



Development of the Poland's maritime industry

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Maritime economy

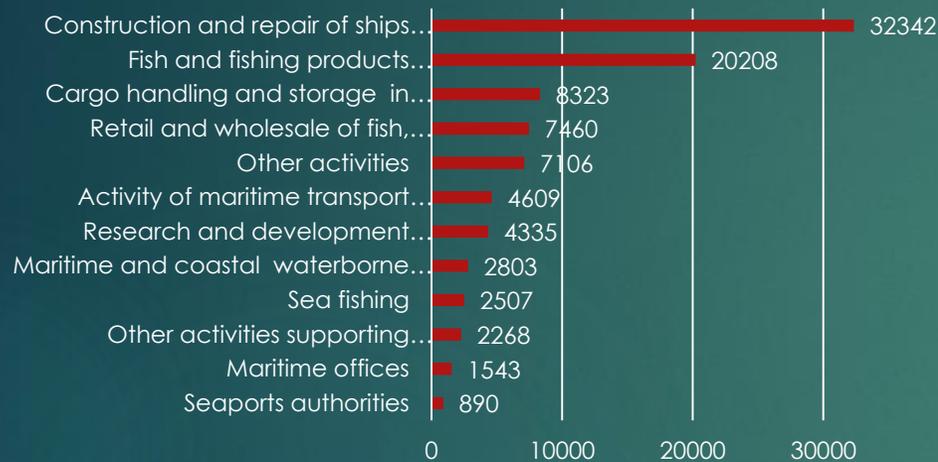
More than 12
thous. entities

More than 90
thous.
employees

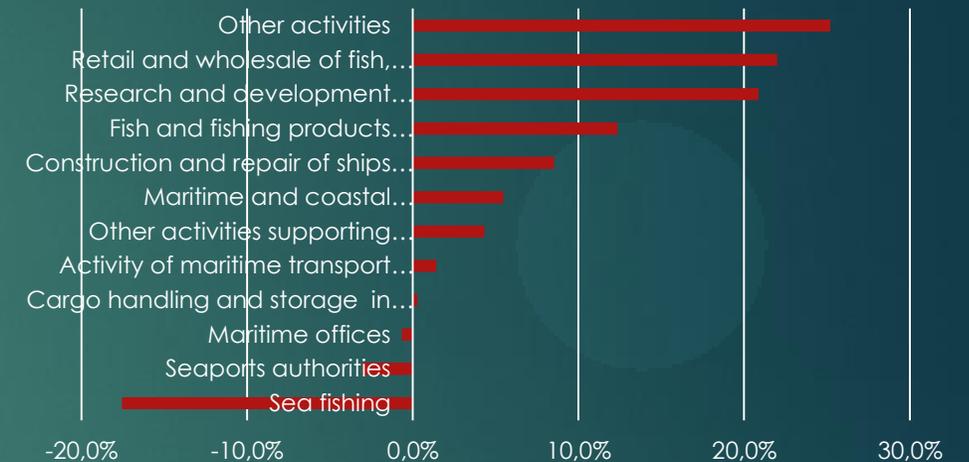
2014	Entities (thous.)	Employed (thous.)	Revenues (mln. zl)
• construction and repair of ships and boats	4,9	31,5	8 947
• maritime transport and logistic	1,6	18,2	6 977
• fishing, fish processing	4	29,1	10 689
• research and development activity and maritime education	0,177	4,2	173
• other activities	1,5	5,8	--

Maritime economy

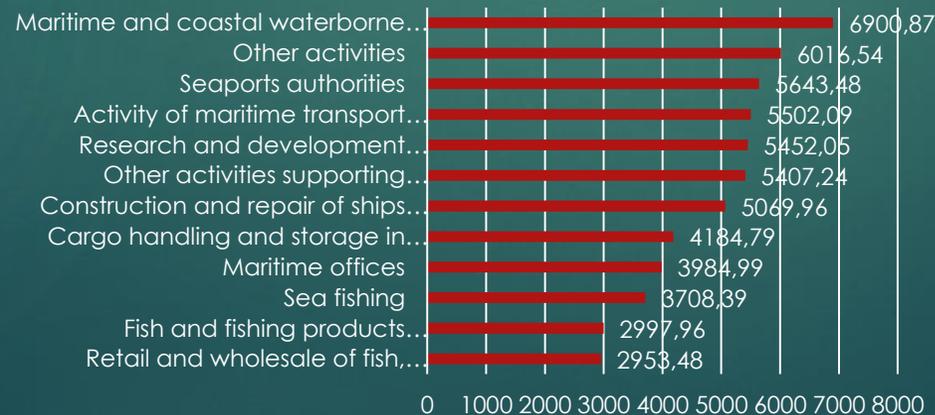
Employed by kind of activity (2014)



