

Innovative answers to your questions

**“COMPETITIVE POSITION AND FUTURE OPPORTUNITIES  
OF THE EUROPEAN MARINE SUPPLIES INDUSTRY”**

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**Final Report**

**Annex 2**

**European Marine Supplies Industry Portfolios**

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## 1. Introduction

This Annex shows aggregated portfolios for EU 28 and EU 28 plus Norway and Turkey. Further it shows country portfolios on the marine supply sector for the 15 strongest marine economies in Europe as well as a brief analysis of national portfolios of all EU Member States.

The statistical analysis of the EU-28 plus Norway and Turkey is based on available statistical information of Eurostat enhanced with additional studies and BALance calculations. The described method has been applied to all national portfolios. In some cases, additional information of national associations has been considered. These deviations from the general method are described in the corresponding description of the national portfolios.

## 2. General method

Starting point of the calculation is the national production value and the value added of the NACE-classes 3011 - Shipbuilding, 3012 - Boatbuilding and 3315 - Repair of ships and boats from Eurostat. In the first step, the production values of the NACE classes 3011, 3012 and 3315 are summarised for the time period 2006 -2010, since no more reliable up-to-date data is available. Afterwards the average of this time period is taken and the value added of these classes is determined using the same procedure.

In the next step the difference of the average production value and the average value added is calculated to determine the total domestic purchase value (see calculation step 1 in Figure 1). In order to determine the share of marine supplies of the total domestic purchase value, national input-output tables have been analysed. According to the results of this analysis, non-marine supplies purchase values have been subtracted from the total purchase value, as illustrated in calculation step 2 in figure 1. The result is the domestic demand for marine supplies from domestic ship- and boatbuilding and repair yards.

In addition to the demand of NACE classes 3011, 3012 and 3315 the demand of other marine markets has been assessed as well. Based on input-output tables, the direct purchase of marine supplies for shipping companies has been calculated. Moreover, direct marine supplies purchases of offshore companies have been calculated in due consideration of Infield offshore platform statistics<sup>1</sup>. Both demands have been added to the national demand (calculation step 3 in figure 1). The result is the total domestic marine supplies market.

The total domestic marine supplies market has been categorised into 8 different classes (see also calculation step 10 in figure 1):

1. Steel and NF metals
2. Paints and coatings
3. Other materials
4. Steel products
5. Mechanical engineering
6. Electrical engineering
7. Engineering and design services
8. Other

Based on an analysis of input-output tables of the corresponding NACE-classes, the total domestic marine supplies market is distributed among these categories.

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<sup>1</sup> Infield offshore platform statistics are available on: <http://www.infield.com/>

In order to determine the total marine supplies market, international trade is considered as well. Therefore the import rates of the corresponding NACE classes have been identified in input-output tables. The results are subtracted from the domestic marine supplies market of each category in calculation step 6.

In calculation step 8 export rates of the corresponding NACE-classes have been analysed in input-output tables. Based on the national demand for domestic marine supplies, the exports of marine supplies are calculated and added. The result is the total marine supplies production.

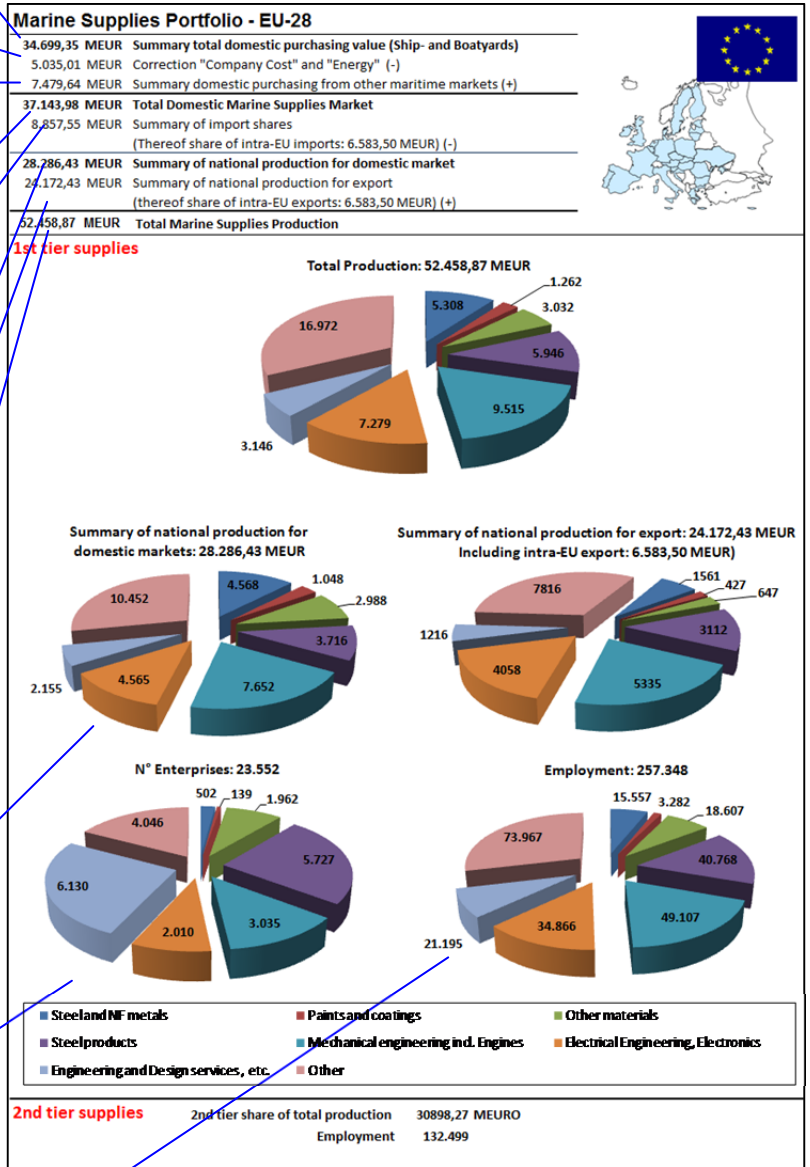
Subsequently the number of employees is calculated. Therefore the production value per full-time equivalent for every category is calculated based on the data provided by Eurostat. On the basis of this relation the number of employees is determined for every category and in total.

Furthermore, the average number of employees per enterprises is derived from Eurostat for every category and country in order to determine the number of enterprises accordingly.

The result of this calculation is the total production, the national production for the domestic market, the national production for export, the number of enterprises and the number of employees for every EU-Member state for all eight introduced categories for the 1<sup>st</sup> tier supplier.

Moreover, the 2<sup>nd</sup> tier share of the total production and the employment of the 2<sup>nd</sup> tier supplier are calculated based on Eurostat statistics.

- 1 Difference between production value and value added for shipbuilding, boatbuilding and repair of ships and boats (NACE 1 classes 3511 and 3512 and the corresponding NACE 2 classes 3011, 3012 and 3315). The average of the years 2006-2010 is the basis.  
*Source: Eurostat*
- 2 Correction for not product related "company costs" like energy supply, administrative services etc.  
*Source: National input-output tables, BALance calculations*
- 3 Correction for purchases of shipping and offshore companies for repair and maintenance.  
*Source: National Input-output tables, BALance calculations, Infield offshore platform statistics.*
- 4 Calculated value for total domestic marine supplies market
- 5 Correction for imports of shipyards, shipping companies, offshore companies in relation to the domestic market  
*Source: Eurostat, studies of national associations (statistical import/export ratios for specific industries)*
- 6 Calculated value for national production for domestic market
- 7 Calculation of the national production for export based on I/O tables.  
*Source: Eurostat, studies of national associations (statistical import/export ratios for specific industries)*
- 8 Calculated value for total marine supplies market (incl. export )
- 9 Distribution of production values over industries according to the average of the available national input-output tables  
*Source: National statistical offices, BALance calculations*
- 10 Calculation of jobs according to the production value per full time equivalent for different industries of all EU 28 countries (averages for the years 2008-2011)  
*Source: Eurostat, BALance calculations*
- 11 Calculation of the number of enterprises according to the average full time equivalent employee per enterprise for different industries of all EU 28 countries (averages for the years 2008-2011)  
*Source: Eurostat*



### 3. Analysis of the National Portfolios

#### Austria

The domestic demand for marine supplies in Austria consists mainly of boatbuilding and repair. Without direct access to the sea, there is no major impact of shipping or offshore companies in terms of direct purchase that would increase the total demand for marine supplies significantly. Consequently, the domestic marine supplies industry is small. The export volumes represent 88% of the total production due to one major crane manufacturer. The total marine supply production amounts to 129 million EUR, which is a share of less than 0,2% of the total marine supplies production in Europe.

#### Belgium

The production value of Belgium shipyards is comparatively low, which results in a low demand for marine supplies. Direct purchases of shipping companies or offshore operators have only a minor impact on the domestic demand for marine supplies. Consequently the marine supplies manufacturers in Belgium have a small production volume, which is also reflected in the small export market. Overall, the Belgium marine supplies manufacturers represent 0,1% of the total European marine supplies production.

#### Bulgaria

Bulgaria has a low production value of NACE-classes 3011, 3012 and 3315. Consequently the marine supplies purchasing value of Bulgarian shipyards reach only 99 million EUR. The demand from national shipping and offshore companies amounts to 11,25 million EUR. Overall, the national demand for marine supplies is relatively low. Moreover, the statistical analysis indicates that 54 % of the national demand is imported, which results in an even smaller domestic industry. Consequently, the exports are insignificant with only 15 million EUR. The small size of the industry is also represented in the small amount of enterprises and employees. Overall the Bulgarian marine supplies industry represents 0,1% of the total European marine supplies production.

#### Croatia

The Croatian marine supplies industry, with a production value of more than 746 million EUR, is one of the middle-sized industries in European comparison. The basis for the industry is the demand of the ship-and boatbuilding industry. Direct purchases of shipping and offshore companies have only a minor impact on the domestic demand. The international trade does not add additional demand to the Croatian marine supplies industry, since the import exceeds the exports. As a result, the Croatian marine supplies industry produces 1,2% of the total European marine supplies production.

#### Cyprus

The production value of ship- and boatbuilding as well as repair of ships and boats in Cyprus is very low. Direct purchases of shipping and offshore companies are weak as well and haven't got a remarkable effect on the domestic demand for marine supplies. Consequently, the domestic demand is served mainly by imports. Overall the production volume of marine supplies in Cyprus represents less than 0,1% of the total European marine supplies production.

#### Czech Republic

The small domestic demand for marine supplies in Czech Republic originates from boatbuilding and repair. Direct purchases of shipping and offshore companies are limited. As a result, the industry size is small, which leads to low export volumes. Overall, the production of marine supplies in the Czech Republic represents less than 0,1% of the total European marine supplies production.

