



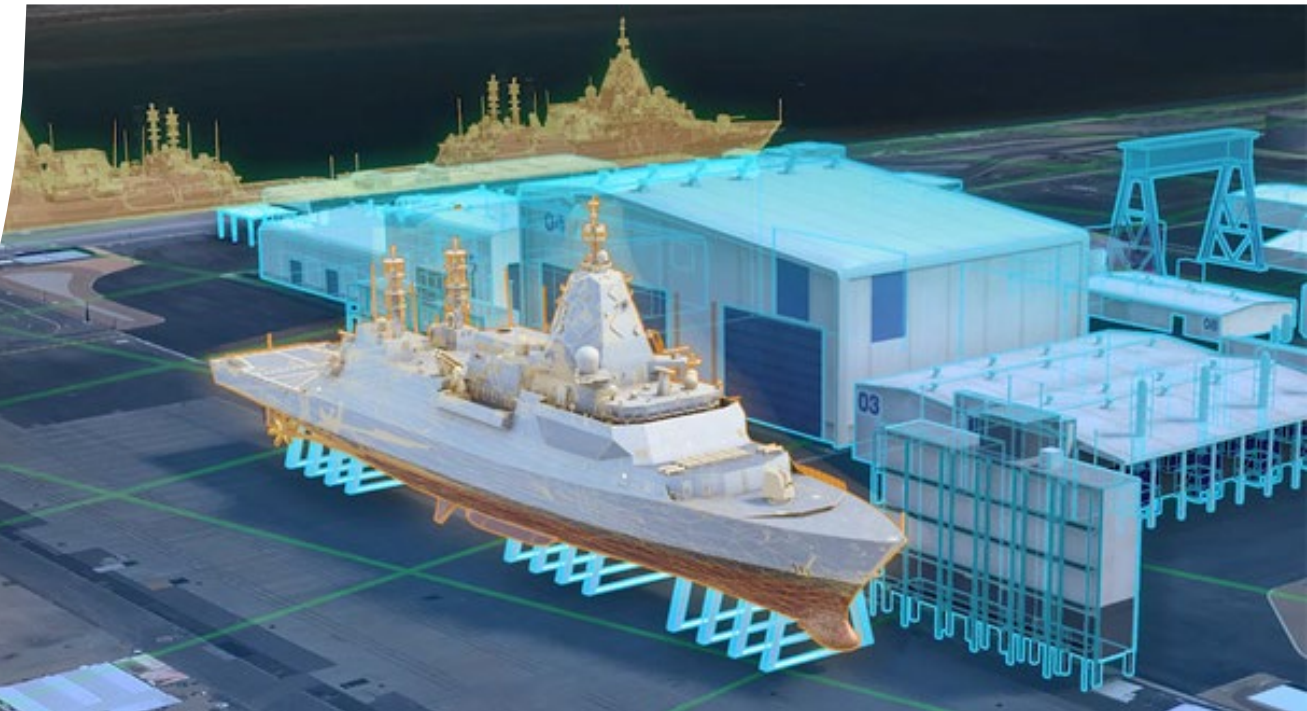
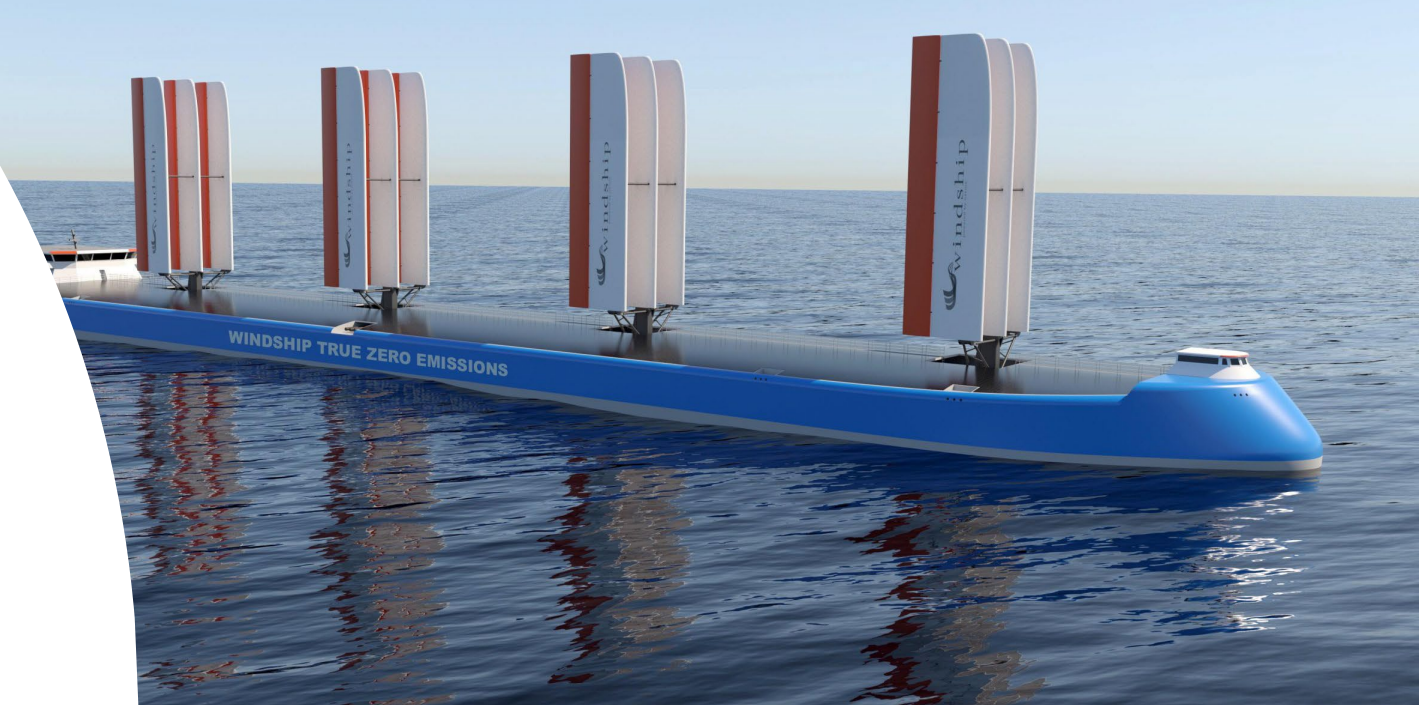
Department for
Business & Trade

