COMPETITIVIDAD DE LA INDUSTRIA NAVAL LATIONAMERICANA

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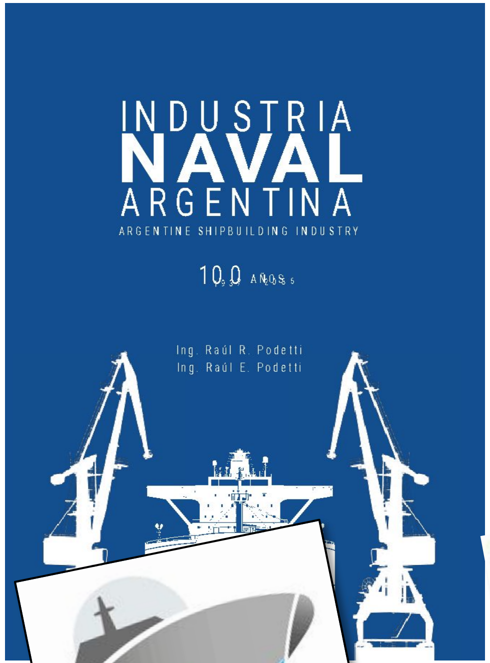
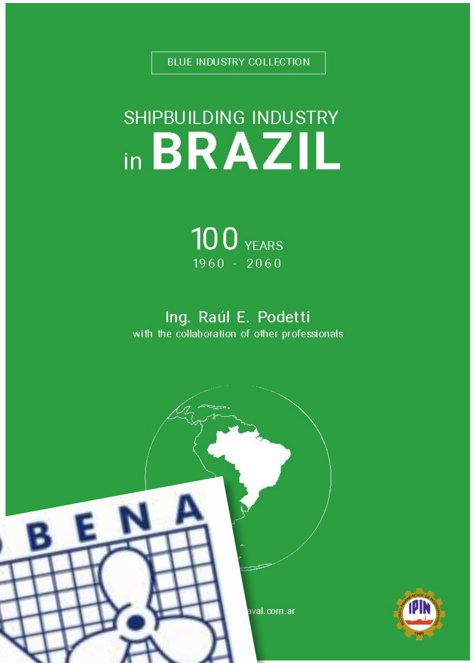




