

China's Shipbuilding Capacity Reached 232 Times That of the US. Admiral Cem Gürdeniz

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The environment where the final showdown of global hegemony will take place will be the oceans, as it has been in the past. Since China is the most serious rising power against the US, we can easily say that this area will be the Western Pacific Ocean. The most talked about scenario today is China's intervention in Taiwan in 2027 or 2028 or a crisis concerning the 9-points line in the South China Sea escalating and triggering a war between the US and China, first indirectly and then directly. In both the Taiwan and South China Sea scenarios, the main front will be the ocean, sea and islands. Therefore, the kinetic power of both navies and their potential areas of capability will determine the outcome of the war. From the beginning, the US can adopt the Ukraine model and help China's rivals such as Taiwan or the Philippines with indirect ISR (Intelligence, Surveillance and Reconnaissance) and firepower support and hybrid war techniques. However, since the area where the war will be waged and the definitive result will be achieved is the oceanic environment, even the indirect support will not be easy, as it was in Ukraine.

The Difficulty of Waging a Proxy War in the Pacific

Since there is no proxy war at sea in a crisis in the Pacific and the fog of war will be very intense in the events that will occur, direct engagements between US and Chinese ships or aircraft will be in question. On the other hand, ship movements or logistical support to the islands, examples of which can only be seen in World War II, will be in question, and in this case, even if US and Chinese ships or unmanned sea vehicles avoid confrontation, there will definitely and inescapably be confrontation in the air, surface and underwater. Although the US would adopt an indirect approach, scenarios requiring direct engagement will emerge unexpectedly. As a result, when the war spreads to the ocean, the outcome will inevitably be at the ocean. The eventuality of this war will be determined by the capabilities of the navies to conduct joint and combined operations; their logistical integration capabilities, especially fuel and ammunition; and the speed at which they can repair damaged ships and replace sunken ones. The essence of war on land is iron and blood. In other words, the number of armed combatants, the ordnance and the will to fight are the main determinants. However what is essential at sea is to first establish situational awareness in the vast waters of the ocean and then to prevent the enemy from using the sea as a means of transportation or power projection into land. To attain this objective, a manned or unmanned ship and flying elements (helicopters, aircraft and UCAV/UAV) providing tactical support to the ship are essential. The ship is always at the center. What is essential on the ship is the shipbuilding capacity of the motherland.

American Record Between 1941-1945

The main reason for the US victory in World War II was its capacity to build ships, both merchant and naval ships. In World War II, the USA, which produced 6000 ships in 24 shipyards belonging to the Navy and 150 shipyards belonging to the private sector between 1941-1945, broke the world record under the conditions of that day.

Image: SS *John W. Brown* on the Great Lakes in 2000. *John W. Brown* is one of only two surviving World War II Liberty Ships, the other being the SS *Jeremiah O'Brien*.



For example, the American-made Liberty and Victory-class dry cargo ships, which formed the backbone of the logistic support convoys that changed the course of the war in both the Pacific and the Atlantic, were built and put into service in record short periods of time. Between 1941 and 1945, the 7,000-ton Liberty and 15,000-ton Victory-class cargo ships were built. The Liberty class broke records in production speed. An average ship was built in 42 days. When the war ended in 1945, there were 2,710 Liberty and 510 Victory-class ships in service. Only these two classes of ships were built by around 30 private shipyards.

The Declining American Shipbuilding Industry

In 1975, the U.S. shipbuilding industry was number one in terms of global capacity, with more than 70 commercial ships ordered for domestic production. Approximately 50 years later, the U.S. has now fallen to 19th place in the global rankings. Today, the U.S. is facing serious shipbuilding problems. After the end of the Cold War, there was an increase in the number of countries building commercial ships because of globalization. On the other hand, the demand for warships in the US domestic market has decreased. Submarine production fell from 3.8 per year in the 1980s to 0.7 in the 1990s. Demand started to increase again in the 2000s, but the industry was not ready. Today, there is a significant increase in the government's demand for ships for the navy, but the shipyards are insufficient to achieve this goal. Since 2019, the navy has ordered 3 submarines per year, two of which are nuclear-powered attack submarines and one is a nuclear ballistic missile submarine, but the actual production has been only half of this.

