

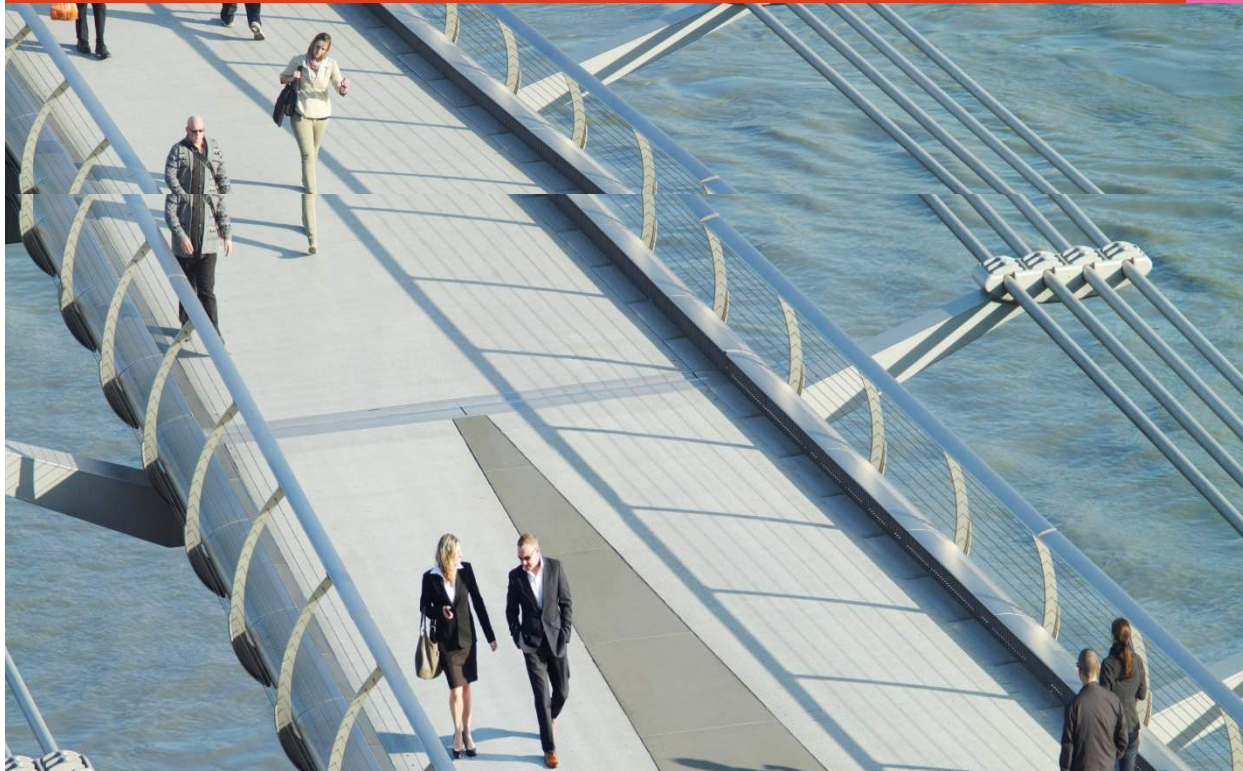
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A Global Perspective on the Economy of the Sea

Miguel Marques

**OUR OCEAN
WEALTH**
*1st Annual
Conference*

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18 June 2014*



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*“The timeless waves, bright, sifting, broken glass,
Came dazzling around, into the rocks,
Came glinting, sifting from the Americas*

*To possess Aran. Or did Aran rush
to throw wide arms of rock around a tide
That yielded with an ebb, with a soft crash?*

*Did sea define the land or land the sea?
Each drew new meaning from the waves' collision.
Sea broke on land to full identity.”*

*in “Lovers on Aran”,
Seamus Heaney*

An underwater photograph showing a diver in the lower left corner, holding a camera. A large, dense school of fish occupies the right side of the frame. The water is clear and blue. Three orange text boxes are overlaid on the image.

Harmony

Balance / Sustainability

Fair regulatory framework (to avoid unsustainable practices / but not creating barriers to development)

*Element of incentive for good sustainable practices.
Distinguish good practices (blue flags, certification ...)*

A large blue and white cargo ship is docked at a pier. In the foreground, two workers wearing orange high-visibility jackets and yellow hard hats are handling thick ropes on the deck. The ship's hull is white with a blue stripe, and its superstructure is visible in the background. The water is a deep blue-green color.

What is this resource that we call the sea?

Are we ready to understand this resource?

