
Description: 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.

Contents:

1 Overview of Marine Diesel Engine
   1.1 Definition
   1.2 Classification & Features
      1.2.1 Classification
      1.2.2 Features

2 Development of Global Marine Diesel Engine
   2.1 Market Size
   2.2 Competitive Landscape
      2.2.1 by Country
      2.2.2 by Enterprise

3 Development Environment of Marine Diesel Engine in China
   3.1 Industrial Environment
   3.2 Policy Environment
      3.2.1 Industrial Planning
      3.2.2 Trade Policy

4 Marine Diesel Engine Market in China
   4.1 Supply & Demand
      4.1.1 Supply
      4.1.2 Demand
   4.2 Import & Export
      4.2.1 Import
      4.2.2 Export
   4.3 Competitive Landscape
      4.3.1 Regional Competition
      4.3.2 Corporate Competition

5 Chinese Marine Diesel Engine Market Segments
   5.1 Low-Speed Marine Diesel Engine
      5.1.1 Status Quo
      5.1.2 Key Players
   5.2 Medium-Speed Marine Diesel Engine
      5.2.1 Status Quo
      5.2.2 Key Players
   5.3 High-Speed Marine Diesel Engine
      5.3.1 Status Quo
      5.3.2 Key Players

6 Key Global Marine Diesel Engine Companies
   6.1 MAN Group
      6.1.1 Profile
      6.1.2 Operation
      6.1.3 Marine Diesel Engine Business
   6.2 Wartsila
      6.2.1 Profile
      6.2.2 Operation
      6.2.3 Marine Diesel Engine Business
   6.3 Caterpillar
      6.3.1 Profile
      6.3.2 Operation
6.3.3 Development in China
6.4 Hyundai Heavy Industries
6.4.1 Profile
6.4.2 Operation
6.4.3 Development in China
6.5 Mitsubishi Heavy Industries
6.5.1 Profile
6.5.2 Operation
6.5.3 Development in China
6.6 Doosan Engine
6.6.1 Profile
6.6.2 Operation
6.6.3 Development in China
6.7 MTU
6.7.1 Profile
6.7.2 Development in China

7 Key Enterprises in China
7.1 Hudong Heavy Machinery
7.1.1 Profile
7.1.2 Operation
7.1.3 Major Subsidiary-CSSC-MES Diesel Co., Ltd.
7.1.4 Major Subsidiary-China Shipbuilding Power Engineering Institute Co. Ltd.
7.1.5 R&D Capability
7.2 Dalian Marine Diesel
7.2.1 Profile
7.2.2 Operation
7.2.3 R&D Capability
7.3 Yichang Marine Diesel Engine
7.3.1 Profile
7.3.2 Operation
7.3.3 R&D Capability
7.3.4 Development Strategy
7.4 Weichai Heavy Machinery
7.4.1 Profile
7.4.2 Operation
7.4.3 Project Progress
7.5 Shaanxi Diesel Engine Heavy Industry
7.5.1 Profile
7.5.2 Operation
7.5.3 R&D Capability
7.5.4 Development Strategy
7.6 CSSC Marine Power
7.6.1 Profile
7.6.2 Operation
7.6.3 Subsidiary-Anqing CSSC Marine Diesel Co., Ltd.
7.6.4 Development Strategy
7.7 Zibo Diesel Engine Parent Company
7.7.1 Profile
7.7.2 Operation
7.7.3 R&D Capability
7.8 Henan Diesel Engine Industry
7.8.1 Profile
7.8.2 Operation
7.8.3 R&D Capability
7.9 Others
7.9.1 Jiangsu Antai Power Machinery Co., Ltd.
7.9.2 Shanghai Xinzhong Power Machine Co., Ltd.
7.9.3 Hefei RongAn Power Machinery Co., Ltd.
7.9.4 ZGPT Diesel Heavy Industry Co. Ltd.
7.9.5 Ningbo C.S.I. Power & Machinery Group Co., Ltd.
7.9.6 Zhongji Hitachi Zosen Diesel Engine Co., Ltd.
7.9.7 Yuchai Marine Power Co., Ltd
7.9.8 CSR Ziyang Locomotive Co., Ltd.