Colombia mar2019

SOBENA

XXVII COPINAVAL
CUBA 2021

ESTATAL

M. GUERRA

ESTABLE

COTECMAR

DIANCA

ASTINAVE EP

ASTILLEROS NAVALES ECUATORIANOS

SIMA

ASMAR

PRIVADA

M. MERCANTE

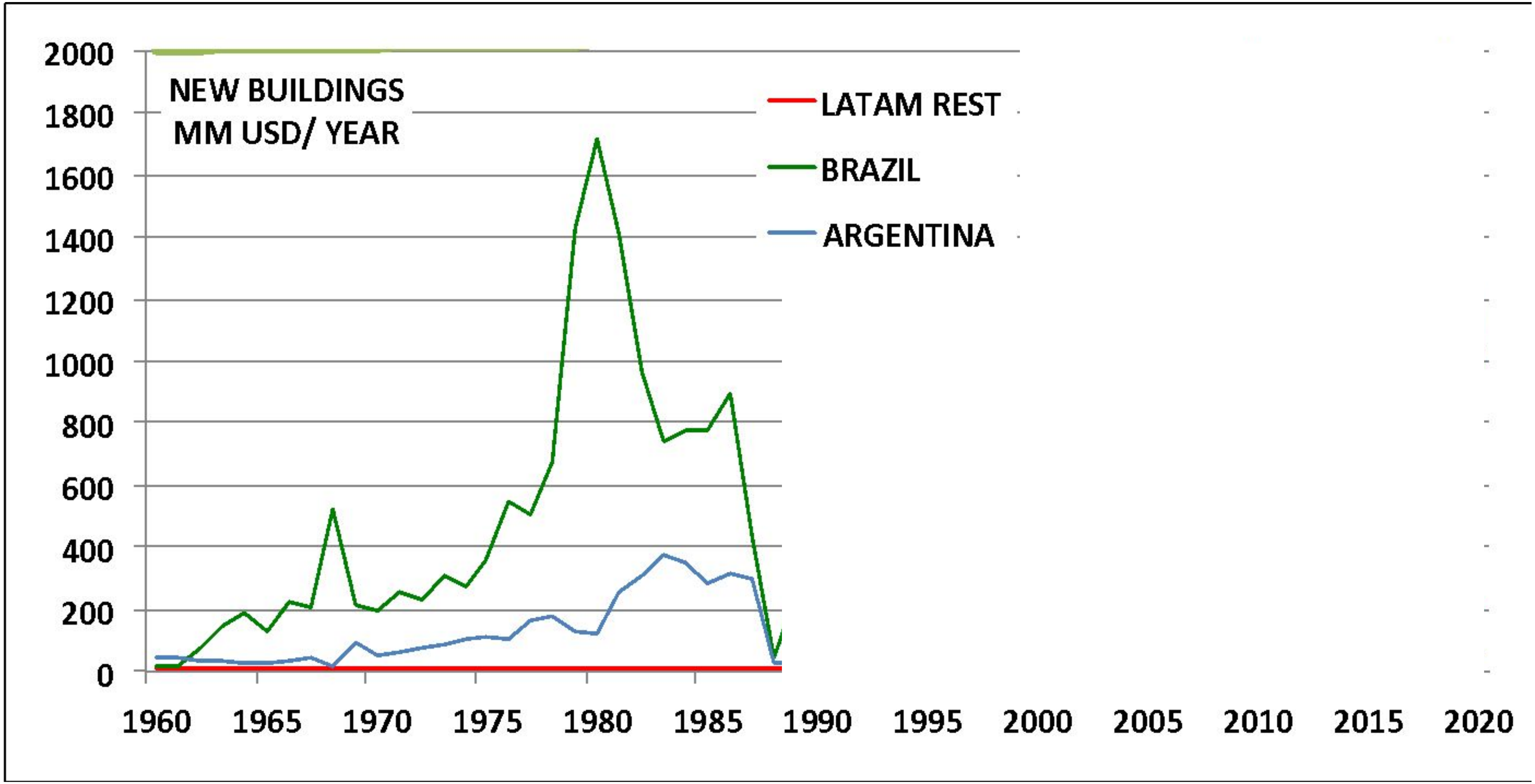
INESTABLE

PROSUB

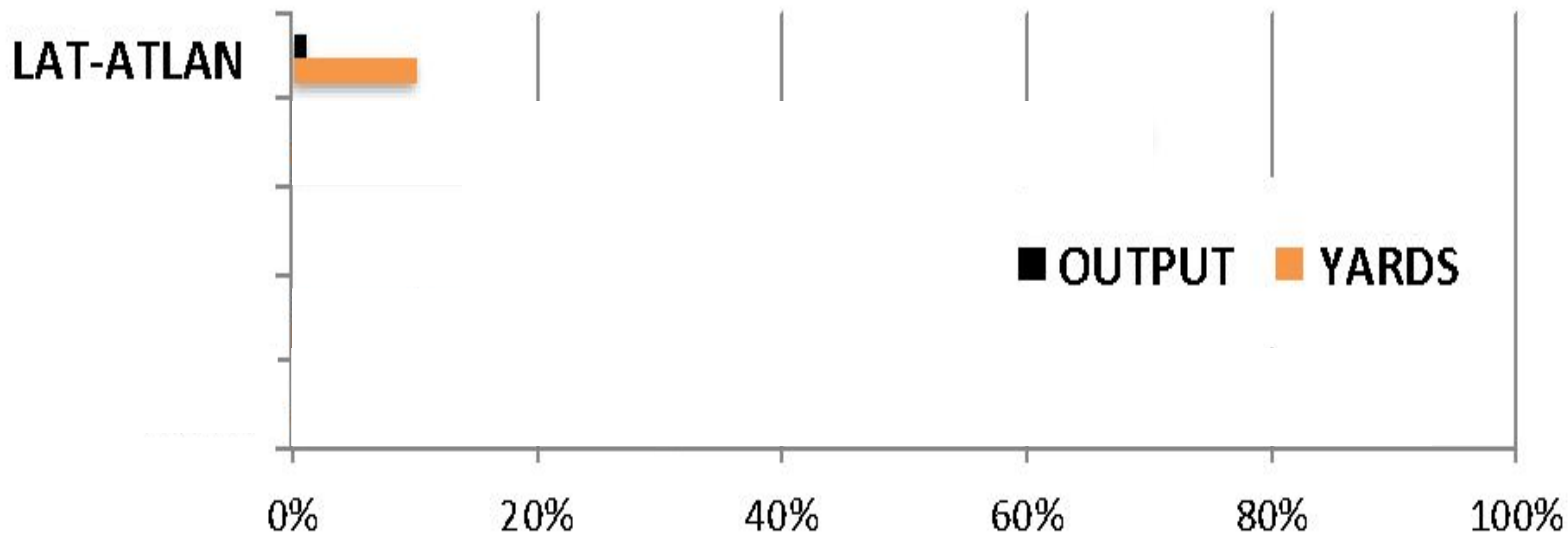
ARS

Astillero RÍO SANTIAGO

