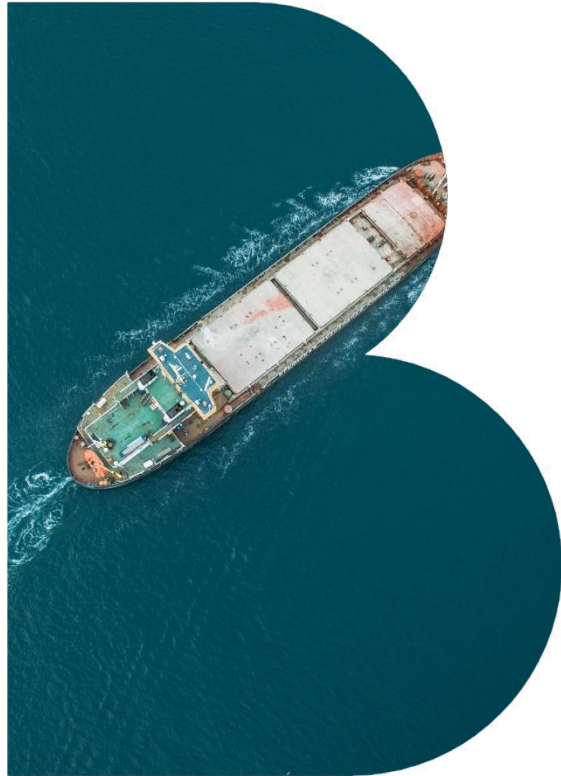
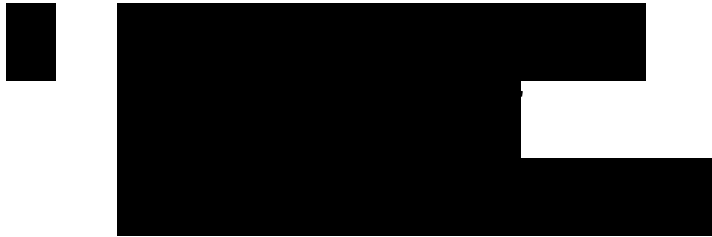




Содержание Стр.

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Prerequisites for the development of shipbuilding in Ukraine

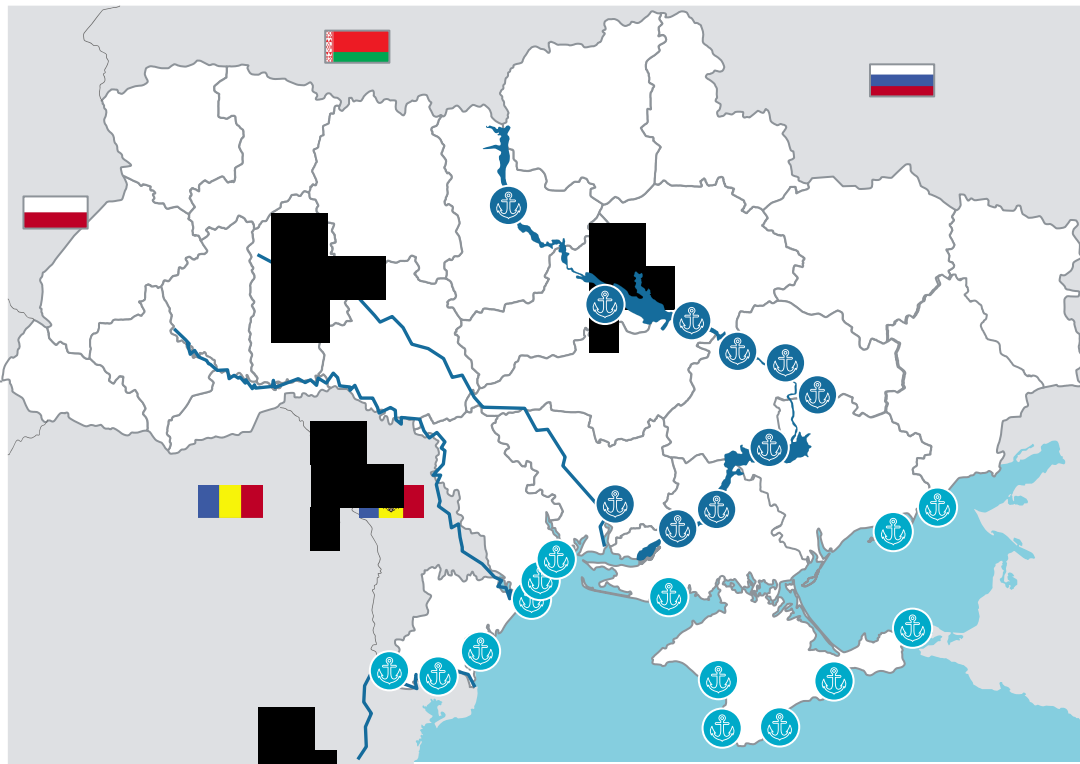
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Key facts about Ukraine's water resources and infrastructure

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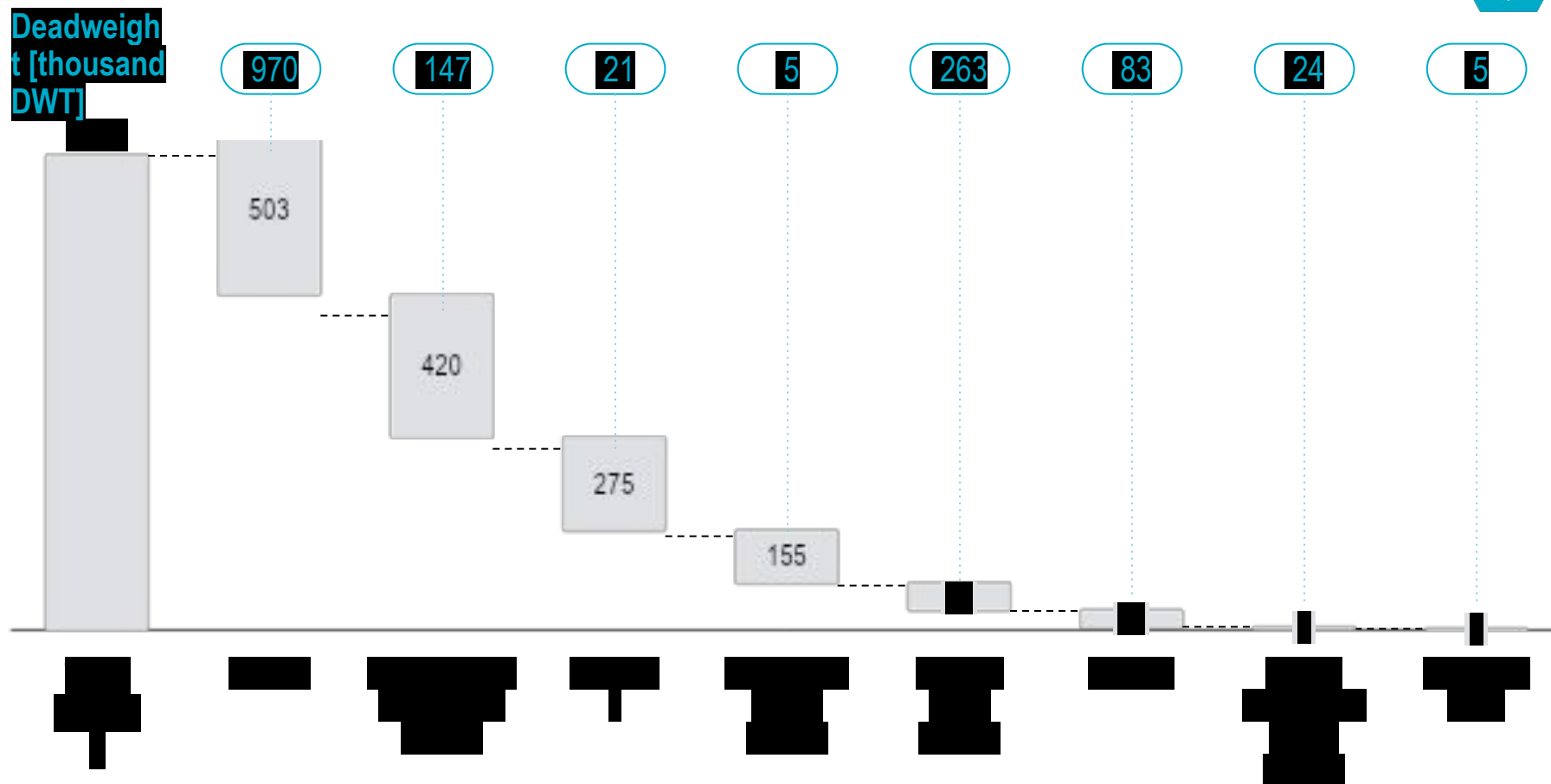


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Key Facts

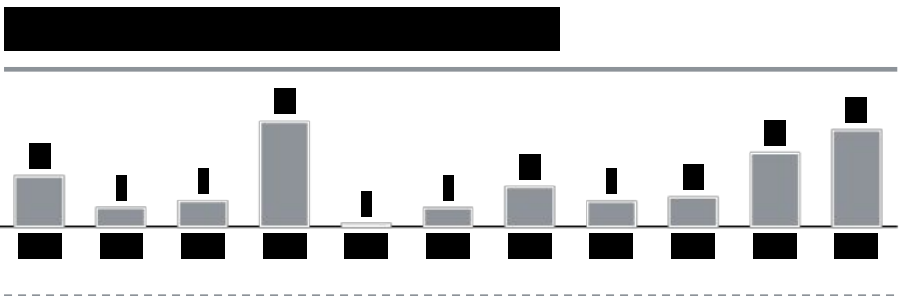
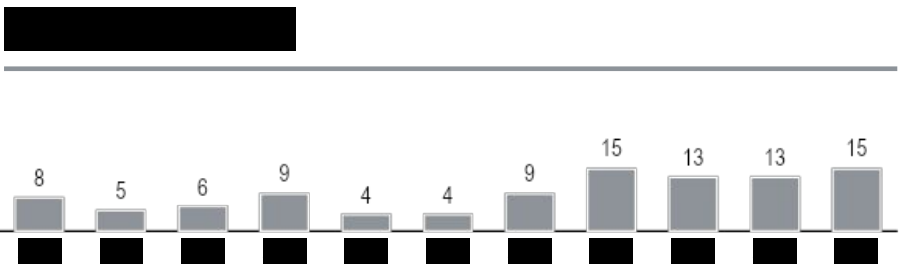
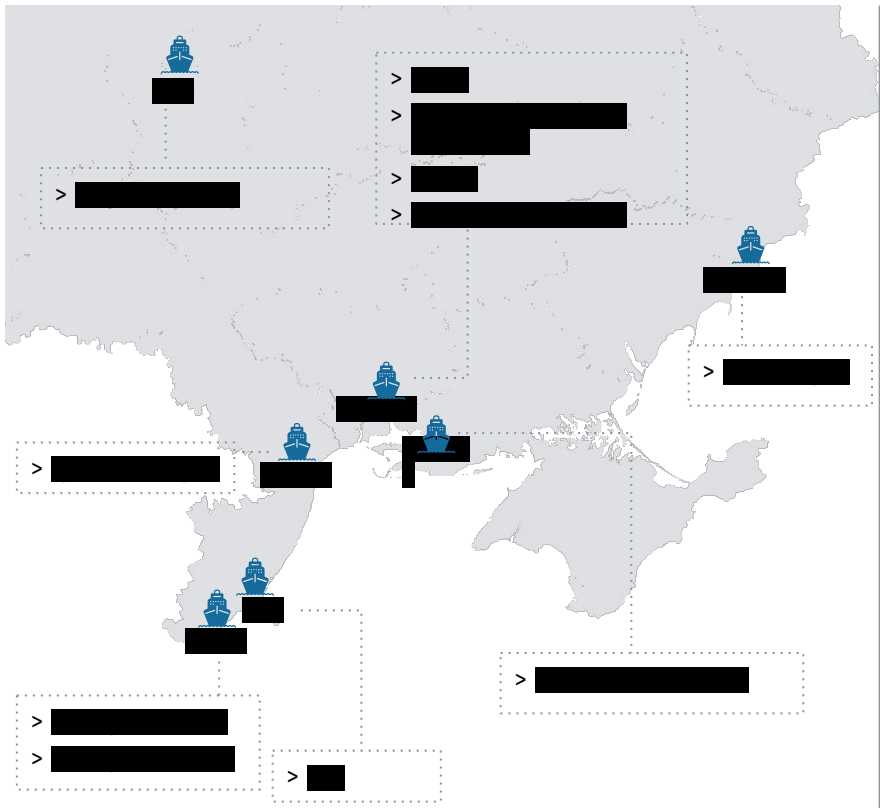
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Structure of the Ukrainian fleet by type of vessel [pcs., thousand DWT]



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Civil shipbuilding and ship repair clusters of Ukraine³⁾