Maritime Exports & Investment

NSO Symposium 14 March 2023

OUR VISION

Thriving exports and investments that support the National Shipbuilding Strategy and the Defence and Security Industrial Strategy to deliver low carbon growth, additional jobs, improved security and strong international partnerships.





Department for Business & Trade

The Department for Business and Trade brings business and trade together into a single department, creating a department with all the levers to unleash the power of British businesses, reform regulation to reduce burdens and unlock Brexit freedoms.

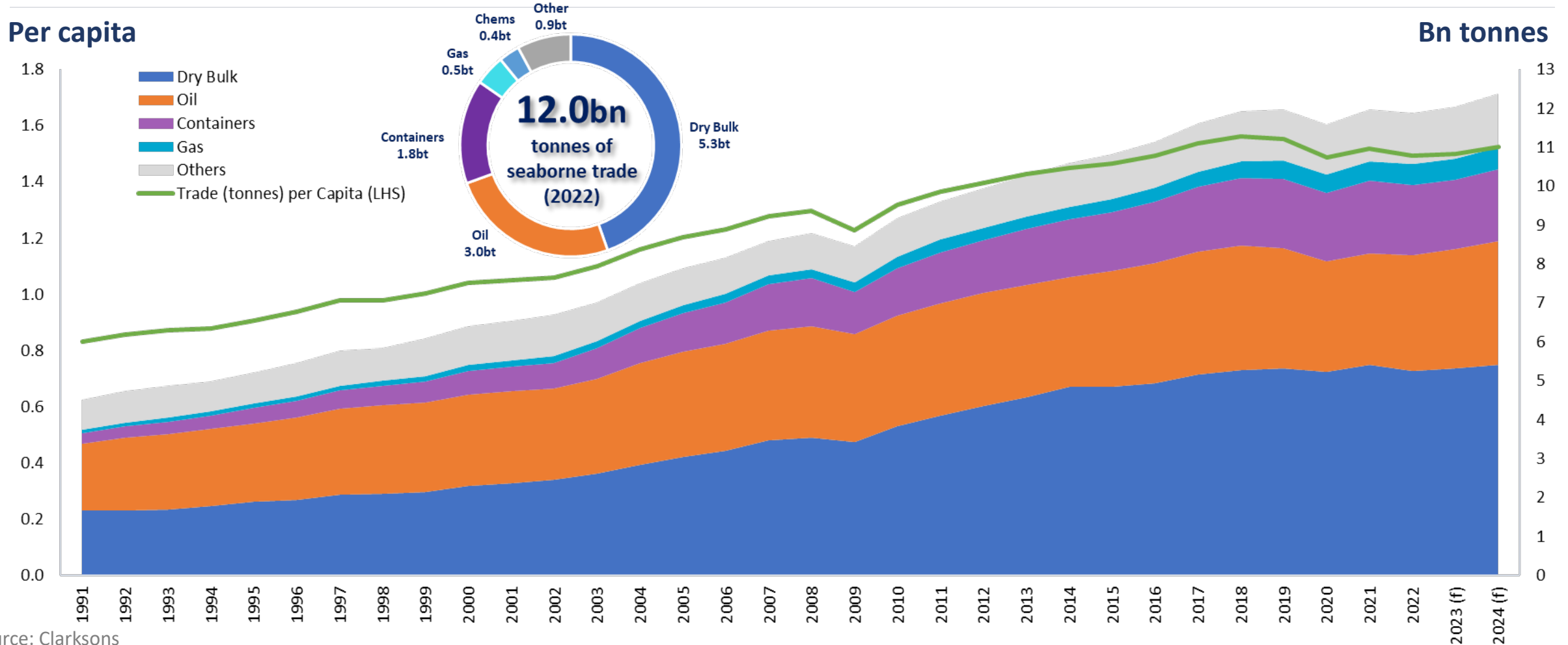
The Department for Business and Trade brings together the business focused functions of the former Department for Business, Energy and Industrial Strategy (BEIS) and the Department for International Trade (DIT).

Our Secretary of State, the Rt. Hon. Kemi Badenoch MP, leads the Department. The Ministerial team includes: Nusrat Ghani MP, Nigel Huddleston MP, Lord Johnson and Kevin Hollinrake MP.