How are we going to organize this odyssey?

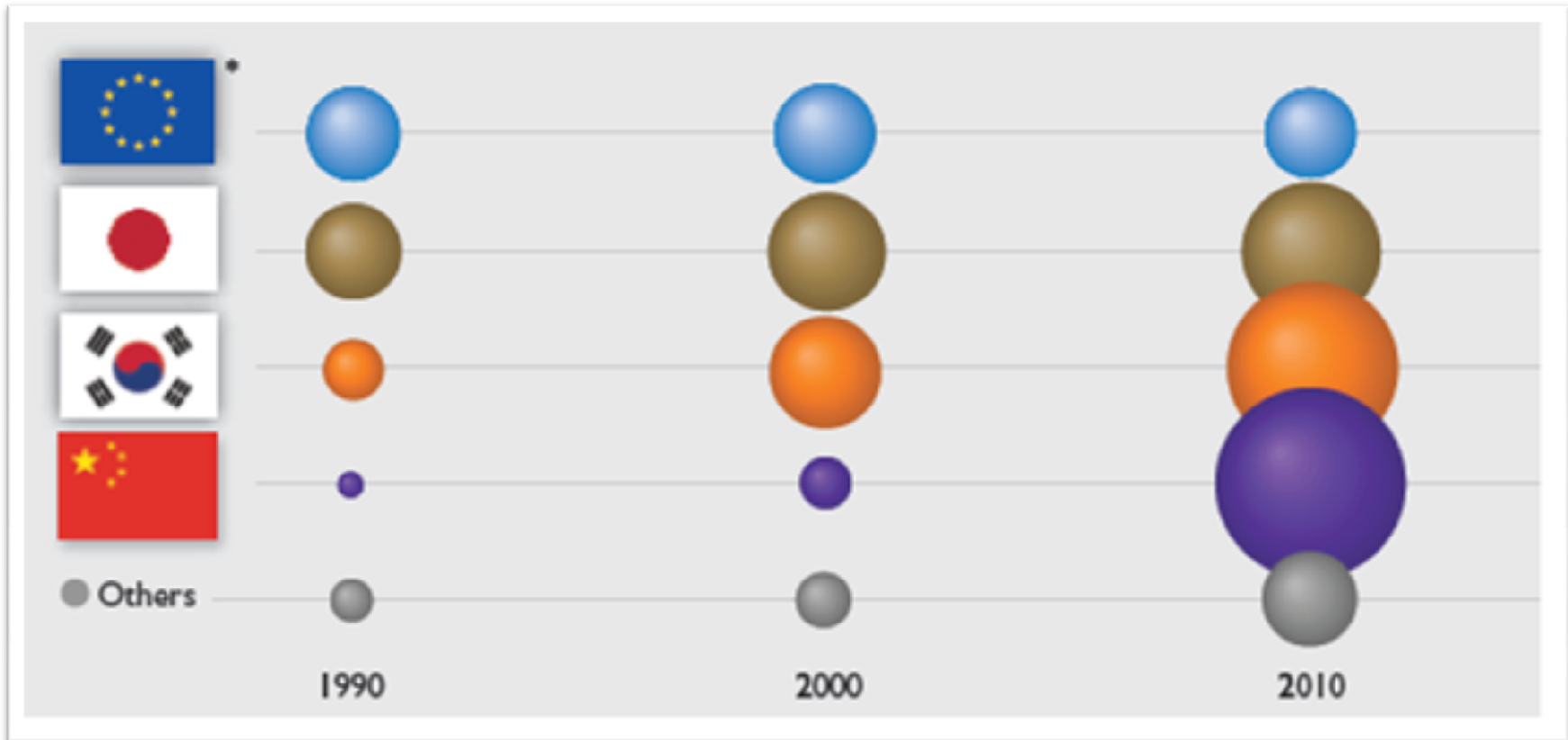
Movement

Opportunities / Challenges

Movement ***Opportunities / Challenges***

Harnessing the opportunities of the economy of the sea, demands skilled people but also equipment.

Shipbuilding: Massive Capacities Built Up (Production in CGT)



Source: LR – Fairplay data
** CESA membership*

Movement ***Opportunities / Challenges***

Harnessing the opportunities of the economy of the sea, demands skilled people but also equipment.