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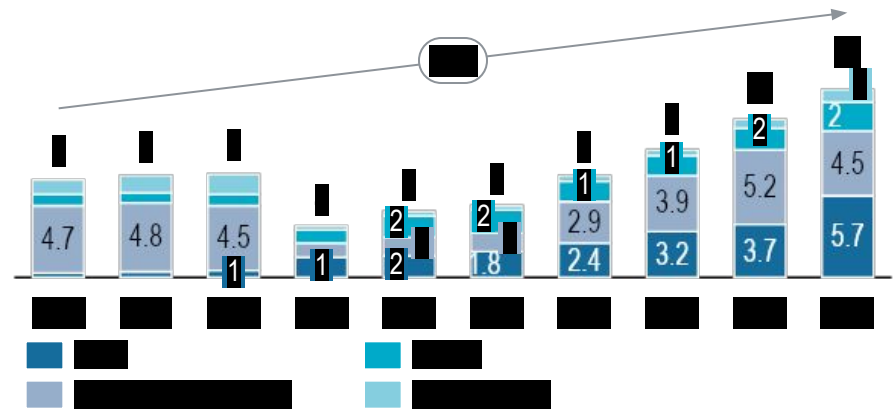
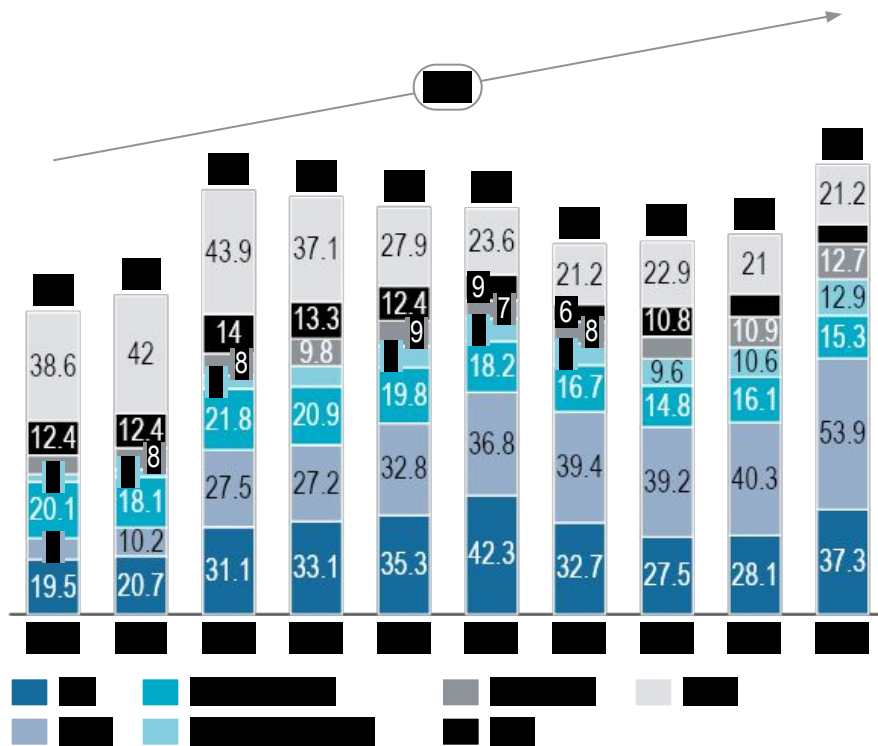
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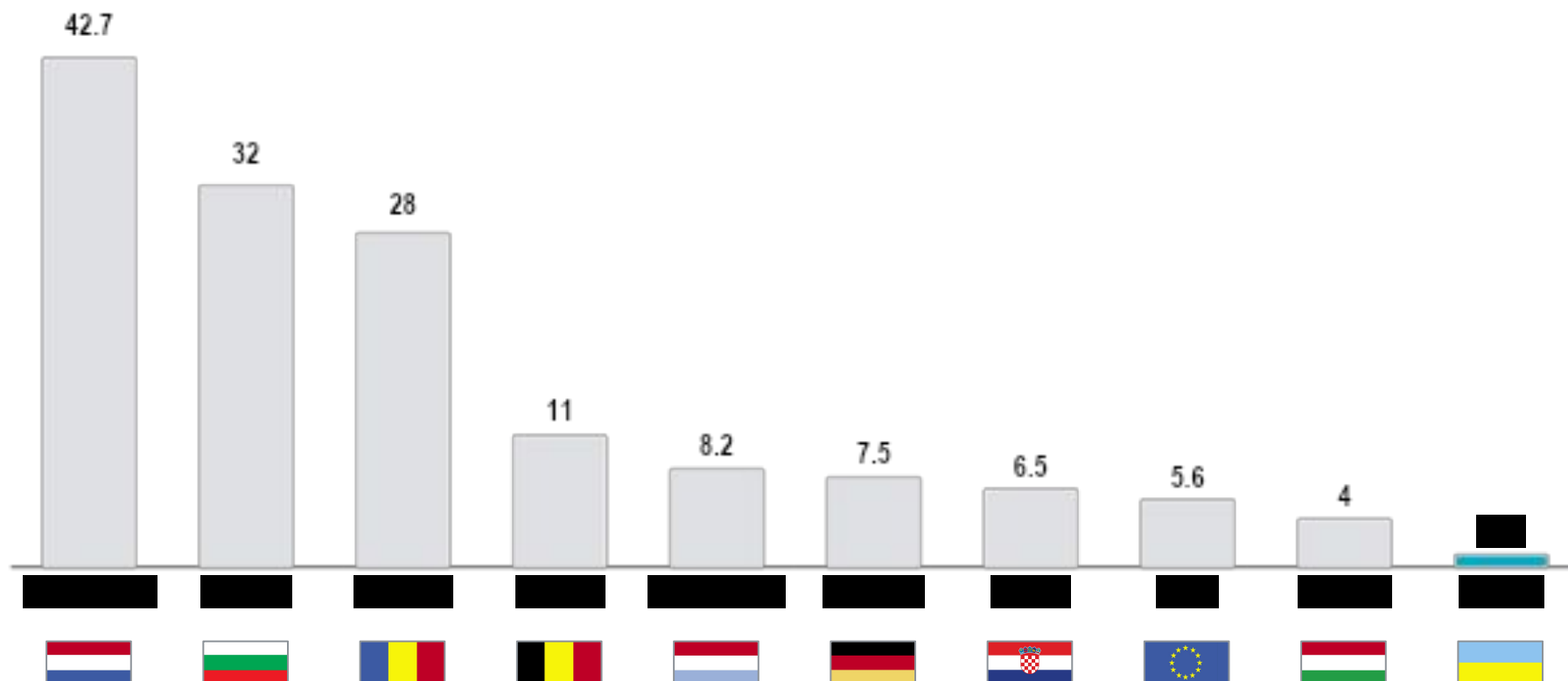
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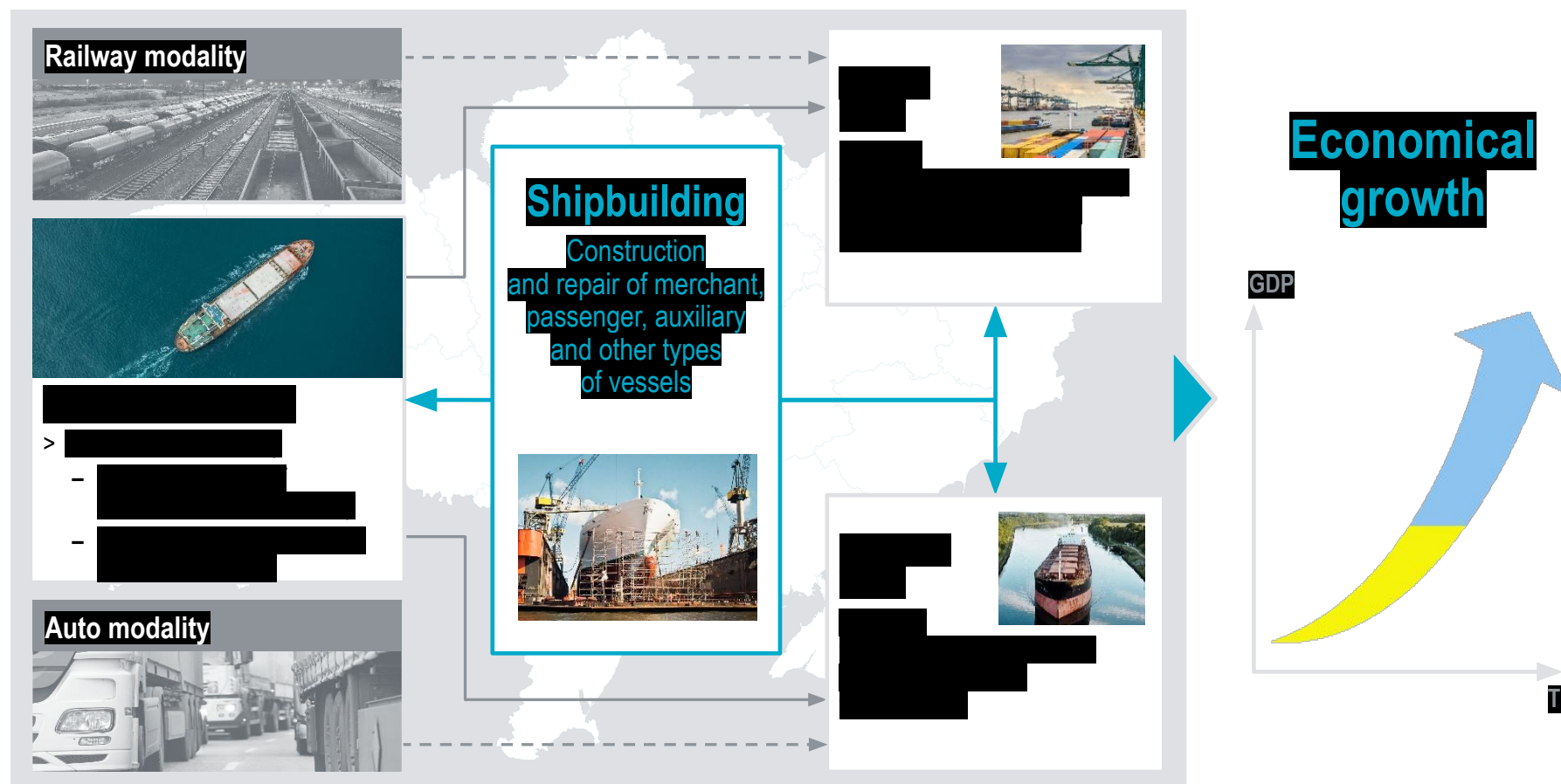
Key facts about Ukraine's water resources and infrastructure

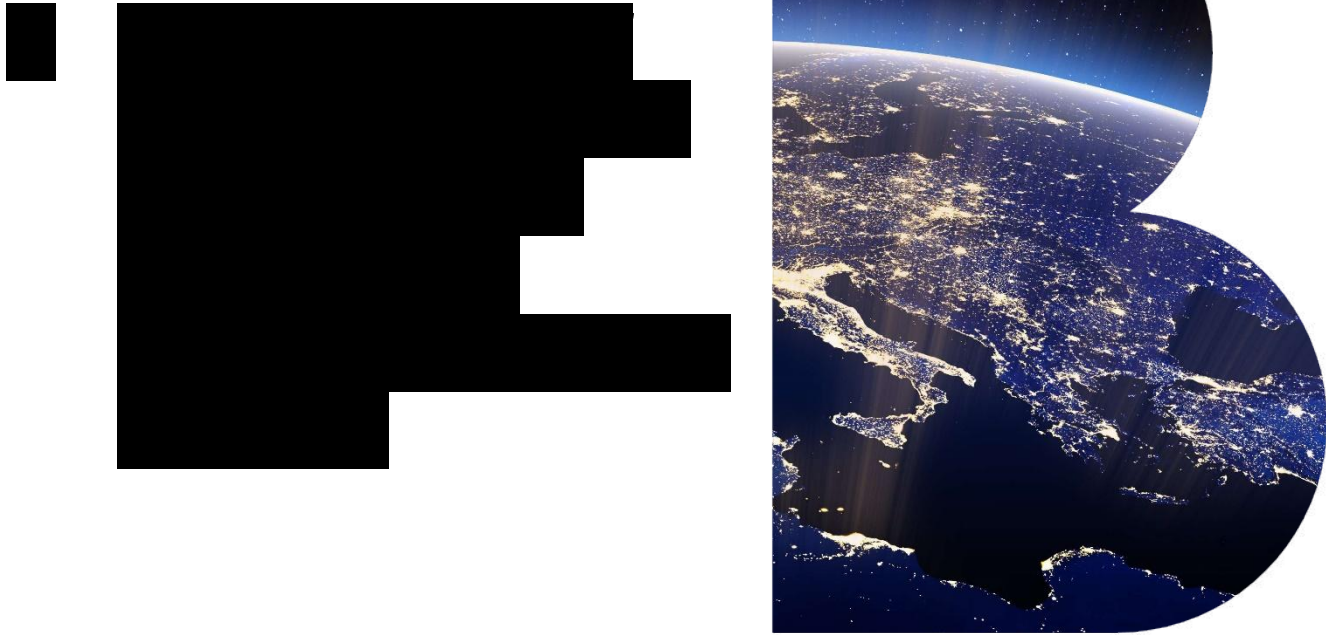


The share of inland water transport¹⁾ in the volume of domestic shipments in 2019 [%]²⁾



Shipbuilding - Factor In The Development Of Infrastructure And Trade In Ukraine





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Reasons for supporting the shipbuilding industry in other countries

Reason groups

Strategic

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Economic

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Synergies

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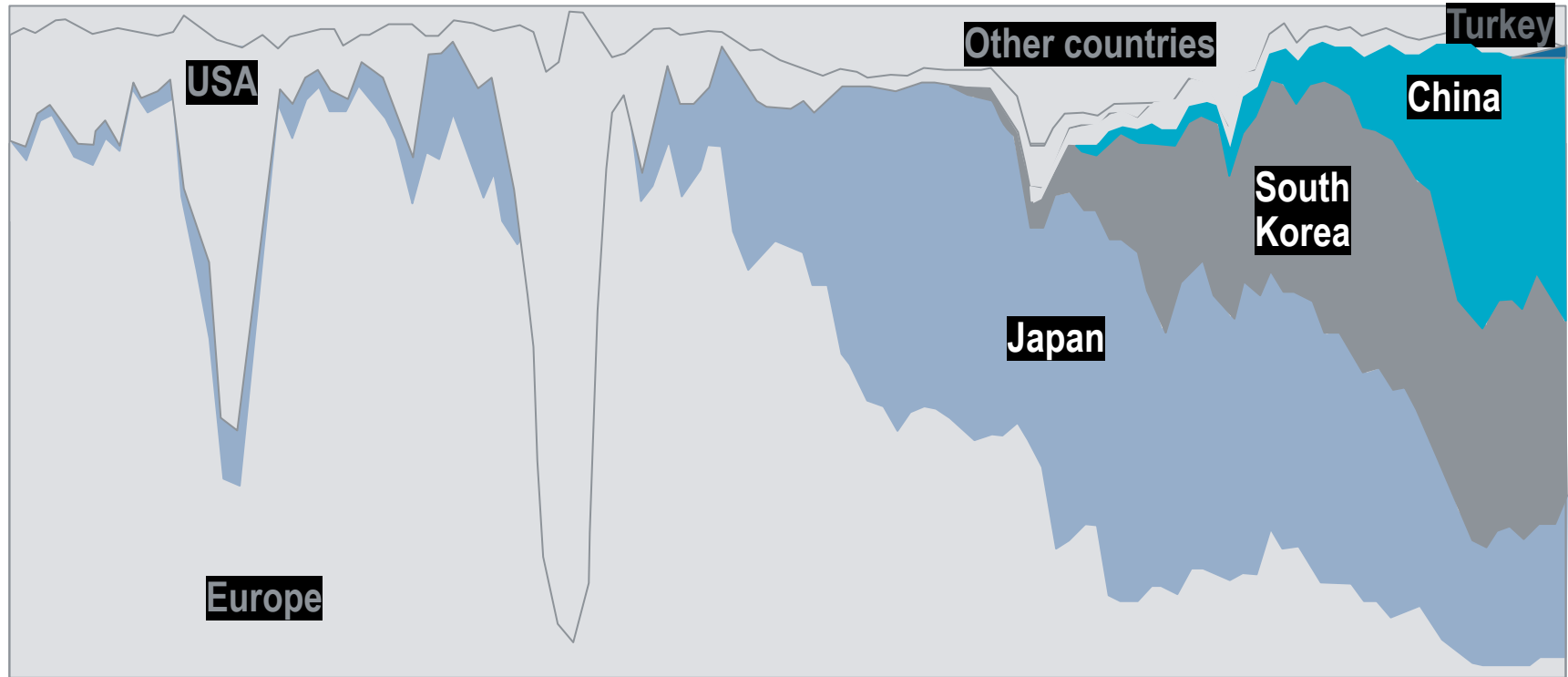


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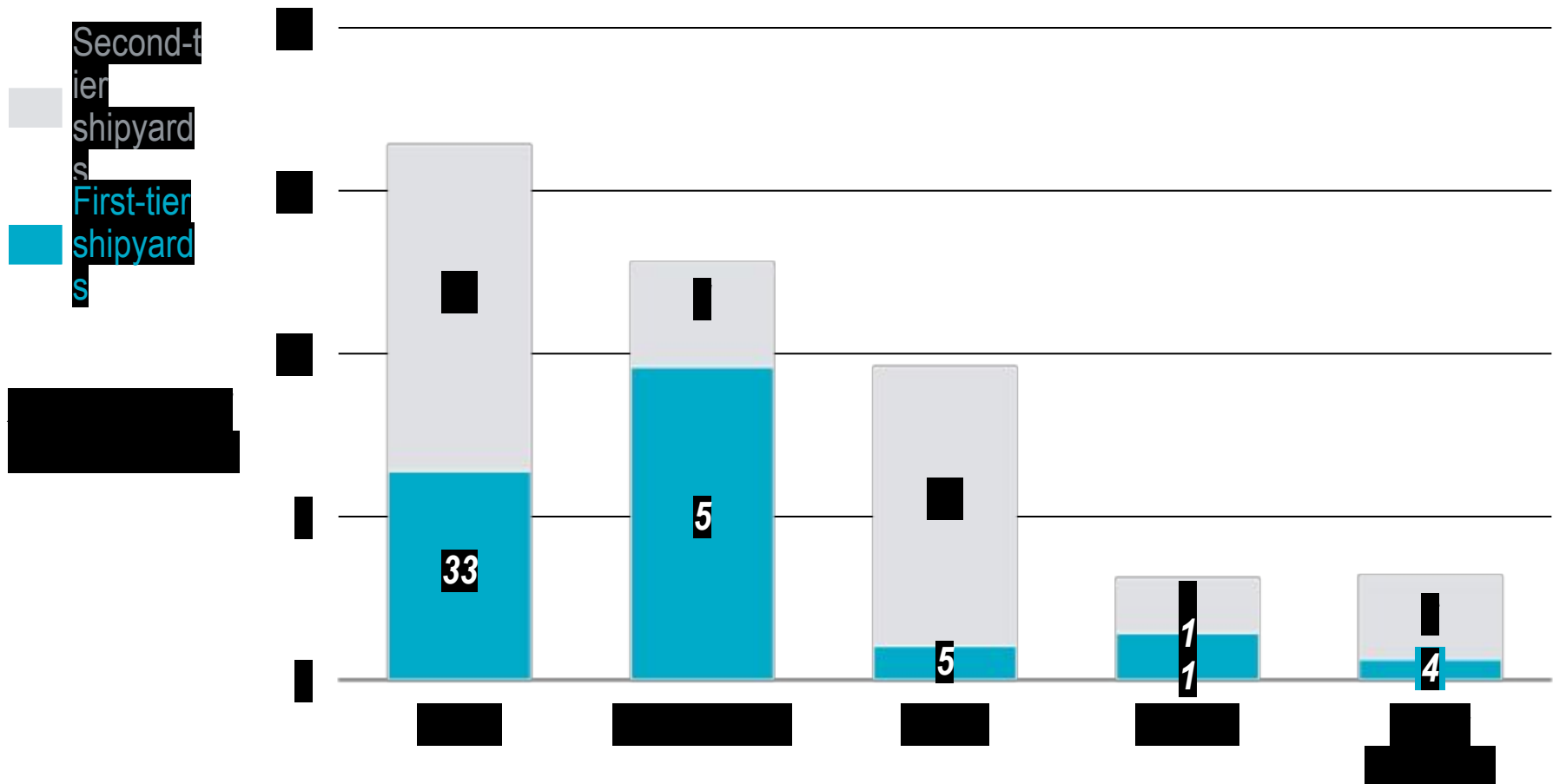


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Historical distribution of shares in shipbuilding among countries of the world (GT)




Number of active shipyards and production capacity [million CGT, pcs.]

