



EU Industrial Maritime Strategy

EUROPEAN PORT FORUM
3 October 2025

Towards an EU Industrial Maritime Strategy



*“You will also propose a new **Industrial Maritime Strategy** to enhance the competitiveness, sustainability and resilience of Europe’s maritime manufacturing sector”.*

Mission Letter to Commissioner Tzitzikostas, 17 September 2024

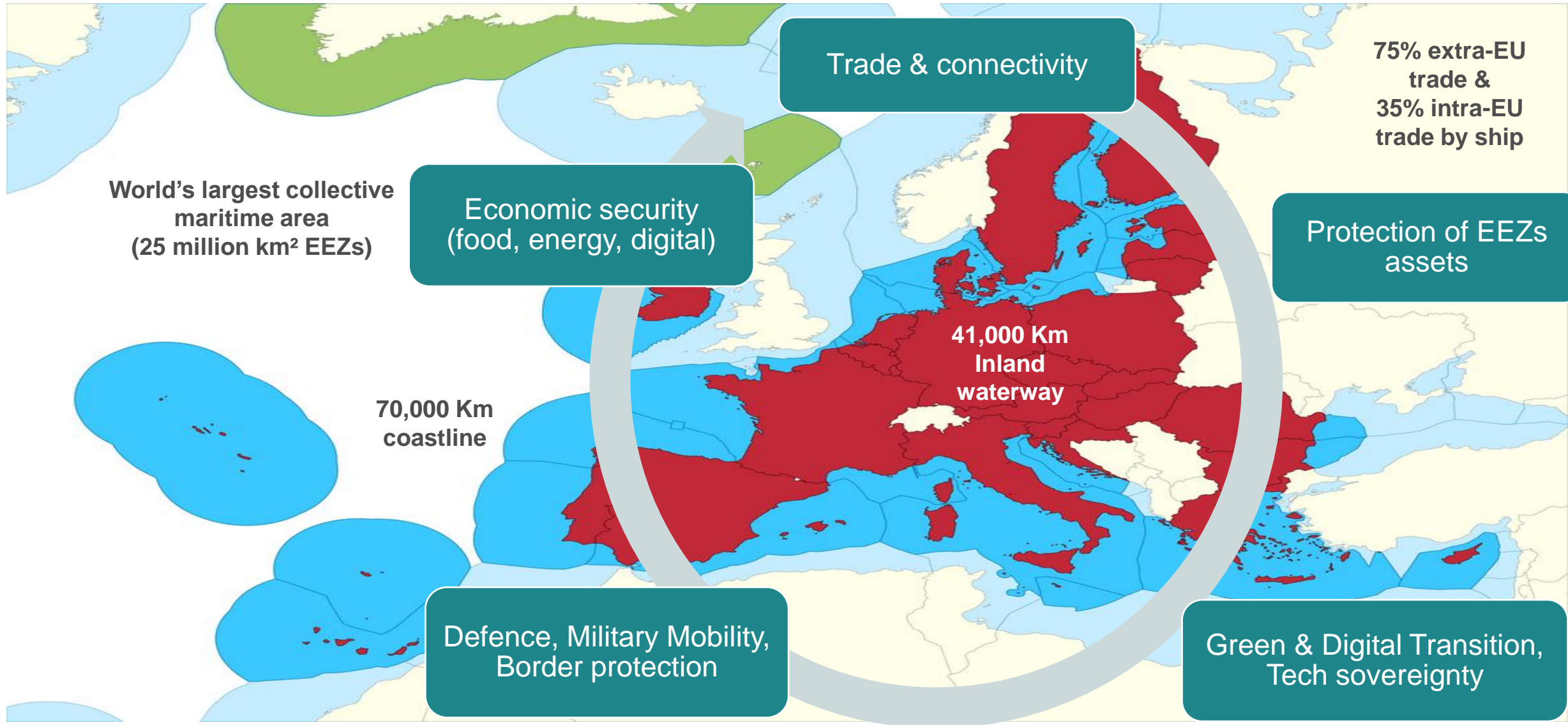


*“We aim to ensure that Europe’s ports and waterborne industries are equipped to **lead the clean and digital energy transition, support defence and trade, and remain globally competitive**”.*

