

# **Global and China Marine Diesel Engine Industry Report, 2016**

**Jun. 2016**

## **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 Company Reports, and National Bureau of Statistics of China etc.

## Abstract

A marine diesel engine is the major power equipment of a vessel, with the cost accounting for around 10% of the total. It can be divided into low-speed, medium-speed and high-speed marine diesel engines according to the rotational speed.

In 2015, the global marine diesel engine market size was 33.43 million kilowatts, up 10.2% from a year earlier. The global marine diesel engine production was mainly concentrated in China, Japan, and South Korea. And South Korea mainly produced low-speed marine diesel engines while China and Japan primarily focused on medium-speed engines.

In 2015, fueled by the growing starts in vessels, the output of marine diesel engines in China rose by 15.1% year on year to 16.99 million kilowatts, with the output of low-speed, medium-speed, and high-speed engines accounting for 41.2%, 40.1%, and 18.7%, respectively.

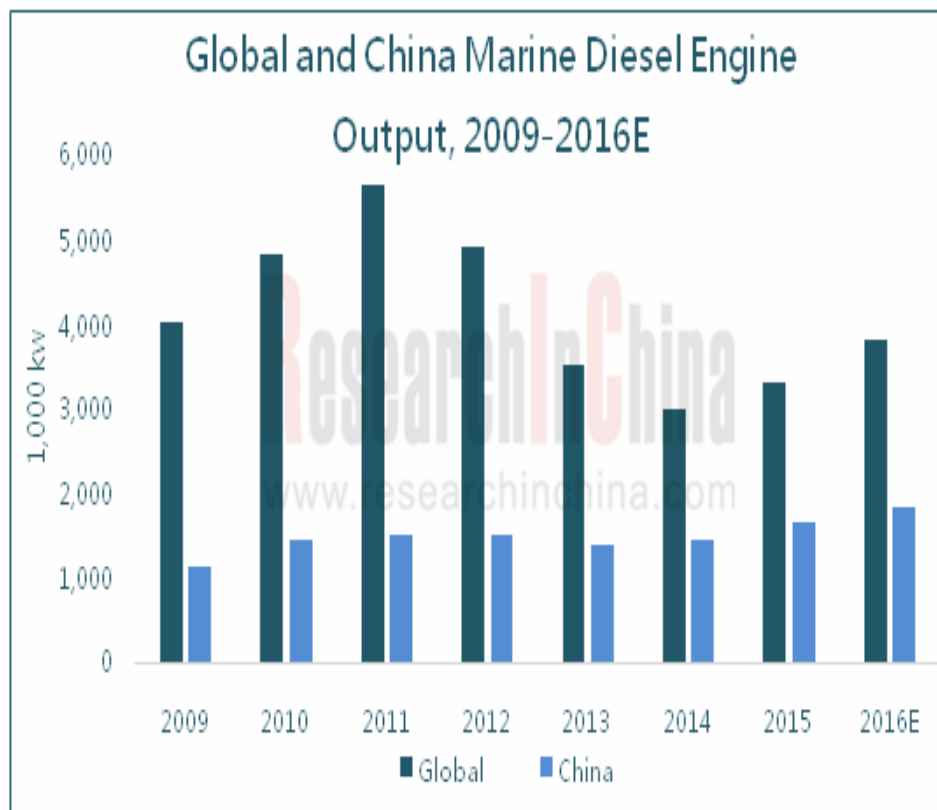
In China, marine diesel engines are mainly produced through patent licensing. Low-speed engines are absolutely dominated by MAN, Wartsila, and Mitsubishi Heavy Industries; in medium-speed engine market, Wartsila, MAN, and Caterpillar represented a combined market share of 82% (in 2015); high-speed engine brands primarily include MTU, Deutz, MWM, SACM, Pielstick, Ruston, and Paxman.

China's marine diesel engine market started late, so much so that it is poor in production technology and R&D capability. Therefore, most engine products with high technical content are still reliant on imports. In 2015, China imported USD1.07 billion worth of marine diesel engines and exported USD94.95 million engines, with a trade deficit of as much as USD970 million.

In China's low-speed diesel engine market, Hudong Heavy Machinery, Dalian Marine Diesel, and Yichang Marine Diesel Engine accounted for an aggregate market share of roughly 95.9%; in medium-speed diesel engine market, Weichai Heavy Machinery and CSSC Marine Power made up a 58.9% market share; high-speed diesel engine manufacturers mainly include Weichai Heavy Machinery, Shaanxi Diesel Engine Heavy Industry, and Henan Diesel Engine Industry, of which Weichai Heavy Machinery has a market share of around 26%.

To improve the competitiveness in marine diesel engine market, major Chinese diesel engine manufacturers are working on new product development.

**Hudong Heavy Machinery** is the largest manufacturer of low-speed marine diesel engines in China (a roughly 65% share in domestic market). It gained a 51% stake in CSSC-MES Diesel in 2013. In April 2016, the company's high-pressure marine air supply system became China's first certified FGSS, thus breaking the monopoly of Japan and South Korea in the product market.



In October 2015, **CSSC Marine Power** renewed the contract with MAN Diesel & Turbo for another 10 years of production of four-stroke medium speed engines. In May 2016, the company's 6S60ME low-speed diesel engine started operation. The latest designed model is the largest diesel engine constructed by CSSC Marine Power, which weighs approximately 390 tons.

**Henan Diesel Engine Industry** released the first domestic HPCR high-speed high-power diesel engine -- CHD622V20CR in December 2015, a move that helped fill the gap in the domestic 3500kw-above high-speed diesel engine market.

**Yichang Marine Diesel Engine** completed the bench test of its first 8S60ME-C8.2 diesel engine in August 2015, and the performance indicators of the product satisfied the design requirements. With a rated power of 14100KW, it could be the largest diesel engine product in power since the company's founding.

The report highlights the followings:

- Market size and competitive landscape of global marine diesel engine;
- Industry environment, policy environment, market size, import and export, and competitive landscape of marine diesel engine in China;
- Market status, major enterprises, and competitive landscape of the Chinese marine diesel engine market segments (low-speed diesel engine, medium-speed diesel engine, and high-speed diesel engine);
- Operation, development in China, R&D capability, and development strategies of 7 global and 16 Chinese marine diesel engine companies.

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