, but the figure was far behind that of 18.6% in 2010; by contrast, the order value of Wartsila Ship Power decreased by 7.7% year-on-year.

In order to enhance competitive edge and consolidate the market dominance, international marine diesel engine giants in 2011 accelerated their expansion in the Chinese market.

In May, the phase- II project of MAN Diesel & Turbo started business in Changzhou; in June, Wartsila and Jiangsu Cuixing Ocean Engineering established a joint venture which was specialized in the production of W26, W32 four-stroke middle-speed engine; in November, Caterpillar teamed up with Anqing CSSC Marine Diesel Co., Ltd. to set up a joint venture which was also the world’s only joint venture of Caterpillar in middle-speed marine diesel engine sector.

In China, the production of all low-speed diesel engines should be accredited by foreign tycoons such as MAN and Wartsila (occupying over 95%). In particular, one third of middle-speed diesel engines are licensed by MAN and Wartsila, being mainly applied as generating units of ocean vessels. And the rest are applied for the R&D and production of offshore and inland vessels. In 2011, CSSC Guangzhou Marine Diesel Co., Ltd. separately signed marine diesel engine technology import agreements with MAN and Wartsila. Taken together, MAN had 16 China-based technology authorized dealers, while Wartsila had 9 ones.

Chinese marine diesel engine enterprises made remarkable progress in many aspects such as capacity, product structure and independent R&D through import.

Improvement in the Level of Production

In 2010, the low-speed marine diesel engine capacity of China hit 12 million horsepower, while the output realized 4.306 million horsepower, rising 39.4% over 2007. And the middle-speed marine diesel engine output registered 8.245 million horsepower, an increase of 73.1% over 2007.

In 2011, the production of marine diesel engine in China witnessed remarkable progress over 2010, with the output of Dalian Marine Diesel Co., Ltd., Yichang Marine Diesel Engine Co., Ltd., Zhenjiang CME Co., Ltd. reaching 101 units (1.63 million horsepower), 101 units (1.04 horsepower) and 713 units (including 14 units of low-speed engines). By contrast, both the output of Hefei RongAn Power Machinery Co., Ltd. and Jiangsu Antai Power Machinery Co., Ltd. doubled year-on-year to 40 units.

Gradual Perfection in Product Structure

In recent years, China's marine diesel engine enterprises have intensified their efforts to adjust product structure, developed and realized mass-production of high-power, big-cylinder diameter or intelligent low-speed marine diesel engines, new-type middle-speed diesel engines, etc, making it possible for China to make gradual progress in the domestication R&D of patent marine diesel engines.

The IMO Tier II standard of marine diesel engine was formally effective since Jan.1, 2011. Coupled with the IMO TierIII standard that is to take effect in 2016, the relevant enterprises are forced to make continual effort to facilitate the structural adjustment of marine diesel engines, in a bid to accelerate the environment friendly-driven model.

Breakthrough in Independent R&D Capability

In April 2011, the first independently developed low-speed engine, 6S42MC/ZJ3#, by Zhenjiang CME Co. Ltd (ZJCME) was delivered; then in November, CSIC successfully developed middle-speed diesel engine, 6CS21/32, and formally launched it into the market.

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