

Global Shipbuilding Market Size, Trends and Forecasts (2016-2020)

June 2016



Global Shipbuilding Market Report

Scope of the Report

The report titled “Global Shipbuilding Market: Size, Trends and Forecasts (2016-2020)” provides an in-depth analysis of the global shipbuilding market with detailed analysis of market size and growth, market share and economic impact of the industry. The report also provides market size of each of the segments of the market on the basis of the types of ships.

The report provides detailed regional analysis of Asian countries, leading the global market, which are South Korea, Japan and China. Regional analysis includes market size of the basis of new orders, order book, order completions and delivery trend along with the commercial vessel market.

The report also assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. The current status of the overall global shipbuilding market has been analyzed, taking into consideration the previous growth patterns, the growth drivers and the current and future trends. The competition in the global shipbuilding market is stiff and dominated by the big players like DSME. Further, key players of the market Hyundai Heavy Industries and Mitsubishi Heavy Industries are also profiled with their financial information and respective business strategies.

Regional Coverage

- South Korea
- Japan
- China

Company Coverage

- Daewoo Shipbuilding and Marine Engineering Company
- Hyundai Heavy Industries Co., Ltd.
- Mitsubishi Heavy Industries, Ltd.

Global Shipbuilding Market Report

Executive Summary

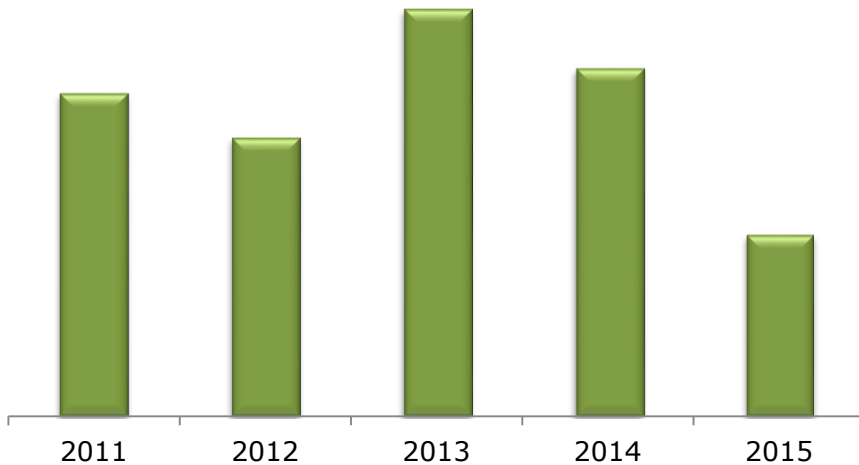
The maritime business has long been known for being cyclical. In times of growth and high profits, ship owners have positive cash flows and they order new capacity. This capacity, however, takes time to be delivered. There are waiting times, because shipbuilding berths tend to be full in times of prosperity; any new construction will only be started two to three years after it has been ordered, and then the construction itself can take up to one year. During the industry's boom years, the world saw records for new vessel orders being set year after year. The companies in this industry build and repair barges, cargo ships, naval vessels, and passenger ships, as well as platforms used for oil and gas drilling and production.

The global shipbuilding market can be analyzed on the basis of new orders, order book and delivery trend of ships. Currently, the market is experiencing tough times but is expected to regain its momentum with Asia leading the global market. South Korea, China, and Japan are the leading countries in the market accounting almost the entire global shipbuilding market. The shipbuilders in a given country typically specialize in certain types of vessels. South Korean companies, tend to focus on containerships and tankers. China produces large numbers of dry bulk containers and Japan builds large numbers of oil tankers.