Europe and Japan continue to lead in the more sophisticated vessels

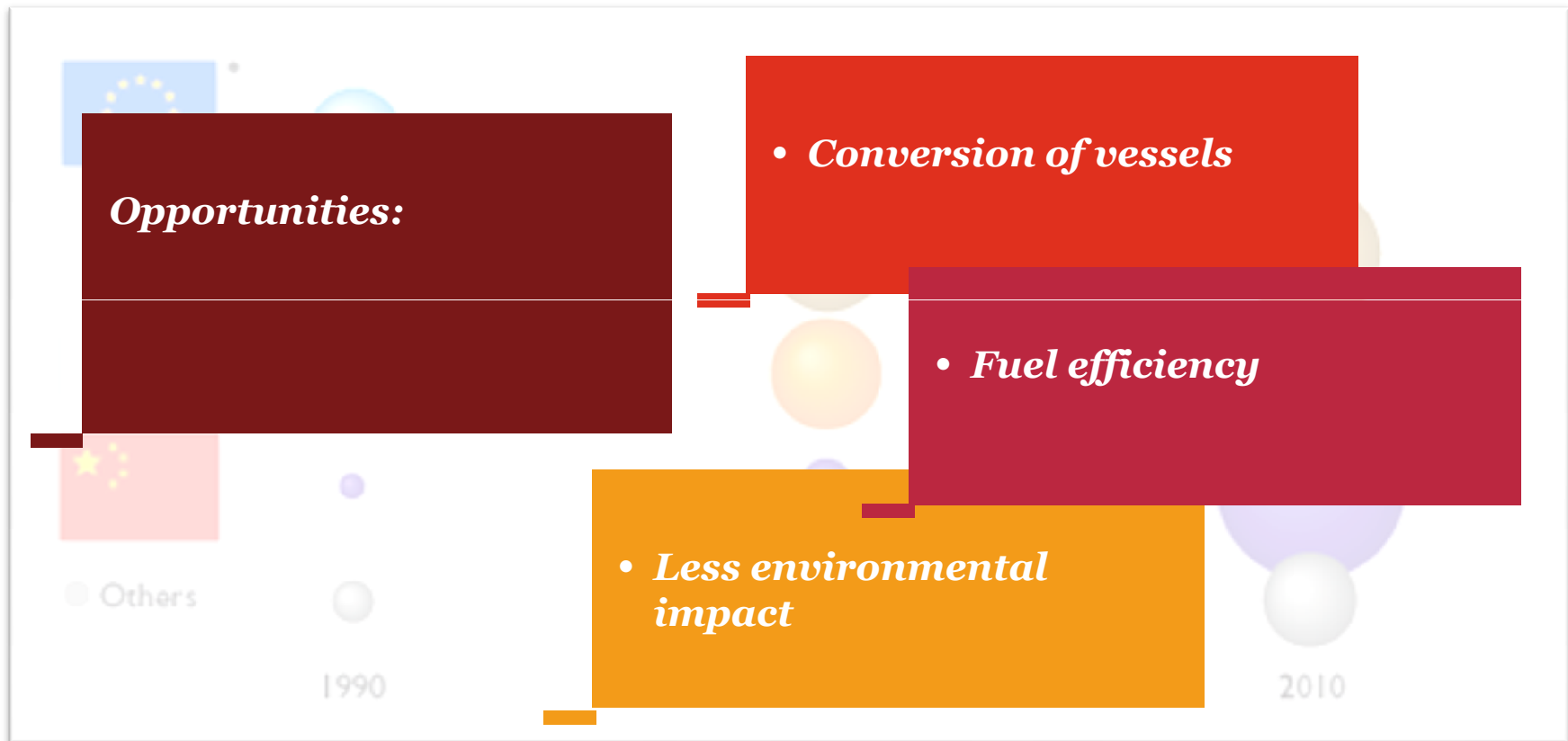
Production costs and state support

Some priority to an infrastructural sector is needed

Ship maintenance and repair is a different industry

Movement ***Opportunities / Challenges***

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Movement
Opportunities / Challenges

“Future of World Trade”
Top 25 Sea and Air Freight Routes - PwC Study



Movement
Opportunities / Challenges

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2030

Movement ***Opportunities / Challenges***

“Future of World Trade” ***Top 25 Sea and Air Freight Routes - PwC Study***

N° of start / destination locations (in the routes) referred to in the Ranking

Region	2009	2030
China	7	17
Asia	19	30
European Union	17	8
United States of America	11	8

Movement

Opportunities / Challenges

With a population of about 8.3 billion by 2030, we will probably need:



*Source: National (USA) Intelligence Council;
Global Trends 2030; Alternative Worlds*

Movement

Opportunities / Challenges



With a population of about 8.3 billion by 2030, we will probably need:

What will be the sources of energy that will support future economic growth?