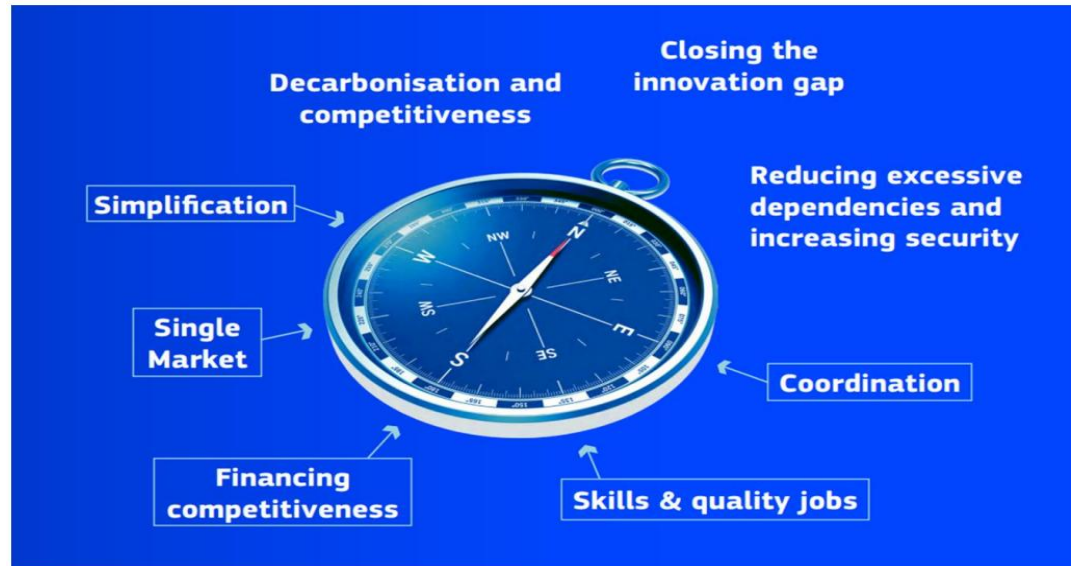
Commissioner Tzitzikostas, 1 July 2025

*“The maritime industry and our ports are vital for Europe’s **sovereignty**”.* EVP Stéphane Séjourné, 1 July 2025

What is at stake



Policy context



COMPETITIVENESS COMPASS

PILLAR 2 “Joint decarbonisation and competitiveness agenda”

CLEAN INDUSTRIAL DEAL

SUSTAINABLE TRANSPORT INVESTMENT PLAN (STIP)



**EU INDUSTRIAL
MARITIME STRATEGY**

**EU PORT
STRATEGY**

Stakeholder Consultations & Data gathering

1. Mobility Transition Pathway co-creation
2. Dialogue with the EU waterborne sector
3. Call for Evidence
4. Stakeholder roundtables, expert groups, workshops, bilateral meetings, field visits
5. External studies