The growth drivers of the global shipbuilding market, especially for the global shipbuilding market are: rise in seaborne trade & shipping confidence level and upsurge in the demand for eco-friendly ships. Despite the market is governed by various growth drivers, there are certain challenges faced by the market such as: volatile oil prices, write-downs on existing backlogs, increasing competition in the commercial segment, delay in financial decisions, political & financial instability, financial crises and stringent environmental regulations

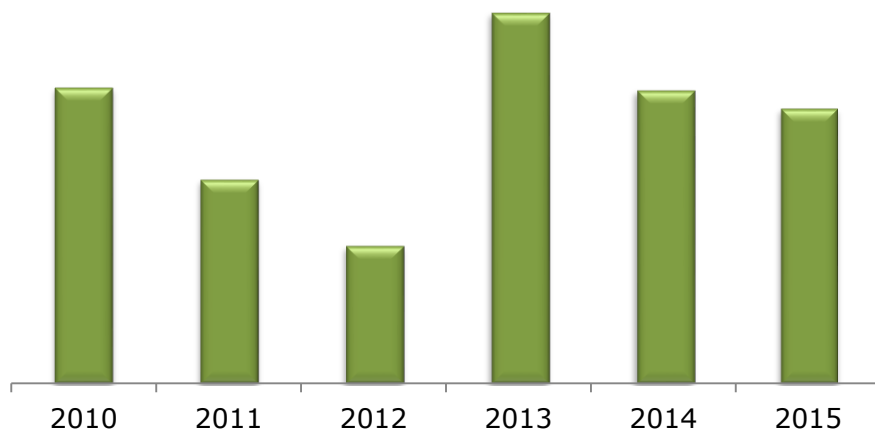
Global Shipbuilding Market Overview

Global Shipbuilding New Orders by Value; 2011-2015 (US\$ Million)

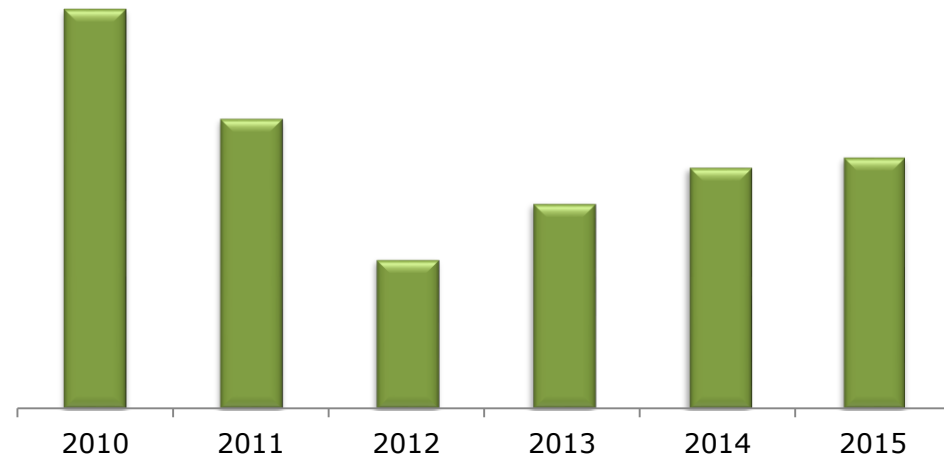


The value of new orders in the global shipbuilding industry has declined to US\$.... million in 2015 from US\$.... million in 2014 at a negative annual rate of approximately%. Also, in terms of volume, the new orders of shipbuilding globally reached ... million GT in 2015 from ... million GT in 2014. The global shipbuilding order book observed an annual growth rate of% to ... million GT in 2014 from ... million GT in 2014. The factors concerning the growth of the market include the economic crises and the decline in the international trade.