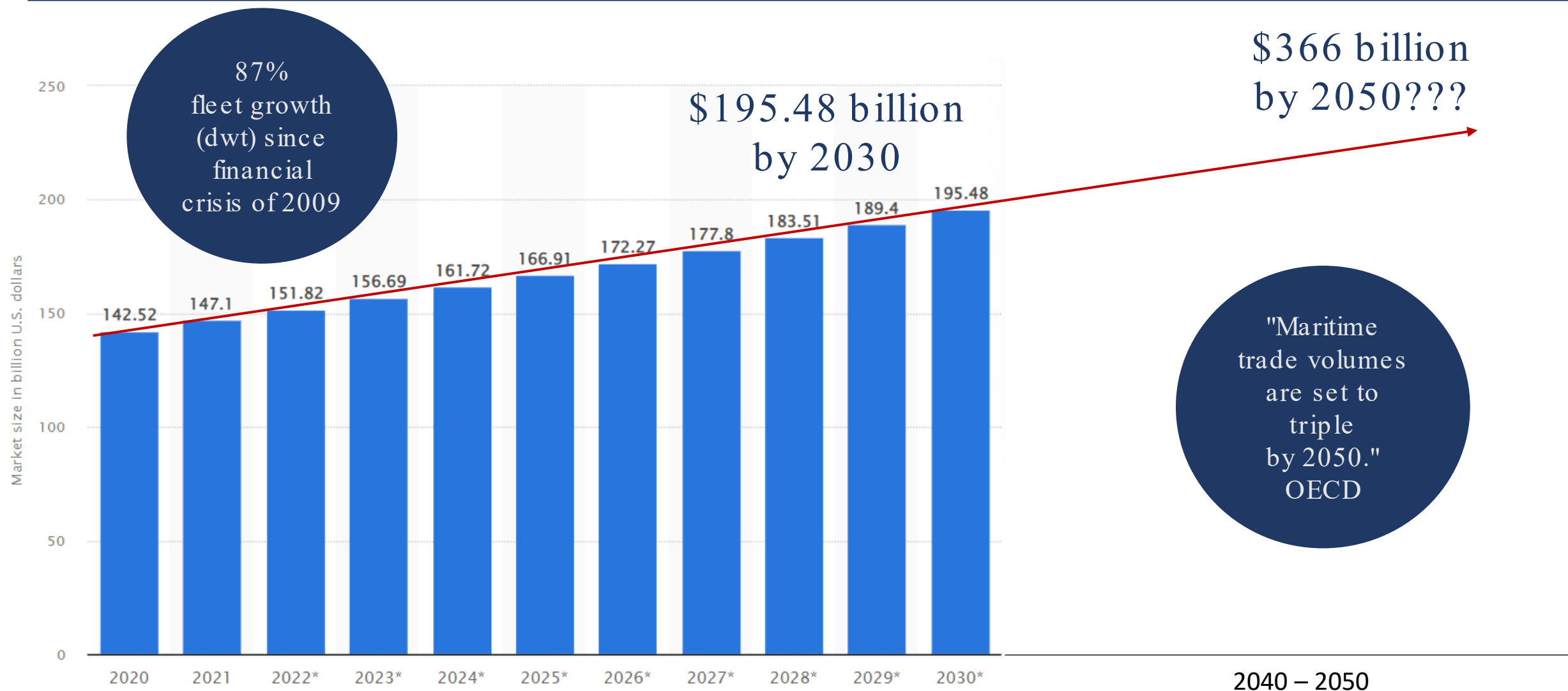
Seaborne trade

- >85% of all trade is moved by sea, equating to 12bn tonnes and 1.6t per capita in 2022
- Trade volumes dropped in 2022 (macroeconomic factors, war in Ukraine) - full recovery expected by 2024