Employment growth (2011-2014)

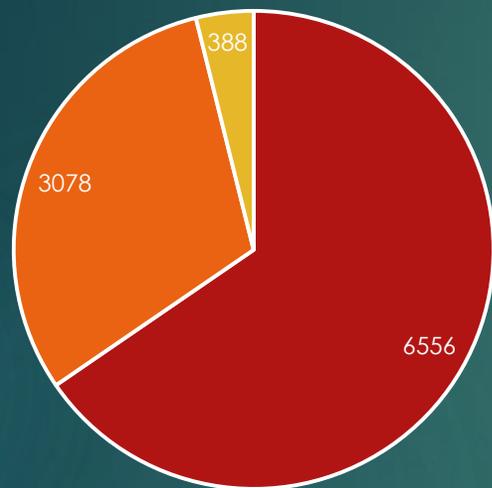


Average Monthly gross wages and salaries



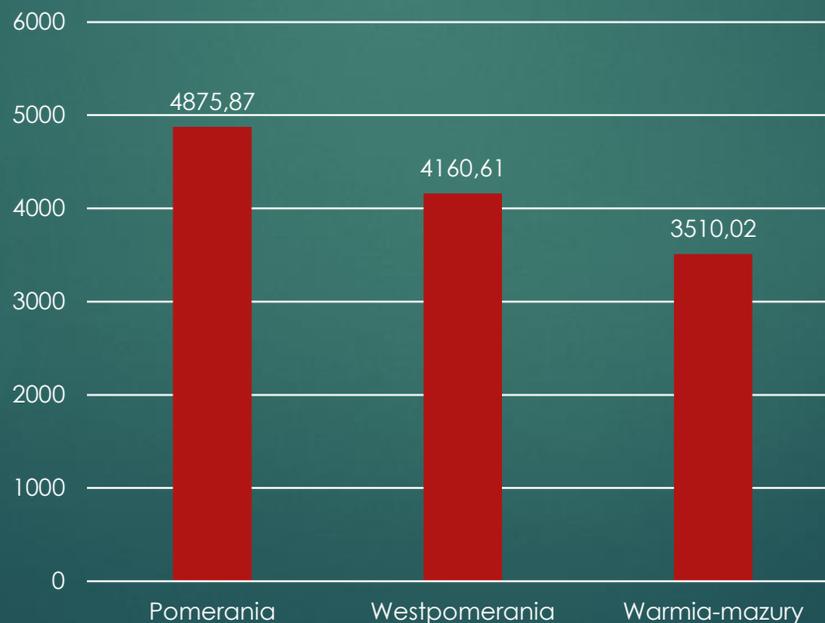
MARITIME ECONOMY IN SEASIDE VOIVODSHIPS

Maritime economy entities

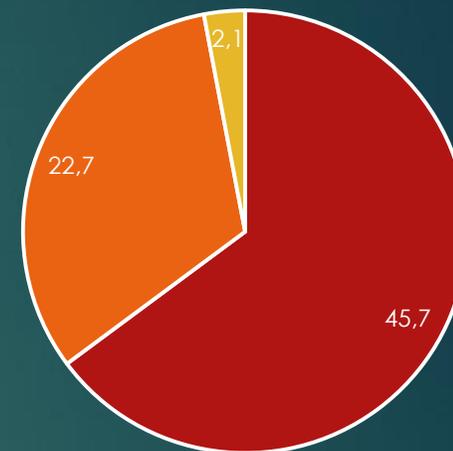


■ Pomerania ■ Westpomerania ■ Warmia-mazury

Average monthly gross wage and salary in maritime economy in zł