## Denmark

The domestic demand for marine supplies in Denmark is characterised by shipbuilding, boatbuilding and repair, which sum up to total domestic demand of almost 1 billion EUR. Direct purchases of shipping and offshore companies add a significant amount to the national demand, whereby the direct purchases of offshore companies are potentially underrated. Imports in the amount 24,4% keep a noticeable amount of domestic demand for the domestic marine supplies industry. The key economic factor for the marine supplies industry in Denmark is the strong export, which is partly calculated based on figures of the national input-output table and the national report: "Beskæftigelse og produktion i Det Blå Danmark" kindly provided by the Danish marine organisation. The report is based on figures of 2006 and accounts a marine production volume of 3,5 billion € for 2006. The calculated national portfolios are based on the timeframe 2006-2010, which includes also the significant lower demand for the years 2009 and 2010 and results in an overall production volume of 3 billion EUR.

Exports represents almost 65% of the total marine supplies production and lead to an overall marine supplies production volume of more 3 billion EUR, which represents 4,8% of the total European marine supplies production volume. Almost 900 enterprises have their main business in the marine supplies production with almost 20.000 employees.

## Estonia

Estonia has an overall marine production volume of 122 million EUR, which is mainly based on the domestic demand of the ship- and boatbuilding industry. Direct purchases of shipping and offshore companies have small impact on the domestic demand. Although Estonia's marine supplies industry exports more than it imports, the additional demand results in 16 million EUR. The share of the total European marine supplies production is 0,2% with more than 150 enterprises and more than 2.600 employees.

## Finland

Finland has a strong ship- and boatbuilding industry with an overall production value of more than 1,45 billion EUR. In addition, direct purchases of shipping and offshore companies increase the domestic demand for marine supplies significantly, whereby the direct purchases from offshore companies are potentially underrated. The strong national demand is served to 35% by imports, resulting in a strong domestic marine supplies industry, which is characterised by a comparatively high export rate of 44%. As a result, the total marine supplies production is one of the biggest in Europe with more than 2,1 billion EUR, approximately 13.800 employees and a share of 3,4% of the total European marine supplies production.

## France

The French ship-and boatbuilding industry causes a strong domestic demand for marine supplies. Moreover, the shipping and offshore companies add to the domestic demand, which is served with 35% of imports. The high domestic demand is served by a strong marine supplies industry, which is also reflected in the high export volume. Overall, the French marine supplies industry is one the biggest in Europe with almost 5 billion EUR production volume, which corresponds to 8% of the total European marine supplies production. More than 32.000 employees in more than 1.400 enterprises work in the French marine supplies industry.

## Greece

The production value of the ship- and boatbuilding industry in Greece is comparatively low. The corresponding purchasing value amounts to 304 million EUR. According to the statistical analysis, direct purchases of the shipping and offshore companies increase the national demand for marine supplies to 371 million EUR. Round about 65% of the national demand is imported, which decrease the size of the national marine supplies industry significantly.



Export volumes are comparatively small with only 20 million EUR. Overall the marine supplies production amount to 149 million EUR, which represents 0,25 % of the total European marine supplies production.

### **Germany**

The German production value for ship- and boatbuilding is one of the highest in Europe. Direct purchases of shipping and offshore companies add 1bill. € to the national demand for marine supplies, whereby direct purchases of offshore companies are potentially underrated. Consequently the national demand ranges with 6 billion EUR among the highest domestic markets in Europe. This high national demand is served by only 11% of imports. Consequently, the national marine supplies industry is strong. The export is the key economic factor. The export value reflects almost 60% of the total production and is calculated in consideration of the report of the German engineering association VDMA for the marine supplies industry. The total production of marine supplies sums up to overall 12.833 million EUR. As a result, Germany represents 20,7% of the total European marine supplies production. The industry employs more than 94.000 people in 2.722 enterprises.

### **Hungary**

Production value of Hungarian ship- and boatbuilding industry is one of the lowest in Europe and there is only little additional demand of domestic shipping and offshore companies. The exports of marine supplies are low as well. Consequently the marine supplies industry in Hungary has low production volume, which corresponds to less than 0,1% of the total European marine supplies production.

### **Ireland**

The marine supplies production volume of Ireland is with more than 7 million EUR one of the lowest in European comparison and represents less than 0,1 % of the total European marine supplies production. Although the domestic demand for marine supplies is actually higher, 58% of the demand is served by imports. Export volumes correspond to 15% of the total domestic production volume.

### **Italy**

In terms of production value, Italy has the biggest ship-, boatbuilding and repair industry in Europe. Thereby ship- and boatbuilding contribute significantly to the high production value. Additionally the demand of shipping and offshore companies for direct purchases is comparatively high. The combination of these factors leads to a very strong domestic demand for marine supplies. The amount of imports to satisfy this high demand is relatively low, which results in a strong domestic production value of marine supplies and leads to a significant amount of export goods as well. As a result, the Italian production volume of marine supplies is with 8,7 billion EUR and a share of 14,1% of the total European marine supplies production one of the highest in Europe.

The high production value also affects the amount of enterprises and employees. According to the statistical analysis Italian is characterised by a high amount of companies with 1-9 employees (72,44% of all companies are represented in this size). As a result, the number of enterprises is especially high due to this characteristic and the highest production volume. With more than 6.800 enterprises and more than 50.000 employees in the marine supplies production, the industry has a significant impact on the Italian economy.

### **Latvia**

In comparison to other European ship- and boatbuilding industries, the production value in Latvia is low. Consequently the domestic demand of these Industries for marine supplies is low as well. The demand of domestic shipping and offshore companies has no major impact, so the overall domestic demand remains on a low level. Although Latvia's exports exceed

the imports of marine supplies, the total production volume of marine supplies represents 0,1% of the total European marine supplies production.

### **Lithuania**

The demand for marine supplies in Lithuania originates mainly from the ship- and boatbuilding industry. The demand of shipping and offshore companies is no major factor, so the total domestic demand for marine supplies remains on a comparatively low level. About 25% of the total domestic demand is served by imports. Although the exports of marine supplies are higher than the imports, the effect on the total domestic production volume is low. Overall Lithuania represents 0,3% of the total European marine supplies production.

### **Luxembourg**

In the statistical analysis no production value for the NACE classes 3011, 3012 and 3315 are identified. Consequently no demand for marine supplies of these industries is calculated. Moreover, no demand of national shipping or offshore companies is assessed, so the production volume of marine supplies in Luxembourg is calculated with zero.

### **Malta**

The Maltese ship- and boatbuilding industry is characterised by little production value and consequently small demand for marine supplies. Maltese shipping companies do not contribute a significant amount to the domestic demand for marine supplies. Moreover 29 % of the little domestic demand is imported, but the export market for Maltese marine supplies represents 42%, which is relatively strong compared to the overall production level. However, since the overall production volume of marine supplies is relatively low, it represents only 0,1% of the total European marine supplies production.

### **Netherlands**

The Netherlands have a strong ship-and boatbuilding industry, which leads to comparatively high domestic demand for marine supplies. In addition, the demands from the shipping and offshore companies are strong as well and strengthen the domestic demand, which is mainly served by domestic suppliers. The strong marine supplies industry in the Netherlands is also reflected in the high export rates and sum up to one of the biggest production volumes of marine supplies in Europe (Netherlands share is 8,5% of the total European marine supplies production). The high production volume leads also to a high amount of enterprises and employees: Almost 1.600 companies have their core business in the marine supplies industry and employees more than 25.000 people.

### **Norway**

The national demand of shipbuilding, boatbuilding and repair yards for marine supplies is very strong. In addition, the demand of national shipping and offshore companies adds to the already strong demand, which results in a total domestic demand of 8 billion EUR. The high demand is served by imports in the amount of 37,7% meaning the major part of the national demand is produced domestically. Moreover, the exports of marine supplies correspond to 36% of the total marine supplies production volume. The most important international trading partners are EU-countries. Overall the Norwegian marine supplies industry has a share of 12,9% of the total European marine supplies production with more than 37.000 people working in 3.437 enterprises.

### **Poland**

The ship-and boatbuilding industry in Poland is one of the bigger ones in Europe in terms of production value. Consequently the domestic demand for marine supplies is comparatively strong. The demand of shipping and offshore companies adds to the demand, which is served by imports in the range of 20%. The strong domestic demand for marine supplies

leads to noticeable domestic marine supplies industry, which exports significantly. The overall production volume of marine supplies corresponds to 2,5% of the total European marine supplies production, which leads to more than 800 enterprises and more than 13.000 employees.

### **Portugal**

The overall production value of Portugal's marine supplies industry is rather small with 109 million EUR, which corresponds to a share of only 0,2% of the total European marine supplies production. Although the production value of the ship- and boatbuilding is considerably higher, most of the demand for marine supplies gets imported (more than 60%). As a result, the exports do not change the picture, which results in a comparatively low number of enterprises and employees in the marine supplies industry.

### **Romania**

The shipbuilding and boatbuilding in Romania has a relatively high production value, which results in a noticeable demand for marine supplies. With an import share of 44%, most of the marine supplies is produced domestically, whereas exports represent 26% of the total production. With 532 million EUR Romania is one of the mid-sized marine supplies industries in Europe (share of the total European marine supplies production: 0,8%). The production value results in relatively high employment, since the average production value per full time equivalent is relatively low. Consequently about 18.000 employees work in over 715 enterprises in the Romania marine supplies industry.

### **Slovenia**

Slovenia has an overall marine supplies production volume of only 58 million EUR, which equals less than 0,1% of total European marine supplies production. The demand of the domestic ship- and boatbuilding has a volume of 48 million EUR and the shipping and offshore companies add only little to the domestic demand. The imports are relatively low with an import rate of 30%, and exports don't add significantly for the demand for marine supplies.

### **Slovakia**

Slovakia has one of the lowest production values in ship- and boatbuilding across Europe. Direct purchases of shipping or offshore companies are negligible. Although the exports of marine supplies exceed the import, the overall production value remains with a share of total European marine supplies production of less than 0,1% on a very low level.

### **Spain**

The Spanish ship-and boatbuilding industry has one of the bigger production values across Europe, which leads to a comparatively high purchasing value of marine supplies. In addition, direct purchases of shipping and offshore companies are relatively high and result in an overall strong domestic demand. On the other hand, 33,8% of the strong domestic demand is served by imports, which decreases the demand for domestically manufactured marine supplies. Moreover, the exports of marine supplies products are low. As a result, the production volume of Spanish marine supplies is with a share of 5% of the total European marine supplies production one of the bigger marine supplies industries in Europe.

### **Sweden**

The production value of building and repairing ships and boats in Sweden is middle sized in comparison to other European countries. Consequently the demand for marine supplies from these industries is middle-sized as well and receives some additional demand of shipping and offshore companies. The exports of marine supplies with more than 53% of the total production volume are remarkable and exceed the imports. Overall the Swedish production

volume of marine supplies shares 1% of the total European marine supplies production. The production volume leads to more than 310 enterprises with more than 3.700 employees.