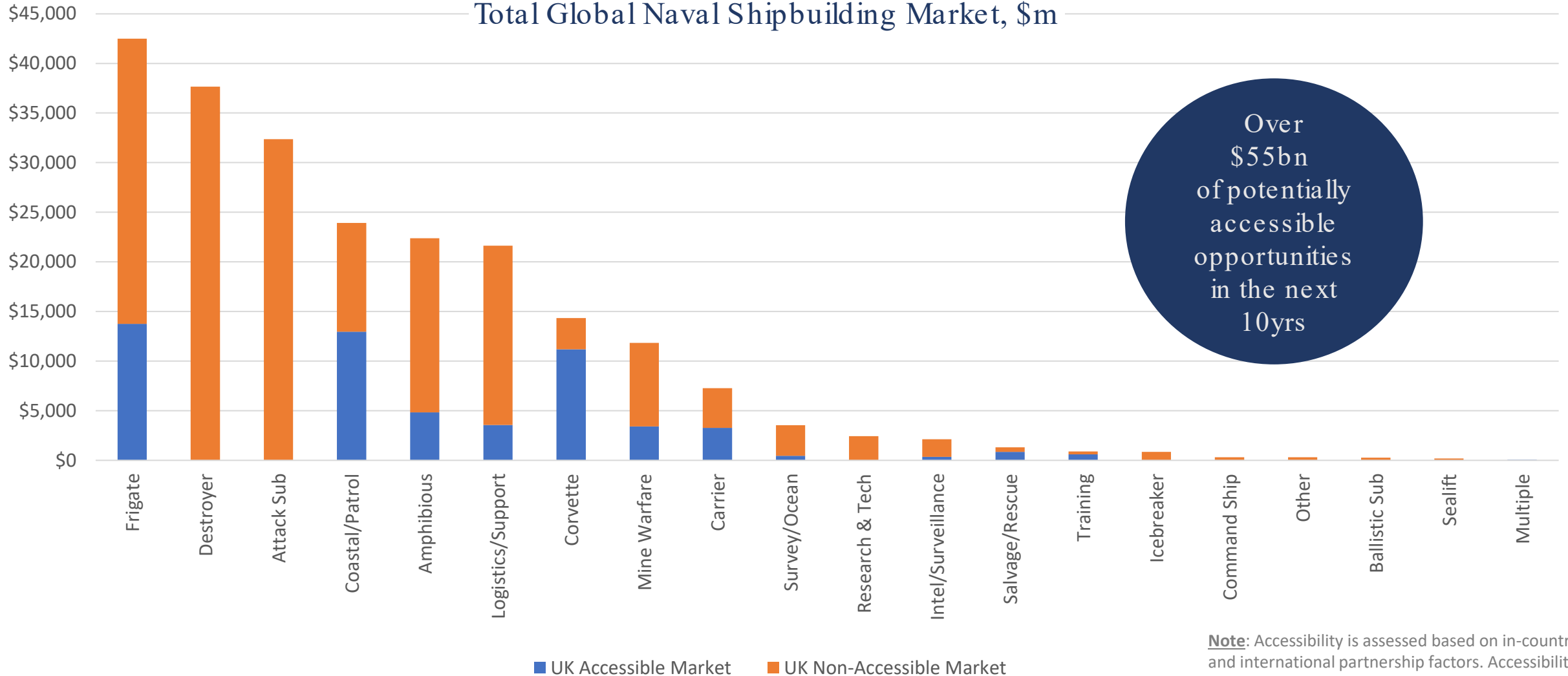
Global shipbuilding market





Global demand: defence

Sum of 10 Year Forecast (2023-2032),
Total Global Naval Shipbuilding Market, \$m

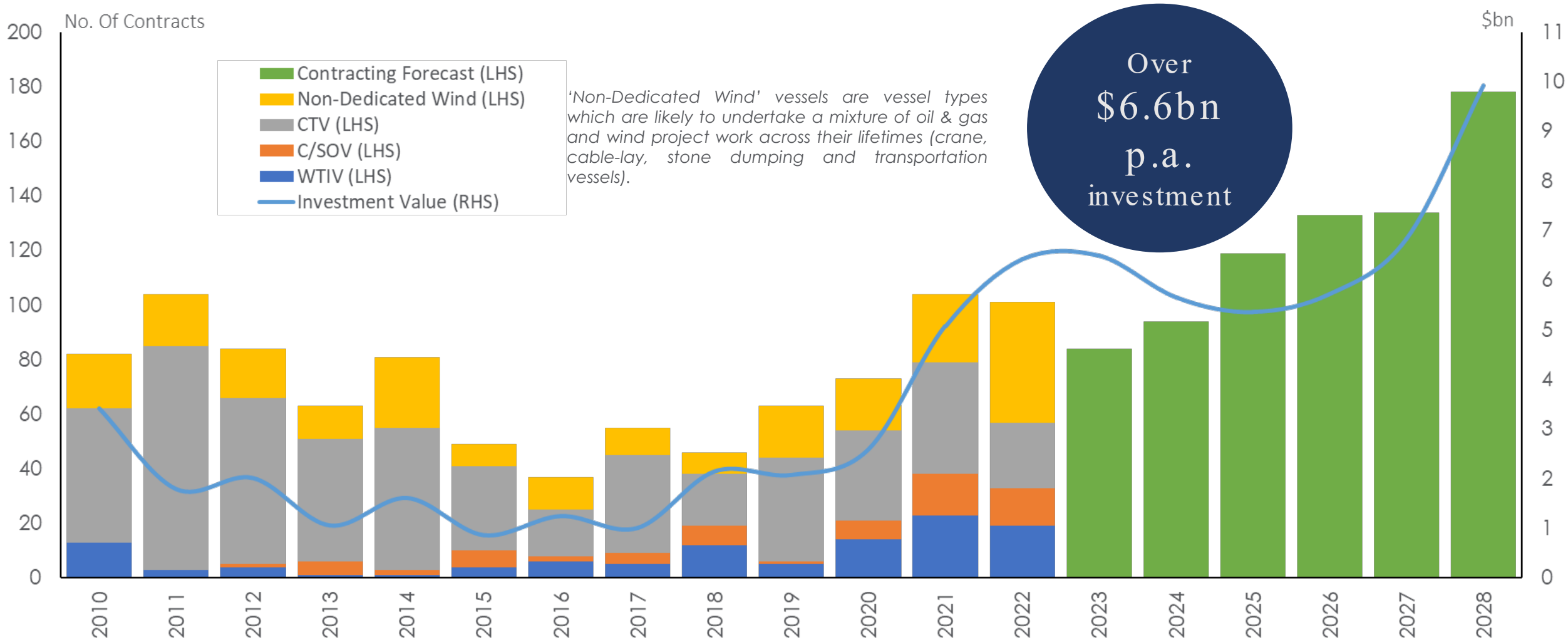


Over
\$55bn
of potentially
accessible
opportunities
in the next
10yrs



Global demand: offshore wind vessels

- Average investment of over 120 units and \$6.6bn p.a. in ‘dedicated’ and ‘wind-related’ vessels across 2023-28





