

Shipbuilding Groups - World

Market Analysis – 2016-2020 Trends – Corporate Strategies

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Exclusive extracts from this 220-page-long report:

- **What is the business?**

The shipbuilding industry is engaged in the construction of ships and other floating vessels. The shipbuilding market is highly concentrated in Asia (particularly China, South Korea and Japan), which received more than 80% of total orders in 2014. Nevertheless, the market is fragmented when it comes to companies' strategic advantages [...].

- **Who are the key players?**

South Korean shipbuilders Hyundai Heavy Industries, Samsung Heavy Industries and Daewoo Shipbuilding & Marine Engineering are the three largest shipbuilding groups by revenue. These companies have built their success on differentiation in the last two decades and now are leaders in major high-end markets such as LNG carriers, offshore platforms and ultra large containers. Shipbuilders in Japan have been severely hit by the economic crisis and have consolidated and scaled down their operations in recent years. [...] Companies analysed in the report include: **Hyundai Heavy Industries, Mitsubishi Heavy Industries, Daewoo Shipbuilding & Marine Engineering, Samsung Heavy Industries, Fincantieri, China State Shipbuilding Corporation, Yangzijiang Shipbuilding, Japan Marine United Corporation, Hanjin Heavy Industries, CSBC, Sanlorenzo, Azimut-Benetti Group and Meyer Werft.**

- **How intense is competition?**

In recent years, rivalry in the industry has been growing as a result of increasing price competition from Chinese groups on the basis of low-cost advantages against a background of rising price competition resulting from low capacity utilisation of shipyards. Furthermore, low oil prices and subsequent negative impacts on the offshore segment are pushing shipbuilders to increase competition in other segments (commercial vessels, containers, cruise ships, ...). [...]

- **What are the main markets?**

Panama, a small country of three million people, has the largest shipping fleet in the world (19.4% of the global fleet), greater than that of the US and China combined. Due to its location and shape, Panama enjoys a position as the main marine trade route, which connects the Pacific and the Atlantic oceans. On the other hand, Japan has the world's largest merchant fleet by nationality of the owner (13.7% of the global merchant fleet), followed by Greece (13.1%) and Germany (8.3%). The Japan- and Greek-owned fleets, the biggest two fleets in tankers, dry bulk carriers, LNG tankers and container ships, are the result of a long tradition in shipping and the successful course of its ship-owners. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

José Bautista
Analyst, Xerfi Global

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