Planned Adoption: early 2026

Call for Evidence



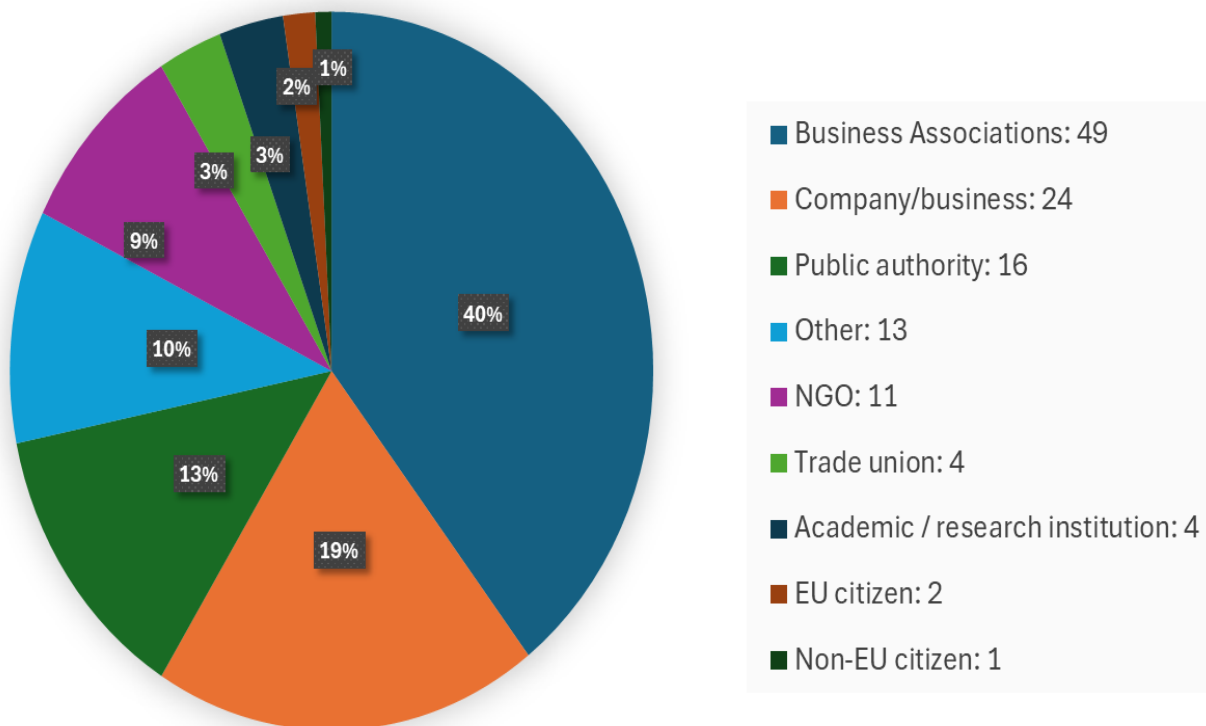
Feedback period:
30 June - 28 July 2025

124 valid replies received

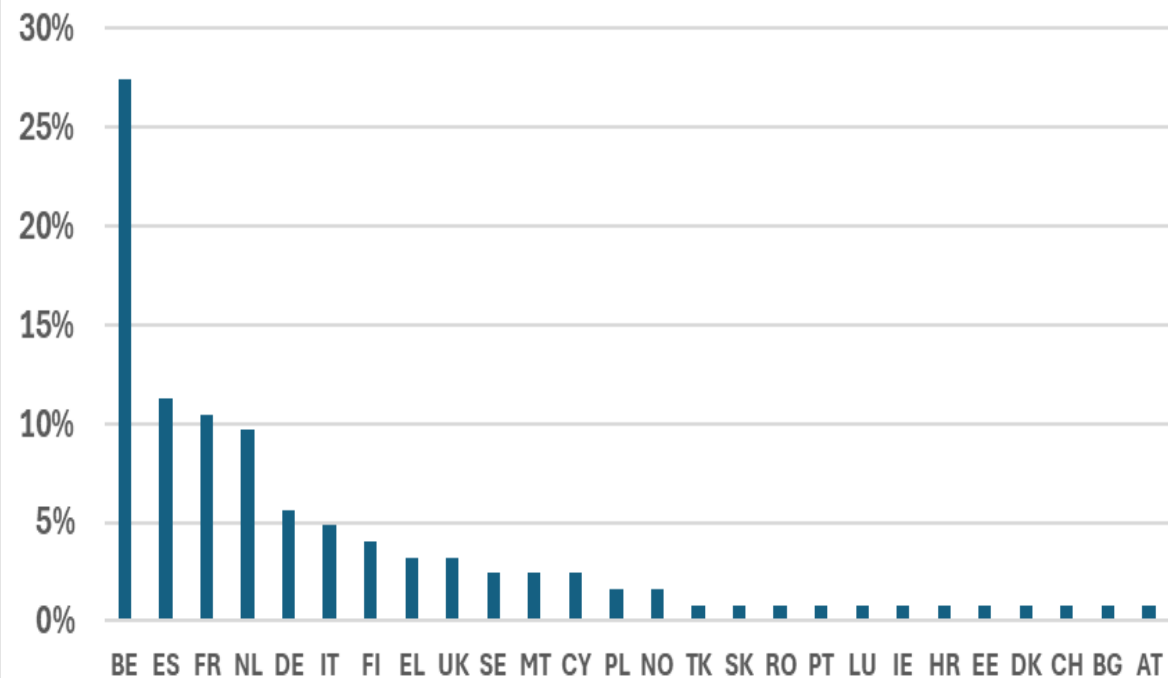
<https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14745-EU-industrial-maritime-strategy-en>

By category and country of respondents

By category of respondent



Respondents by country



Preliminary results observed

1. Respondents overall expressed **wide support** to the Commission's plans to develop a new EU industrial maritime strategy.
2. Several respondents **welcomed the broad, integrated “ecosystem approach”** intended to underpin the strategy, encompassing different manufacturing and transport services activities (upstream & downstream).
3. Some stakeholders drew attention to **specific segments or technologies or geographical realities** to be (further) considered in the strategy
4. Several stakeholders underlined the need for the **strategy to be closely aligned with the upcoming Sustainable Transport Investment Plan and Port Strategy** and other key policy frameworks (e.g. Ocean Pact)

Preliminary results observed

1. Respondents overall stressed the need for **Europe to preserve its strategic maritime interests and assets**, retaining and securing control over its fleets, markets, key technologies, supply chains, industrial capabilities and infrastructure.
2. Several replies also stressed the need to maintain and increase the attractiveness of **EU flags**.
3. Wide support for fostering **Europe's leadership in high-tech, complex shipbuilding and equipment manufacturing** as well as **new emerging technologies/business areas**, while preserving & strengthening **global competitiveness of Europe's shipping and ports**.
 - ✓ Some respondents called for supply and demand-driven measures to support innovation, infrastructure upgrades & investments in EU-built ships in certain lead markets, in EU-based retrofitting and equipment, asking for **strong trade and industrial policy responses to global unfair competition**.
 - ✓ Some respondents were concerned about possible **protectionism**, while others favored the **repatriation of ship production in some high-value segments (where viable and competitive)** in particular in order to maintain viable supply chains for military shipbuilding.

Thematic areas to be addressed

Competitiveness

Sustainability

Resilience

Security

**INNOVATION &
DIGITALISATION**

**GREENING &
MADE IN EU CLEAN TECH**

**ACCESS TO
FINANCE**

**WORKFORCE &
SKILLS**

**EU INDUSTRIAL
MARITIME
STRATEGY**

**LEAD MARKETS, LEVEL
PLAYING FIELD &
FAVOURABLE BUSINESS
ENVIRONMENT**

NAVAL, DUAL USE & UNDERWATER

Build

Equip

Repair

*Transport &
Connect*

**YOUR INPUT
WILL BE KEY**

EU Industrial Maritime Strategy



Thank you



© European Union 2023

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](#) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

Slide xx: [element concerned](#), source: [e.g. Fotolia.com](#); Slide xx: [element concerned](#), source: [e.g. iStock.com](#)