Global demand forecast: other sectors

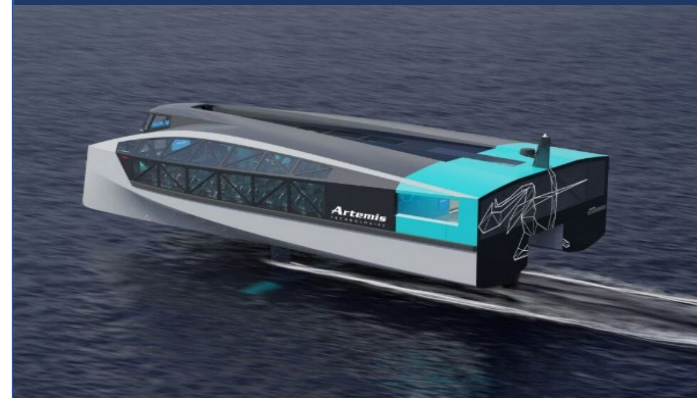
Leisure boat market

The global leisure boat market size was valued at \$44.47bn in 2022 and is expected to expand at a compound annual growth rate of 5.4% from 2023-30.



Ferries

Low-emission ferries & fast ferries are expected to form a part of wider green global transport ecosystems in congested, urban areas.



Fisheries and aquaculture

It is estimated that the ocean could sustainably supply over six times more food than it does today, becoming the primary protein source of the future.



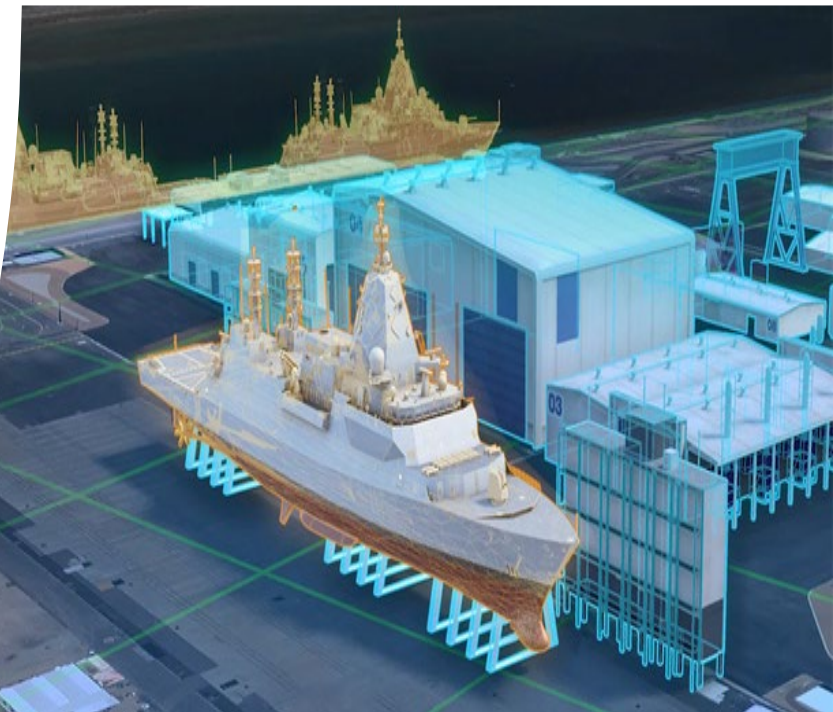
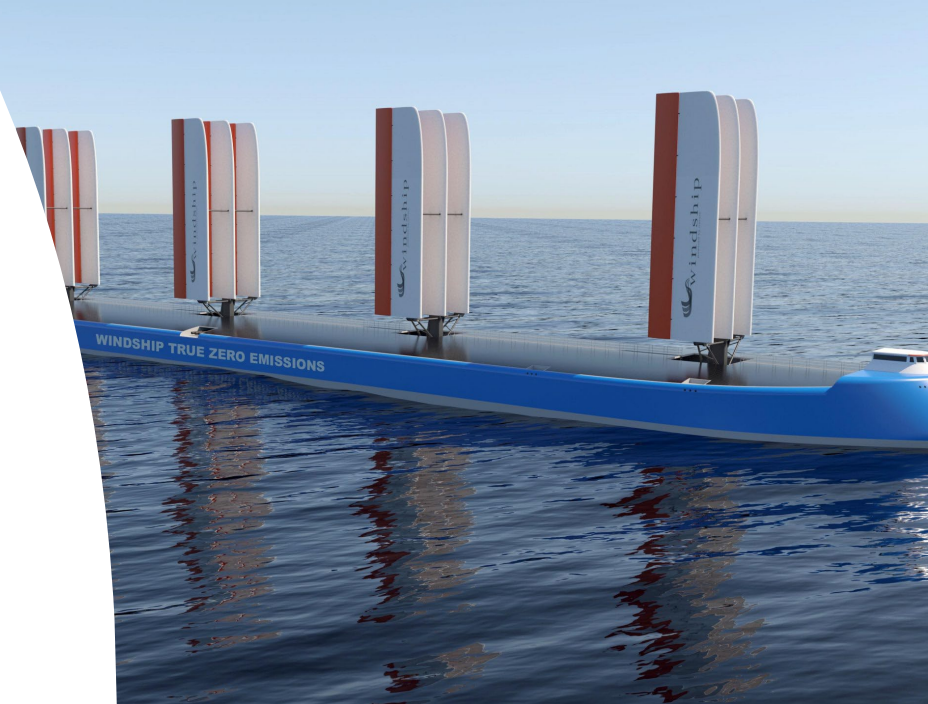


Department for
Business & Trade

Which subsectors of the global
market are you interested in?

