

# INDIAN SHIPBUILDING INDUSTRY

## GUJARAT

1. ABG
2. L&T
3. ALCOCK ASHDOWN
3. PIPAVAV

## W BENGAL

1. CIWTC
2. GRSE
3. HDPE
4. SHALIMAR
5. AC ROY
6. BHARATI

## MAHARASHTRA

1. MDL
2. BHARATI

## GOA

1. CHOWGULE
2. DEMPO
3. GSL
4. BHARATI
5. WSL

## ANDHRA

1. HSL

## TAMIL NADU TEBMA

## KARNATAKA TEBMA

## KERALA CSL

9 PUBLIC SECTOR

19 PRIVATE SECTOR

TOTAL 27

20 DRY DOCKS

40 SLIPWAYS

1 MILLION DWT



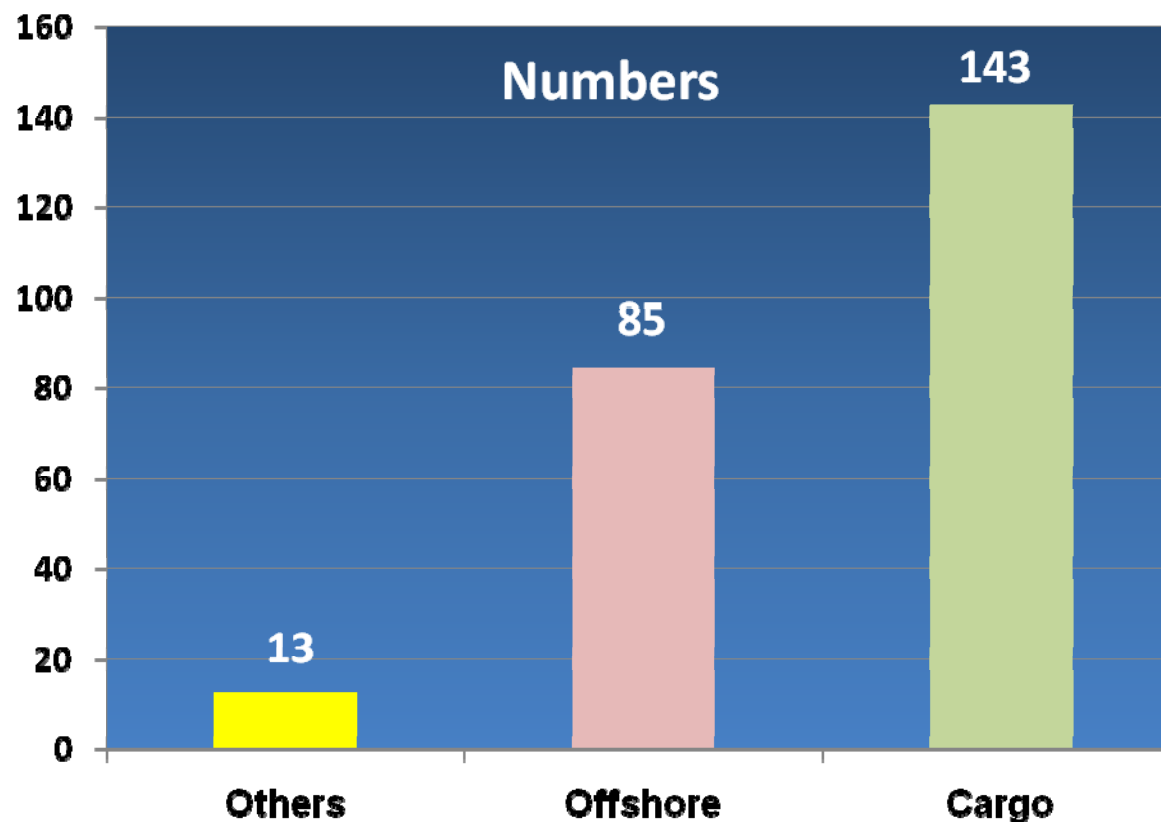
## SHIPPING CAPACITY – COMPARISON WITH THE BIG THREE

	KOREA	JAPAN	CHINA	INDIA
Total Building/Repair Tonnage in shipyards	11.5 Million DWT	12.1 Million DWT	12.2 Million DWT	1 Million DWT
Building berths for ships > 150,000 DWT	24	22	21	Nil
Building berths for ships > 250000 DWT	17	6	8	Nil

Most Indian Shipyards have inadequate infrastructure and low level of technology.