Global Shipbuilding New Orders by Volume; 2010-2015 (Million GT)

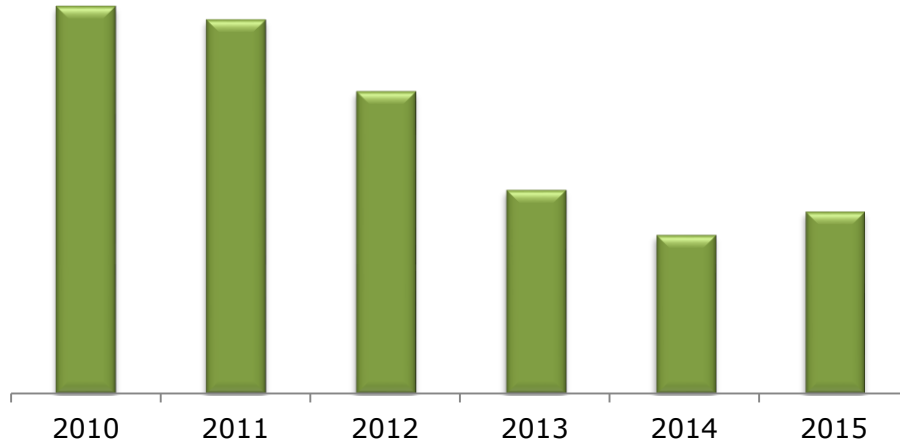


Global Shipbuilding Order Book; 2010-2015 (Million GT)

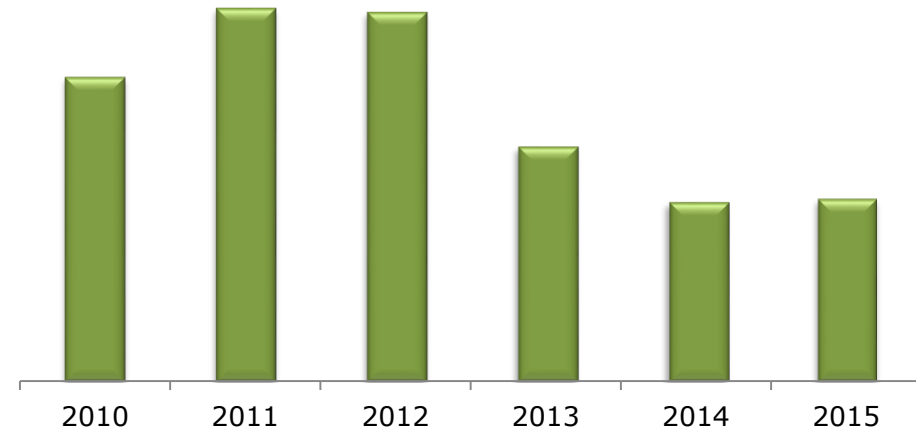


Global Shipbuilding Market Segments Overview

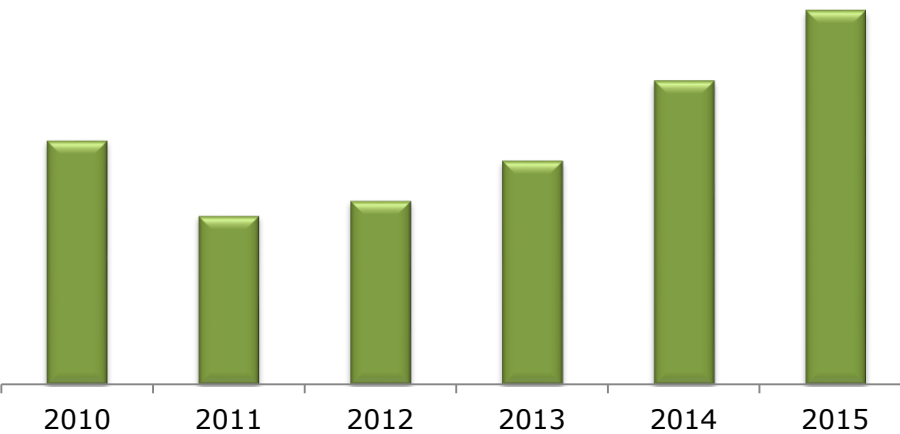
Global Tanker Delivery Trend; 2010-2015
(Million GT)



Global Bulk Carrier Delivery Trend;
2010-2015 (Million GT)



Global Containership Delivery Trend; 2010-
2015 (Million GT)