### **Turkey**

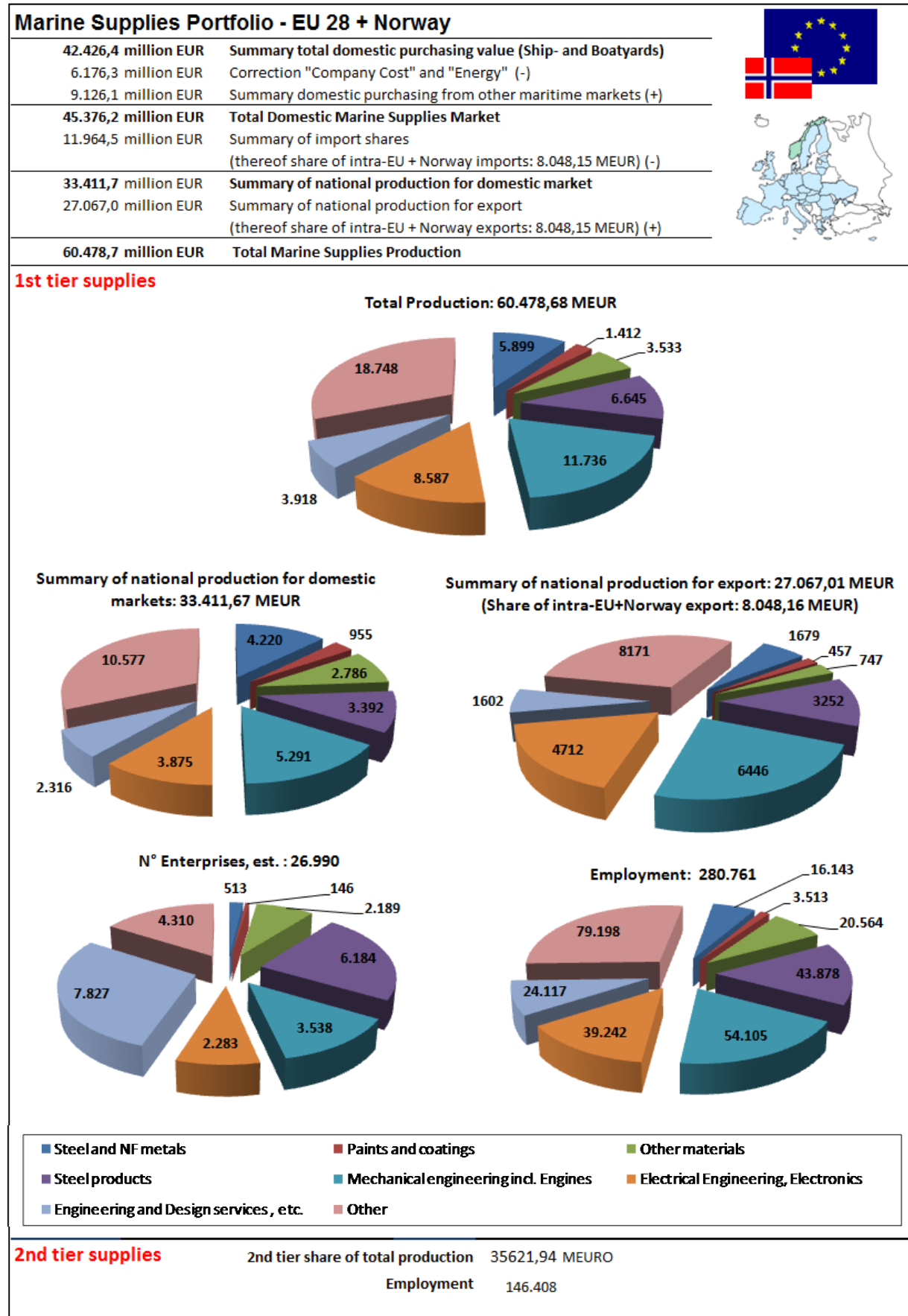
Turkey has a strong domestic demand for marine supplies based on the ship and boatbuilding industry and the direct purchases of shipping and offshore companies. Although the imports exceed the exports, the production volume of the Turkish marine supplies industry remains with 1.36 billion EUR strong in comparison to most EU-Member States. Consequently the employment of 24.602 in 2.089 enterprises is rather high.

### **UK**

The domestic demand for marine supplies of the ship- and boatbuilding industry builds a strong foundation for the UK marine supplies industry. In addition, the purchases of the shipping and offshore industry are significant, whereby purchases of offshore companies are potentially underrated. This strong domestic demand is served by only 24,3% of imports, which leads to a strong marine supplies industry. Consequently the export volume is comparatively high and corresponds to 59% of the total marine production in the UK. Overall, the marine supplies industry production volume amounts to 12% of the total European marine supplies production. The high production volumes lead to more 3.000 enterprises with more than 62.000 employees.



## 5. EU-28 + Norway



## 6. EU-28 + Norway & Turkey

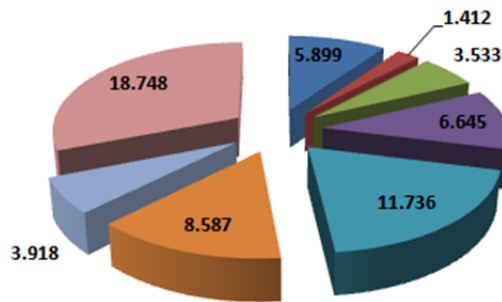
### Marine Supplies Portfolio - EU 28 + Norway + Turkey

44.094,5 million EUR	Summary total domestic purchasing value (Ship- and Boatyards)
6.422,7 million EUR	Correction "Company Cost" and "Energy" (-)
9.315,5 million EUR	Summary domestic purchasing from other maritime markets (+)
46.987,3 million EUR	Total Domestic Marine Supplies Market
12.580,0 million EUR	Summary of Import shares (-)
34.407,3 million EUR	Summary of national production for domestic market
27.426,4 million EUR	Summary of national production for export (+)
61.833,7 million EUR	Total Marine Supplies Production

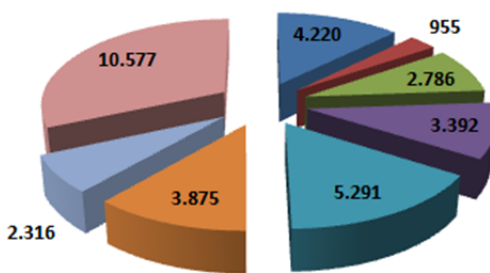


### 1st tier supplies

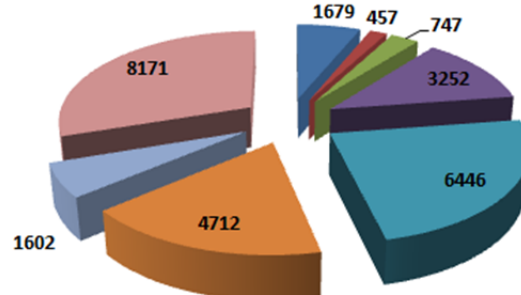
Total Production: 61.833,69 MEUR



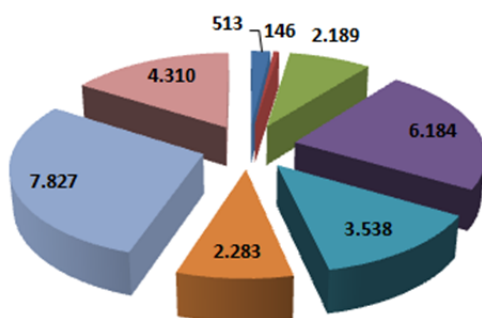
Summary of national production for domestic markets: 34.407,31 MEUR



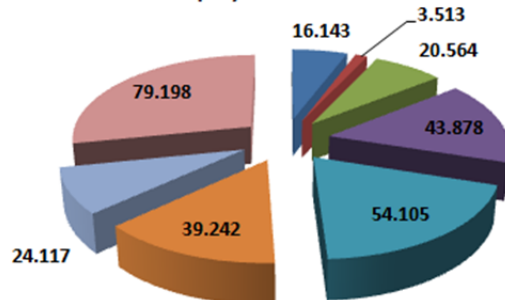
Summary of national production for export: 27.426,38 MEUR



N° Enterprises, est. : 29.078



Employment: 296.082

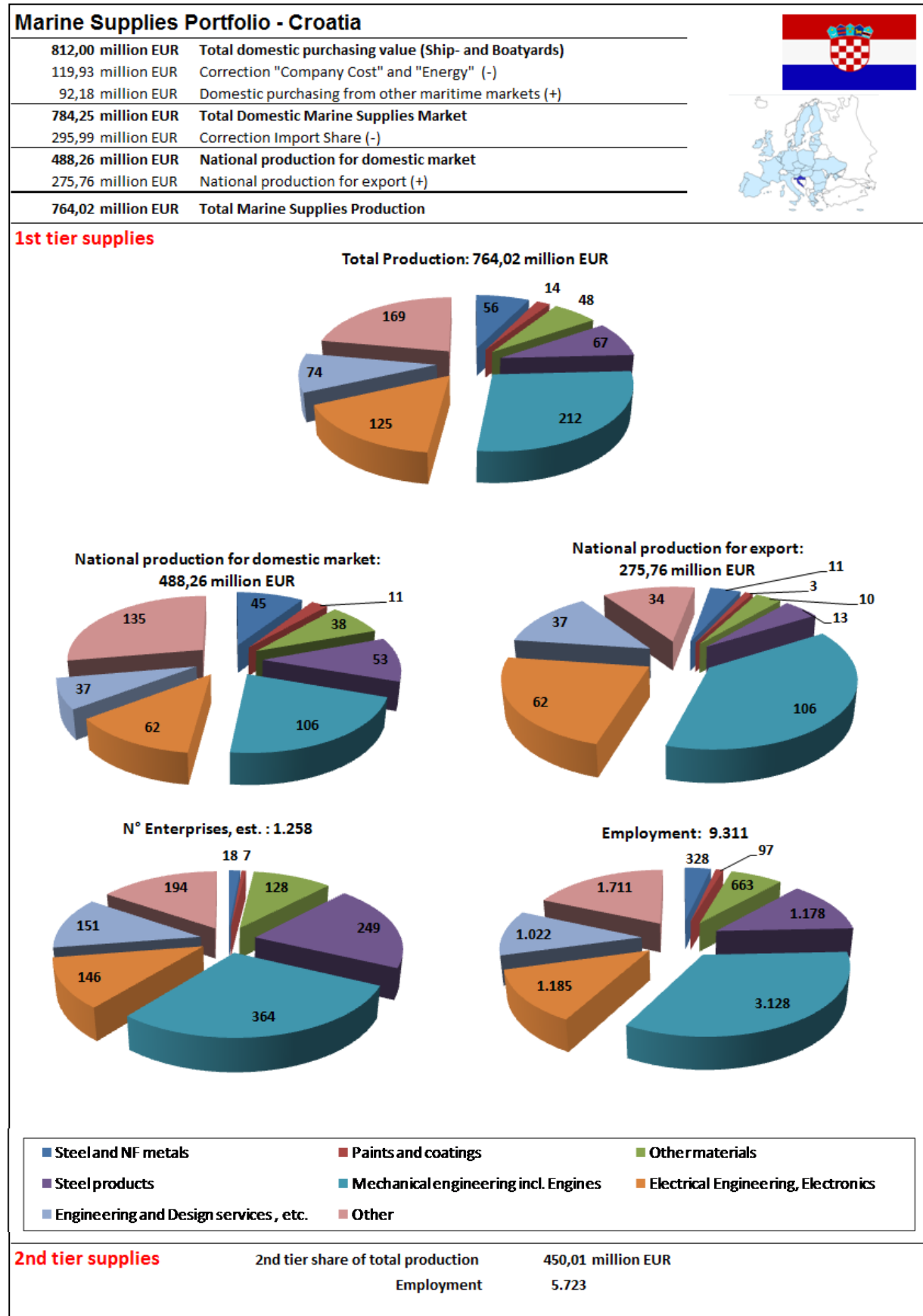


- Steel and NF metals
- Paints and coatings
- Other materials
- Steel products
- Mechanical engineering incl. Engines
- Electrical Engineering, Electronics
- Engineering and Design services, etc.
- Other