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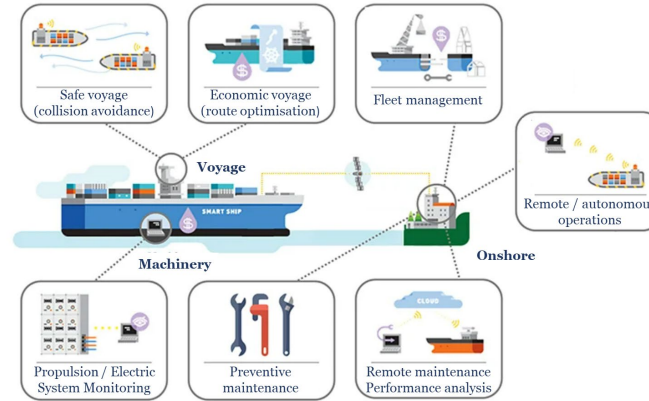




Getting ahead: drivers and capabilities

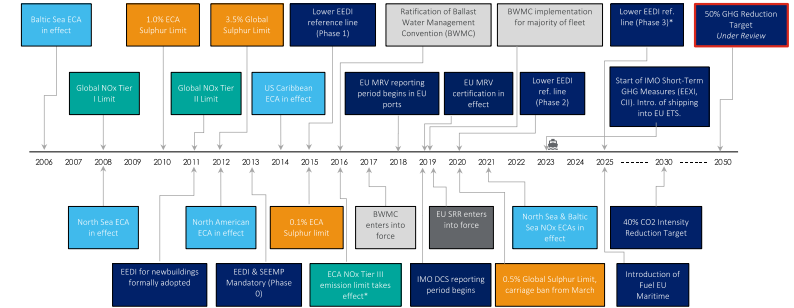


EVOLVING

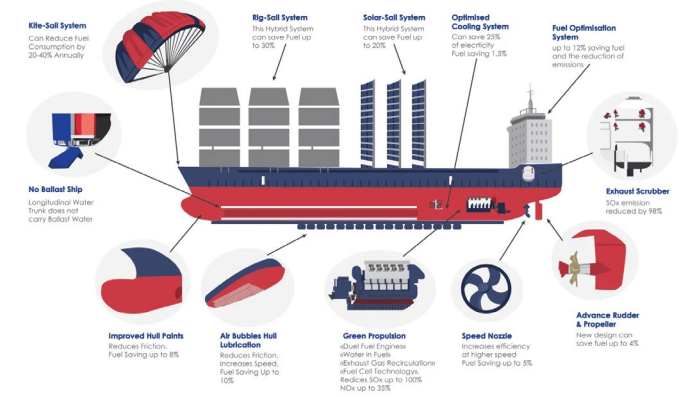


DIGITAL

TECH NATION



GREEN





Case study 1



SILVERSTREAM TECHNOLOGIES

- Air Lubrication system fitted to larger vessels.
- Key markets – China, Korea, Japan, Greece, Norway.
- Influencers – shipowners, managers, shipyards.
- DBT role – introduce Silverstream Technologies to key companies. Support by the UK DBT China Team with profile raising promotions and collateral.
- Results – Contacts with key new building yards owned by CSSC.
- New orders including a very important project from CSSC DSIC: two new tankers that will be used for carbon capture as part of the Northern Lights project in Norway. Value- £2-5m per ship the system installed.