What will be the mix of energy sources that will contribute to the sustainability of the world, considering the three pillars of sustainability, the economic, the environmental and the social?

*Source: National (USA) Intelligence Council;
Global Trends 2030; Alternative Worlds*

Movement

Opportunities / Challenges



With a population of about 8.3 billion by 2030, we will probably need:

- *The importance of local sources of energy*
- *The impact of each energy project on scientific knowledge*
- *The impact on the shipbuilding and ship maintenance industry*
- *The impact on ports and the shipping industry*

*Source: National (USA) Intelligence Council;
Global Trends 2030; Alternative Worlds*

Movement

Opportunities / Challenges

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Opportunities / Challenges

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Movement

Opportunities / Challenges

With a population of about 8.3 billion by 2030, we will probably need:

Fishing - listen to people related to the environmental and also the fishermen themselves

Aquaculture - adequate regulation framework that does not constitute a bureaucratic barrier

Seafood processing - adding value to sea food products and differentiation is key



Source: National (USA) Intelligence Council; Global Trends 2030; Alternative Worlds

Movement

Opportunities / Challenges

With a population of about 8.3 billion by 2030, we will probably need:

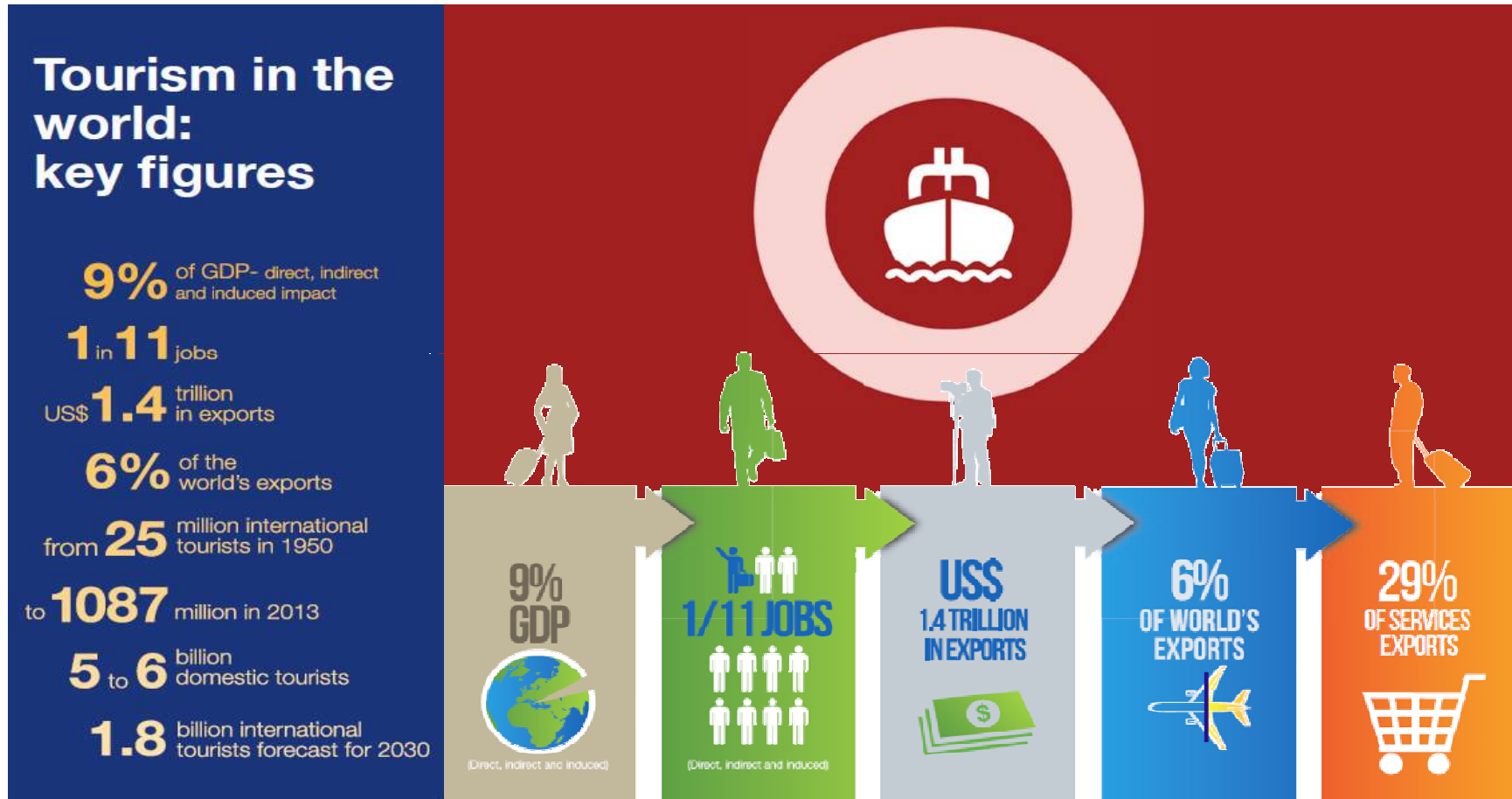
- *Waste from seafood processing is raw material for biotechnology*
- *Other biological resources like algae or sea bacteria also are in the scope*
- *Biotechnology is key to harnessing ocean wealth*
- *From biotechnology to bioeconomics*