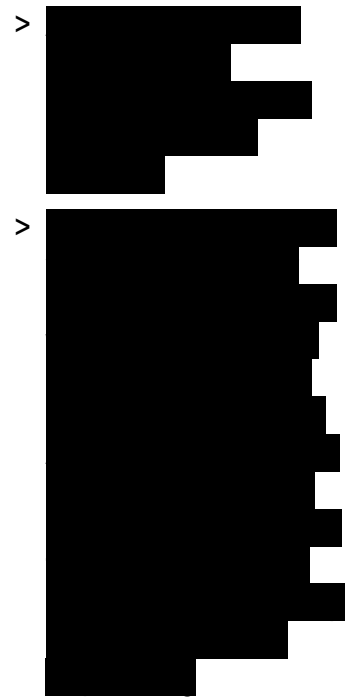




Number of employees in the shipbuilding and ship repair industry of EU countries [thousand FTEs]

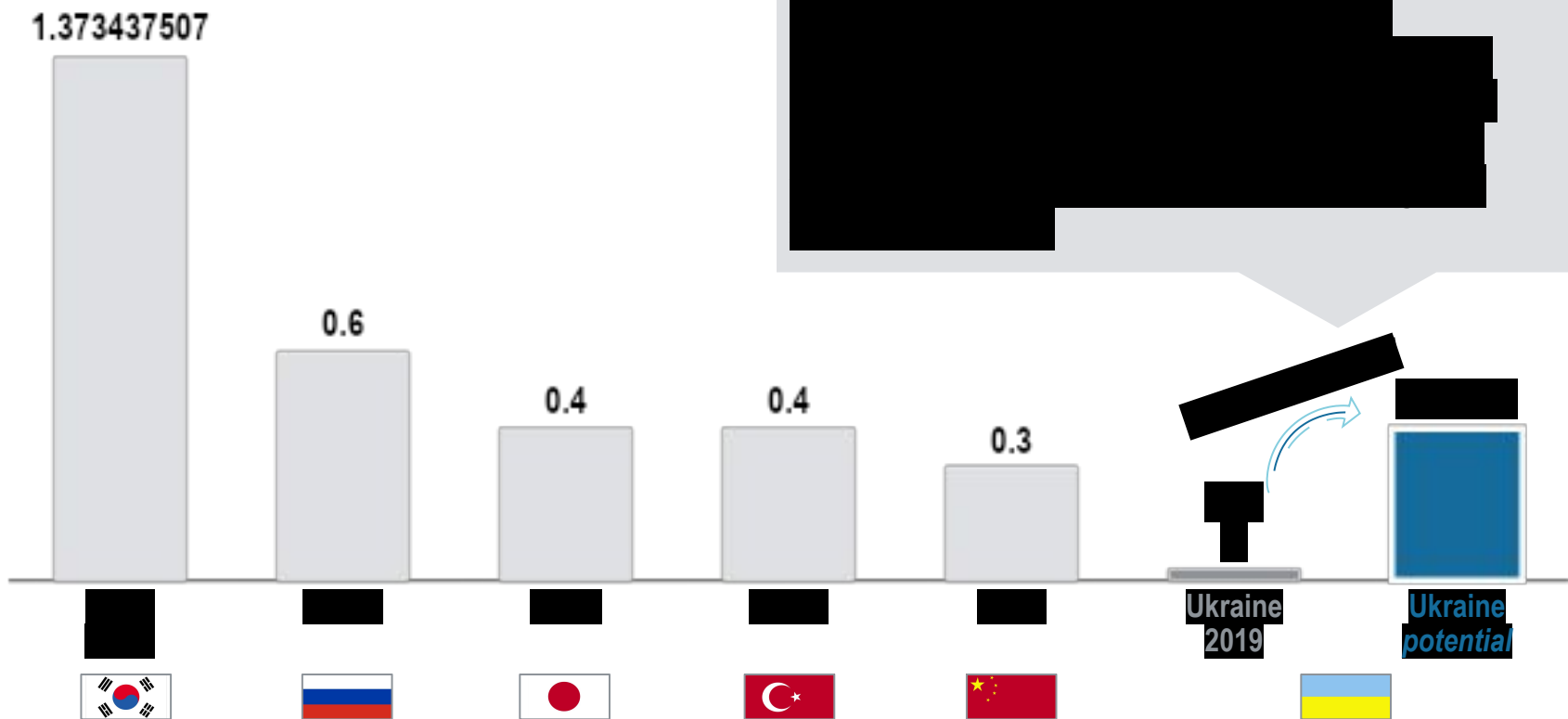


EU Country	2014	2015	2016	2017	2018	2019
Bulgaria	█	█	█	█	█	█
Croatia	█	█	█	█	█	█
Denmark	█	█	█	█	█	█
Finland	█	█	█	█	█	█
France	█	█	█	█	█	█
Germany	█	█	█	█	█	█
Greece	█	█	█	█	█	█
Italy	█	█	█	█	█	█
Netherlands	█	█	█	█	█	█
Norway	█	█	█	█	█	█
Poland	█	█	█	█	█	█
Portugal	█	█	█	█	█	█
Romania	█	█	█	█	█	█
Spain	█	█	█	█	█	█
Great Britain	█	█	█	█	█	█

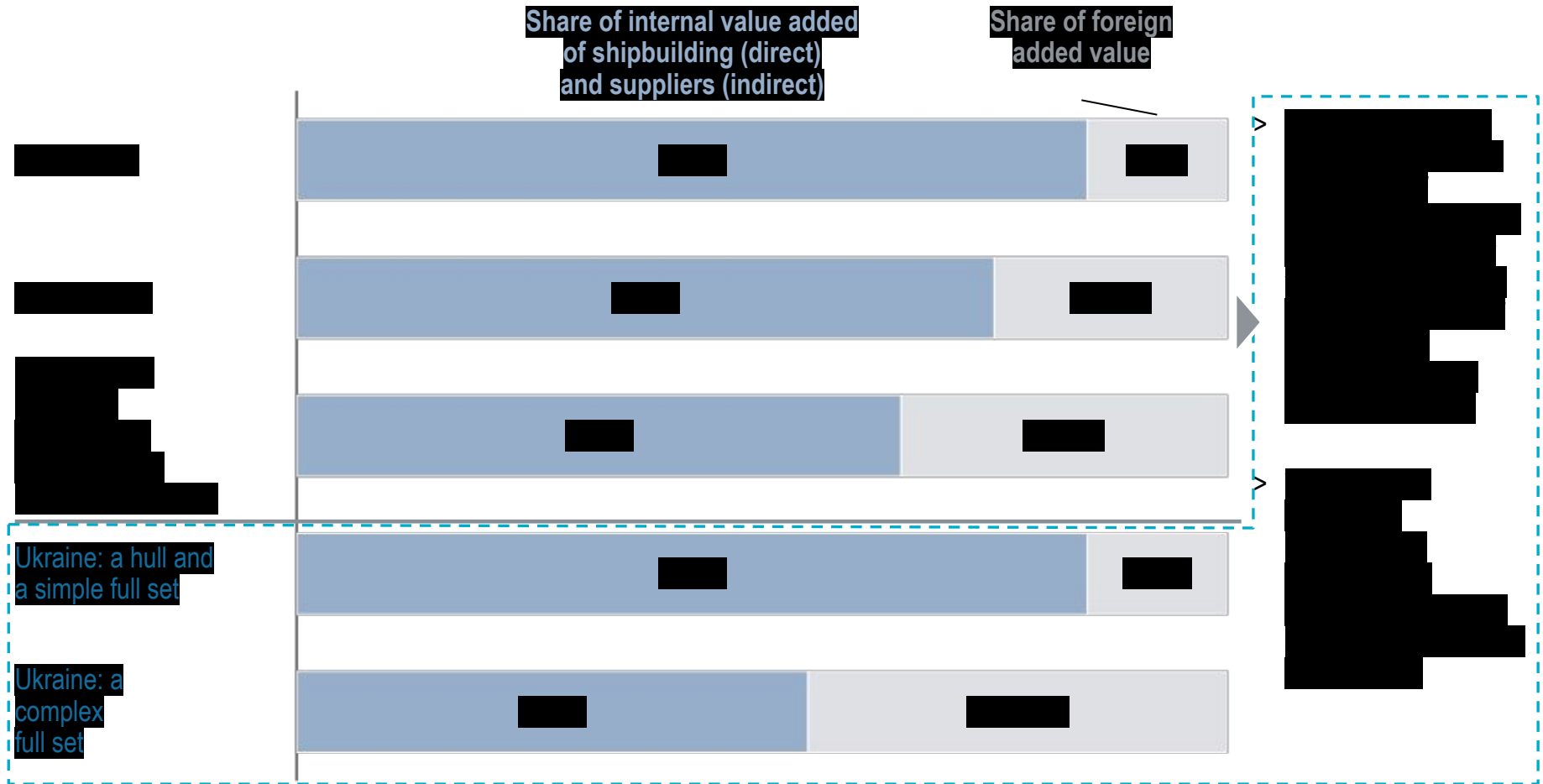


The number of employees in the EU shipbuilding industry is practically unchanged

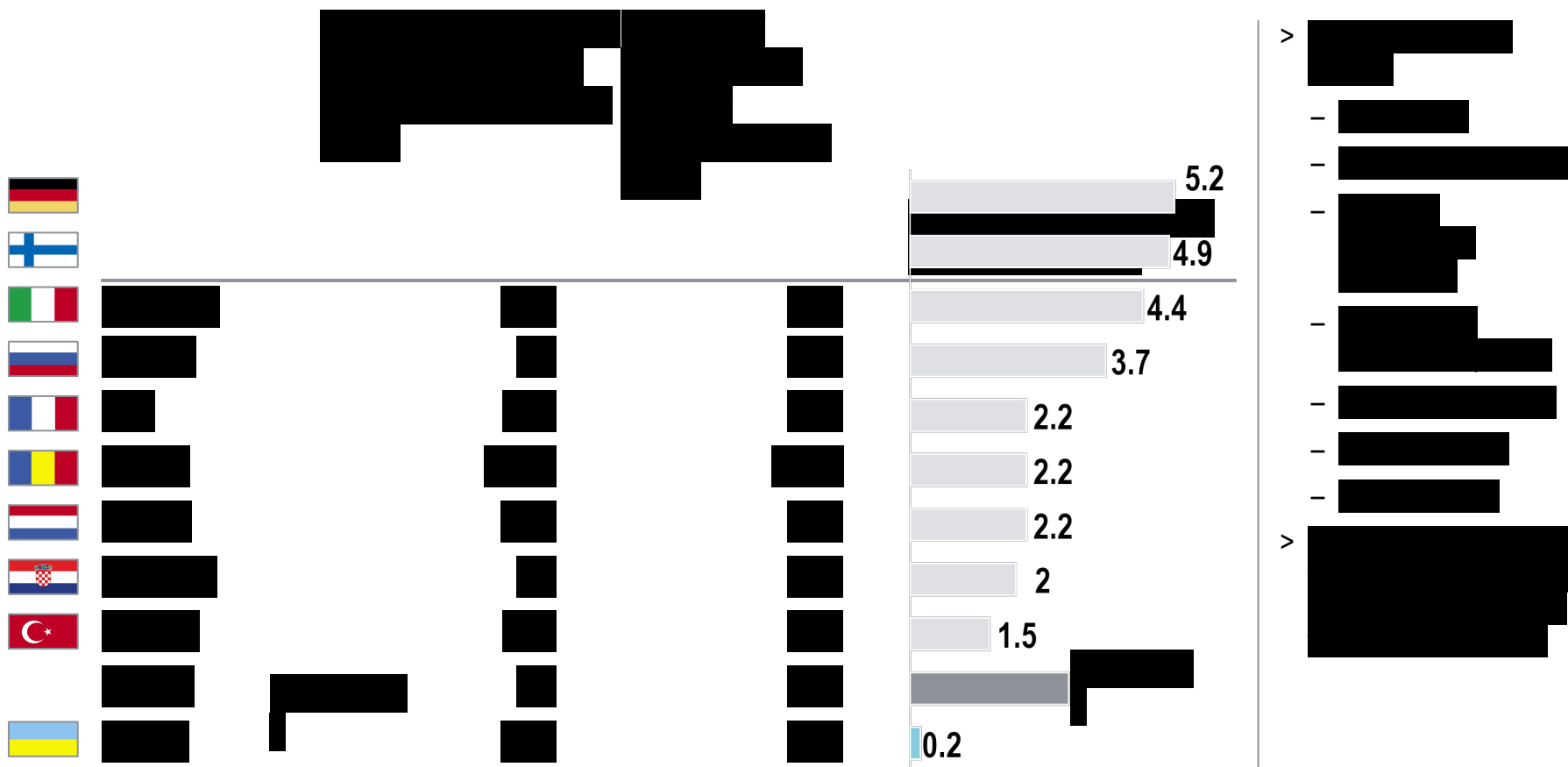
The direct contribution of the shipbuilding industry to the GDP of the world's leading countries [%]¹⁾, 2019



Foreign and local value added in shipbuilding ¹⁾ [%]



Multiplier effect of shipbuilding on workers in supplier industries



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- > the strategic importance of the industry
- > cover a long period



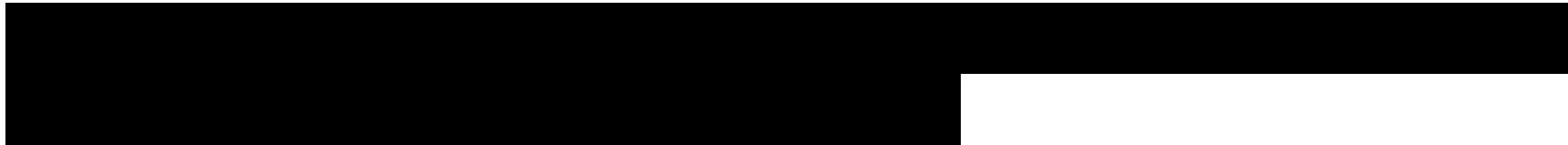
Sets the main directions and priorities of state policy in the development of the shipbuilding industry



Sets clear goals and indicators, deadlines for achieving goals, defines responsible agencies




Determines resources for implementation and their sources




State support for shipyards – selective


These figures are based on research (which is not exhaustive); the actual totals allocated over the decades are likely higher in most cases

5 **Turkey** 


- > [Redacted]
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4 **Russia** 


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1 **South Korea** 

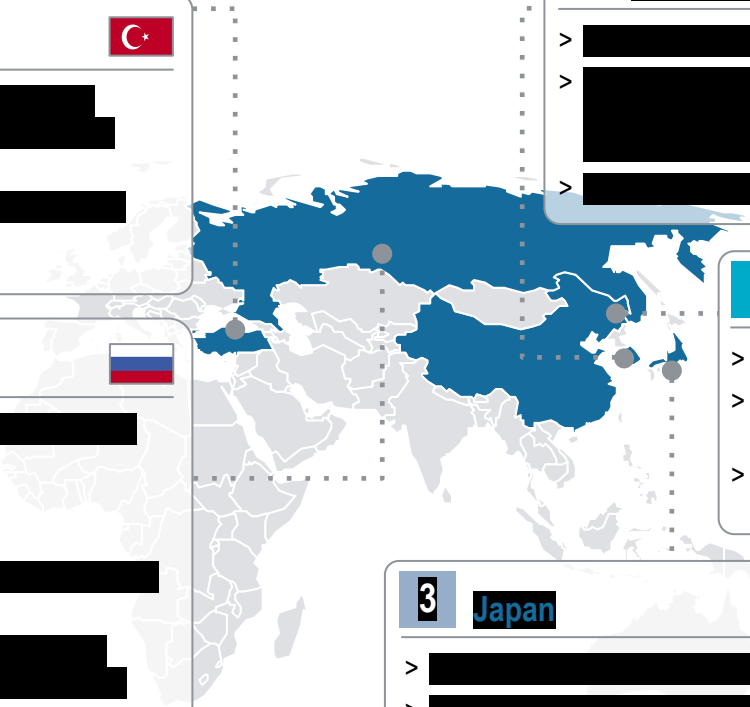
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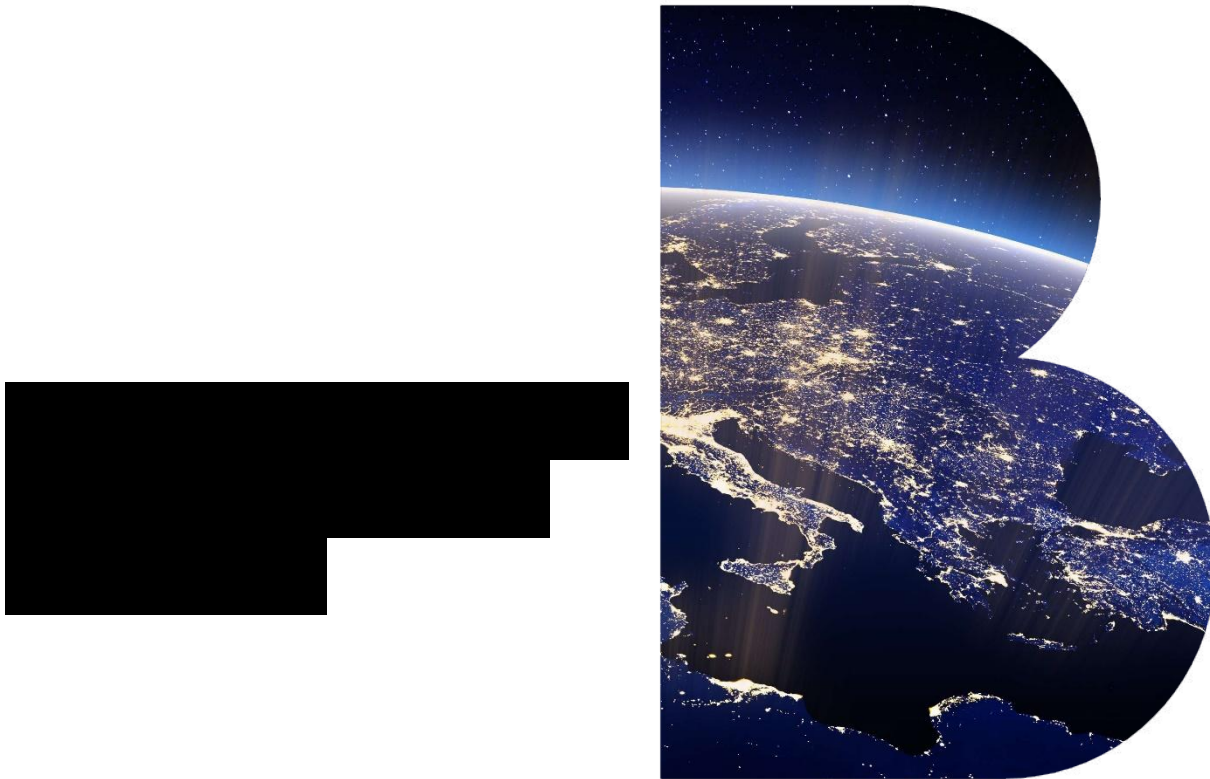
2 **China** 