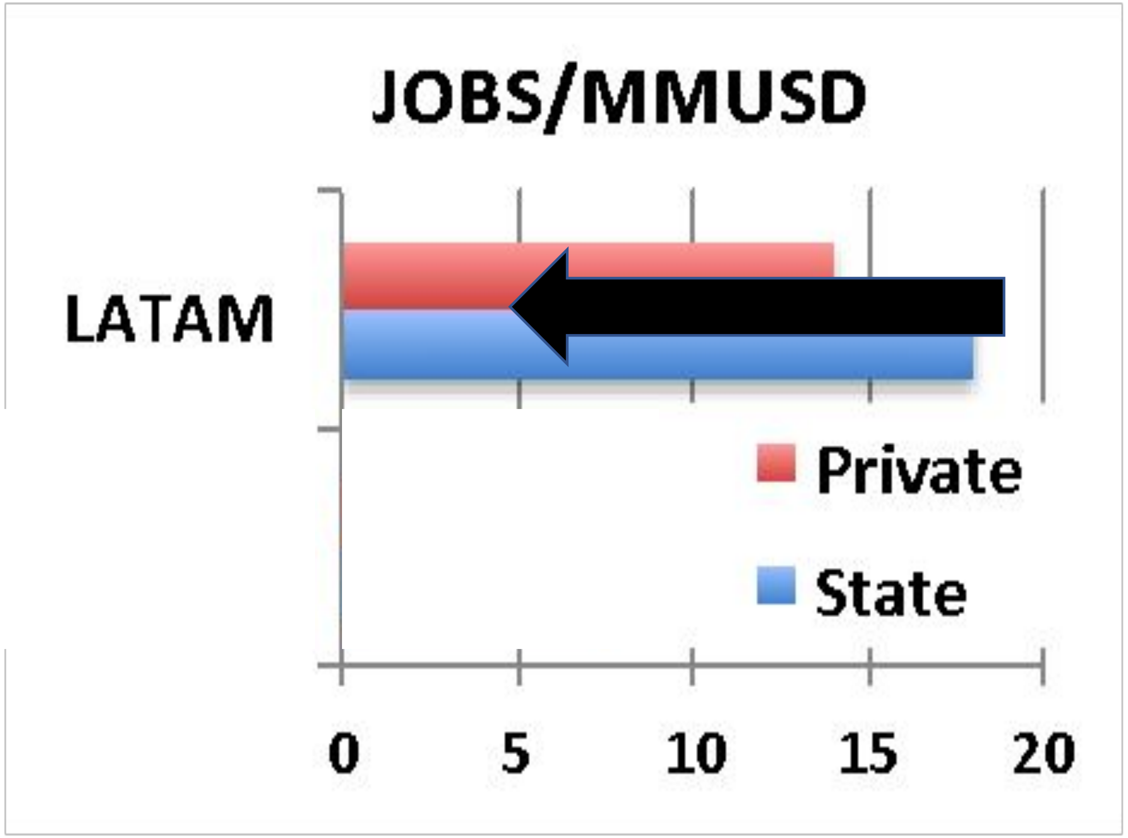
LATAM SHIPBUILDING EVOLUTION



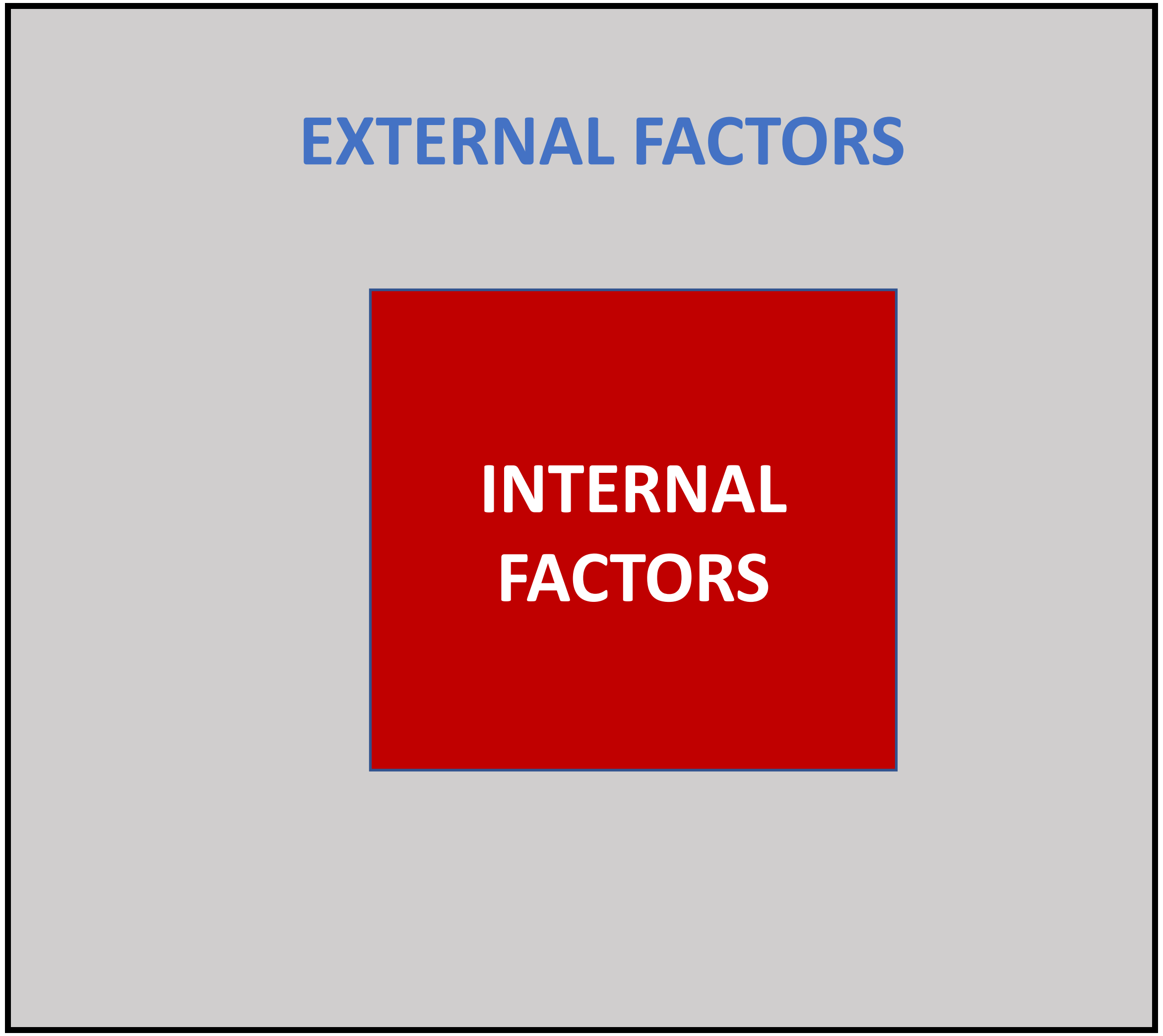
COMPARATIVA DE ASTILLEROS ESTATALES

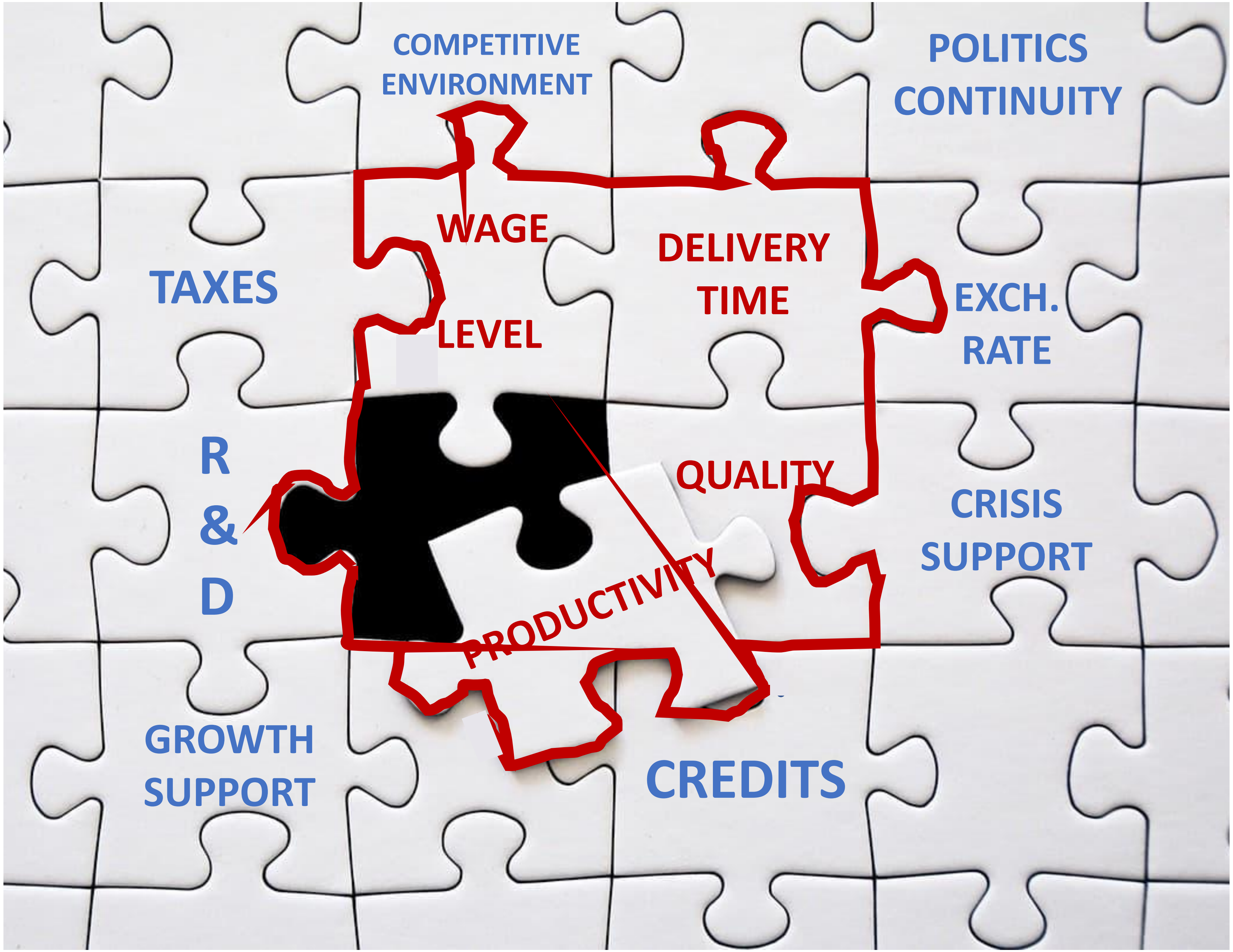