Case study 2



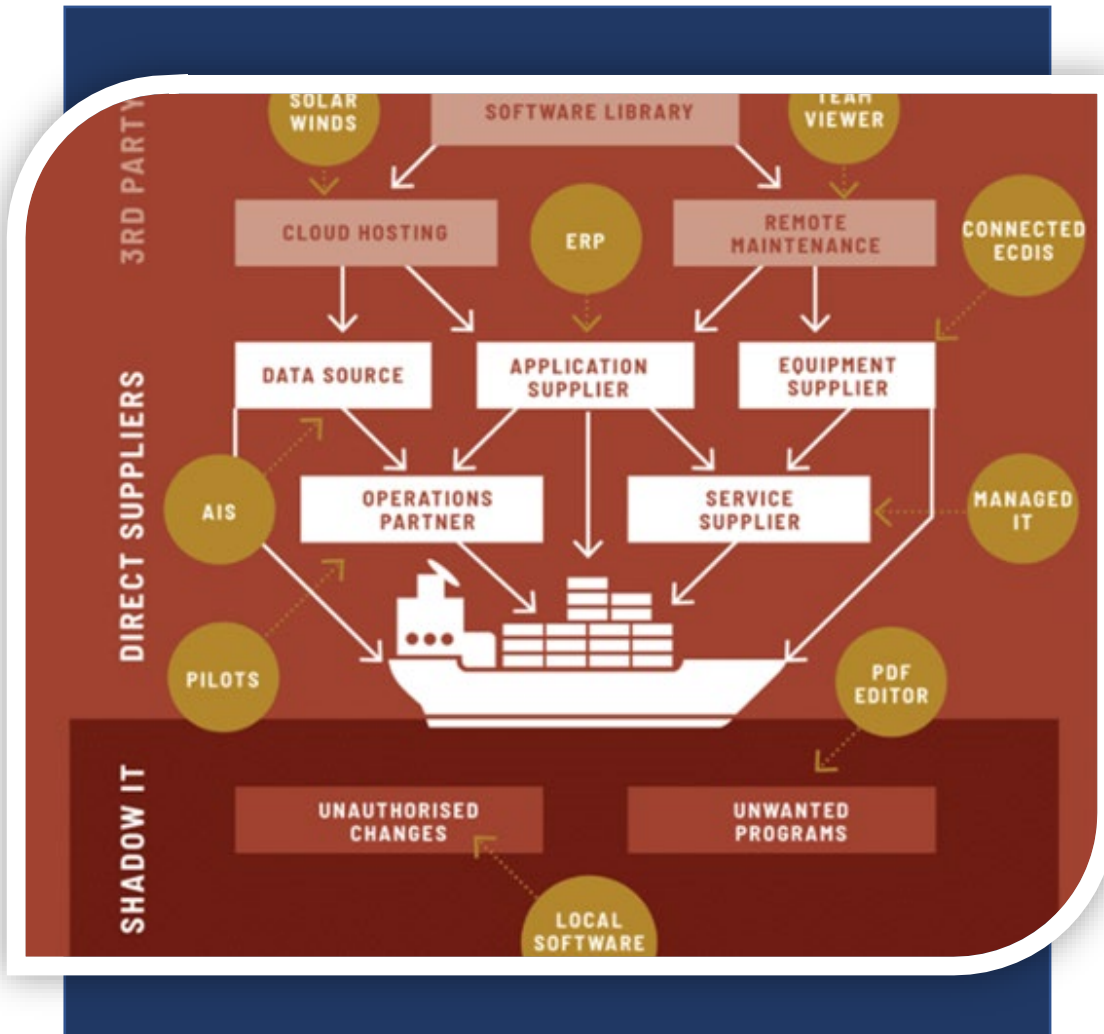
E C O M A R
P R O P U L S I O N



- High performance electric and hybrid hydrogen marine propulsion systems outboard and inboard.
- Key markets – Canada, Norway, Sweden.
- Influencers – boat owners, builders, investors, defence.
- DBT role – support by International Trade Advisor
- Platform for showcasing new technologies including Norshipping, Amsterdam and SMM Hamburg.
- Results – Exports to Canada, Scandinavia and more widely. Value - £ 3-5m this year.
- Hope to start assembling batteries in Scotland through Shift Clean Energy in Leith, Scotland



Case study 3



- Smarter cyber security solutions
- Key markets – Singapore, Korea, Greece.
- Influencers – shipowners, managers, operators, insurers.
- DBT role – Showcase at SMM Hamburg. Tech sector teams and International Trade Advisers plus MCCO specialists.
- Introductions to key players including a Cyber demonstrator “wargame” in Singapore.
- Results – export success in a number of countries.
- The company now chairs the Singapore Shipping Association Cybersecurity Subcommittee.



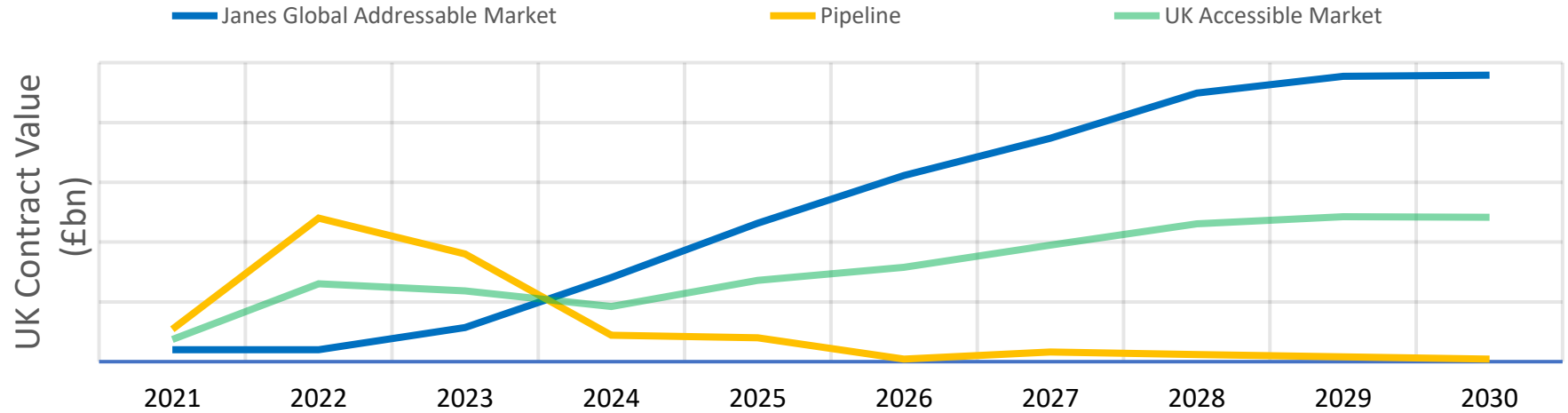
How we work



National
Shipbuilding
Office



UK Defence &
Security Exports



Identify (5+ years out)

1. capture of prospects from various sources
2. analysis to validate opportunities and the credibility of UK offers
3. senior-level prioritisation

Develop (3 years out)

4. shape wide customer requirement through skilled engagement
5. develop whole-UK offer through industry and HMG engagement
6. “gift-wrapped” Campaign Plan for delivery teams

Deliver (2 years out)

7. execute plans in partnership with business
8. outcomes and lessons learned captured



FDI opportunities

Inward investment supports domestic production and ensures a long-term pipeline of innovative and dynamic maritime solutions helping to future proof and expand our export potential.