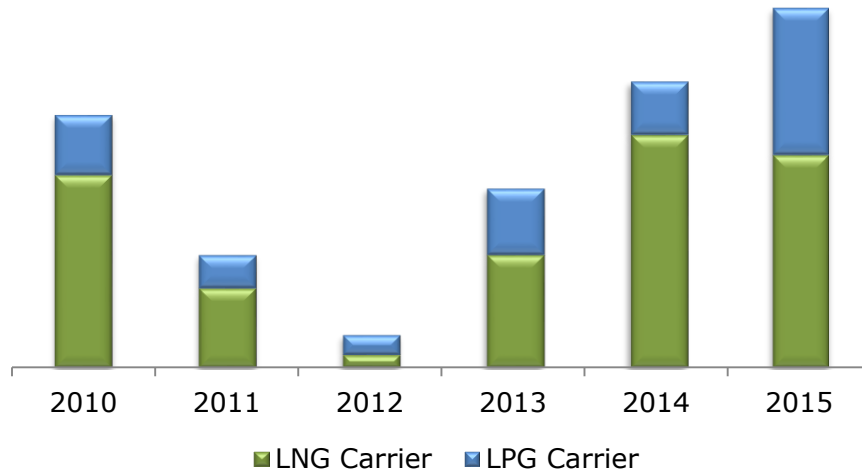
The global tanker delivery trend witnessed an annual increase of% and reached ... million GT in 2015 from million GT in 2014.

The global bulk carrier delivery trend showed the declining tendency in and while the market witnessed a rise in the delivery trend in 2015. The delivery of bulk carriers increased to million GT as compared to million GT in 2014, at an annual growth rate of ...%.

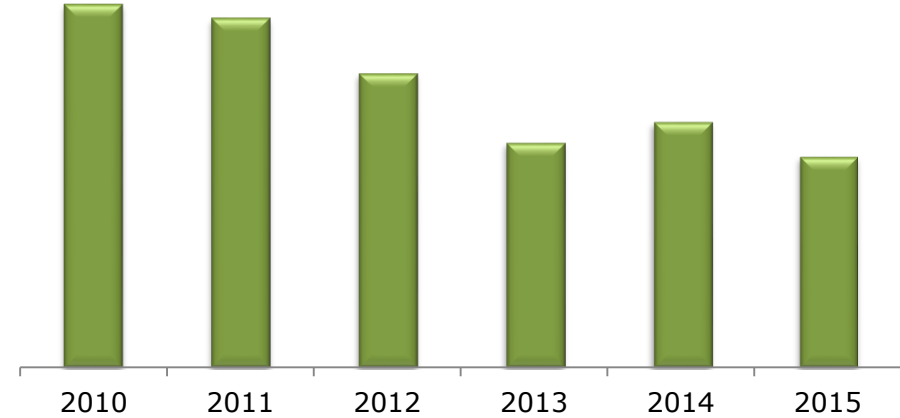
The global deliveries of containers held million GT in 2015, an increase of% from million GT in 2014.

Global Shipbuilding Market Segments Overview

Global Gas Carrier Delivery Trend; 2010-2015 (Million GT)



Global Special Vessel Delivery Trend; 2010-2015 (Million GT)

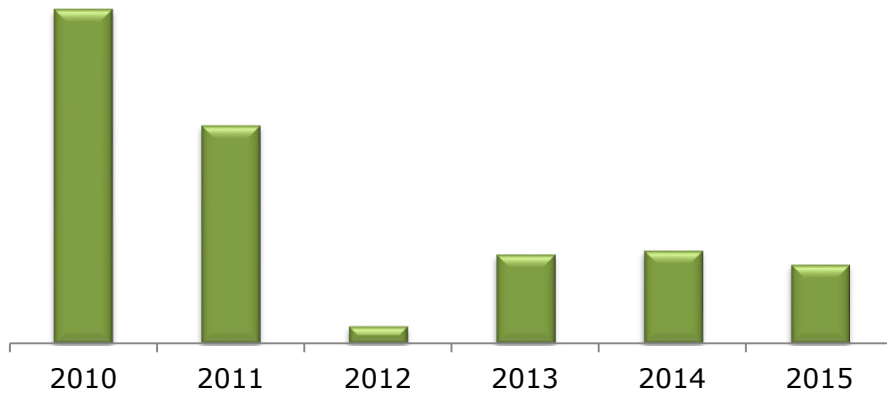


The deliveries of gas carriers have increased since 2013 and reached to million GT in 2015. Of which, million GT deliveries were of LPG Carrier while million GT deliveries were of LNG Carrier.