### 2nd tier supplies

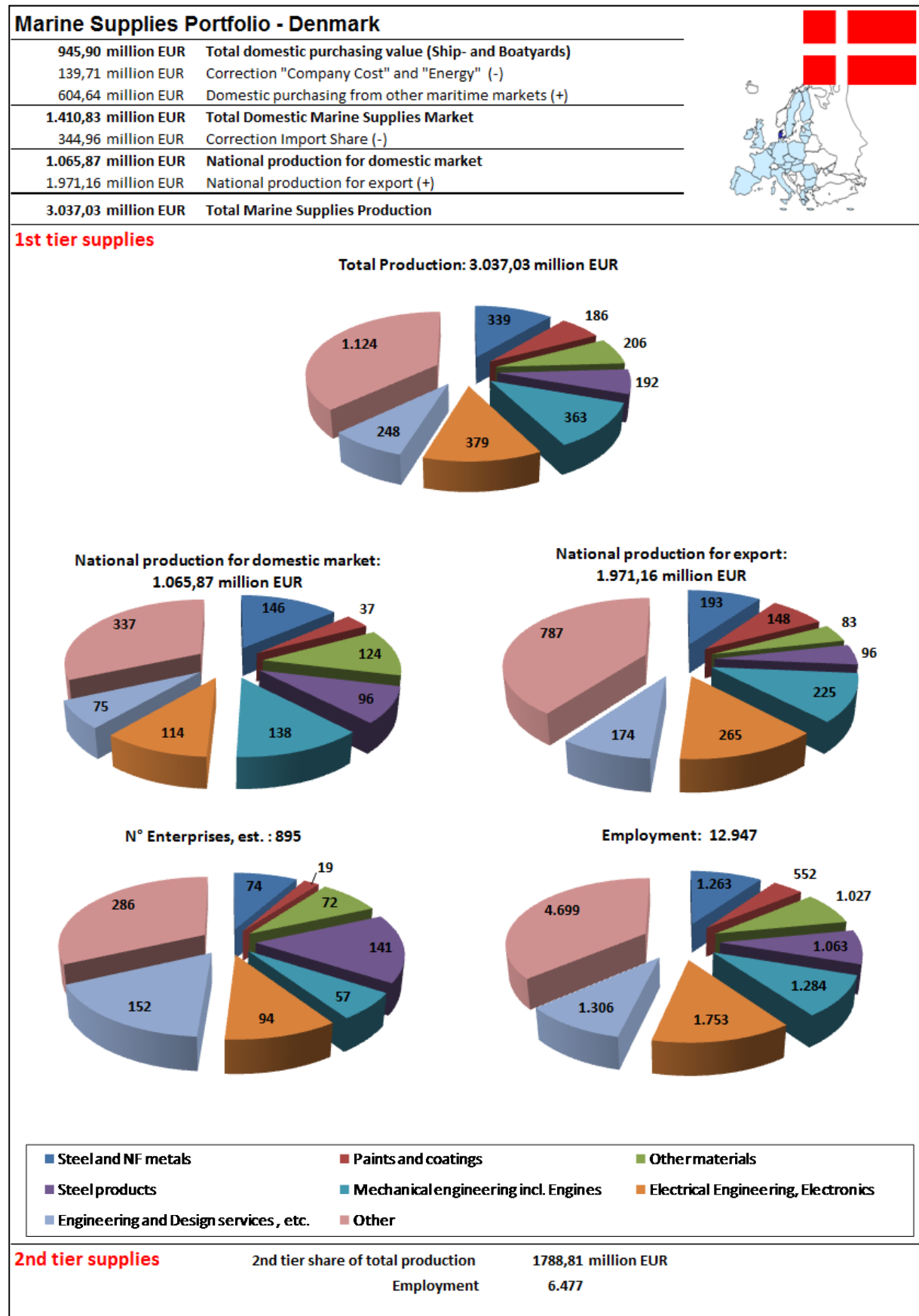
2nd tier share of total production 36420,04 MEURO  
 Employment 155.689

## 7. Croatia





## 8. Denmark



## 9. Finland

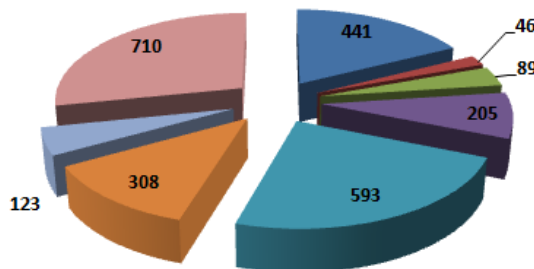
### Marine Supplies Portfolio - Finland

1.455,41 million EUR	Total domestic purchasing value (Ship- and Boatyards)
214,96 million EUR	Correction "Company Cost" and "Energy" (-)
930,34 million EUR	Domestic purchasing from other maritime markets (+)
2.170,78 million EUR	Total Domestic Marine Supplies Market
764,51 million EUR	Correction Import Share (-)
1.406,28 million EUR	National production for domestic market
1.109,58 million EUR	National production for export (+)
2.515,86 million EUR	Total Marine Supplies Production

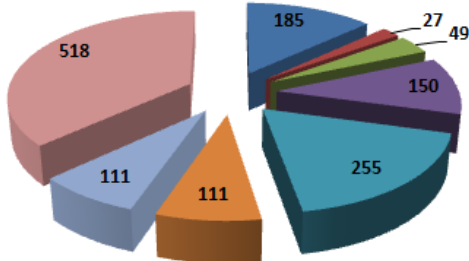


#### 1st tier supplies

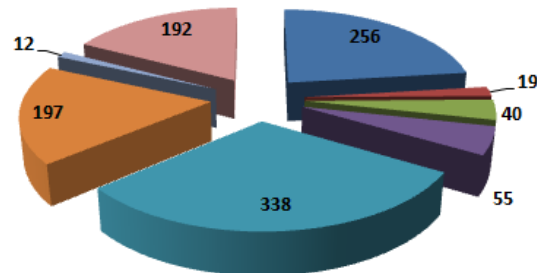
Total Production: 2.515,86 million EUR



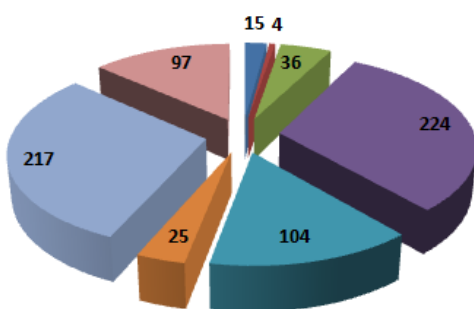
National production for domestic market:  
1.406,28 million EUR



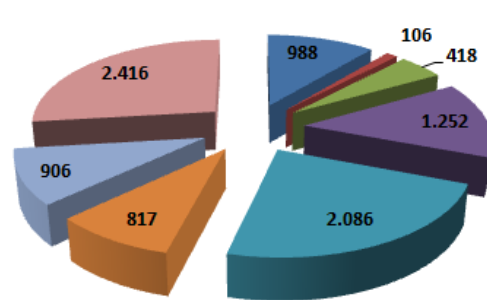
National production for export:  
1.109,58 million EUR