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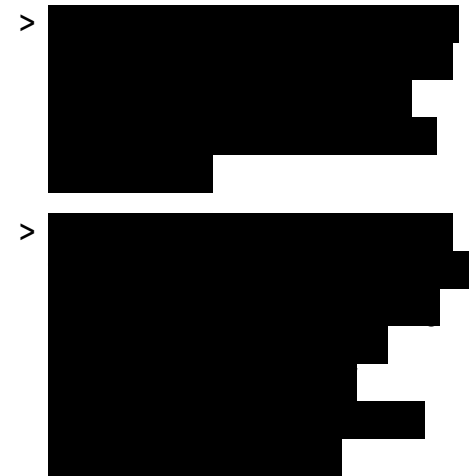
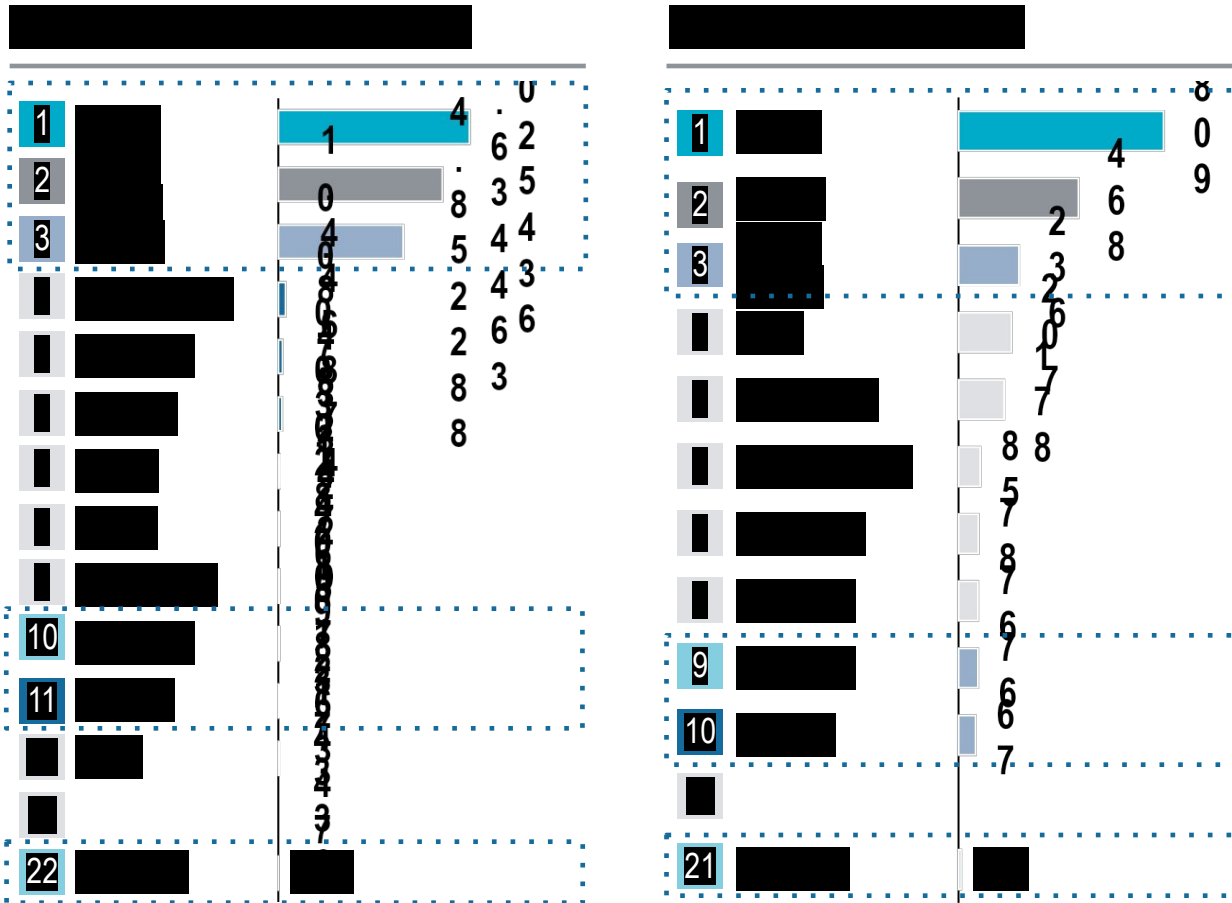
3 **Japan** 

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Leading countries in terms of vessels built in 2019²⁾



Review of National Strategies

> [Redacted]
 the strategic importance of the industry

> [Redacted] cover a long period

> Localization

[Redacted]	[Redacted]	[Redacted]	[Redacted]
1 [Redacted]		> [Redacted]	 Localization of defense capabilities (increased security)
2 [Redacted]		> [Redacted]	 Long-term contribution to GDP
3 [Redacted]		> [Redacted]	 Job creation (direct and indirect)
4 [Redacted]		> [Redacted]	 Significant spillover effects on other industries
5 [Redacted]		> [Redacted]	

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The main reasons for the development and support of shipbuilding by the maritime powers

Protection of national interests
(relevant to China, Russia, Turkey)

1

Support and development of shipbuilding engineering with related industries
(relevant for all leading countries)

2

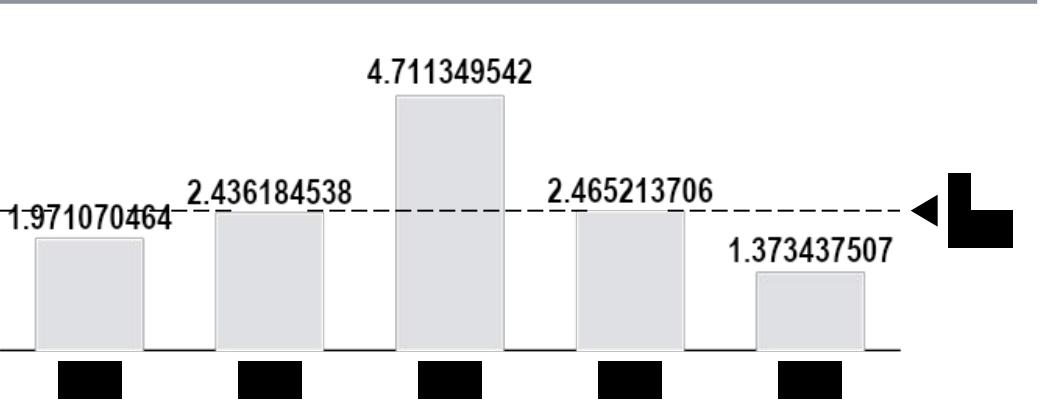
Supporting and enhancing foreign and domestic trade
(relevant for all leading countries)

3

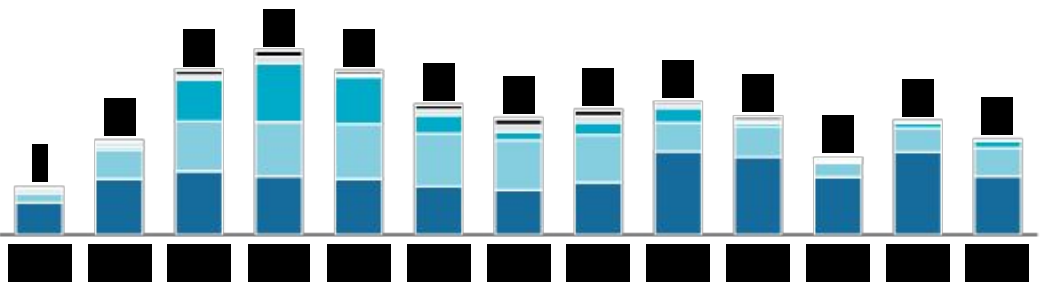
Key indicators of the volume and impact of the industry on the country's economy



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Success Factors in the Korean Shipbuilding Industry

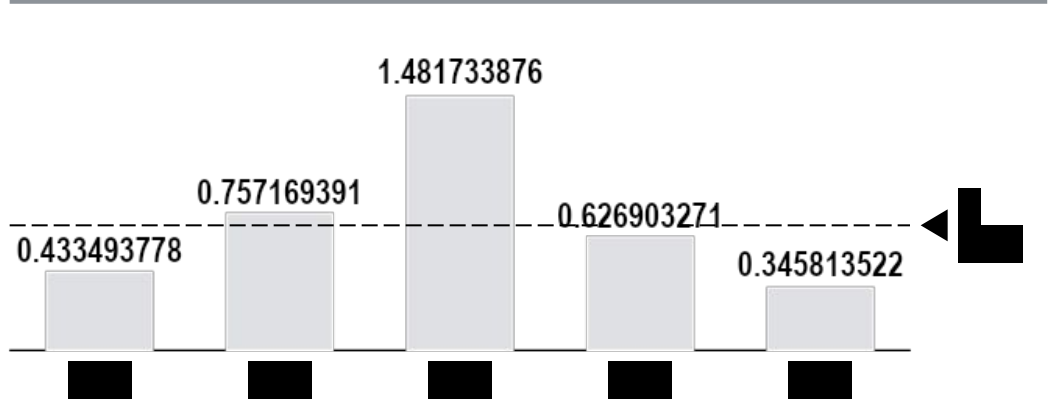


1	Political measures	
2	Relatively low wages	
3	Shipbuilding technologies	
4	Domestic demand	
5	State funding	
6	Steel industry cluster effect	
7	Robotics	
8	Consolidation of critical size clusters	
9	Qualified personnel	
10	Cooperation organizations	

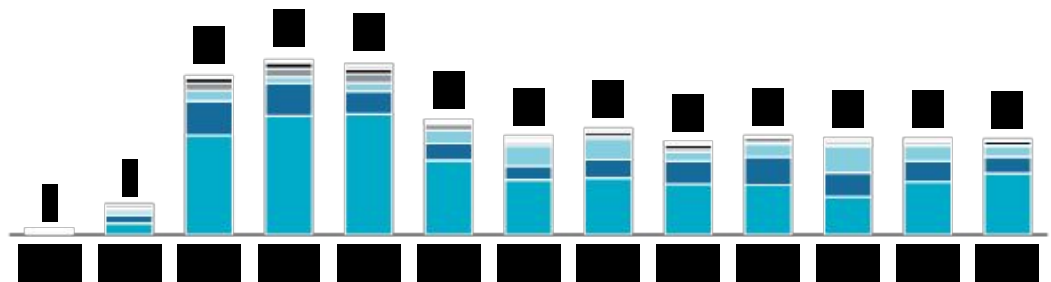
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Key indicators of the volume and impact of the industry on the country's economy

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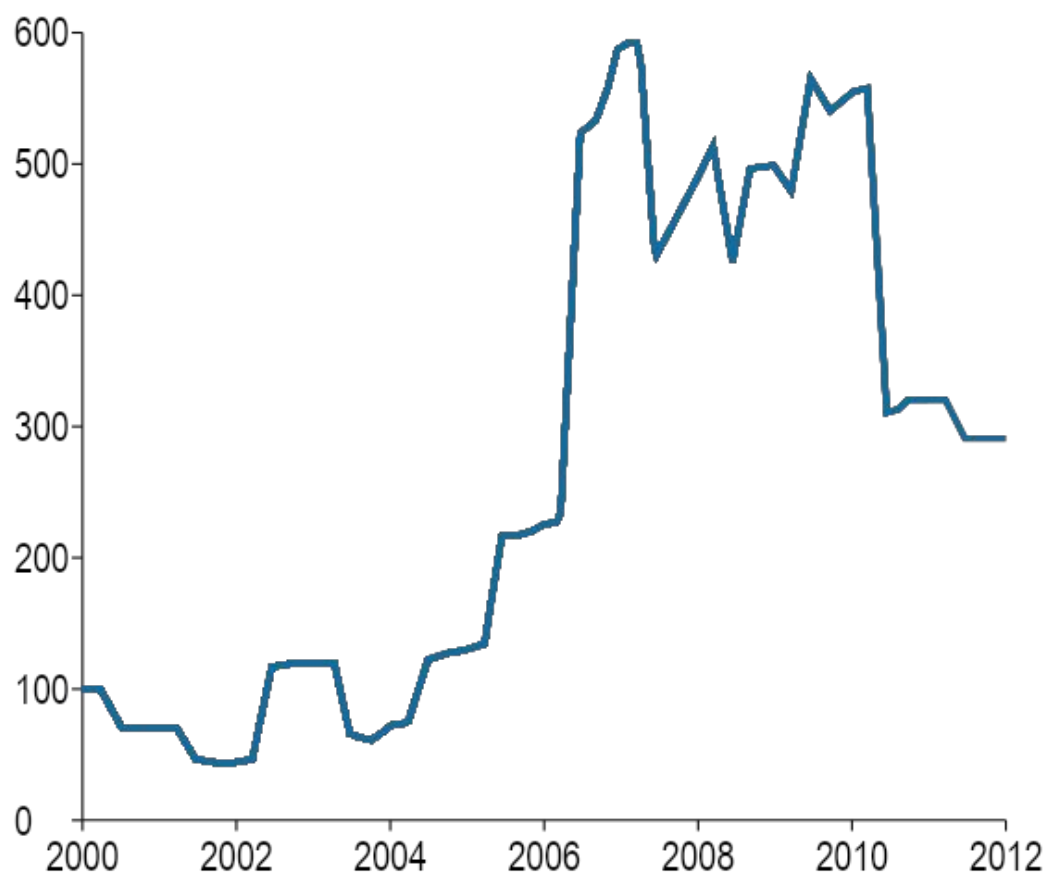
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Quarterly investments in Chinese shipyards [million USD]



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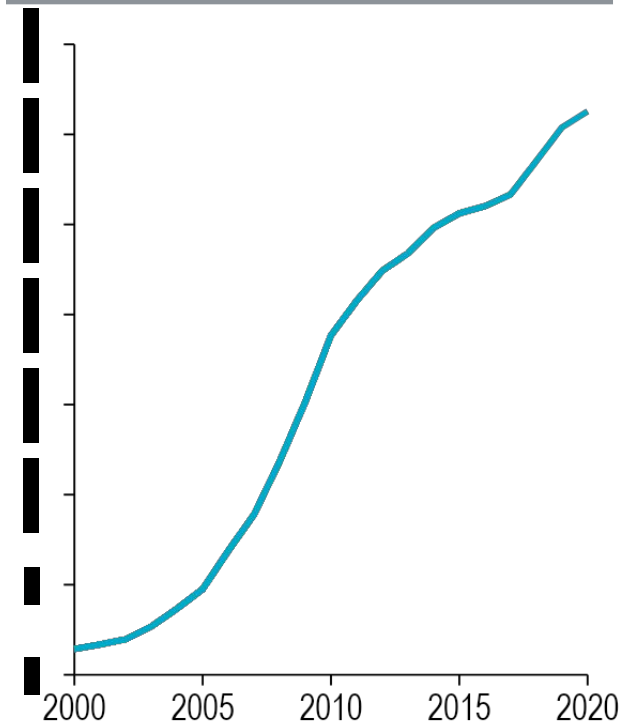
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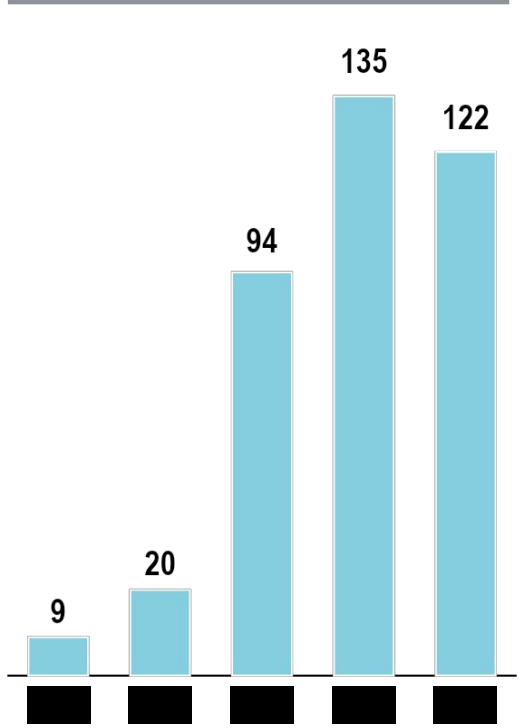
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Dynamics of production indicators by years