8 Development Trend of China Marine Diesel Engine Industry
8.1 Existing Problems
8.2 Development Trend

9 Summary and Forecast
9.1 Market
9.2 Enterprises
9.2.1 Global
9.2.2 China

List of Charts
- Classification of Marine Diesel Engines
- Global Low-speed Marine Diesel Engine Market Share (by Country), 2015
- Japan's Marine Diesel Engine Output and Revenue, 2009-2015
- Japan's Marine Diesel Engine Output Structure (by Power), 2015
- Three Indicators of Global Shipbuilding, 2010-2016
- Three Indicators of China's Shipbuilding, 2010-2016
- Memorandum of Understanding Signed between China Association of the National Shipbuilding Industry, MAN and Wartsila, 2011
- NOx Emission Standards for Marine Diesel Engines
- Development of Marine Diesel Engines Complying with Tier Standards in China, 2010-2016
- China's Output of Marine Diesel Engines, 2009-2016
- Shipbuilding Completions in China, 2010-2016
- Import Volume and Value of Marine Diesel Engines in China, 2008-2016
- TOP 10 Import Sources of Marine Diesel Engines in China, 2014-2015
- TOP 10 Importers (Provinces/Municipalities) of Marine Diesel Engines in China, 2014-2015
- Export Volume and Value of Marine Diesel Engines in China, 2008-2016
- TOP 10 Exporters (Provinces/Municipalities) of Marine Diesel Engines in China, 2014-2015
- Top 10 Export Destinations of Marine Diesel Engines in China, 2015
- Key Production Areas and Representative Companies of Marine Diesel Engines in China
- Low-Speed Marine Diesel Engine Manufacturers and Their Technical Copartners in China
- China's Output of Medium-speed Marine Diesel Engines, 2011-2016
- Chinese Medium-speed Marine Diesel Engine Manufacturers and Technical Copartners
- Major High-speed Marine Diesel Engine Manufacturers and Products in China
- MAN's Order Value, 2008-2015
- MAN's Revenue Structure (by Business), 2013-2015
- MAN's Revenue Breakdown (by Region), 2014-2015
- Major Operating Indicators of MAN MDT, 2013-2015
- Marine Diesel Engine Manufacturing Bases of MAN
- Wartsila's Order Value and Revenue, 2007-2015
- Wartsila's Order Value and Revenue (by Business), 2009-2015
- Wartsila's Revenue (by Region), 2009-2015
- Wartsila's Marine Diesel Engines and Applications
- Wartsila's Dual-fuel Medium-speed Engine Models and Power
- Loading Capacity of Wartsila's Diesel Engines, 2006-2015
- Wartsila's Joint Ventures and Sole Proprietorships in China, 2015
- Revenue and Net Income of QMD, 2013-2015
- Caterpillar's Revenue and Growth Rate, 2008-2015
- Caterpillar’s Revenue (by Business), 2011-2015
- Caterpillar’s Power System Revenue (by Region), 2010-2015
- Caterpillar’s Presence in China
- Global Network of Hyundai Heavy Industries
- Revenue and Net Income of Hyundai Heavy Industries, 2010-2015
- Revenue and Order Value of Engine and Machinery Division of Hyundai Heavy Industries, 2007-2015
- New Order Structure of Engine and Machinery Division of Hyundai Heavy Industries (by Region), 2007-2015
- Major Economic Indicators of Mitsubishi Heavy Industries, FY2010-FY2015
- Revenue of Mitsubishi Heavy Industries (by Business), FY2014-FY2015
- Major Technical Copartners of Mitsubishi Heavy Industries in Marine Diesel Engine
- Presence of Mitsubishi Heavy Industries in China
- Competitive Edges of Doosan Engine
- Organizations of Doosan Engine in China, 2015
- Emission Level of MTU 4000 Series
- Diesel Engine Output of Hudong Heavy Machinery, 2007-2015
- Revenue and Net Income of Hudong Heavy Machinery, 2009-2015
- Revenue and Total Profit of Dalian Marine Diesel, 2009-2015
- Major Operating Indicators of Yichang Marine Diesel Engine, 2007-2015
- Marine Diesel Engines of Weichai Heavy Machinery, 2015
- Revenue and Net Income of Weichai Heavy Machinery, 2009-2016
- Revenue and Gross Margin of Weichai Heavy Machinery (by Business), 2011-2015
- Key Marine Diesel Engines of Shaanxi Diesel Engine Heavy Industry
- Major Operating Indicators of Shaanxi Diesel Engine Heavy Industry, 2007-2015
- Revenue and Total Profit of CSSC Marine Power, 2010-2015
- Marine Diesel Engines of Henan Diesel Engine Industry
- Major Economic Indicators of Henan Diesel Engine Industry, 2012-2015
- Diesel Engine Delivery of RongAn Power Machinery, 2010-2015
- Marine Gas Engines Launched by World's Major Manufacturers
- Marine Medium-speed Dual-fuel Engines Launched by World's Major Manufacturers
- Marine Diesel Engine Manufacturers Authorized by MAN, Wartsila and MTU in China
- Output and Capacity of Major Marine Diesel Engine Companies in China, 2015

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