COMPARATIVA DE ASTILLEROS TOTALES



SHIPBUILDING COMPETITIVENESS



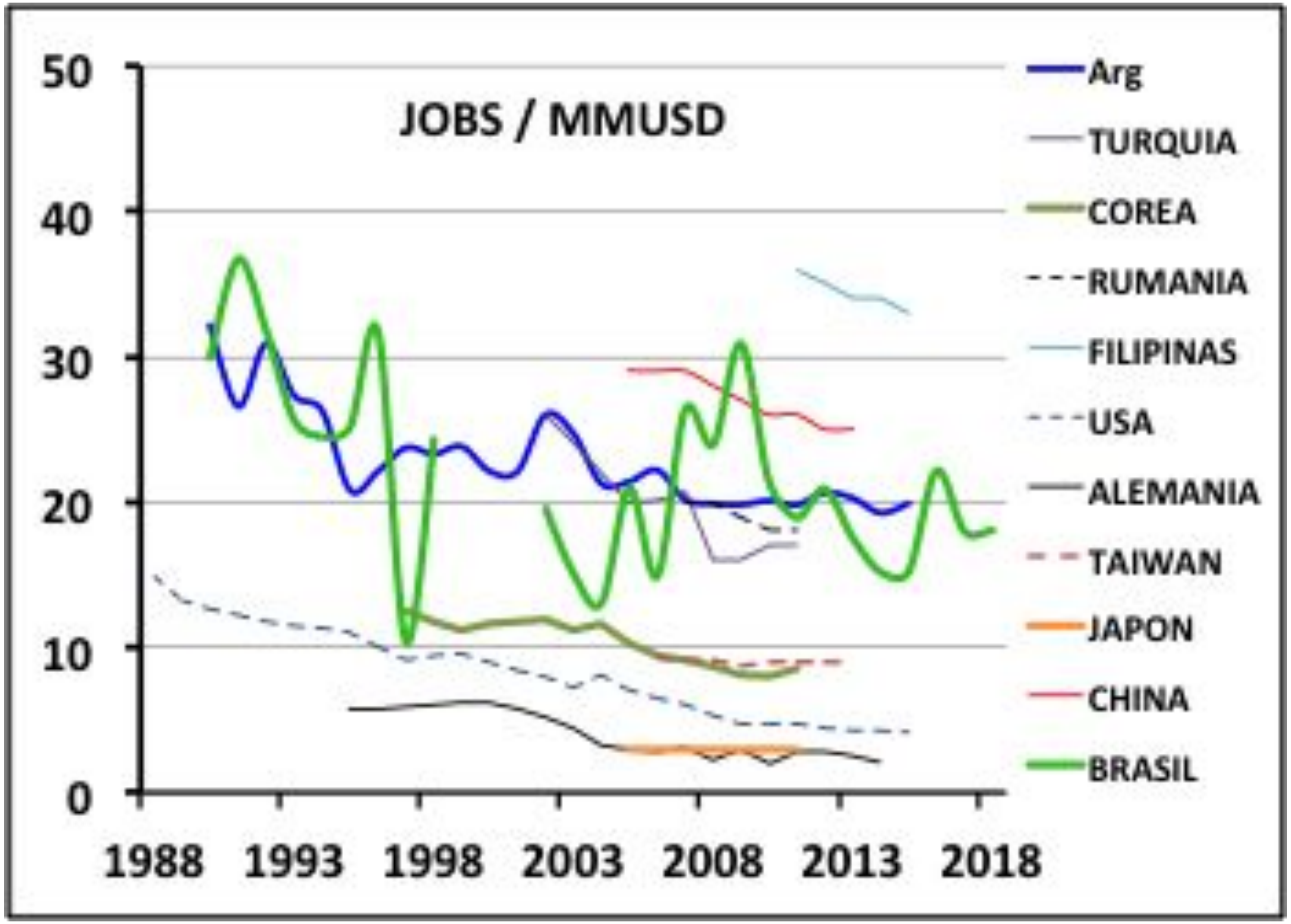

COMPETITIVE ENVIRONMENT
POLITICS CONTINUITY
WAGE LEVEL
DELIVERY TIME
TAXES
EXCH. RATE
R & D
QUALITY
CRISIS SUPPORT
PRODUCTIVITY
GROWTH SUPPORT
CREDITS

SHIPBUILDING PRODUCTIVITY RATIOS

	MH / CGT
Brazil, late 80s :	65
Corea, early 90s:	45

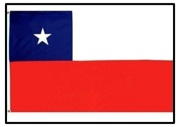
Fishing Vessels ?
Tugs, Pushers ?
Barges ?
Offshore Supply Vessels ?
Offshore Patrol Vessels ?