China's Post-2000 Record

Today, China has achieved a similar performance to the US in World War II. China currently controls 64.7% of all new merchant ship orders in the world. These values are 19.6% for South Korea and 11.2% for Japan. US shipyards, on the other hand, produced only 0.13% of world orders. Especially in the last decade, the amount of new merchant ship orders from China has increased by 170%. This increase has not been previously seen in the history. It

was an unprecedented development. The global share of 10% in 2000, reaching 65% in the last 24 years is doubtlessly a great success. During the same period, the total new ship order rate of South Korea and Japan decreased from 78% to 31%.

In parallel with these developments, most recently, the US Naval Intelligence Directorate (ONI) announced that China's merchant ship construction capacity is 232 times greater than that of the US. While China's new ship construction capacity is 33,200,000 tons, this value is around 100,000 tons for the US. The main factor that transformed the Chinese Navy from a defensive to an offensive strategic transformation in a short period of 30 years is its ship construction capacity, which uses the advantages of basic raw materials, technological accumulation and qualified manpower. This capacity is developing every passing day in the fields of naval and merchant ships and unmanned marine vehicles. On the other hand China builds the machinery, electronic systems and weapons of its warships without being dependent on foreign sources. In reaching this stage, the extensive subsidies of the state undoubtedly ensured China's global leadership. After 2000, the Chinese government ensured that the shipbuilding sector transitioned to dual-use features, as the US government did in World War II.

Reasons for the US Decline

The father of modern capitalism, Adam Smith, believed that shipbuilding was one of the few industries that deserved national support and should not be left solely to market forces. After the Cold War, the US left shipbuilding in the hands of market forces. The situation is best summarized by US **Secretary of the Navy Del Toro**:

“China can produce in one year as many ships as the US can produce in 7 years.”

At the beginning of the Cold War, the US Navy had 11 military shipyards. Today, there are no military shipyards left. There are around 7 civilian shipyards capable of building large warships. This number is a few dozen in China. While the 154 civilian shipyards in the US today can focus on warship production in the event of war, this number is 1,100 in China. Another problem of the US maritime power is the insufficient number of competent and skilled shipyard workers. Today, there are 150,000 shipbuilding and repair workers employed in US private shipyards and 38,000 in public shipyards. This number is very insufficient for a country like the US. Increasing shipbuilding and repair capacity will require more skilled workers in addition to engineers. However, since American youth are not inclined to become intermediate workers such as shipyard welders and plumbers, there is a weakness even in the current situation. As production moves overseas and capital and labor migrate to more profitable areas, knowledge and skilled labor in the US have atrophied. In an article titled “Worker Shortages Risks US Security” in the Wall Street Journal on December 20, 2024, writer Greg Ip says:

“Wages here at the shipyard start at \$17 an hour, exceed \$20 a year, and exceed \$30 for those with more seniority. This once represented a significant premium for unskilled jobs in the region. Not now. Local fast-food restaurants pay up to \$16 an hour, and Target advertises warehouse jobs for as little as \$24.”

Image: CSSC gantry cranes in June 2012 (Licensed under CC BY 2.0)



China's State Shipbuilding Corporation (CSSC) alone will employ an estimated 200,000 people by 2023. If the remaining 1,100 shipyards are considered, China's shipbuilding sector will employ more than half a million workers.

From Merchant Ships to Warships

As is known, to increase the construction capacity of naval vessels, it is first necessary to develop its merchant shipbuilding capabilities. China has done this in the last 30 years. China, which has achieved a record close to the United States' record in World War II in merchant shipbuilding, has been able to convert this success into its warship-building capabilities. This development has become the biggest threat the United States has faced in the world's oceans and seas since the Cold War. In the report titled "China's Naval Modernization: Implications for the United States - Background and Considerations for Congress" published by the US Congressional Research Center on August 16, 2024, this situation was expressed as follows (<https://sgp.fas.org/crs/row/RL33153.pdf>): "Between 2015 and 2020, the Chinese Navy surpassed the US Navy numerically. The Chinese Navy is by far the largest navy in East Asia." According to the report, which states that the Chinese Navy is the largest navy in the world with 370 combat ships, this navy is expected to have 395 ships by 2025 and 435 combat ships by 2030. In comparison, the US Navy has 296 combat ships as of August 12, 2024. This number will be 294 in 2030. U.S. military officials and other observers have described China's warship-building efforts and capabilities as alarming compared to American capabilities and have identified the Chinese Navy as the single biggest obstacle to U.S. wartime control of high-seas areas in the Western Pacific. Admiral Lisa Franchetti, who continues to serve as the 33rd Commander of the U.S. Naval Forces (CNO), having launched the "Project 33" action plan states the following:

"We cannot create a larger conventional navy in a few years or focus solely on numbers without the right capabilities to win the struggle for sea control... But even without these resources, we will improve our combat readiness, capabilities and capacity. We must understand that the navy faces serious financial and industrial constraints."