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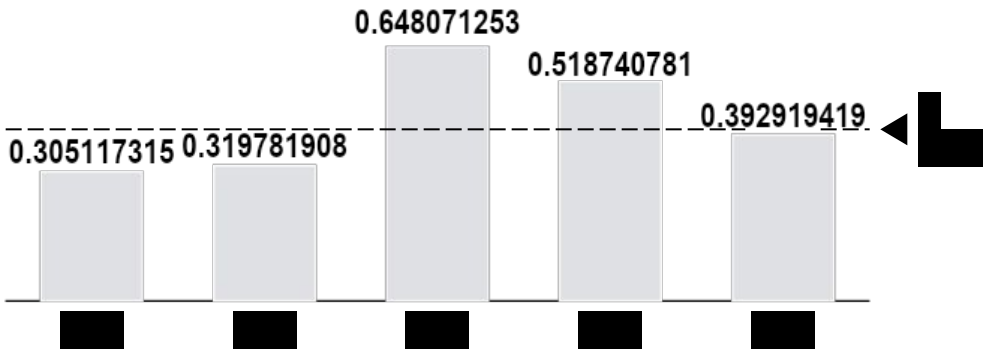
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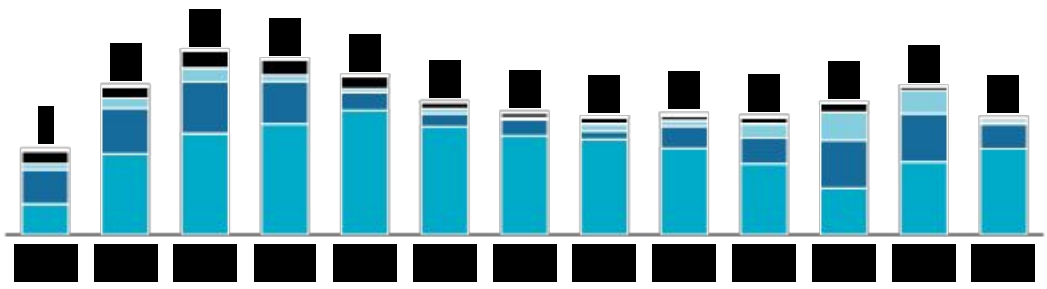
Key indicators of the volume and impact of the industry on the country's economy



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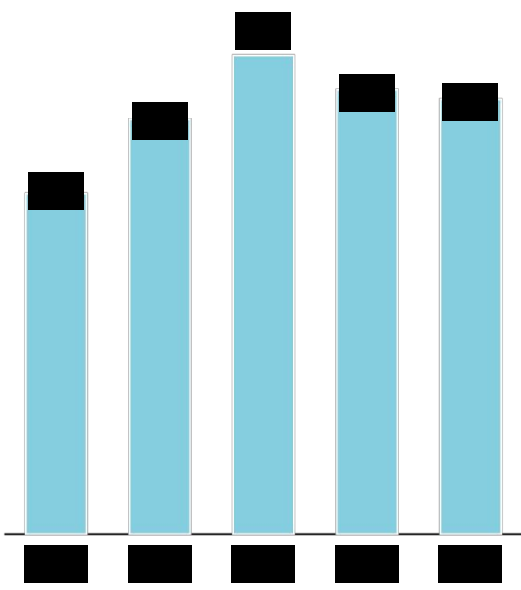
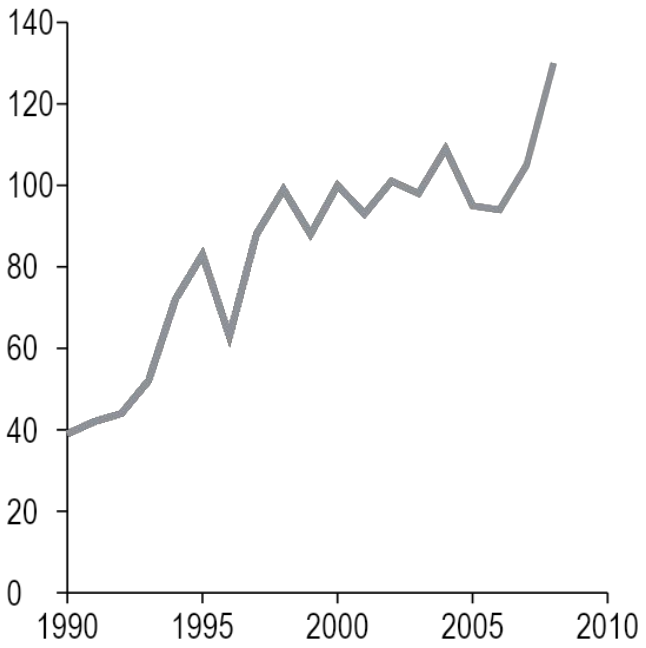
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Dynamics of production indicators by years



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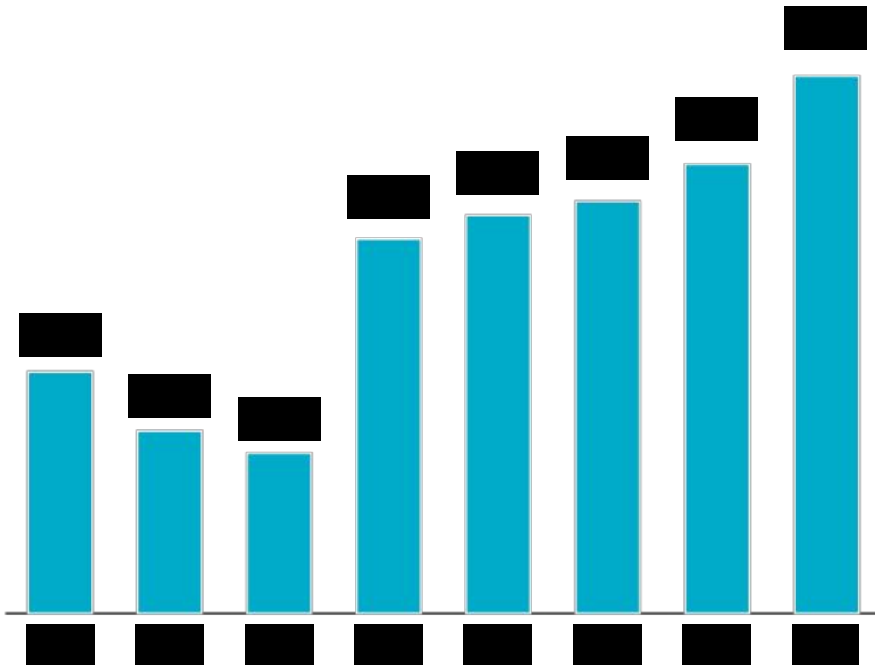
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An overview of major lending and grant instruments in Japan



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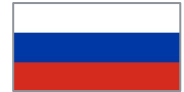


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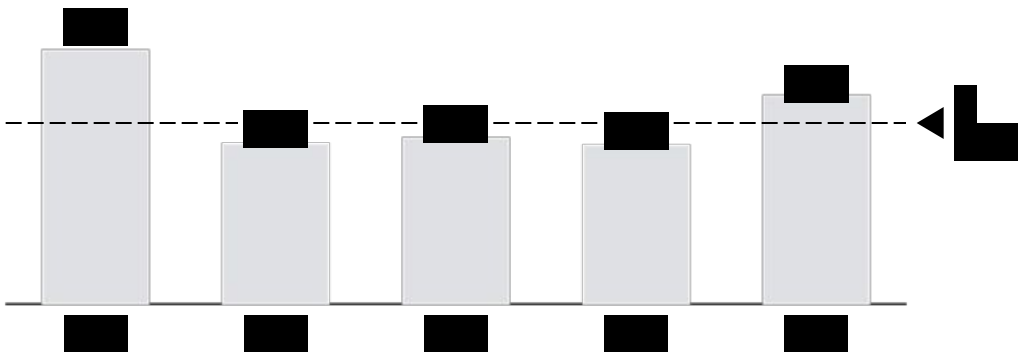
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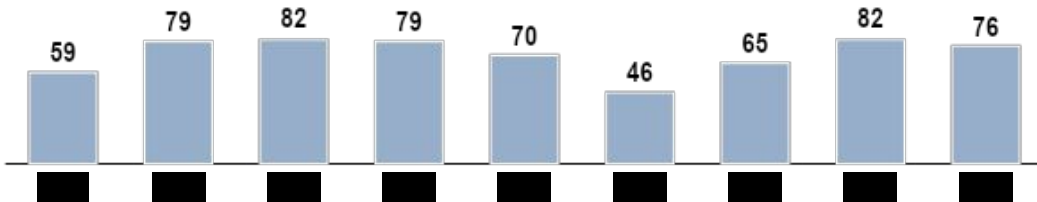
Overview of key industry indicators in Russia (1/2)



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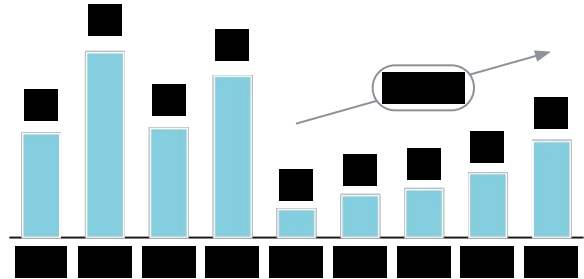
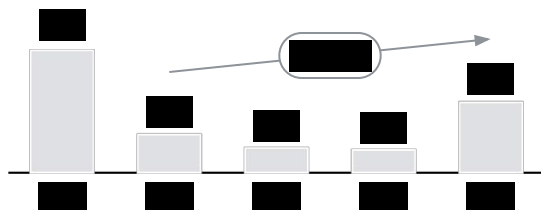
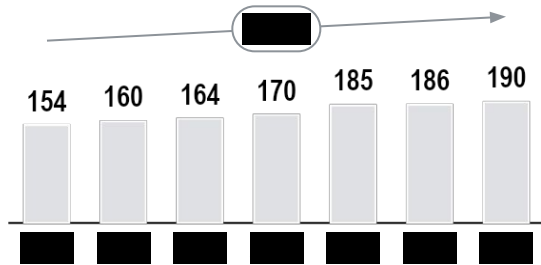
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Overview of key industry indicators in Russia (2/2)



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602	71	849	46	12	05



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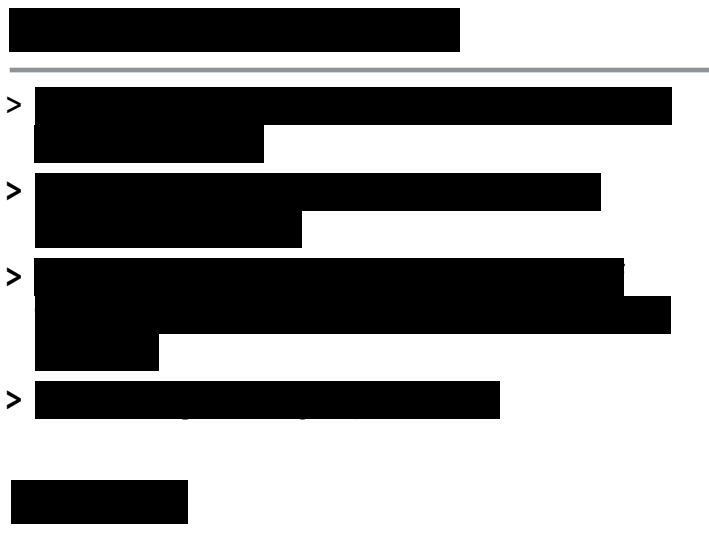
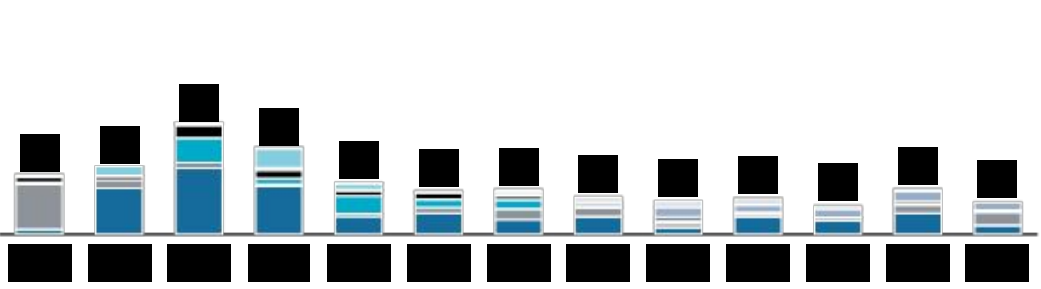
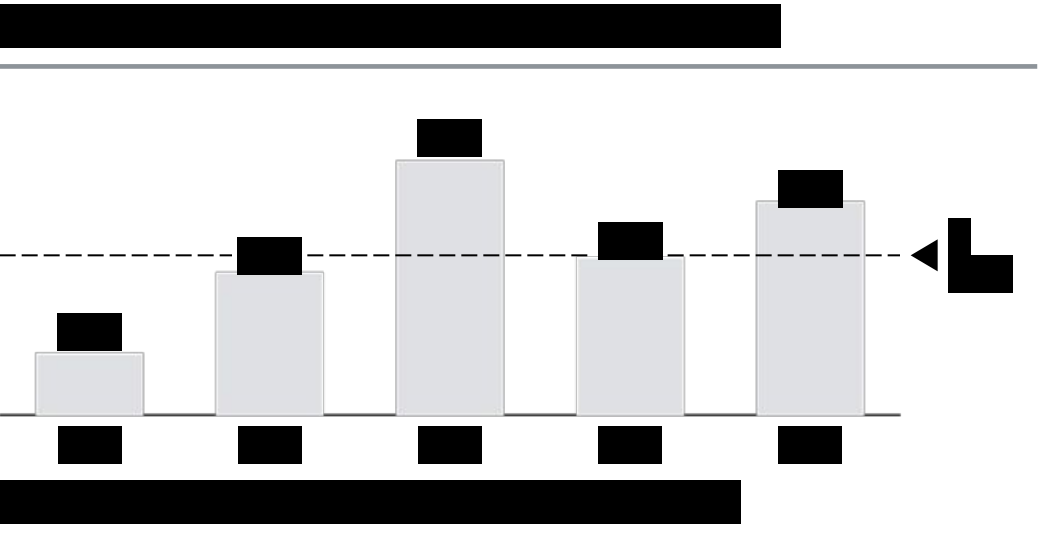
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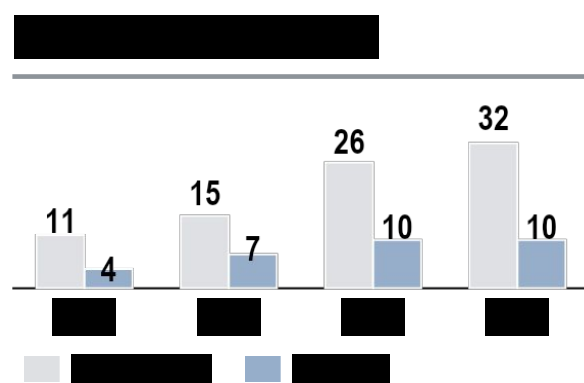
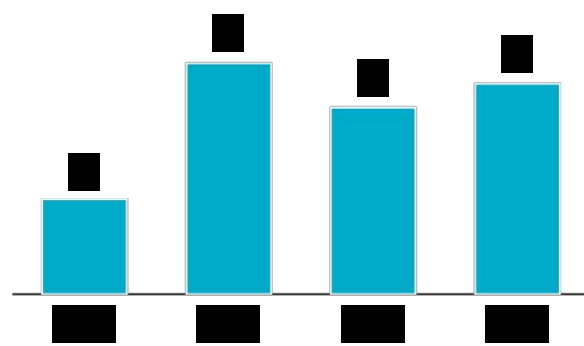
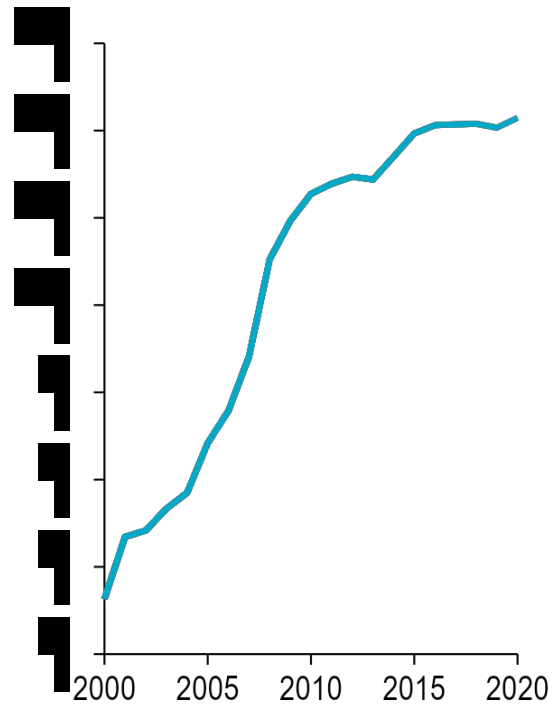
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Key indicators of the volume and impact of the industry on the country's economy

