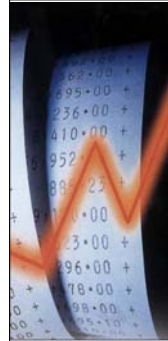


German Marine and Offshore Equipment Industries

Situation and Perspectives

Holger Kunze, VDMA



- Turnover: 160 billion euro
- Employees: 920,000
- Creation of 50,000 new jobs in 2007
- Export quota: 76.5%
- Trade surplus of 80 billion euro
- German share of EU production: 39%
- More than 3,000 member companies
- 86% small and medium-sized companies (SMEs) according to EU definition

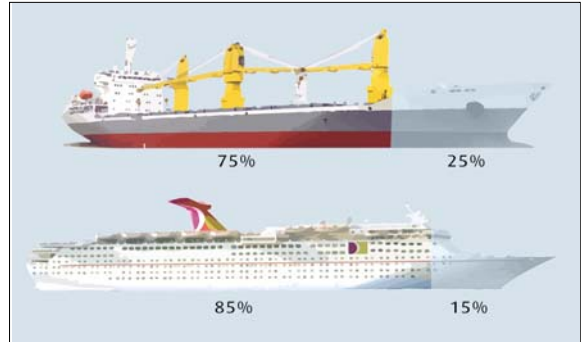
Association Profile

German Marine and Offshore Equipment Industries

- Special division of VDMA (German Engineering Federation), founded in 1973
- Non-profit organisation, membership voluntary
- Member companies from all industrial branches like
 - mechanical engineering,
 - electrical / electronics industry etc.



Relevance of marine equipment industries value share of a ship (equipment suppliers / shipyard)



Facts and Figures

German Marine and Offshore Equipment Industries

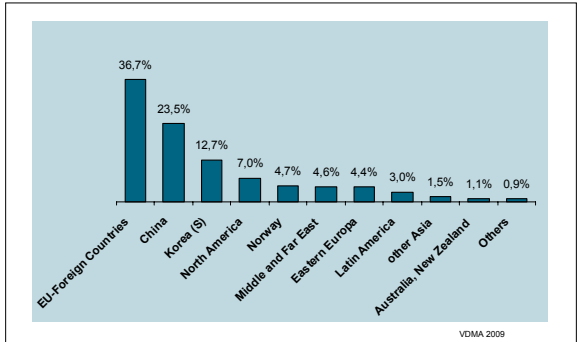
- 400 manufacturing companies
- 72,000 employees
- Turnover: Euro 11.9 billion (2009)
- Export Volume: 75 %
- World's largest exporter of marine equipment



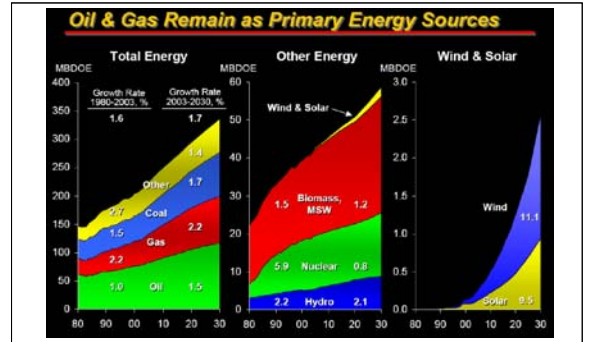
Turnover of German Marine Equipment Industries



Foreign order income by regions



Oil and Gas – the most important energy sources also in future



Offshore Wind: Service and Construction Ships Market and Technology Potential

Windcat Workboat

Gaoh concept

Ampelmann

Blue Ocean

Shipbuilding Markets with Perspectives

- Growth markets**
 - Eco-friendly ship technology
 - Alternative Propulsion systems / alternative fuels
 - Increase in efficiency, reduction of emissions
 - Safety systems
 - Re-fittings
- New markets**
 - Deep Sea Offshore Oil & Gas
 - Deep Sea mining
 - Renewable ocean energies
 - swimming infrastructures

Offshore Markets: Perspectives

- Impact of crises are temporarily very limited
- Economic performance and global trade will grow again
- Demand for oil and gas will grow
- Prices will incline again
- Deep water exploitation will continue gaining importance
- Recurrence of bottlenecks in **technology** and manpower are to be expected

Quelle: Douglas-Westwood 2010

German Marine and Offshore Equipment Industries

Thank you very much for your attention!