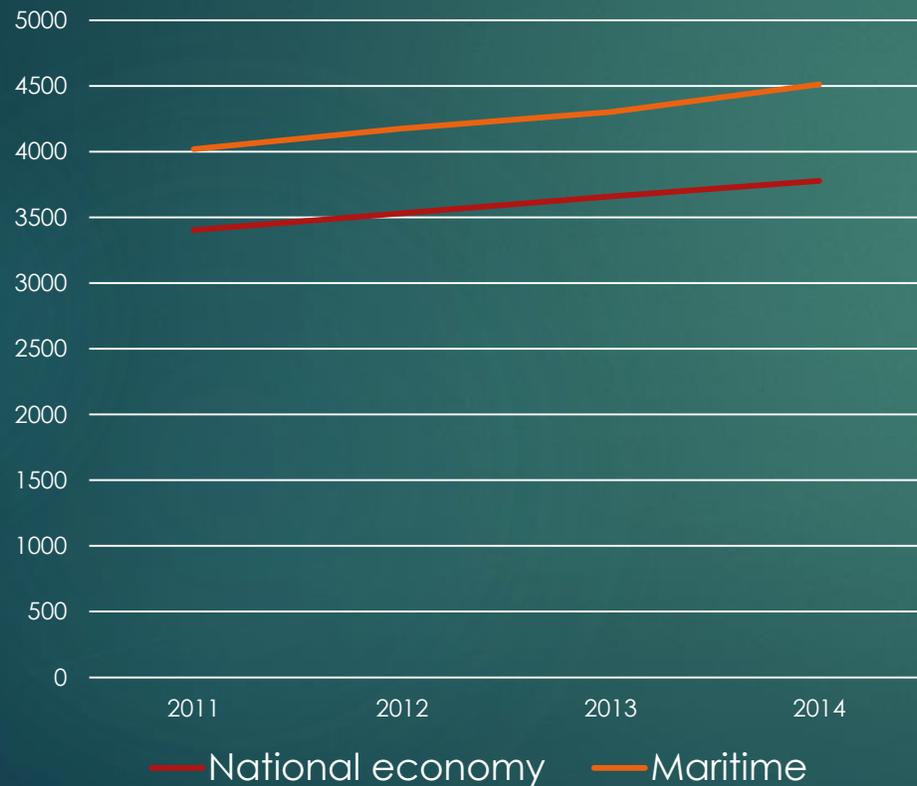
Persons employed in maritime economy (thous.)



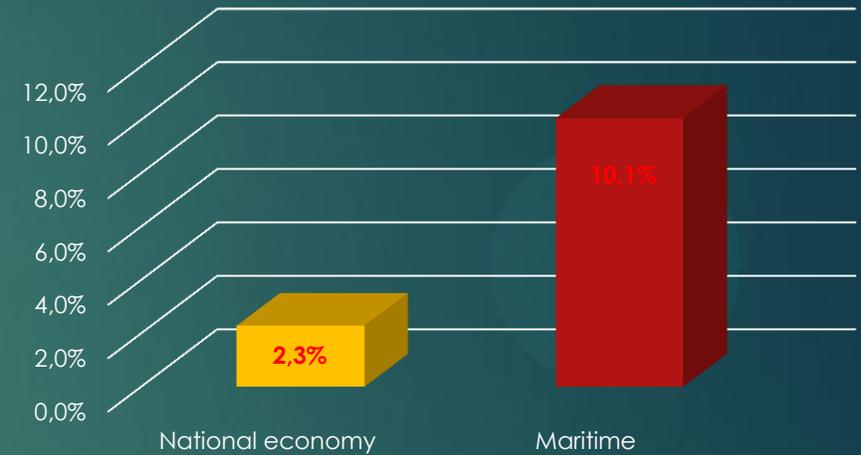
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MARITIME vs. NATIONAL ECONOMY

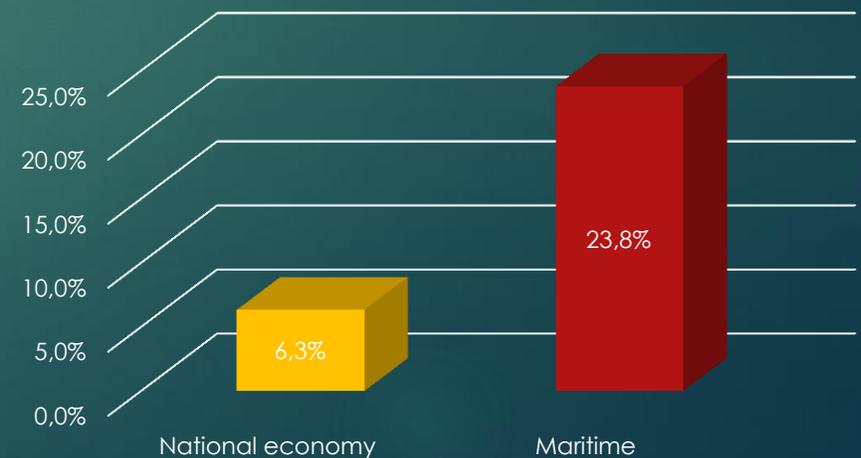
Average monthly gross wages



Employment growth (2011-2014)