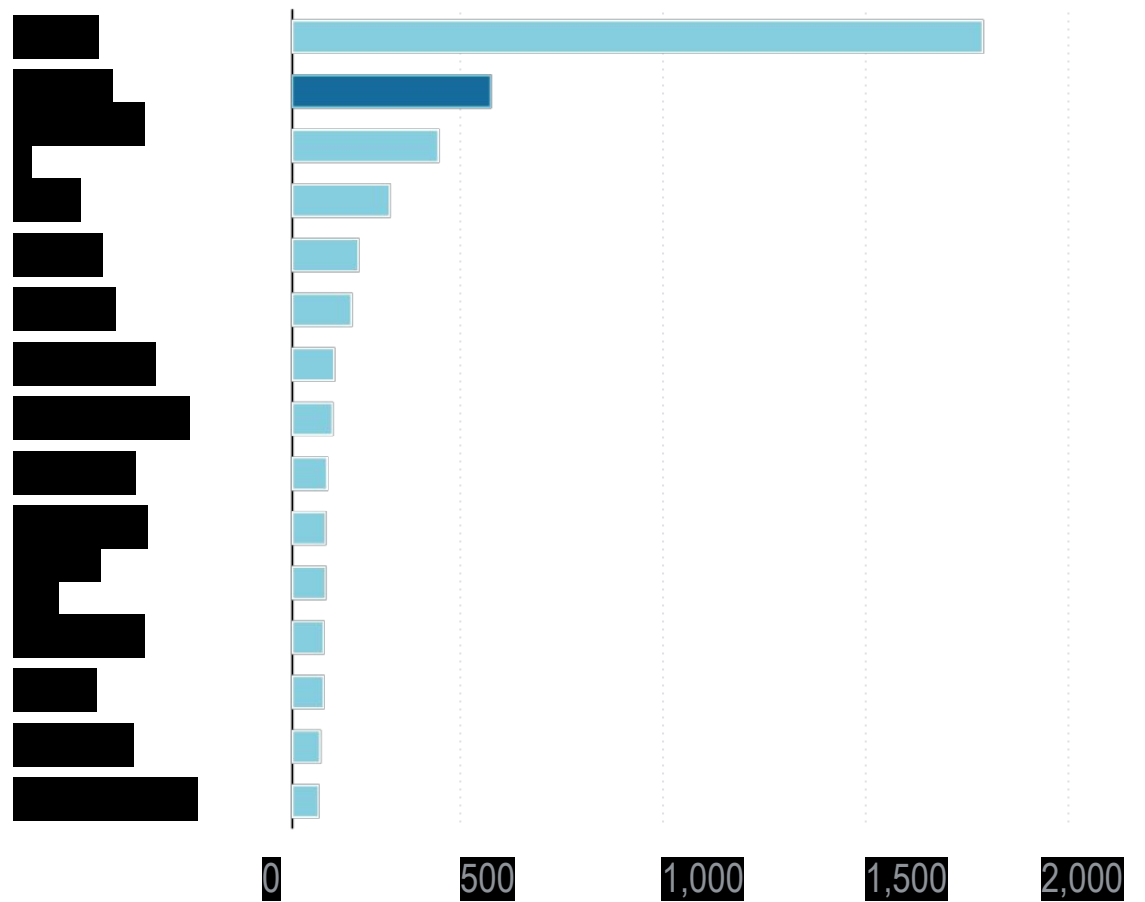




Dynamics of production indicators by years

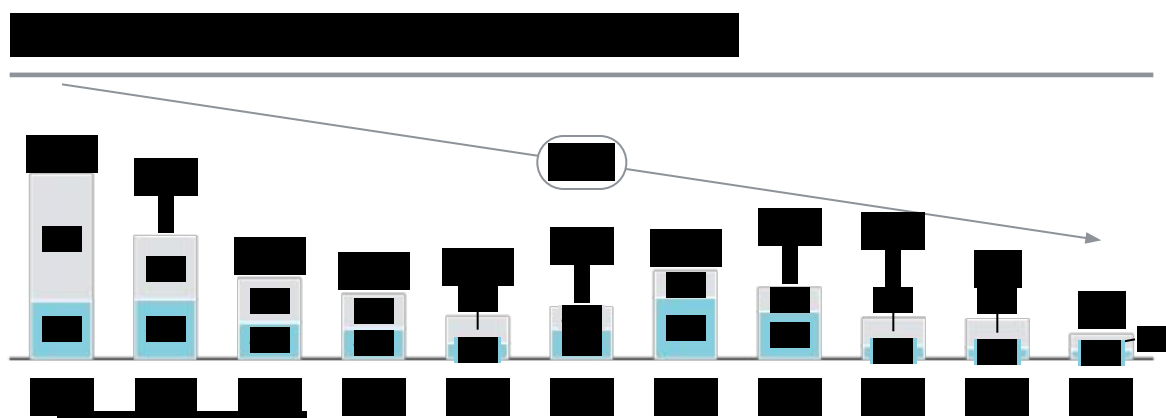
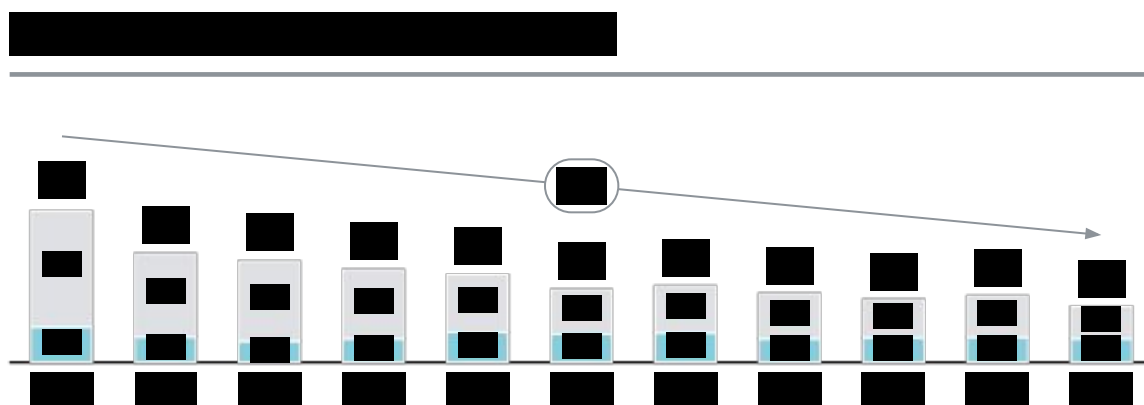


Leading countries in the number of ship repairs, 2018





European region – new vessels, 2010-2020 (target segment¹⁾)



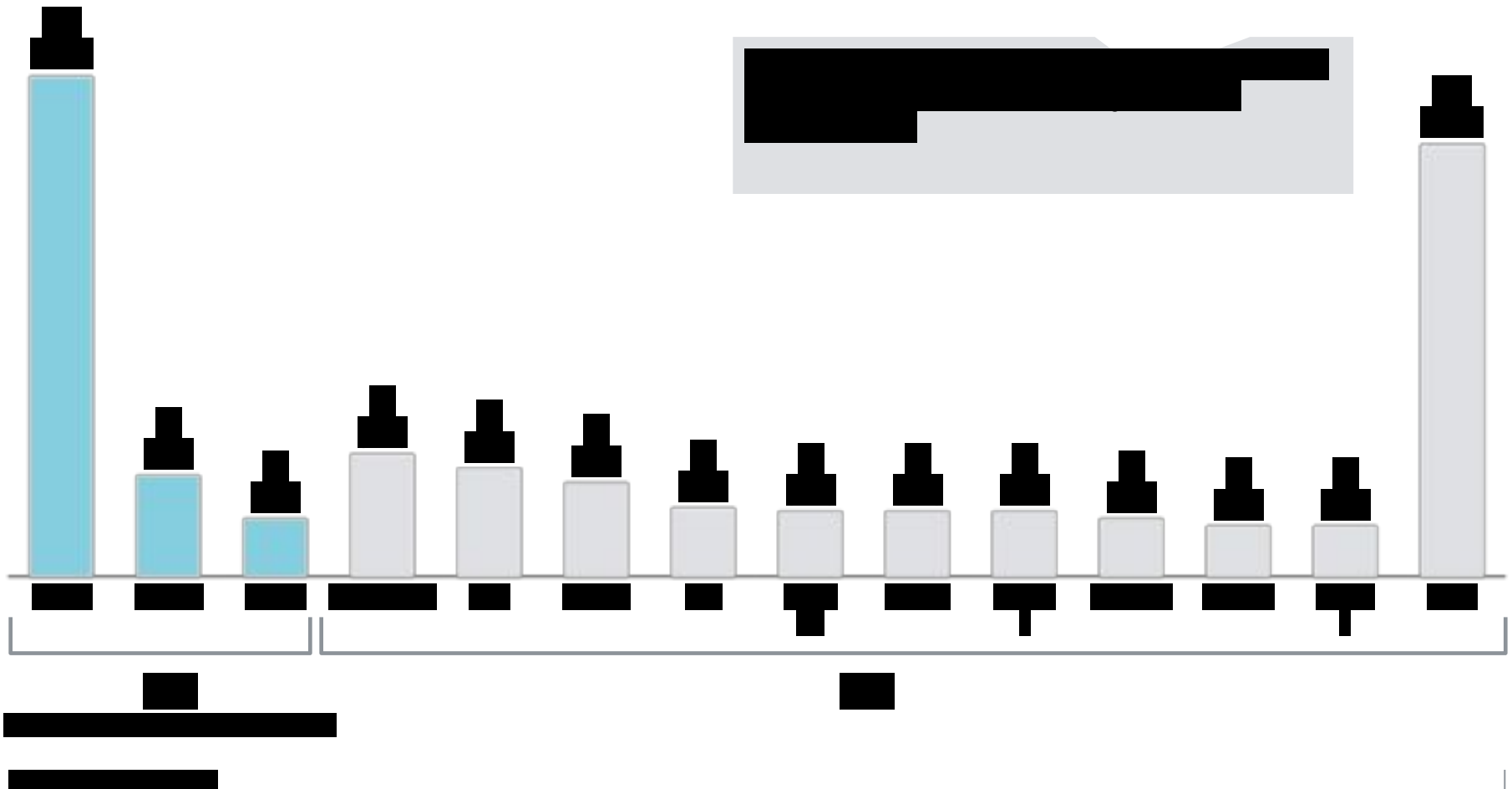
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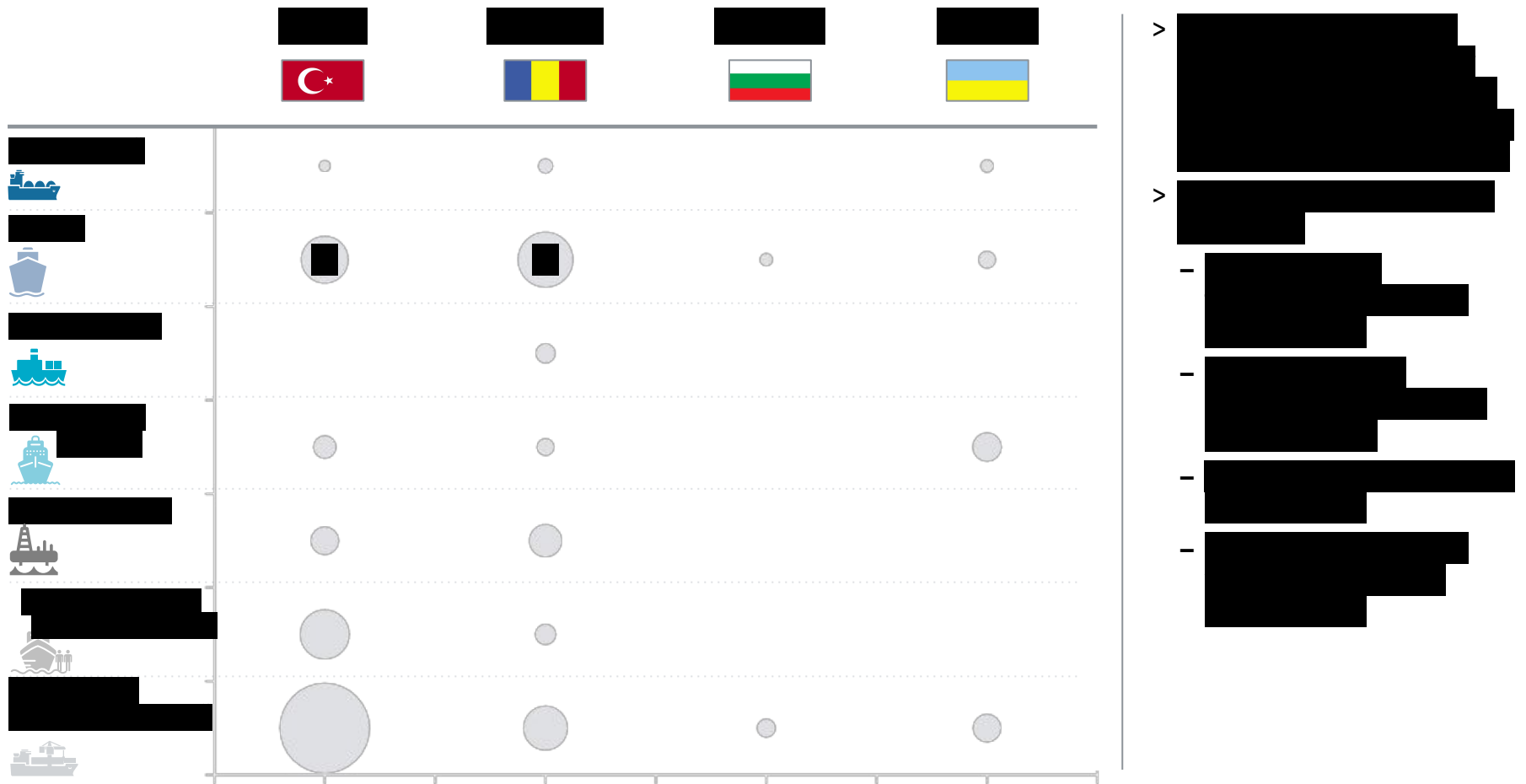


Black Sea shipbuilding market by customer countries in 2016-2020 [pcs, %]



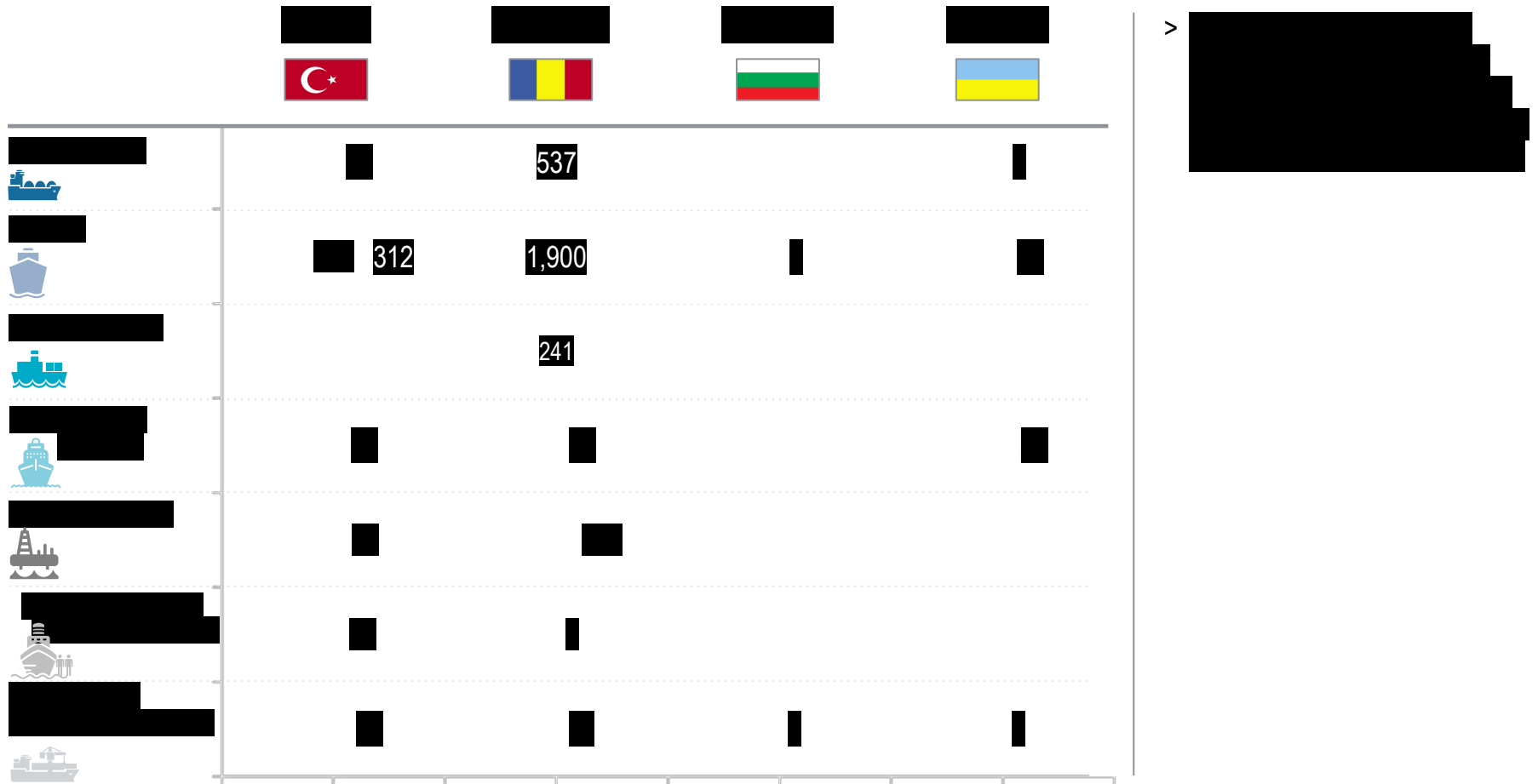


Black Sea region – specialization of countries, new ships, 2016-2020 [pcs.]