N° Enterprises, est. : 723



Employment: 8.989

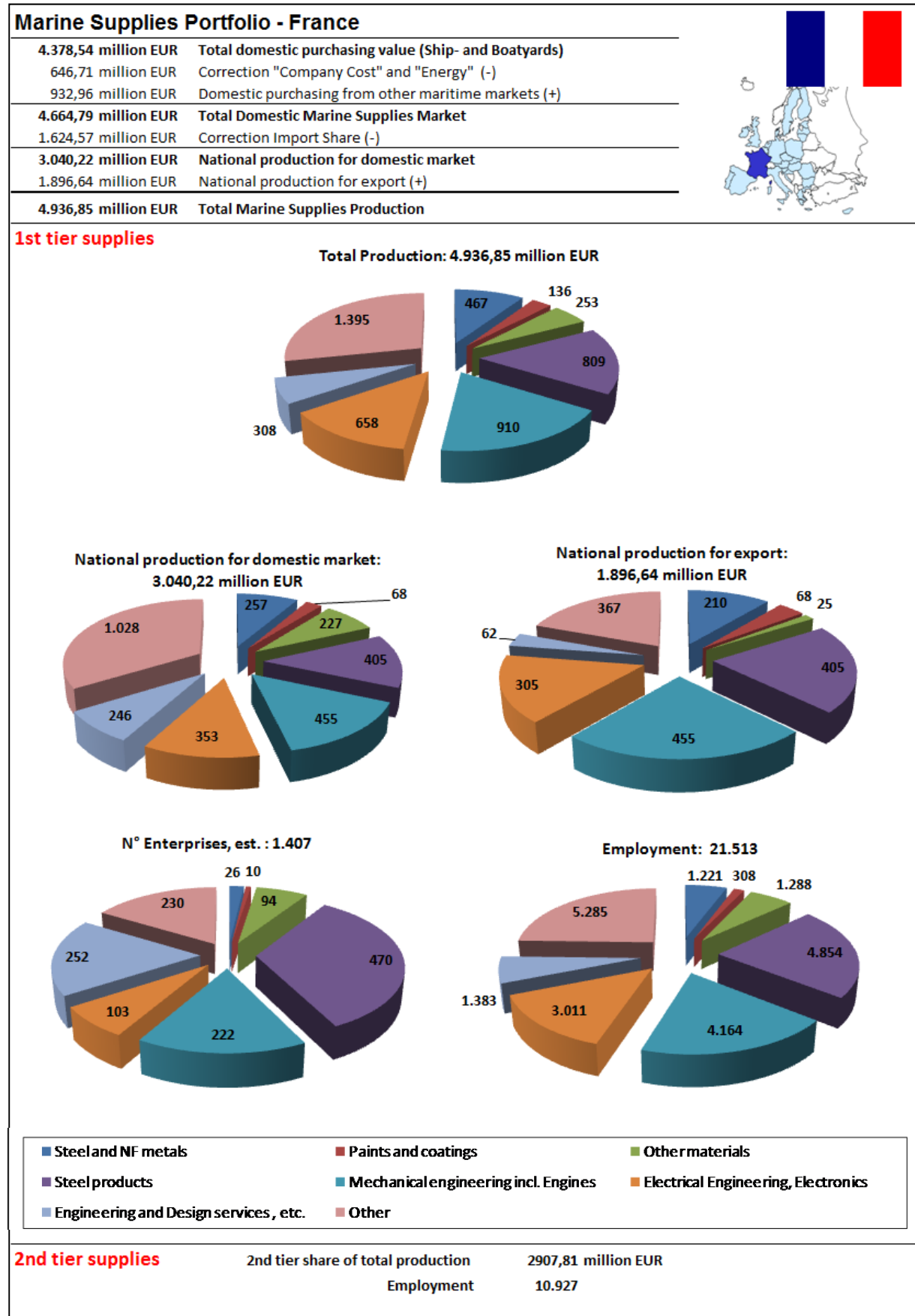


■ Steel and NF metals	■ Paints and coatings	■ Other materials
■ Steel products	■ Mechanical engineering incl. Engines	■ Electrical Engineering, Electronics
■ Engineering and Design services, etc.	■ Other	

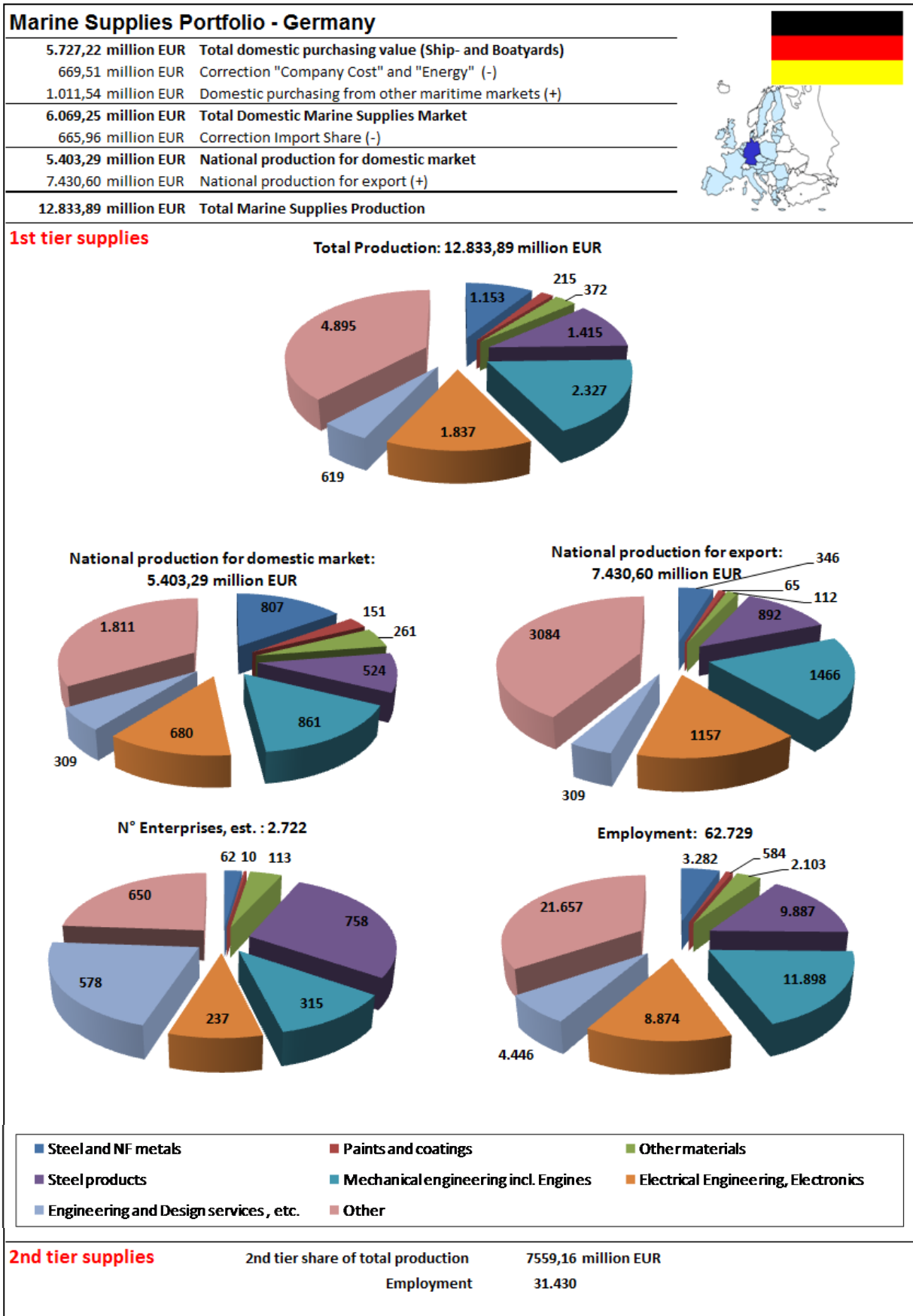
#### 2nd tier supplies

2nd tier share of total production	1481,84 million EUR
Employment	4.805

## 10. France



# 11. Germany



## 12. Italy

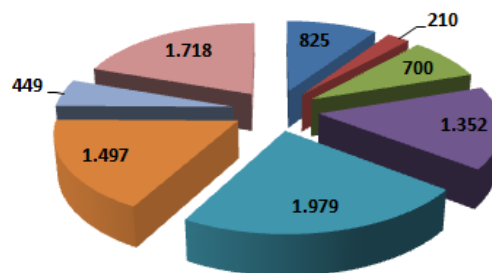
### Maritime Supplies Portfolio - Italy

7.049,42 million EUR	Total domestic purchasing value (Ship- and Boatyards)
1.041,20 million EUR	Correction "Company Cost" and "Energy" (-)
800,29 million EUR	Domestic purchasing from other maritime markets (+)
<b>6.808,52 million EUR</b>	<b>Total Domestic Marine Supplies Market</b>
755,36 million EUR	Correction Import Share (-)
<b>6.053,16 million EUR</b>	<b>National production for domestic market</b>
2.677,41 million EUR	National production for export (+)
<b>8.730,57 million EUR</b>	<b>Total Marine Supplies Production</b>

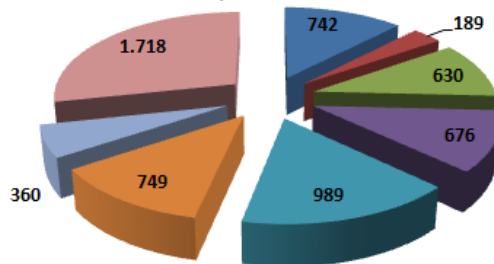


### 1st tier supplies

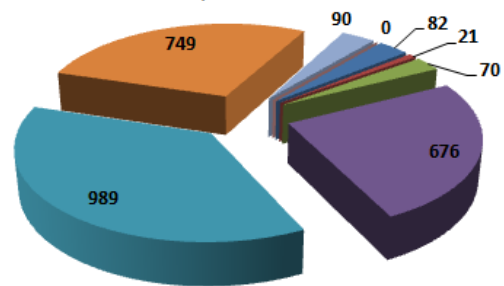
Total Production: 8.730,57 million EUR



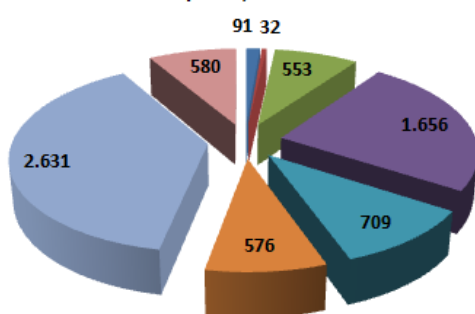
National production for domestic market: 6.053,16 million EUR



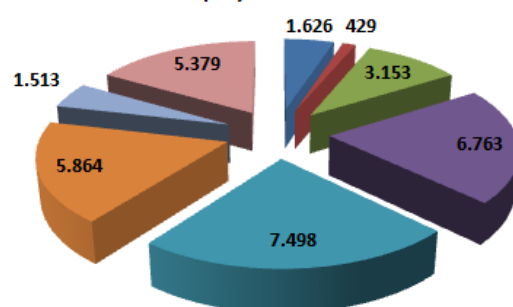
National production for export: 2.677,41 million EUR



N° Enterprises, est. : 6.828



Employment: 32.225



■ Steel and NF metals	■ Paints and coatings	■ Other materials
■ Steel products	■ Mechanical engineering incl. Engines	■ Electrical Engineering, Electronics
■ Engineering and Design services, etc.	■ Other	

### 2nd tier supplies

2nd tier share of total production	5142,31 million EUR
Employment	18.423

### 13. Lithuania

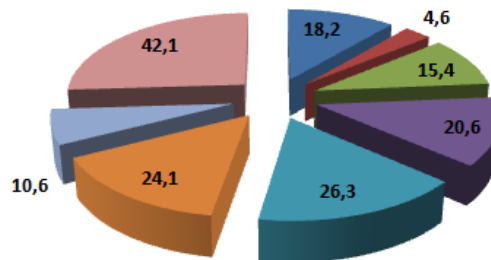
#### Marine Supplies Portfolio - Lithuania

145,86 million EUR	Total domestic purchasing value (Ship- and Boatyards)
21,54 million EUR	Correction "Company Cost" and "Energy" (-)
16,56 million EUR	Domestic purchasing from other maritime markets (+)
<b>140,88 million EUR</b>	<b>Total Domestic Marine Supplies Market</b>
33,63 million EUR	Correction Import Share (-)
<b>107,24 million EUR</b>	<b>National production for domestic market</b>
54,77 million EUR	National production for export (+)
<b>162,01 million EUR</b>	<b>Total Marine Supplies Production</b>