Source: National (USA) Intelligence Council; Global Trends 2030; Alternative Worlds

Movement

Opportunities / Challenges



Source: UNWTO Tourism Highlights, 2014 Edition

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***PwC Economia e Finanças
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***PwC Economy and Finances
of the Sea Spring Summit***

*Reunião 1 - Lisboa
3 de abril de 2014
Breves Notas*

*1st Summit - Lisbon
3 April 2014
Some Notes*

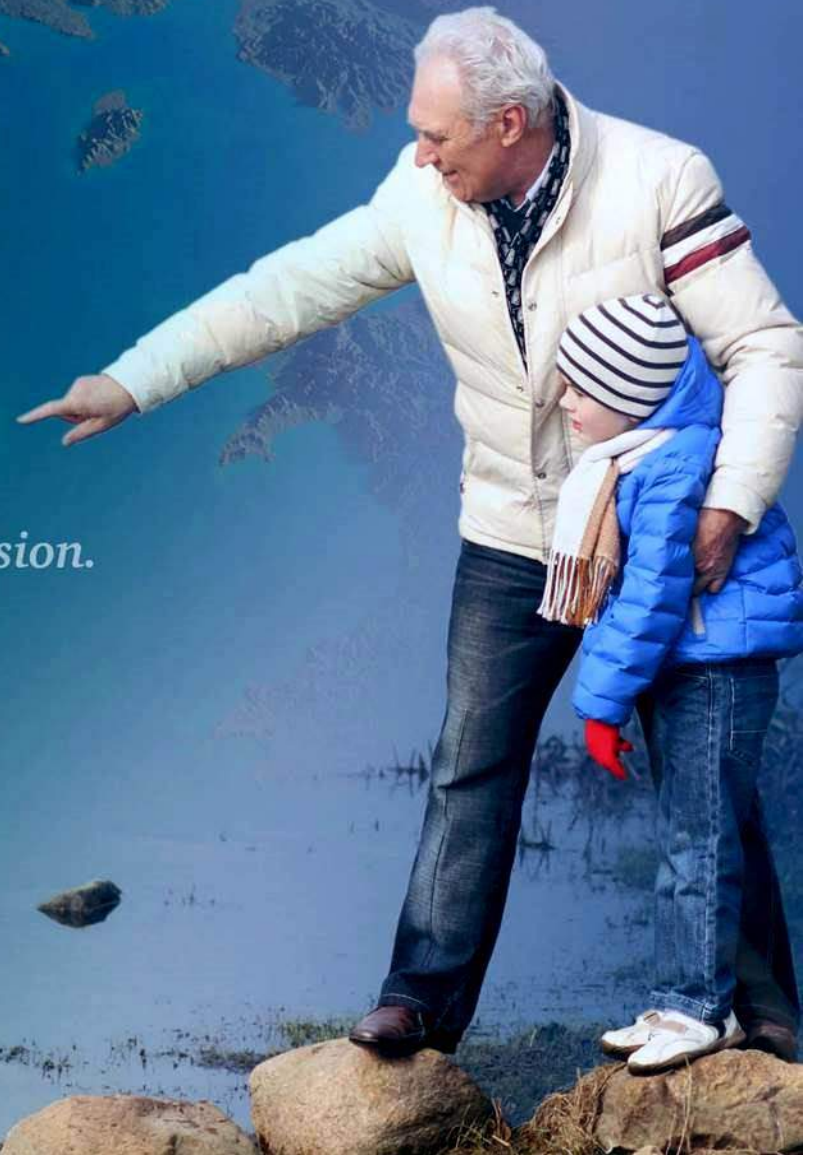


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Thank You!



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