# ORDER BOOK - STATUS

- Orderbook Increased from 330 m usd 6.6 b usd in 2009.
- Total 241 Ships on order With 5 m dwt. (Ships >1000 Gt)
- 30 Ships Domestic And 211 for Export Which Is 87.5% of total numbers.

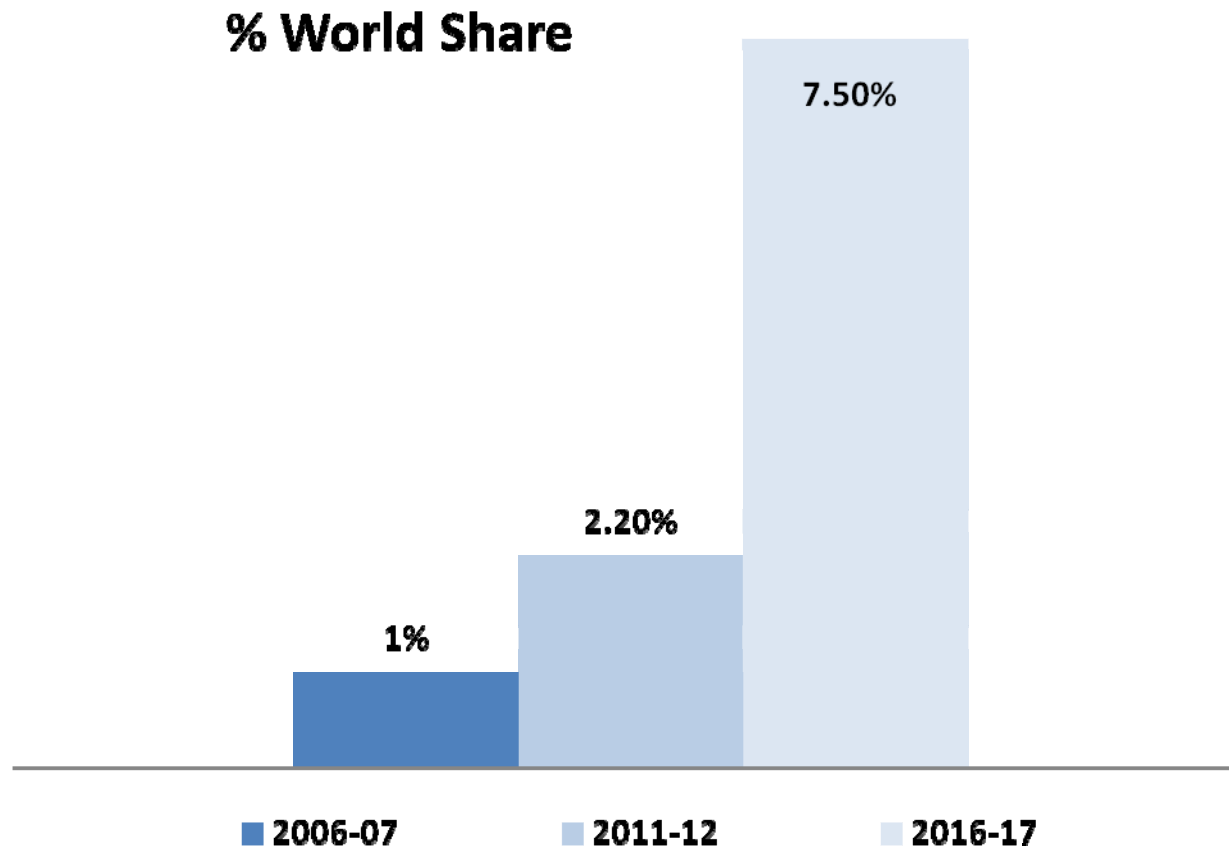


Global Share of Orderbooks

7

2.7% by Numbers, 1.4% by CGT and 1% by DWT and 1.4% by Value

# ANTICIPATED SHARE OF SHIPBUILDING BY INDIA



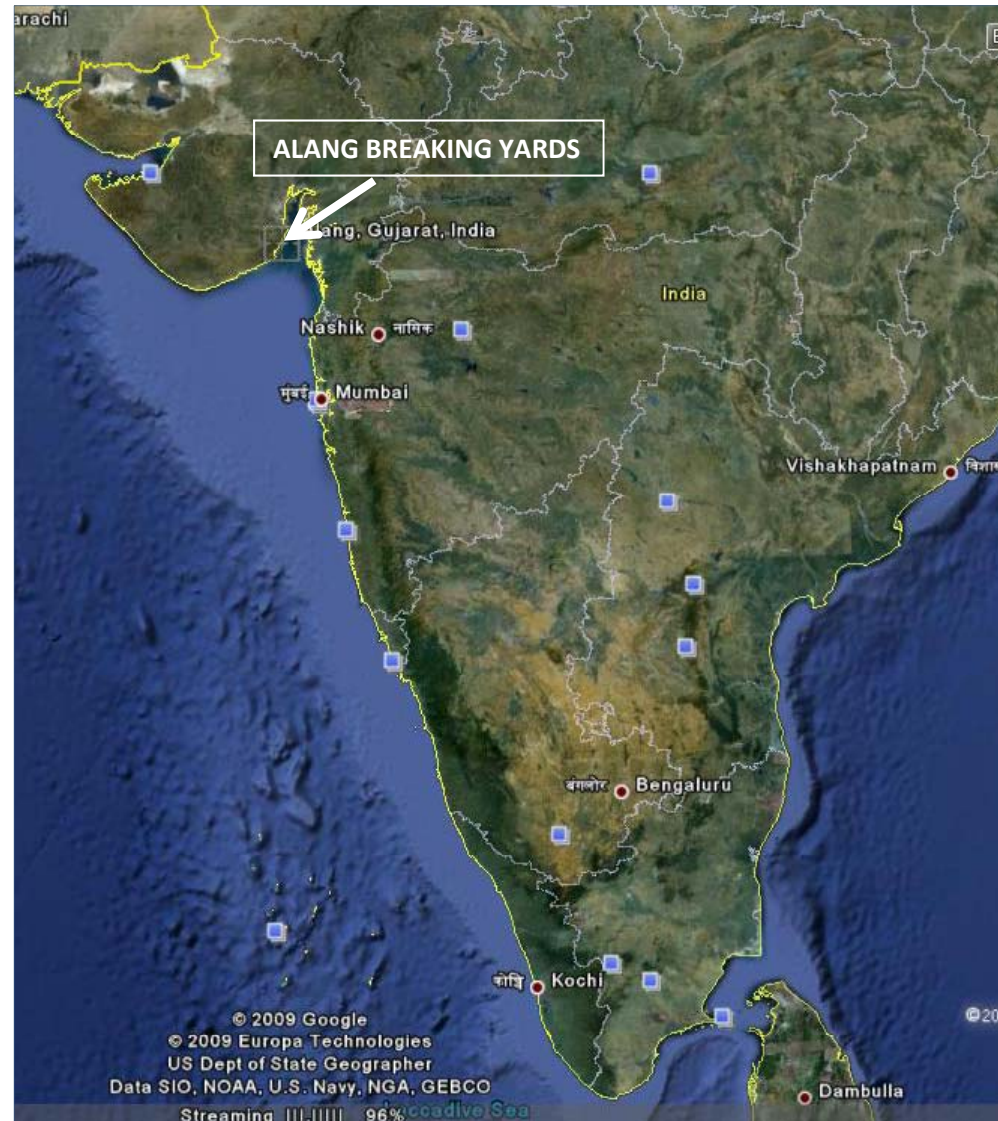


# SHIP REPAIR FACILITIES

Size of Ships	1,10,00 dwt by CSL 70,000 dwt by HSL
Repair Units	35 SRUs
Facilities	•2 DD & 1 F D with Shipyards •13 DD & 1 FD_with Ports <u>Total 17</u>
Employment	6000

# SHIP BREAKING - ALANG

- Indian Ship Breaking Yards are located at ALANG which is situated on the West Coast of India in the State of Gujarat.
- Location has high tidal range
- There are 173 plots for ship breaking and almost 30,000 persons are employed
- Since inception Alang has handled 4551 ships of around 31.95 m Light Displacement Tons



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