Black Sea region – specialization of countries, new ships, 2016-2020 [thousand DWT]



All types of vessels produced by the countries of the region for 2010-2020.

Area	Vessel type	Vessel sub-type	Country			
			Turkey 	Romania 	Bulgaria 	Ukraine 
		Ore carriers				
		Other bulk carriers				
		Passenger / Cruise ships				
		Other offshore vessels				
		Drilling vessels				
		Research vessels				
		Other special (auxiliary) vessels				

Capacity of Ukrainian shipyards producing civilian ships

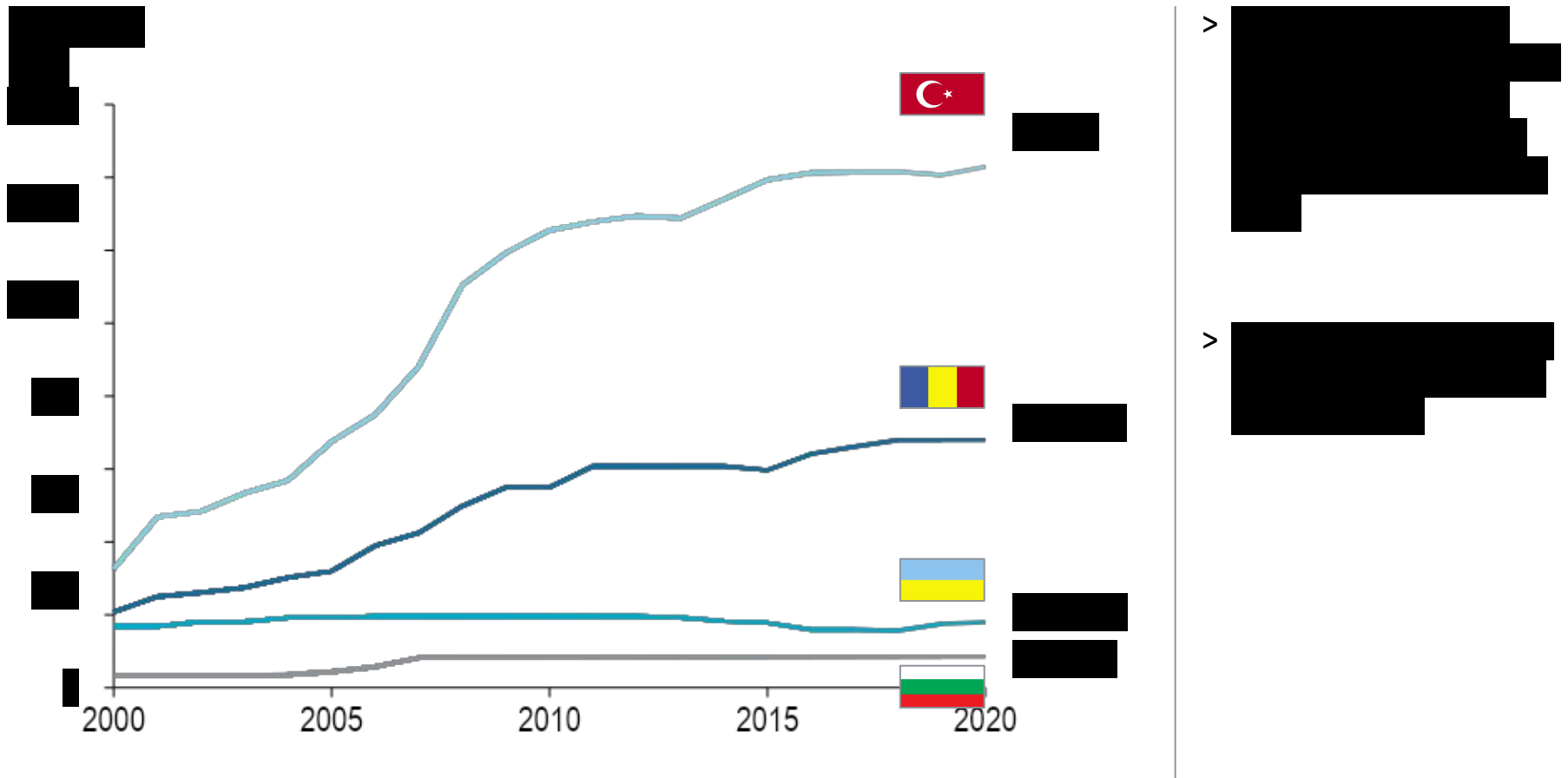


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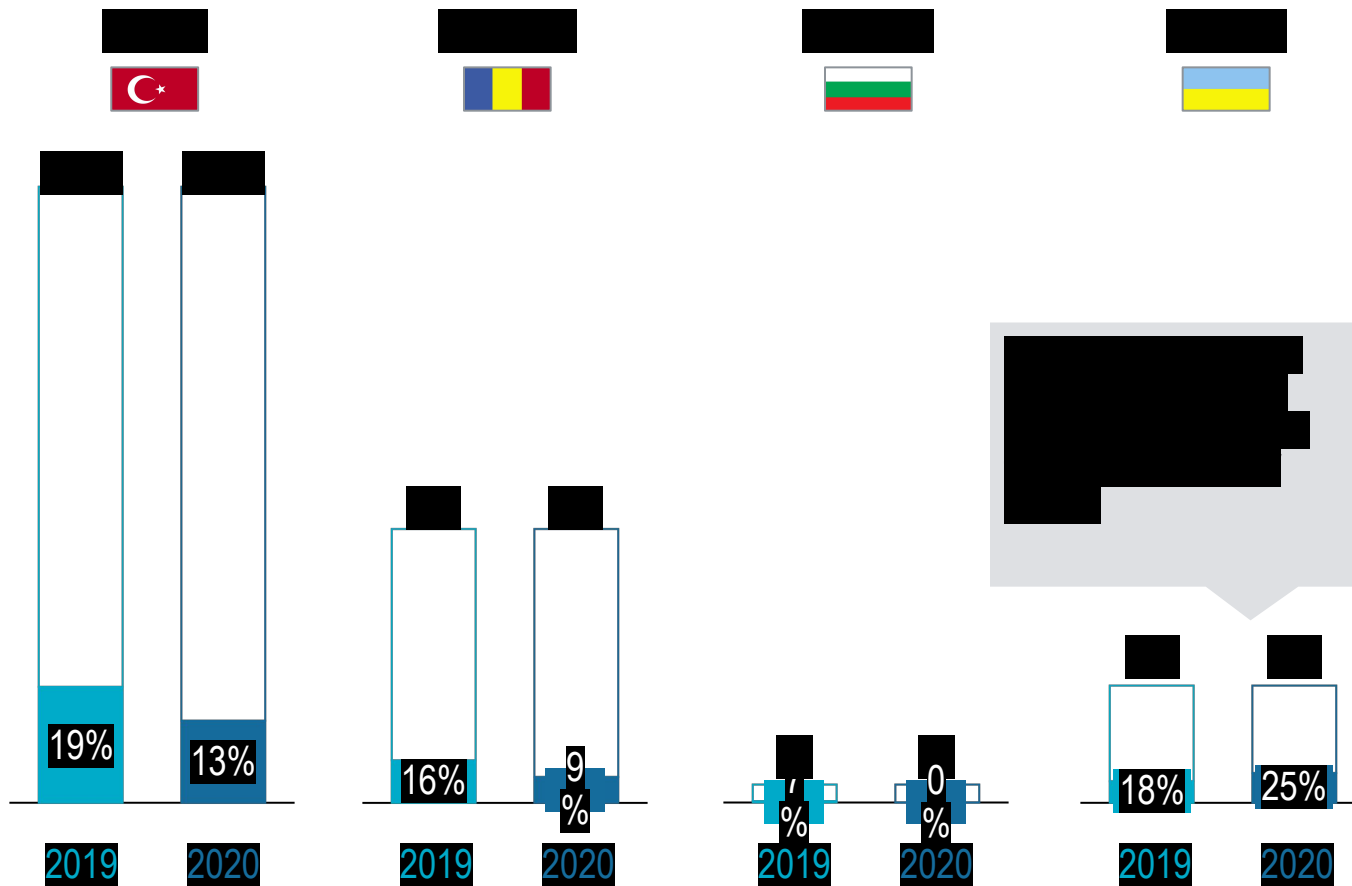
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Black Sea region - capacity dynamics by country, 2000-2020 [thousand CGT, %]



Black Sea region – capacity utilization¹⁾²⁾, 2019-2020 [thous. CGT, %]



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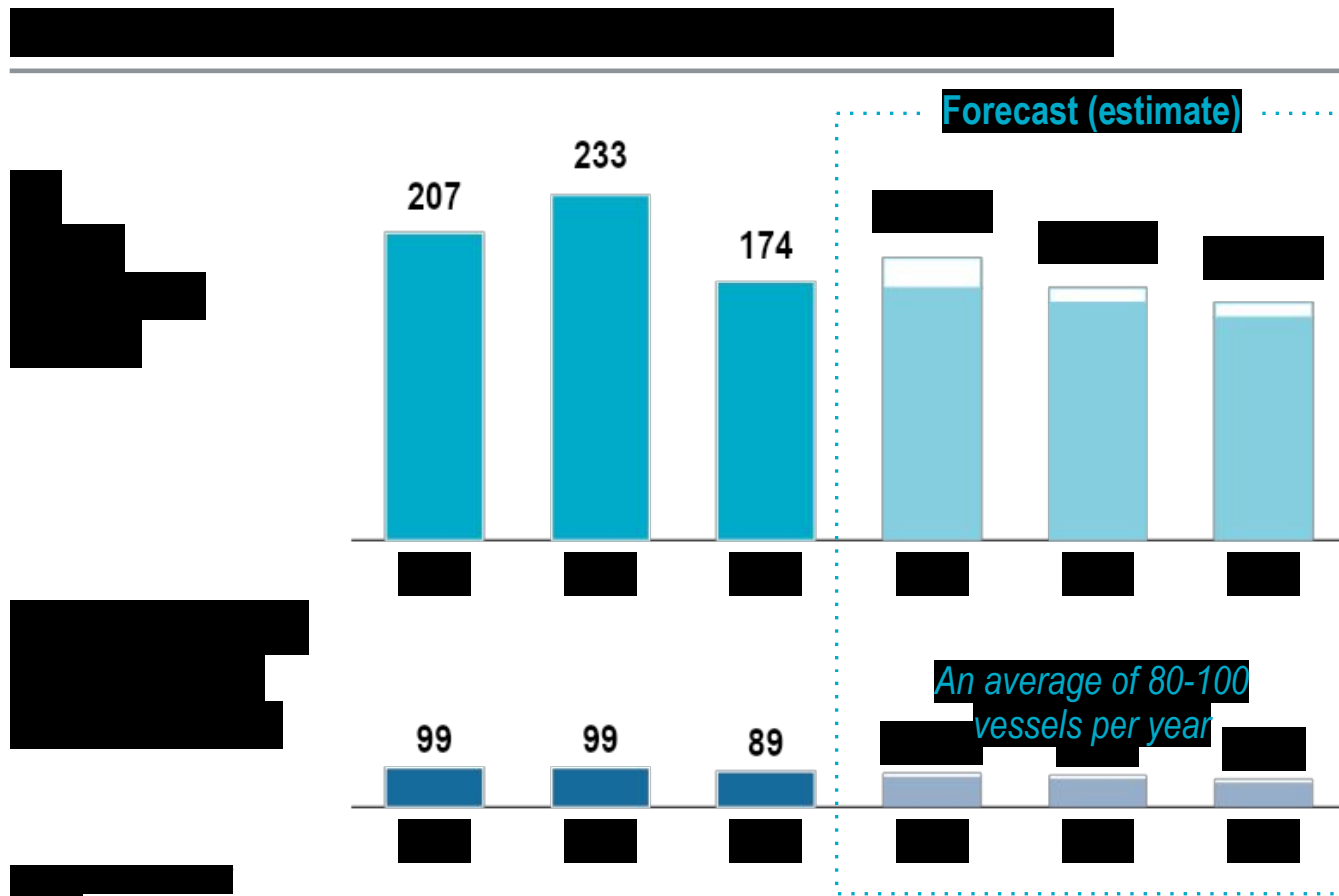
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Assessment of the shipbuilding potential of the Black Sea region

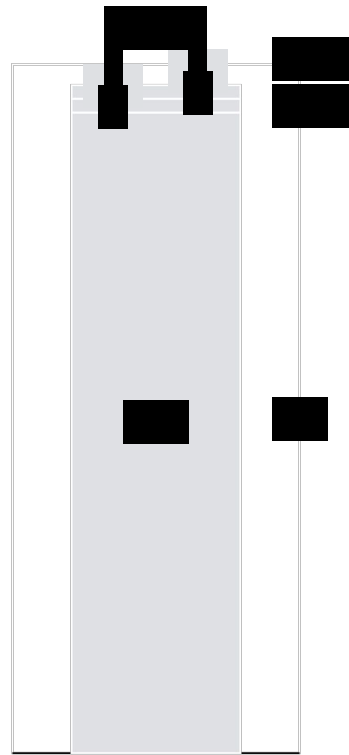
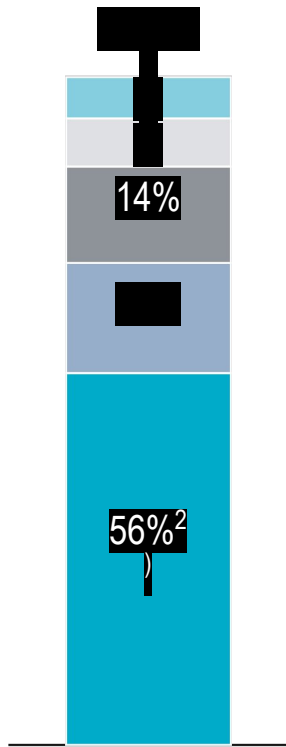