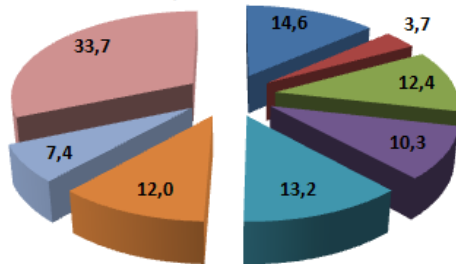


#### 1st tier supplies

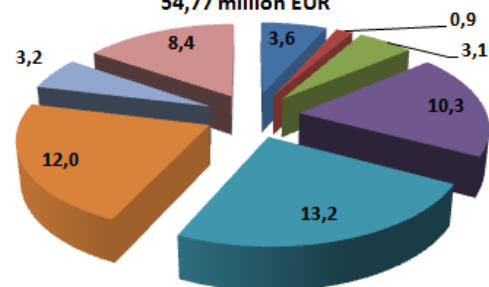
Total Production: 162,01 million EUR



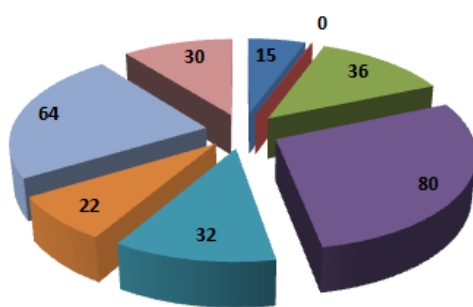
National production for domestic market: 107,24 million EUR



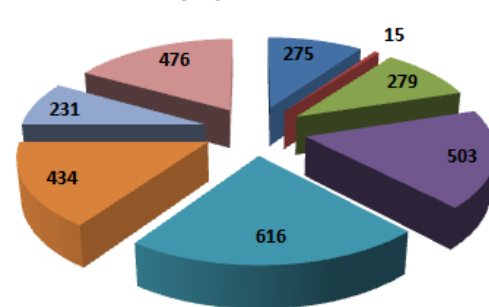
National production for export: 54,77 million EUR



N° Enterprises, est. : 279



Employment: 2.829

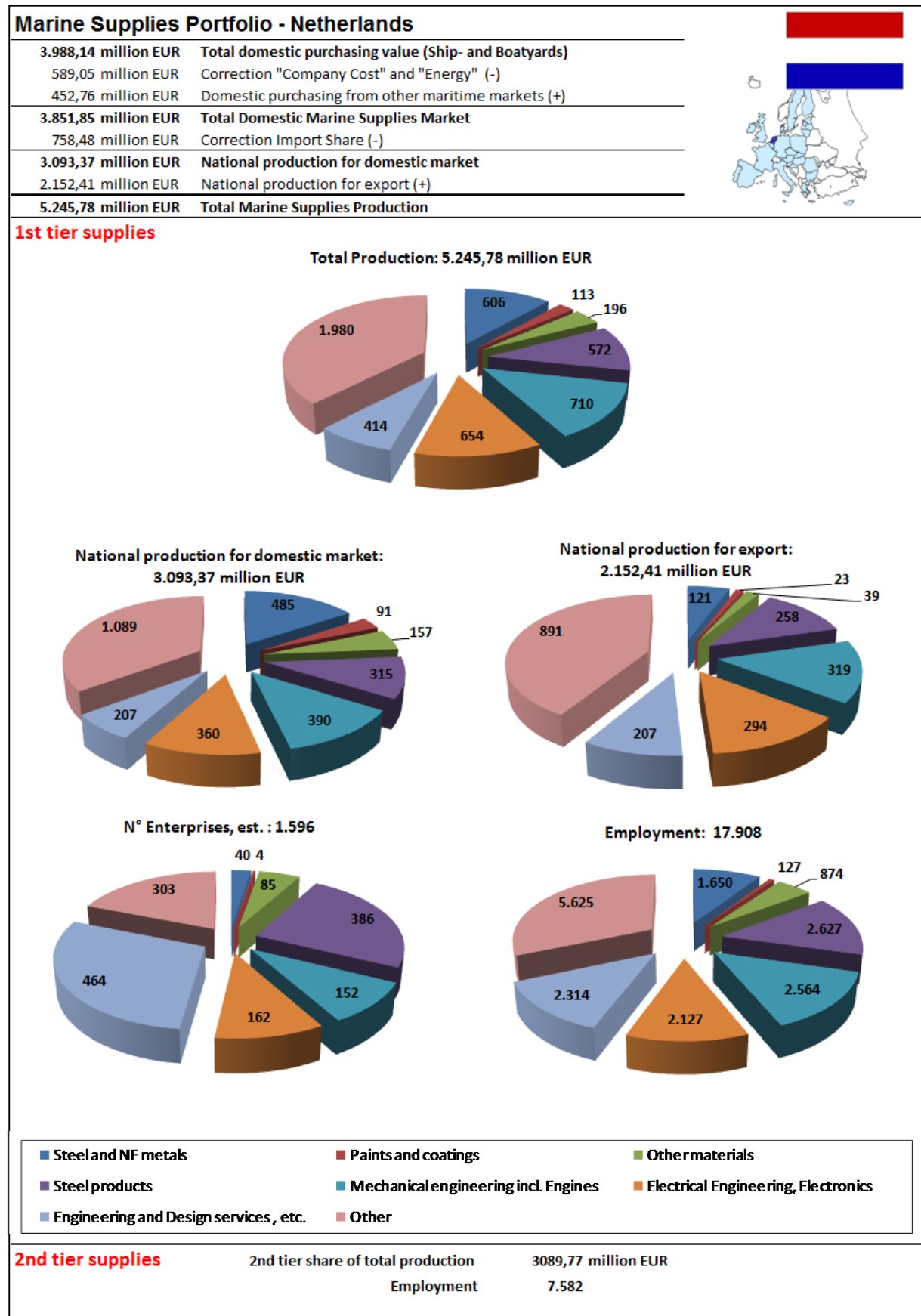


- Steel and NF metals
- Paints and coatings
- Other materials
- Steel products
- Mechanical engineering incl. Engines
- Electrical Engineering, Electronics
- Engineering and Design services, etc.
- Other

#### 2nd tier supplies

2nd tier share of total production	95,43 million EUR
Employment	1.204

## 14. Netherlands



## 15. Norway

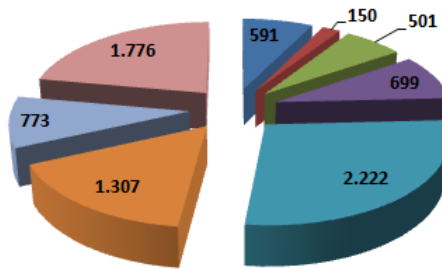
### Marine Supplies Portfolio - Norway

7.727,06 million EUR	Total domestic purchase value (Ship- and Boatyards)
1.141,29 million EUR	Correction "Company Cost" and "Energy" (-)
1.646,44 million EUR	Direct purchases from other maritime markets (+)
<b>8.232,22 million EUR</b>	<b>Total Domestic Marine Supplies Market</b>
3.106,98 million EUR	Correction Import Share (share of intra-EU+Norway imports: 1.464,66 MEUR)
<b>5.125,23 million EUR</b>	<b>National production for domestic market</b>
2.894,58 million EUR	National production for export (share of intra-EU+Norway exports: 1.464,66 MEUR)
<b>8.019,82 million EUR</b>	<b>Total Marine Supplies Production</b>

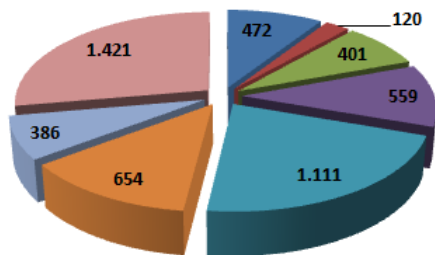


#### 1st tier supplies

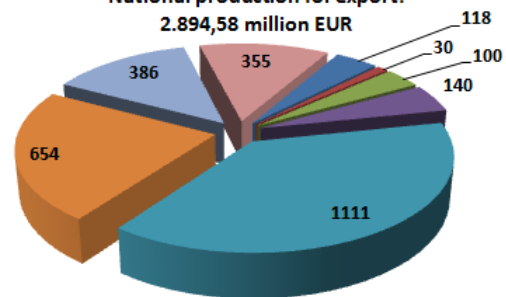
Total Production: 8.019,82 MEUR



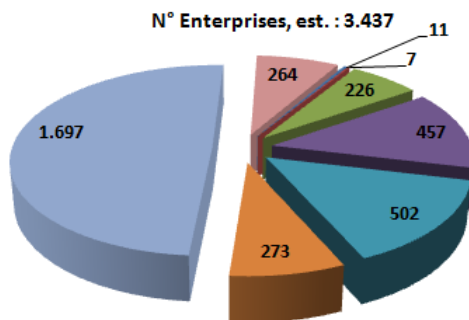
National production for domestic market: 5.125,23 million EUR



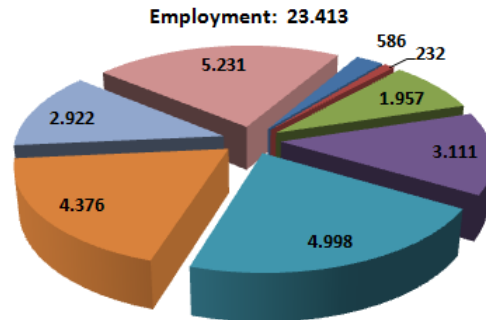
National production for export: 2.894,58 million EUR



N° Enterprises, est. : 3.437



Employment: 23.413



■ Steel and NF metals	■ Paints and coatings	■ Other materials
■ Steel products	■ Mechanical engineering incl. Engines	■ Electrical Engineering, Electronics
■ Engineering and Design services, etc.	■ Other	

#### 2nd tier supplies

2nd tier share of total production	4723,67 MEURO
Employment	13.909



## 16. Poland

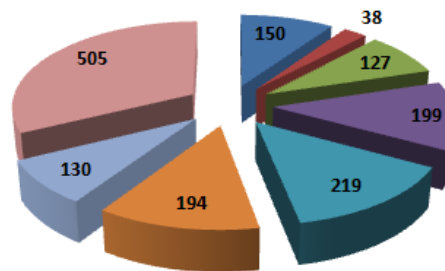
### Marine Supplies Portfolio - Poland

1.203,48 million EUR	Total domestic purchasing value (Ship- and Boatyards)
177,75 million EUR	Correction "Company Cost" and "Energy" (-)
136,63 million EUR	Domestic purchasing from other maritime markets (+)
1.162,35 million EUR	Total Domestic Marine Supplies Market
230,65 million EUR	Correction Import Share (-)
931,70 million EUR	National production for domestic market
630,56 million EUR	National production for export (+)
1.562,27 million EUR	Total Marine Supplies Production