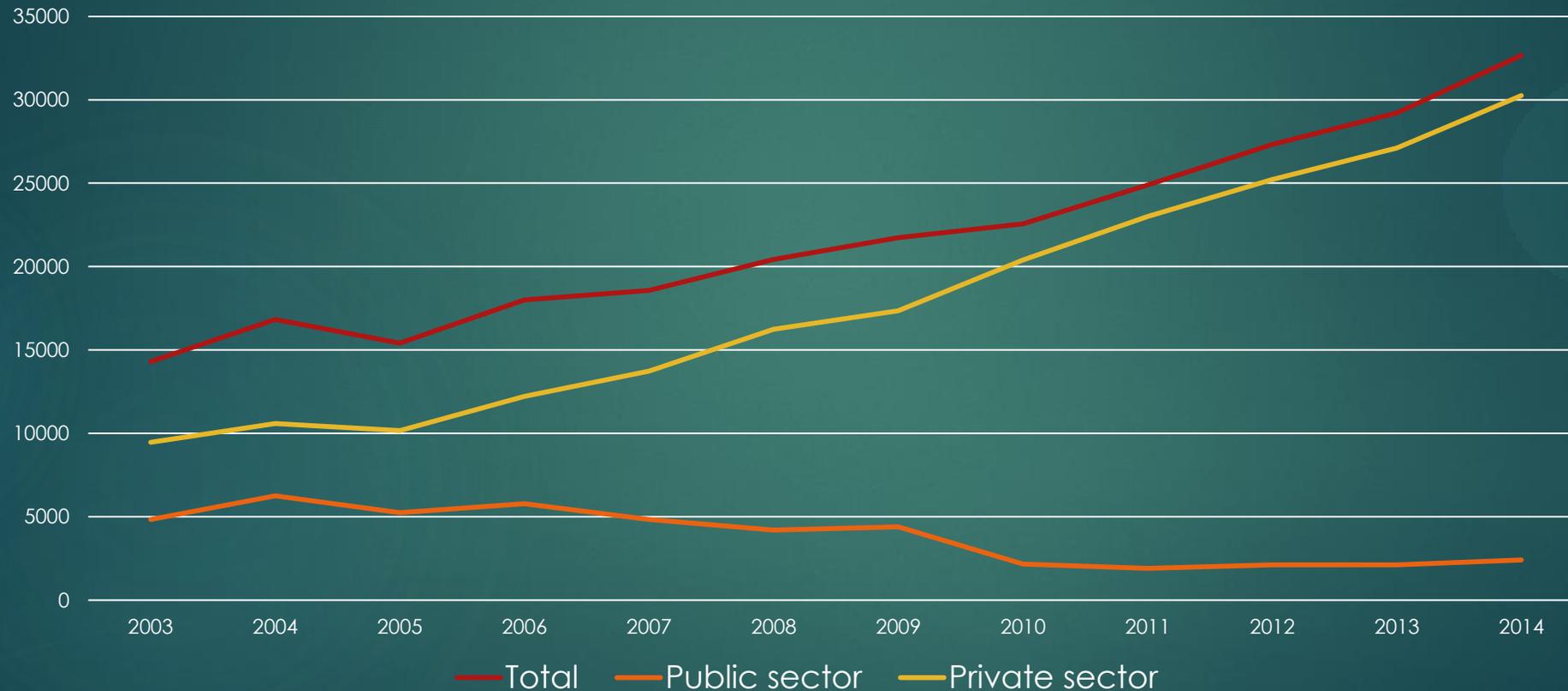


Revenues growth (2011-2014)