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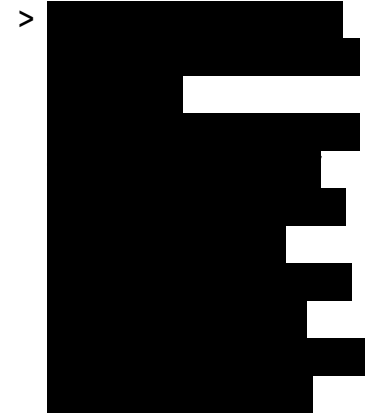
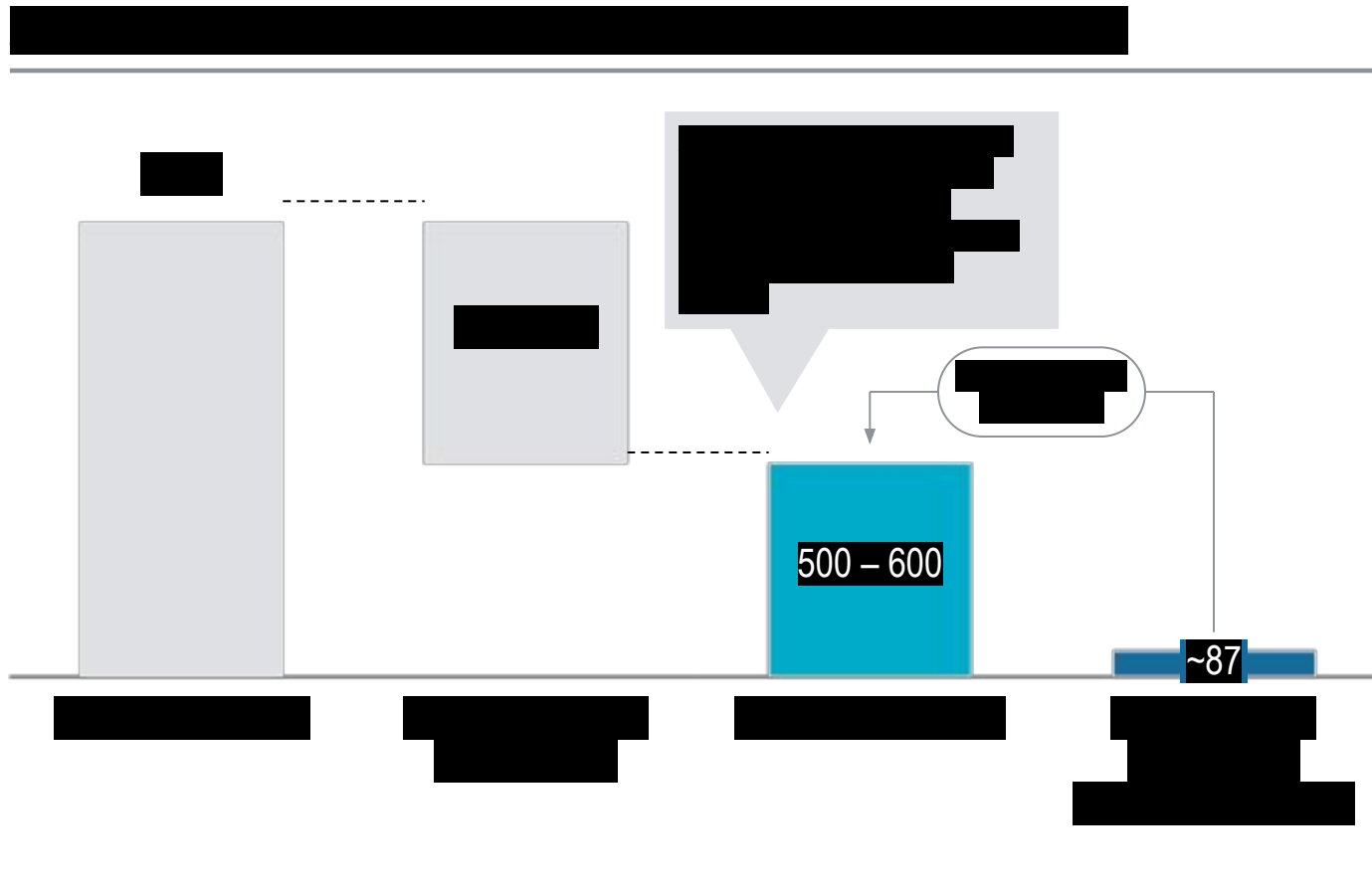
Black Sea shipbuilding market forecast – Ukraine's potential¹⁾ (1/3)



Black Sea shipbuilding market forecast – Ukraine's potential¹⁾²⁾ (2/3)

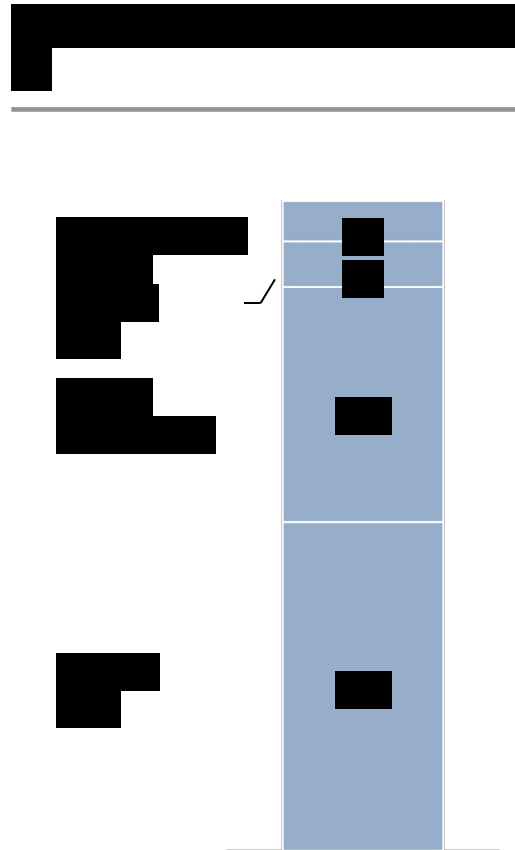
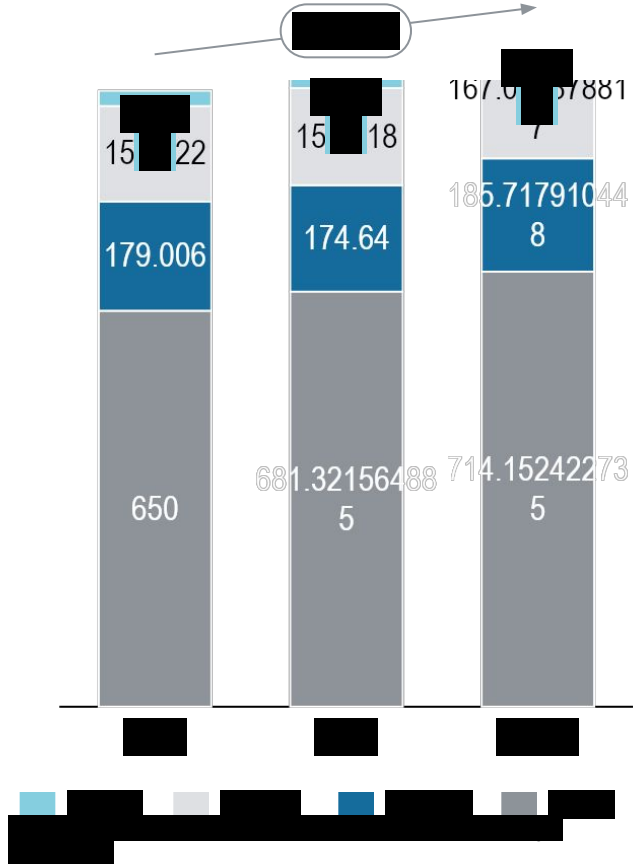


Black Sea shipbuilding market forecast - Ukraine's potential (3/3)



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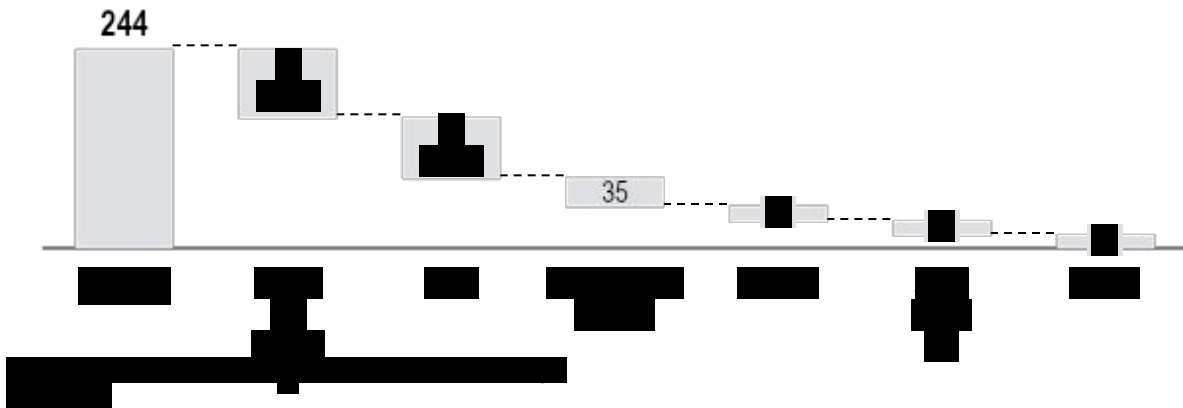
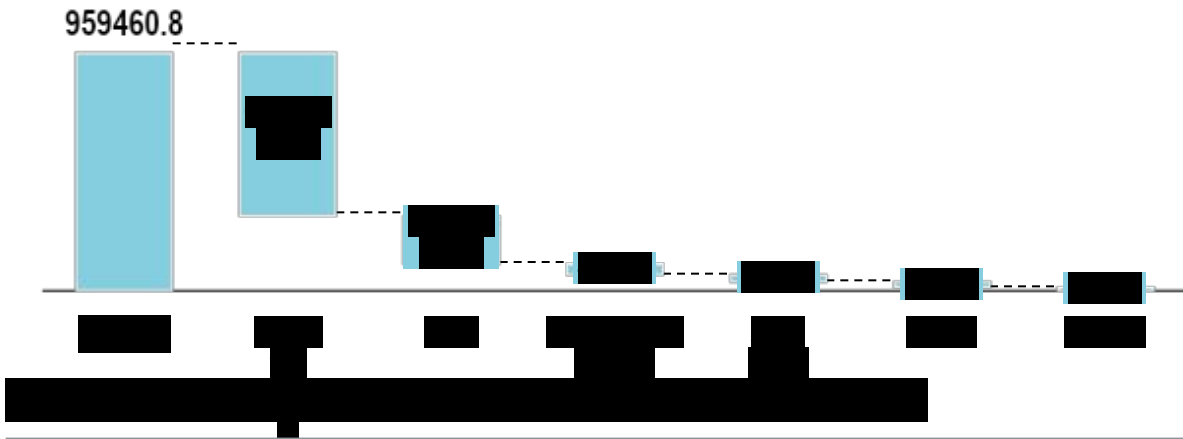
Ship Repairs – Black Sea Region


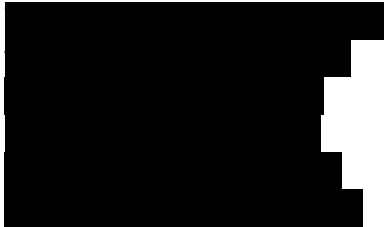



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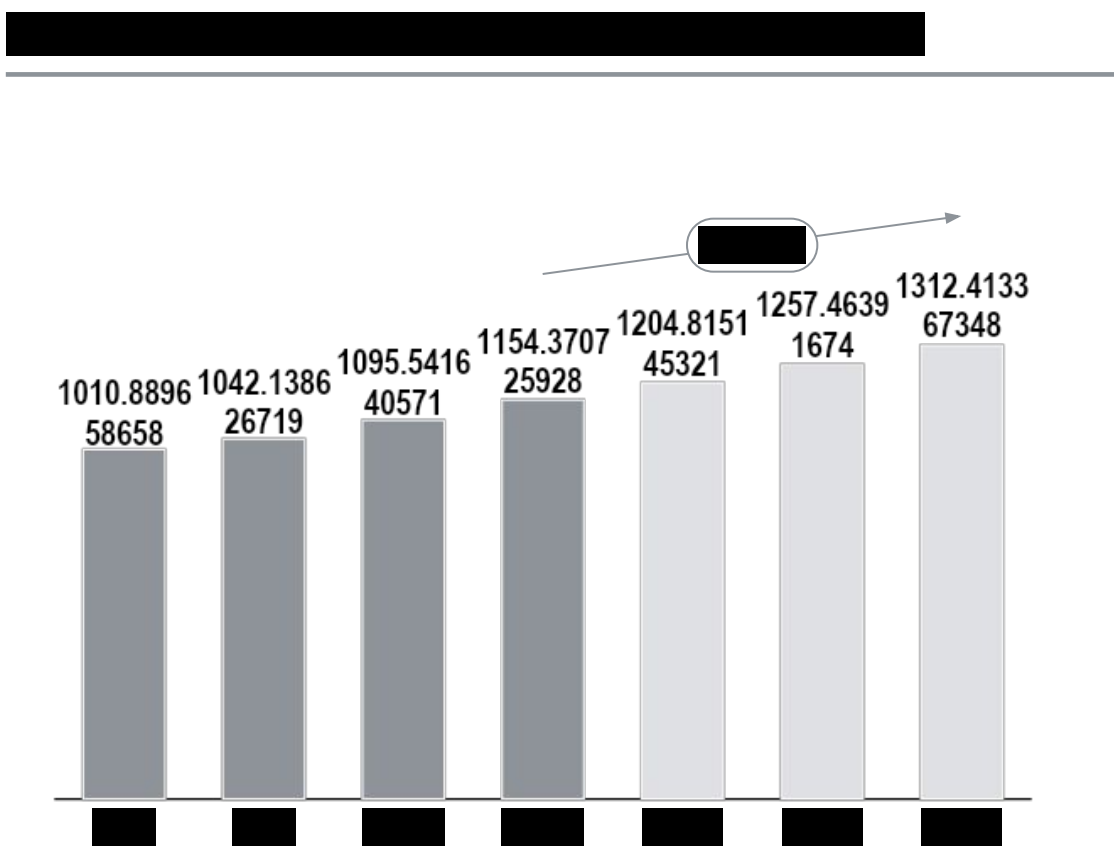


Ship repair – Ukraine



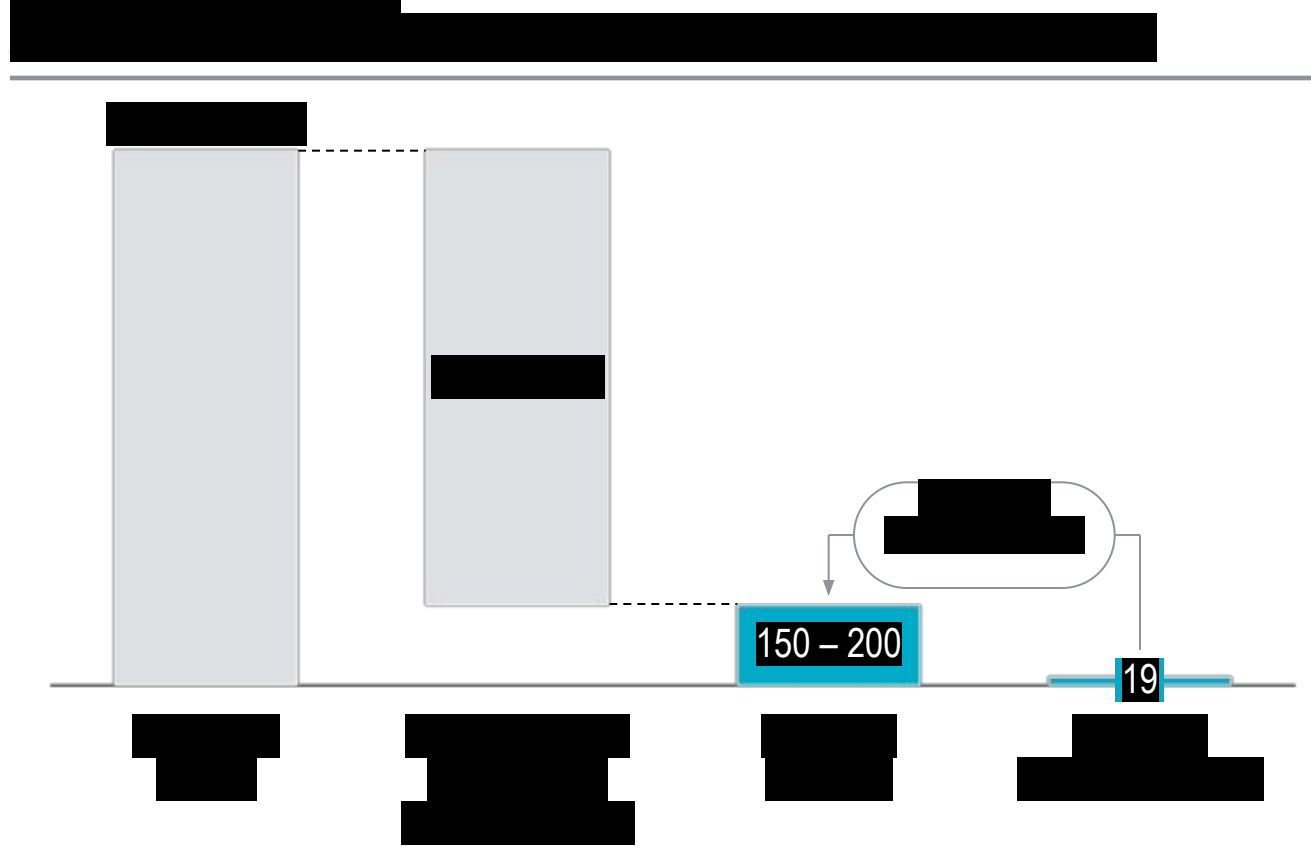
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Ship repairs – Black Sea region, estimated forecast



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Ship Repair – Black Sea Region, Assessment of Ukraine's Potential



- > [Redacted]
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- > [Redacted]

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Market potential of shipbuilding and ship repair per year [mln USD, bln UAH]⁴⁾