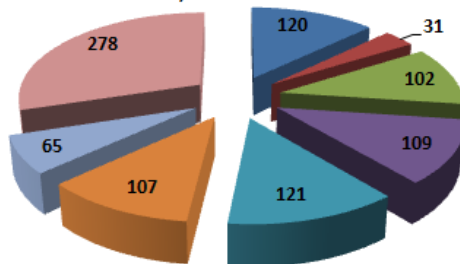


#### 1st tier supplies

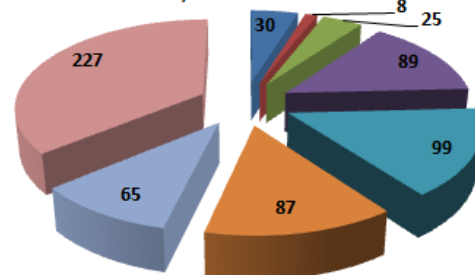
Total Production: 1.562,27 million EUR



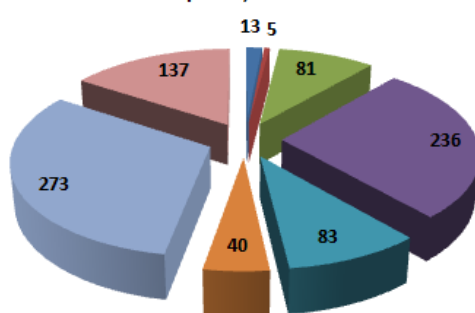
National production for domestic market: 931,70 million EUR



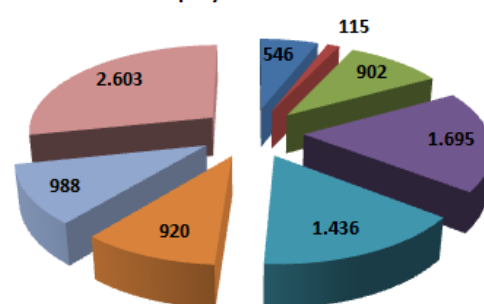
National production for export: 630,56 million EUR



N° Enterprises, est. : 867



Employment: 9.205



■ Steel and NF metals	■ Paints and coatings	■ Other materials
■ Steel products	■ Mechanical engineering incl. Engines	■ Electrical Engineering, Electronics
■ Engineering and Design services, etc.	■ Other	

#### 2nd tier supplies

2nd tier share of total production	920,18 million EUR
Employment	4.399

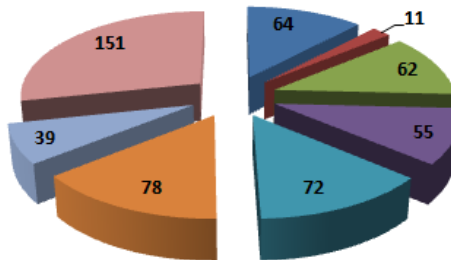
## 17. Romania

Marine Supplies Portfolio - Romania	
725,98 million EUR	Total domestic purchasing value (Ship- and Boatyards)
107,23 million EUR	Correction "Company Cost" and "Energy" (-)
82,42 million EUR	Domestic purchasing from other maritime markets (+)
<b>701,17 million EUR</b>	<b>Total Domestic Marine Supplies Market</b>
308,31 million EUR	Correction Import Share (-)
<b>392,86 million EUR</b>	<b>National production for domestic market</b>
139,56 million EUR	National production for export (+)
<b>532,42 million EUR</b>	<b>Total Marine Supplies Production</b>

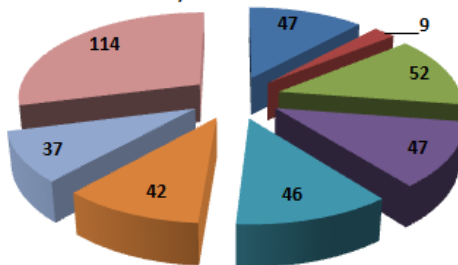


### 1st tier supplies

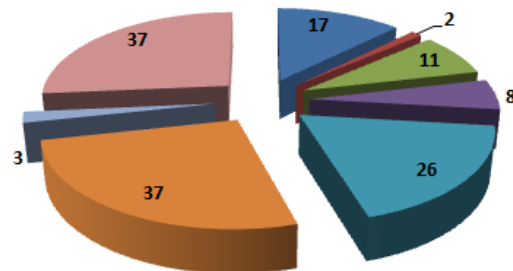
Total Production: 532,42 million EUR



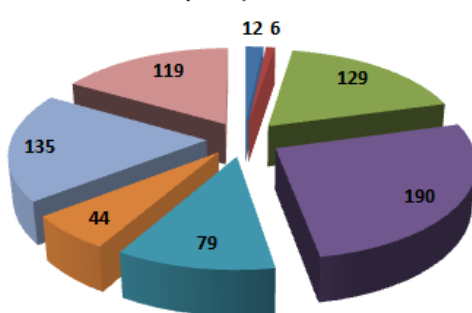
National production for domestic market: 392,86 million EUR



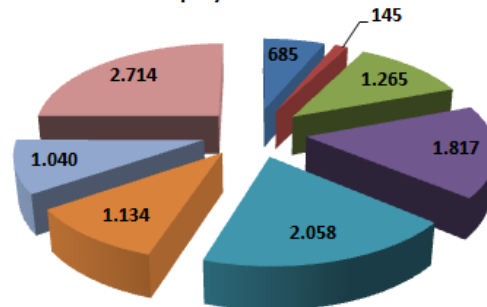
National production for export: 139,56 million EUR



N° Enterprises, est. : 715



Employment: 10.858



- Steel and NF metals
- Paints and coatings
- Other materials
- Steel products
- Mechanical engineering incl. Engines
- Electrical Engineering, Electronics
- Engineering and Design services, etc.
- Other

### 2nd tier supplies

2nd tier share of total production 313,60 million EUR  
 Employment 7.271

## 18. Spain

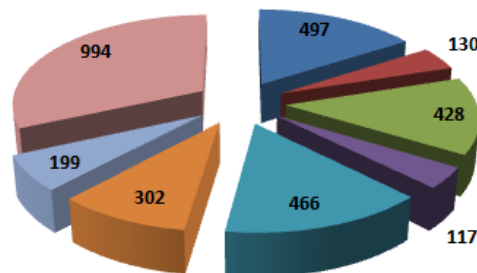
### Marine Supplies Portfolio - Spain

3.703,46 million EUR	Total domestic purchasing value (Ship- and Boatyards)
547,00 million EUR	Correction "Company Cost" and "Energy" (-)
420,44 million EUR	Domestic purchasing from other maritime markets (+)
3.576,90 million EUR	Total Domestic Marine Supplies Market
1.209,20 million EUR	Correction Import Share (-)
2.367,69 million EUR	National production for domestic market
766,22 million EUR	National production for export (+)
3.133,91 million EUR	Total Marine Supplies Production

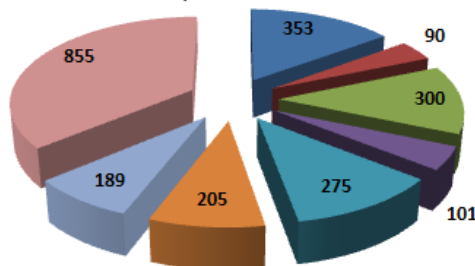


#### 1st tier supplies

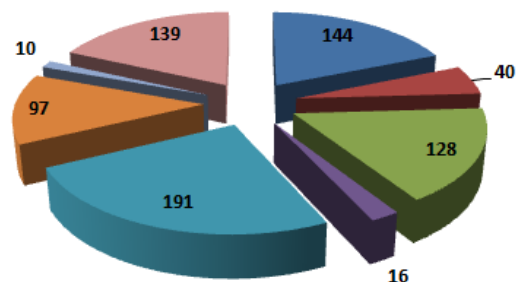
Total Production: 3.133,91 million EUR



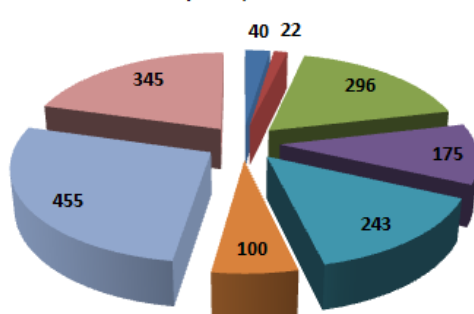
National production for domestic market: 2.367,69 million EUR



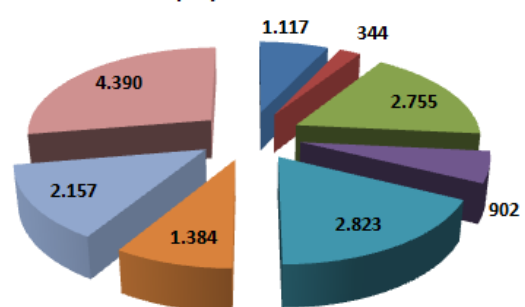
National production for export: 766,22 million EUR



N° Enterprises, est. : 1.677



Employment: 15.872



■ Steel and NF metals	■ Paints and coatings	■ Other materials
■ Steel products	■ Mechanical engineering incl. Engines	■ Electrical Engineering, Electronics
■ Engineering and Design services, etc.	■ Other	

#### 2nd tier supplies

2nd tier share of total production	1845,88 million EUR
Employment	8.225

## 19. Sweden

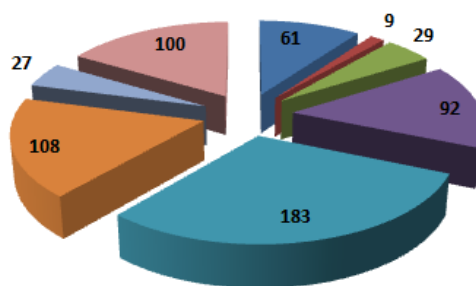
### Marine Supplies Portfolio - Sweden

548,42 million EUR	Total domestic purchasing value (Ship- and Boatyards)
81,00 million EUR	Correction "Company Cost" and "Energy" (-)
62,26 million EUR	Domestic purchasing from other maritime markets (+)
529,68 million EUR	Total Domestic Marine Supplies Market
246,46 million EUR	Correction Import Share (-)
283,21 million EUR	National production for domestic market
325,92 million EUR	National production for export (+)
609,13 million EUR	Total Marine Supplies Production