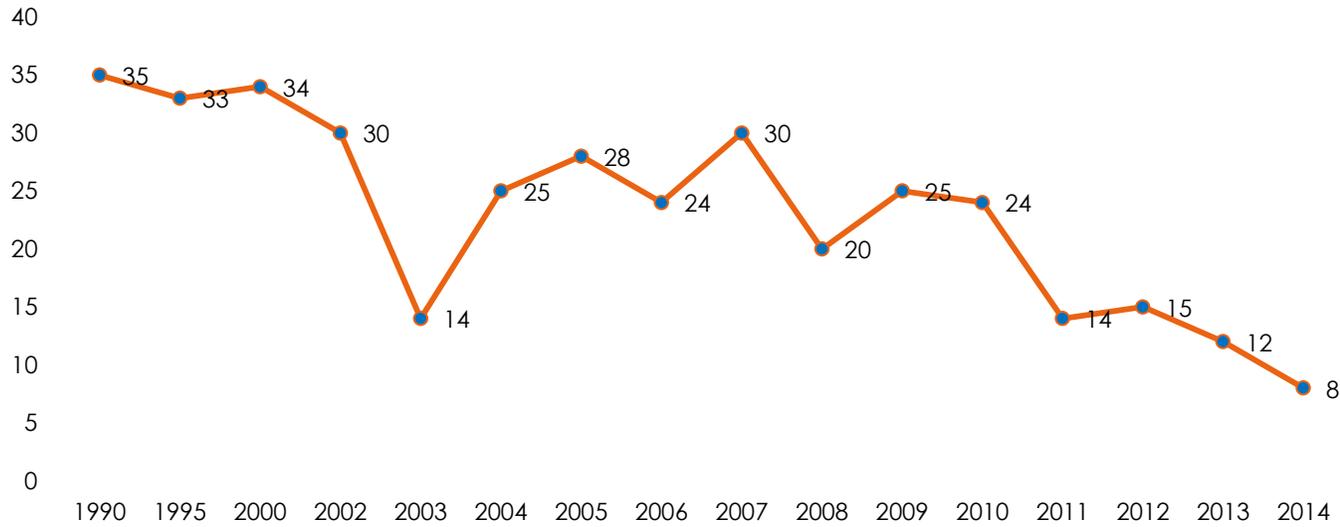
Restructurisation and growth in the private sector

