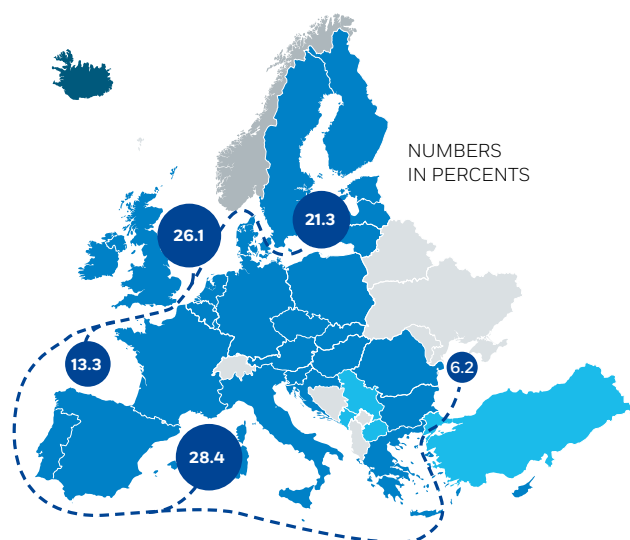


## SETTING THE SCENE

Europe's very identity is intertwined with both ocean and sea. Of 28 member states, 23 have a coastline. While the maritime sector has not been spared the effects of the challenging economic climate, the gross added value of this sector to EU is estimated at €500 billion including jobs for some five million people. The maritime sector is important for a number of policy areas including energy, transport, environment, fisheries and research. Europe will continue to assert itself as a leading player in the maritime world. The following info graphic illustrates just some of the trends currently influencing the maritime sector in the EU.

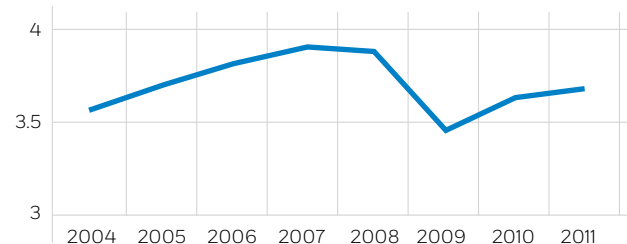
### MARITIME TRANSPORT AS AN ENABLER OF TRADE

**37%** of the intra-EU exchange of goods goes through EU ports



**3.7bn** tonnes of goods were handled by EU ports in 2011, up 1.7% on 2010

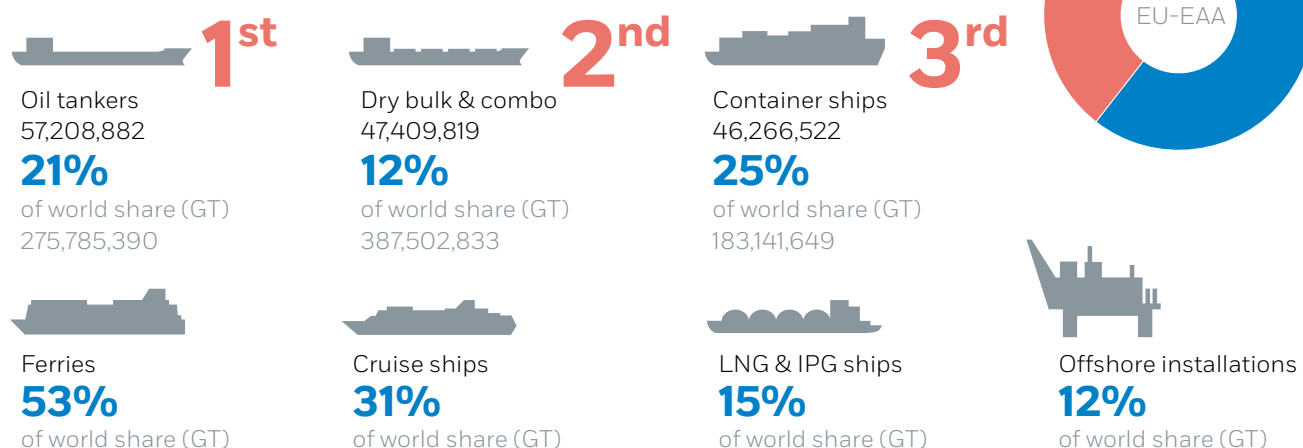
### WEIGHT OF SEABORNE GOODS HANDLED IN ALL EU 27 PORTS IN BILLION TONNES



Tonne-km = moving 1 000kg of cargo a distance of 1 km  
Data source: Eurostat

### EU-EEA SHARE OF THE WORLD FLEET

**>20%** More than one one fifth of the world's commercial fleet has been owned by EU-EEA interests since 2005

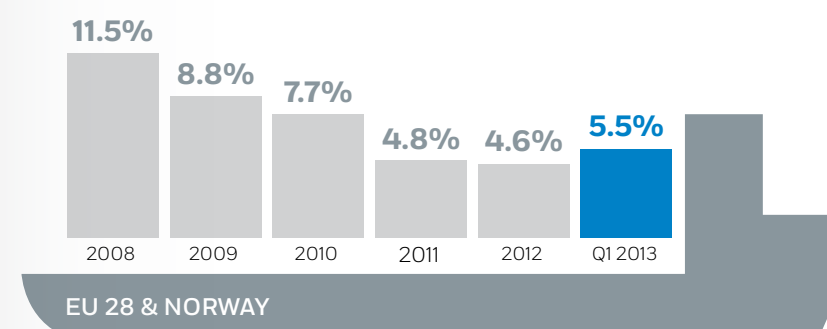


As at 01 June 2013 (100 GT and above). Source: Lloyd's Register-Fairplay: Merchant Fleet – EEA Registered and world fleet development

### SHIPBUILDING IN EUROPE

#### GLOBAL MARKET SHARE OF SHIP COMPLETIONS (IN % OF COMPENSATED GROSS TONNES)

**5.5%** European shipyards have halved their production since 2008 due to the recent drop in demand



Data source: IHS Fairplay June 2013

### BEYOND SHIPBUILDING TO MAINTAINING, REPAIRING AND CONVERTING

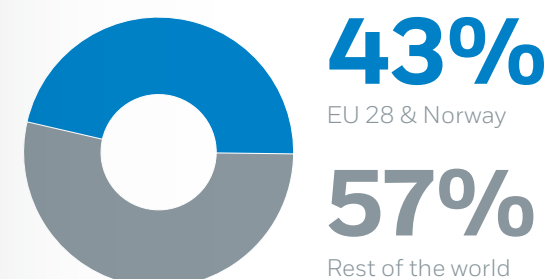
**€3 bn** This segment of the industry has an estimated annual turnover of around €3 bn

Data source: SMRC

The European shipbuilding industry also covers maintenance, repair and conversion yards

### SUPPLIERS OF MARINE EQUIPMENT

#### WORLD SHARE OF MARINE SUPPLY MARKET



**€54.5 bn**

The marine supply industries of the EU and Norway combined production volume

**€125.5 bn**

The global production of marine equipment supplies per year

**>500 000**

The European shipbuilding and maritime equipment industry employees

Data source: SEA Europe