The most striking emphasis in the action plan is that they are preparing to fight China in 2027. Franchetti later adds:

"The defense industry of the People's Republic of China is now in a state of war with the world's largest shipbuilding infrastructure at the disposal of the navy."

On the other hand, while the Chinese Navy has grown by 100% in the number of ships in the last 23 years, the American Navy has shrunk by 20%. While the Chinese navy has added 165 warships to its navy in the last 23 years, this number has remained at 90 for the US. On

the other hand, China has grown by 300% in tonnage growth in the last 23 years, while the US Navy has grown by 2%. For example, while the US has approved the retirement of 19 warships, including 3 nuclear attack submarines and 4 cruisers, for 2025, the number of new ships to be built has been limited to 6. Let's add that new shipbuilding programs are already progressing with a 3-year delay in each class of new ship. The US Navy's greatest advantage in the Taiwan scenario is nuclear attack submarines (SSN). According to US planners, the US's requirement for this type of submarine is 66 nuclear attack submarines. However, today they only have 49. The US will need to produce 2.3 to 2.5 attack submarines per year. Today, this value is 1.2 per year.

Repair and Maintenance Deficiency

The 350 repair and maintenance facilities that were closed in the US and overseas bases after 1989 also dealt a major blow to the maintenance and repair capability of ships damaged during wartime, rather than shipbuilding. For example, the closest American territory to China, Guam Island, has no capacity to dry-dock American warships since 2016. There are only 54 warship repair facilities approved by the US Navy Department in the entire US coasts. The US General Accounting Office (GAO) acknowledged this dire problem in June 2021 and published a highly critical report (GAO-21 -246).

Merchant Marine Fleet, Coast Guard and Fishermen

The situation is much worse in terms of the merchant marine fleet. China operates the world's largest merchant marine fleet with a total national flag tonnage of 102 million DWT. Chinese companies own or operate one or more terminals in 96 foreign ports. 36 of these ports are among the world's top 100 ports in terms of container volume. On the other hand, the number of ships that can provide logistical support to establish a sea lift to US bases and allies in the Pacific is around 85. For China, this number is 5,500. On the other hand, the Chinese Coast Guard has 225 ships over 500 tons. China is also one of the few countries in the world with a Maritime Militia. As an inseparable part of the naval force, the militia has equipment, personnel and discipline that can be used in times of crisis or escalation. China has around 500 thousand fishing boats. It is estimated that the number of boats that can be used for militia purposes is around 250 thousand.

While Hegemony at Sea Changes Hands

The US has long lost its numerical dominance at sea. The American Navy gave its government the chance to protect American interests by controlling the global commons covering two-thirds of the planet. The ability to use these areas as a power projection environment and as an area to deny enemy maritime trade provided a great advantage for the US. However, this ability is now in trouble. Controlling the main transportation routes of the seas was the locomotive of the West's 500-year dominance and hegemony in the international system. The European Atlantic system was established by seizing ports and controlling strategic sea routes.

Russia and China have learned from history. In contrast to the Atlantic system dependent on the seas, they developed Asian transportation networks to provide an alternative in case the connection to the sea is cut off. Today, cost-effective and time-efficient transportation corridors have emerged in Asia, where the coasts from the Norwegian Sea to the Indo-China peninsula are out of the control of the Atlantic system. On the other hand, the distances in the Pacific theater of operations are 2-3 times longer than the European war front. It is very

difficult to achieve military success without uninterrupted sea transportation and the establishment of a sea bridge. Therefore, in the Taiwan scenario, China may not even need to directly engage in military action. The blockade of the island may be sufficient after a certain period. Taiwan is 81 miles away from China and 7,600 miles away from the US. If military intervention in Taiwan is on the agenda, it will be extremely difficult for the US and the coalition it will form to deter and block China, considering their current relative force comparison and shipbuilding capacity.

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Featured image: A Type 052C destroyer, Changchun, in Butterworth, Penang, Malaysia in 2017 (Licensed under CC BY-SA 4.0)

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