Revenues in maritime economy

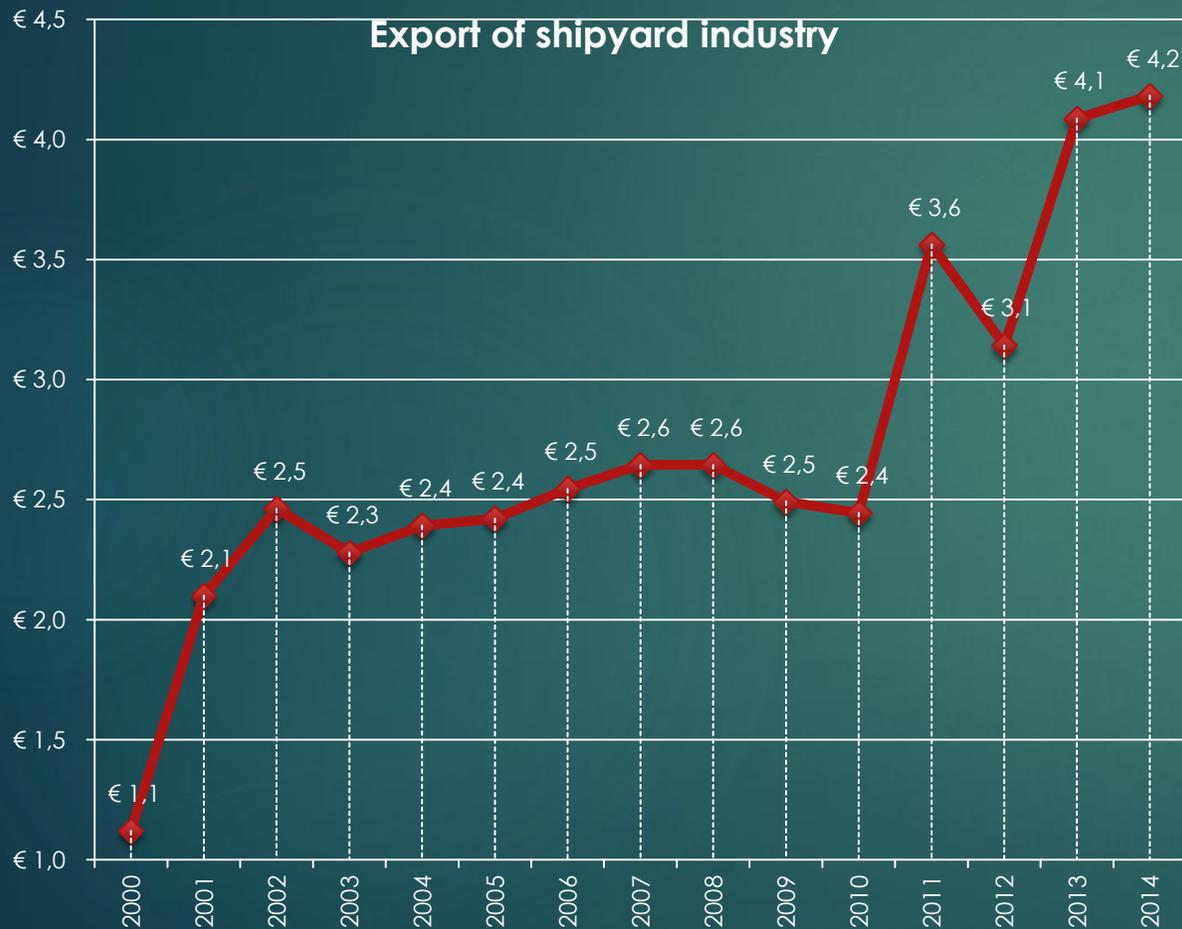


Changes in the shipyard industry

Shipbuilding - completed sea-going vessels



Development of the shipyard industry



- ▶ Privatisation, restructuring and growth in the private sector
- ▶ Revitalization of infrastructure of state owned shipyards
- ▶ Growth of the offshore market
- ▶ Development of design companies based on qualified personnel

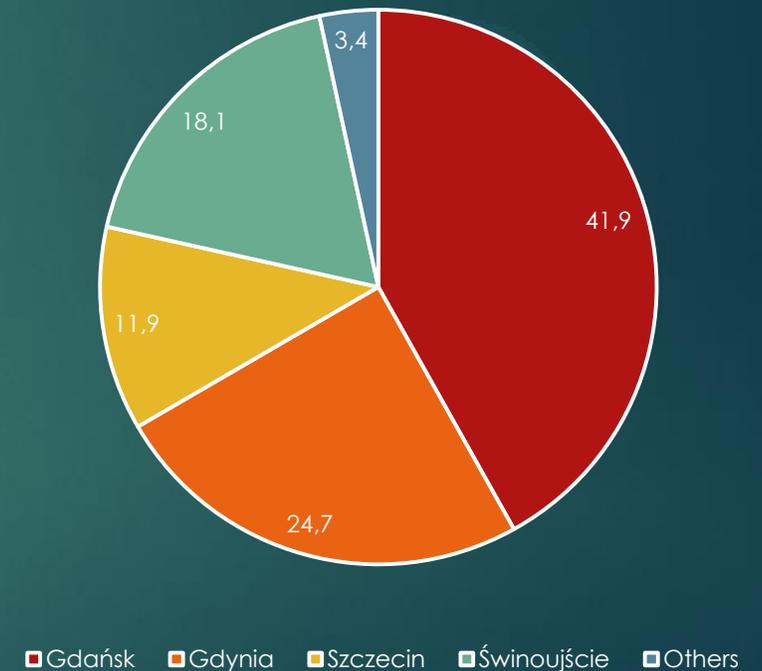
Development of maritime logistic

- ▶ Restructurisation of port management entities
- ▶ Privatization of logistic terminals
- ▶ Foreign investors and new logistic infrastructure
- ▶ Access infrastructure to the ports,

Cargo traffic (in thous. tonnes)



Ports by share in total cargo traffic (2014)



Smart specialization

- ▶ Exploitation of marine resources
- ▶ Vehicles and vessels to be used in the marine environment
- ▶ Monitoring and cleaning the marine environment
- ▶ Technologies for utilizing compounds produced by marine organism
- ▶ Improving the safety and efficiency of transport and logistics services in ports

Challenges

Shipyard industry

- ▶ Low margins in part of the sector of shipbuilding
- ▶ Research & development and cooperation with the R&D sector
- ▶ Slowdown in the offshore drilling market
- ▶ Suppliers development

Logistic

- ▶ Infrastructure – access to the ports
- ▶ Gateway to the CEE
- ▶ Economic slowdown

Thank you!

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