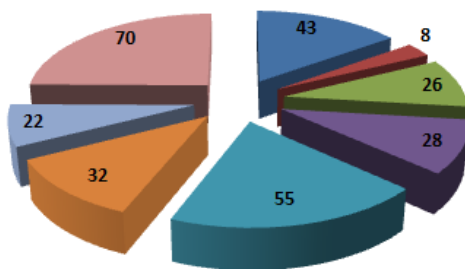


#### 1st tier supplies

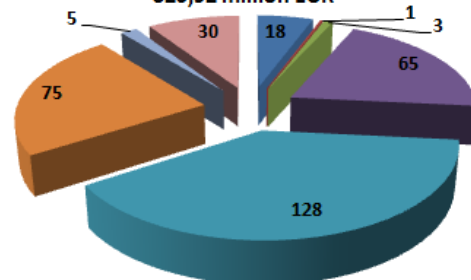
Total Production: 609,13 million EUR



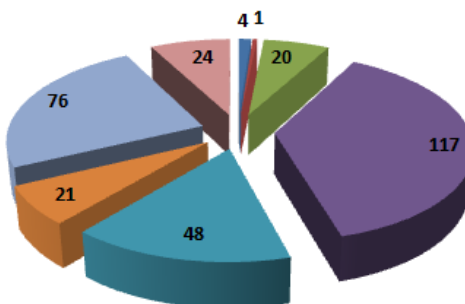
Domestic Market: 283,21 million EUR



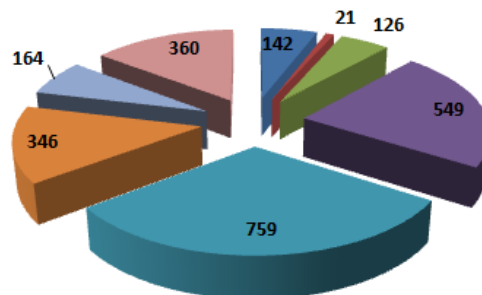
National production for export: 325,92 million EUR



N° Enterprises, est. : 310



Employment: 2.467

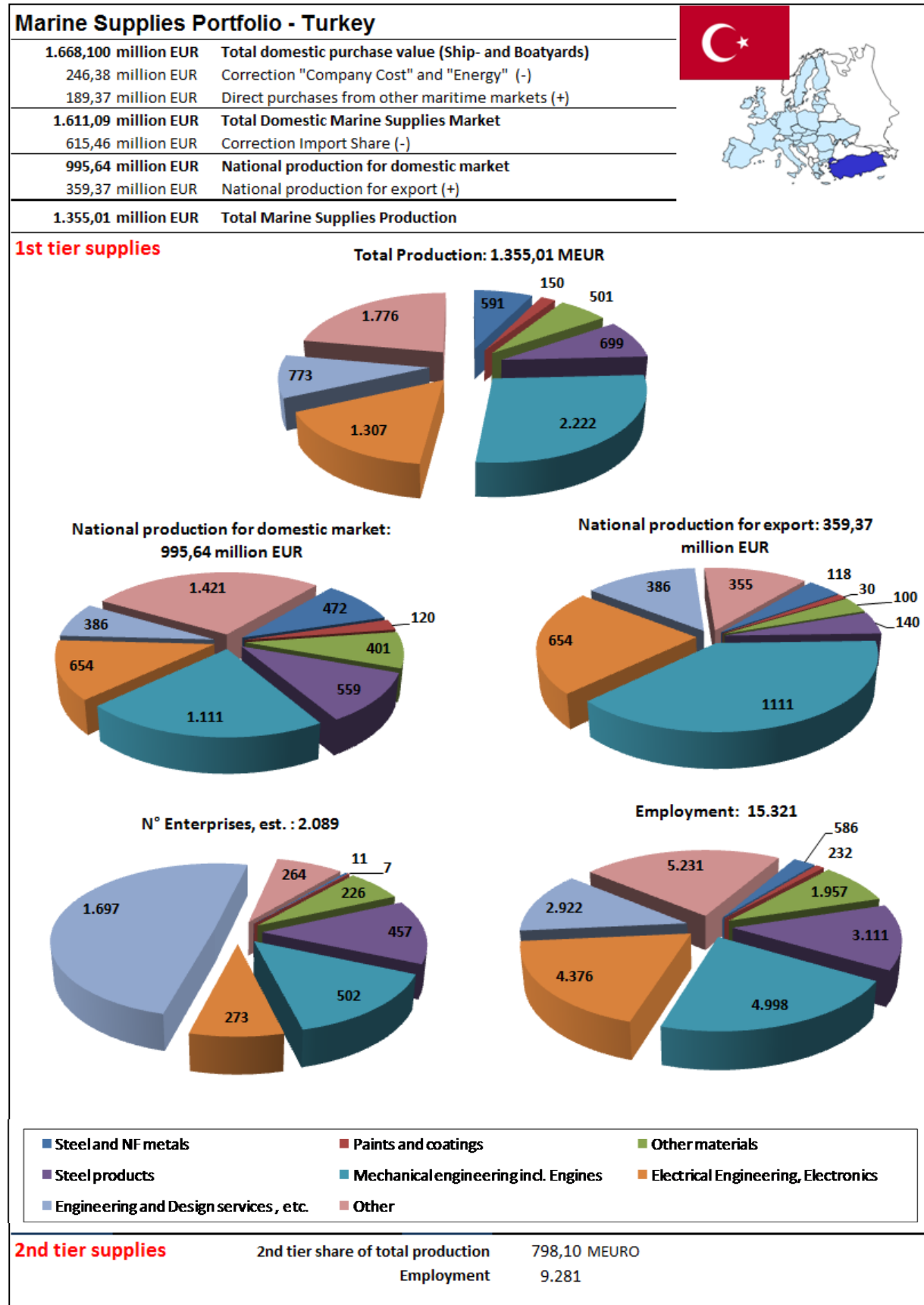


■ Steel and NF metals	■ Paints and coatings	■ Other materials
■ Steel products	■ Mechanical engineering incl. Engines	■ Electrical Engineering, Electronics
■ Engineering and Design services, etc.	■ Other	

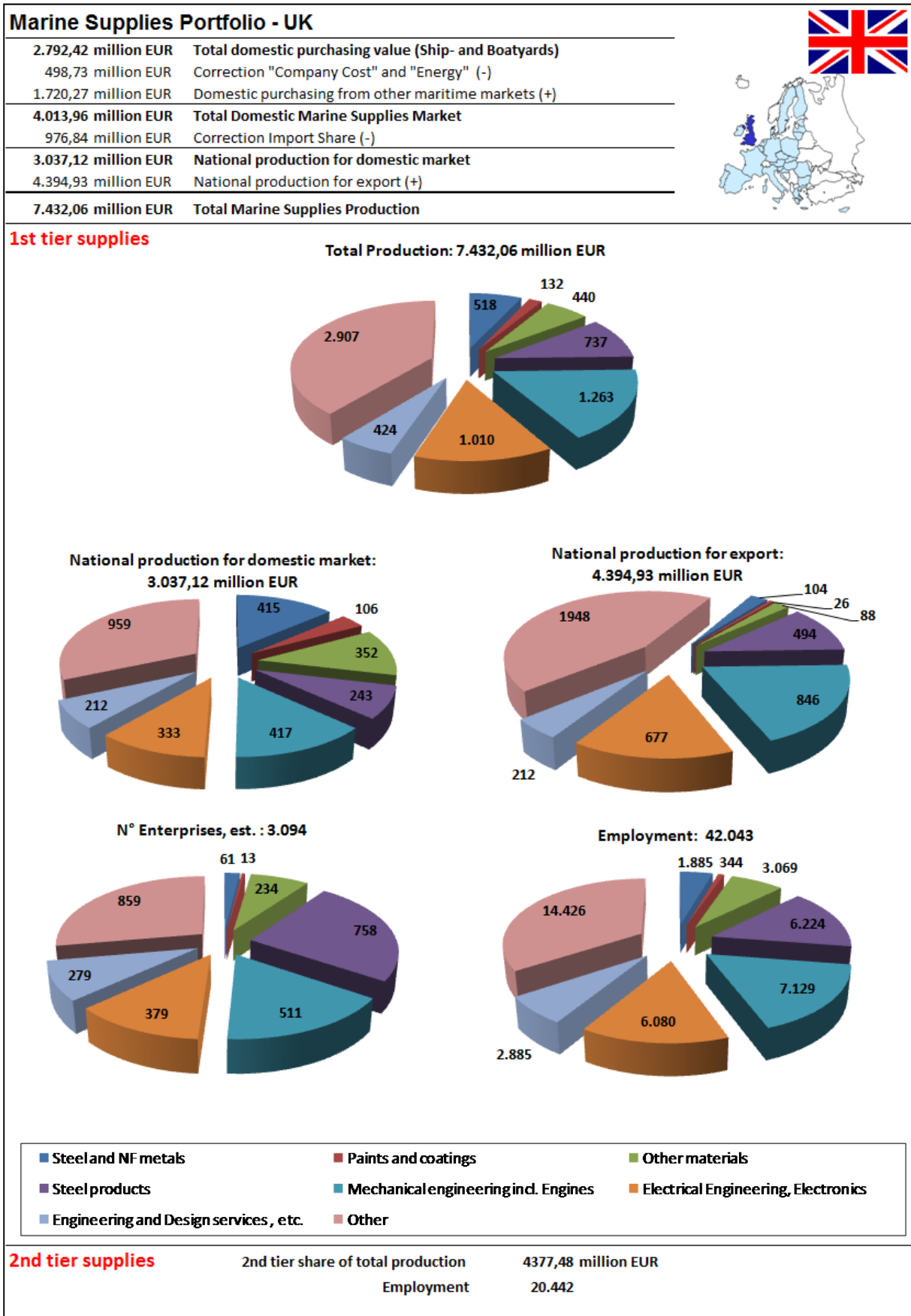
#### 2nd tier supplies

2nd tier share of total production	358,78 million EUR
Employment	1.249

## 20. Turkey



## 21. United Kingdom



## 22. Rest of EU 28

### Marine Supplies Portfolio - Rest of EU 28

	<b>Total marine supplies production</b>	<b>Export market for suppliers</b>	<b>Number of employees (1st and 2nd tier)</b>	<b>Number of enterprises</b>
Austria	129,07 million EUR	113,63 million EUR	864	44
Belgium	92,53 million EUR	23,67 million EUR	351	19
Bulgaria	58,27 million EUR	14,98 million EUR	1.238	106
Cyprus	2,43 million EUR	0,33 million EUR	33	4
Czech Republic	31,53 million EUR	13,72 million EUR	451	41
Estonia	122,11 million EUR	41,28 million EUR	2.658	156
Greece	149,12 million EUR	20,24 million EUR	1.697	325
Hungary	8,91 million EUR	3,87 million EUR	141	20
Ireland	7,43 million EUR	1,13 million EUR	40	2
Latvia	68,60 million EUR	23,19 million EUR	1.871	111
Luxembourg	0,00 million EUR	0,00 million EUR	0	0
Malta	77,19 million EUR	33,58 million EUR	673	40
Portugal	109,30 million EUR	10,93 million EUR	1.623	260
Slovakia	48,38 million EUR	21,04 million EUR	648	25
Slovenia	58,20 million EUR	25,32 million EUR	507	30