Cross countries



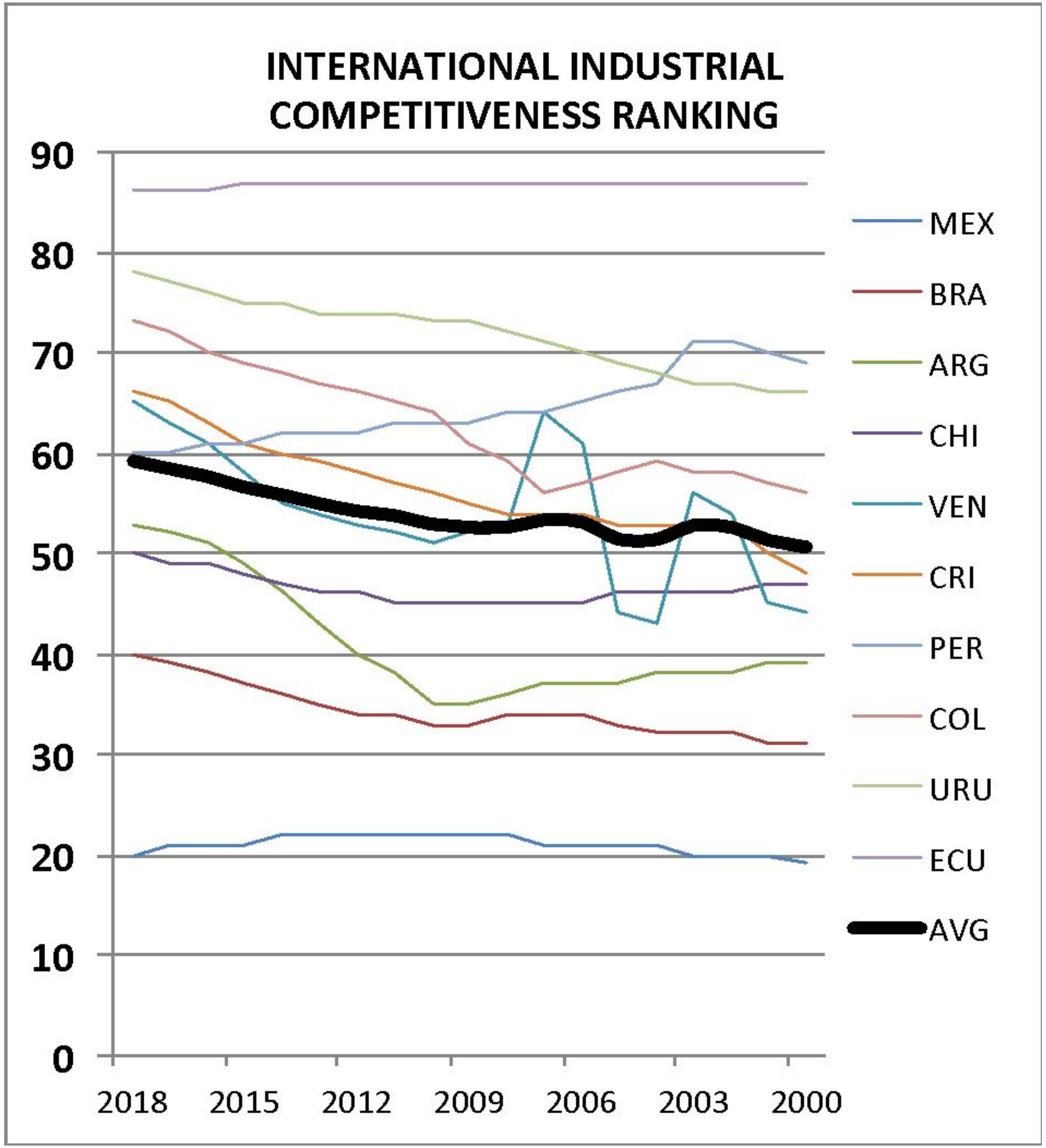
SHIPBUILDING PRODUCTIVITY FACTORS

LEARNING CURVE BRA: 85% , ASIA: 70%

			
SPECIALIZATION	OFFSHORE	FISHING/WATERWAY	NAVY
SERIES	OSV WILSON & SONS	TRAWLERS/CONVOYS SANYM, APA, ARPS	OPV ASMAR
VOLUME	HIGH	MEDIUM	MED/LOW
CONTINUITY	NO	NO	YES

EXTERNAL FACTORS

TAXES	BRASIL +40% INT MKT , BUT ONLY 5% FOR EXPORT
EXCH. RATE	ARG 1992 > GERMAN CONTAINERSHIPS CONTRACT
CRISIS SUPPORT	ASIAN POLICIES VS. ARG+BRAS POLICIES
GROWTH SUPPORT	AGRIBIZ (NATURAL) VS. INDUSTRIAL (ARTIFICIAL)
POLICY CONTINUITY	
COMPETIVE ECONOMIC ENVIRONMENT	



ECONOMIC ENVIRONMENT COMPETITIVENES

United Nations Industrial Development Organization (UNIDO)
Competitive Industrial Performance Index (CIP)
(133 countries)

Relevance:
90% of global ship production is concentrated in the top seven countries of the CIP 2010 [10] ranking (Japan, Germany, USA, Korea, Taiwan, Singapore and China)

EN 18 AÑOS LOS "TOP TEN" DE LA REGIÓN PERDIERON 10 POSICIONES EN EL RANKING COMPETITIVIDAD INDUSTRIAL

TRUE COMPETITIVITY TEST

EXPORT MARKET

COMPETITIVITY NICHES

FISHING INDUSTRY
OFFSHORE OIL & GAS
INLAND WATERWAYS

PROTECTION

EXPLOITATION OF OWN RESOURSE

PORT SERVCES
DREDGING

VALUE ADDED TO EXPORTS

OFFSHORE PATROL

DEFENSE AT HAND

ANTARCTIC LOGISTICS

CLOSENESS

NEW OPPORTUNITY : LNG / BIO LNG / GREEN H2

Colombiamar 2021 DIGITAL

VII CONGRESO INTERNACIONAL DE DISEÑO E INGENIERIA NAVAL

MUCHAS GRACIAS

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