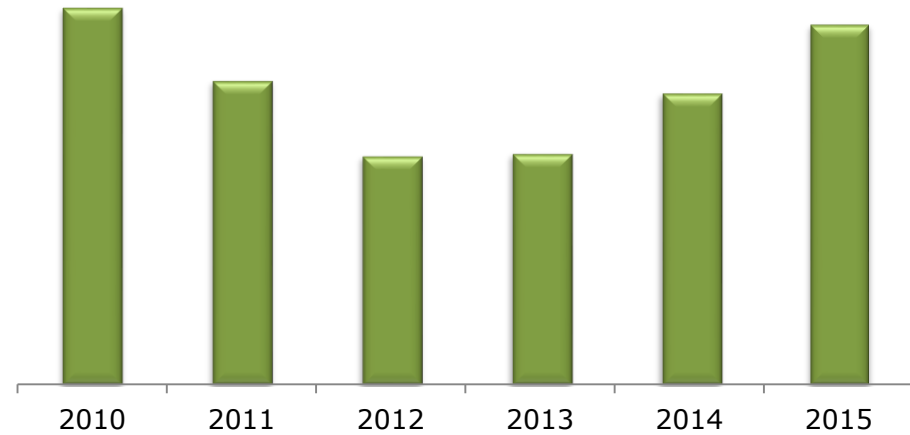
As of 2015, the global deliveries of special vessels was recorded at million GT, depicting a decline of% from million GT in 2014.

Regional Analysis: Market Overview

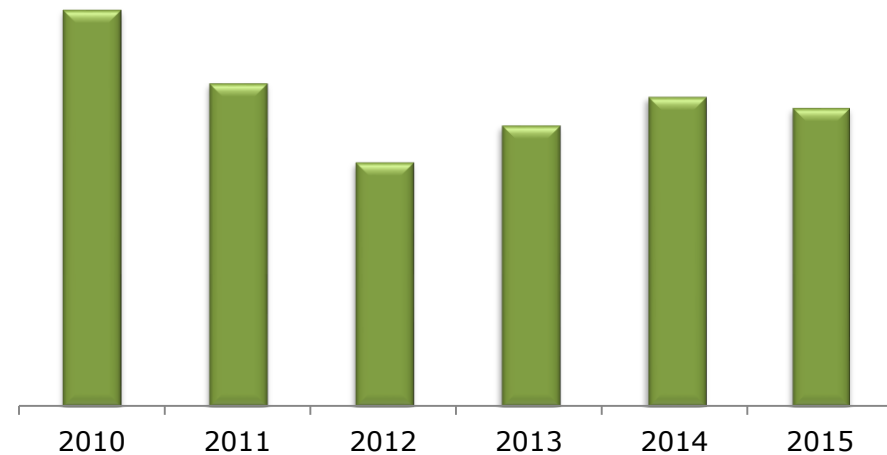
South Korea Shipbuilding Order Book; 2010-2015 (Million GT)



Japan Shipbuilding Order Book; 2010-2015 (Million GT)



China Shipbuilding Order Book; 2010-2015 (Million GT)



The Korea's shipbuilding industry, the former global industry leader, total order volume declined to million GT from million GT in 2014 at an annual rate of%.

The Japanese shipyards had an order book of ... million GT, totaled to ships in 2015, increasing from million GT with ships in 2014.

In the Chinese shipbuilding market, the volume of ships in the order book declined to million GT in 2015 from million GT in 2014.

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