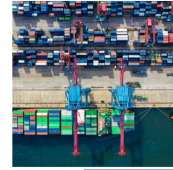
Net Zero

Offshore wind represents a huge opportunity for the UK – with global competition in this space, we should act quickly to seize this opportunity.



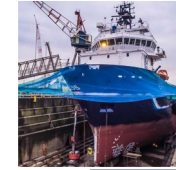
Marine tech

UK companies are leading transformative work on automation, novel vessel design and fuel efficiency.



Freeports

Freeports are unlocking new investment opportunities, driving growth, and supporting trade, innovation, and commerce.

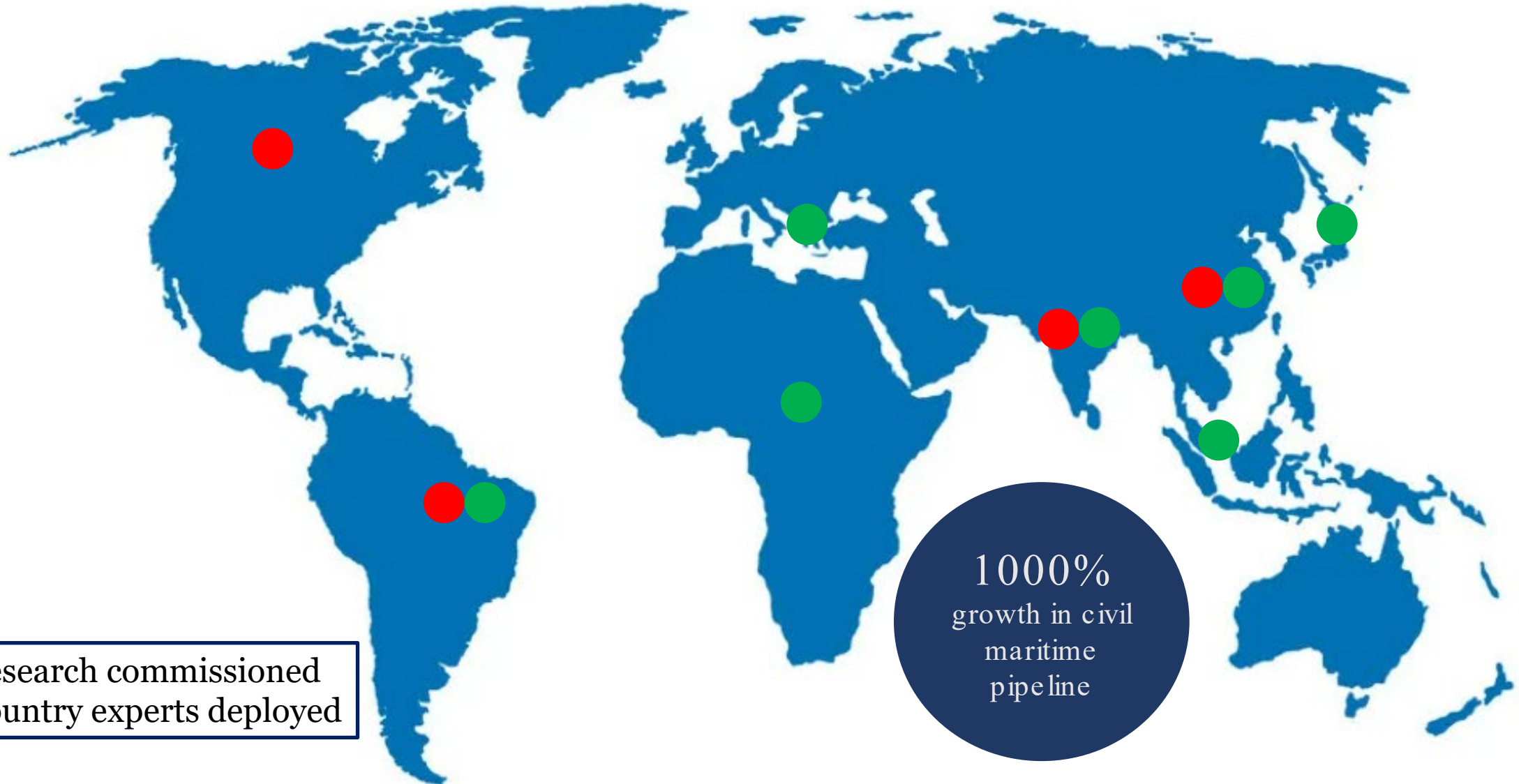


Ports & yards

Investment is a great way to upgrade port and yard infrastructure ensuring the UK is able to keep pace with tech trends and consumer demand.



Government activity cont.



- Research commissioned
- Country experts deployed

1000%
growth in civil
maritime
pipe line



Our toolkit

ASSETS	ACTIVITIES
Expert global network	Intelligence-led prospecting
Capability advisors	Engaging on customer requirements
Cross-Government collaboration	Building whole UK offers
Strong market analysis	Tradeshows and thematic campaigns
Relationships with overseas buyers	Supply-chain missions



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