

***FEDERAZIONE DEL MARE***

***FEDERAZIONE DEL SISTEMA MARITTIMO ITALIANO***

**FEDERATION OF THE SEA**

**FEDERATION OF THE ITALIAN MARITIME SYSTEM**

1996

2002



Industrial maritime activities



Italian Maritime Cluster

# 1996

# 2002

Maritime Transports  
Auxiliary Services  
Merchant Shipbuilding  
Fishing  
Recreational boating

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Maritime Transports  
Auxiliary Services  
Merchant Shipbuilding  
Fishing  
Recreational boating

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The Navy  
Coast Guard  
Port Authorities  
RINA  
IPSEMA



**Il Rapporto  
SULL'Economia  
DEL *mare***

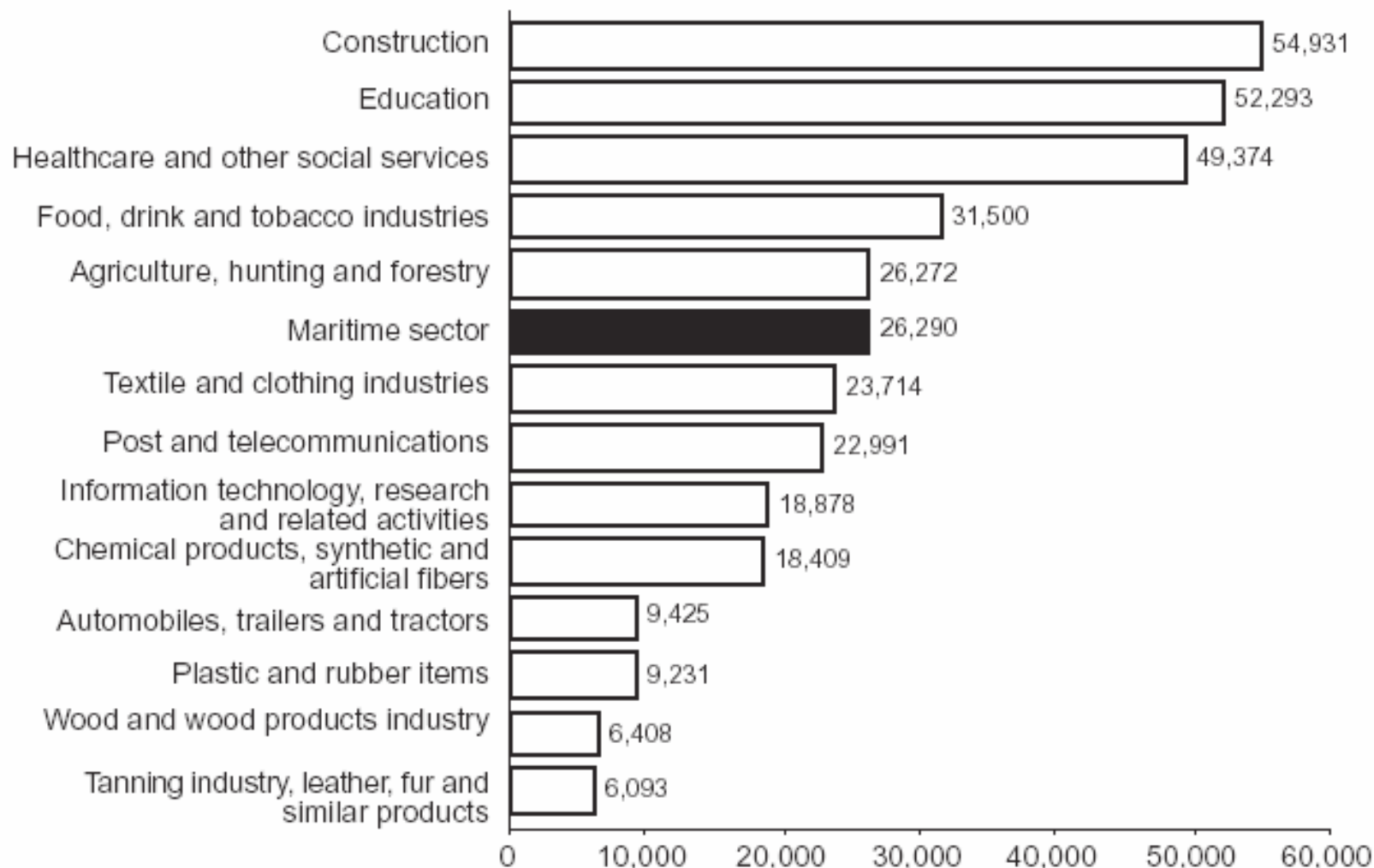
# Italian maritime economy

# Figures of maritime economy

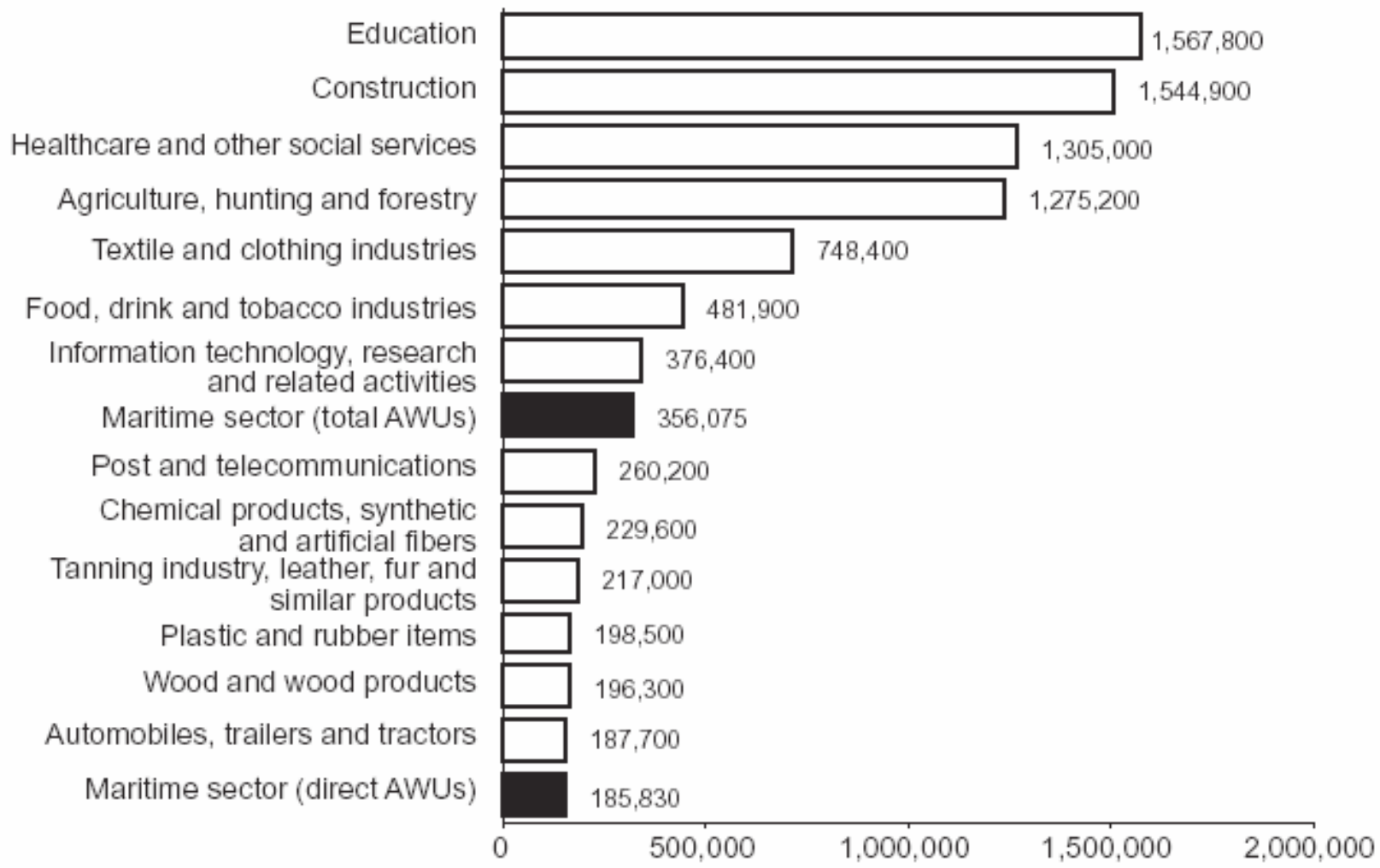
“2,3% GDP - 1,5% total employment”

		Industrial maritime activities	Institutional Maritime activities	Total Maritime sector	
<b>Input output</b>	GDP (net of duplication)	24.230	2.635	26.290	
	Multiplier	2,333	1,510	2,154	
<b>Work units (AWUs)</b>	AWUs	Direct	144.240	41.590	185.830
		Upstream	85.040	8.680	88.985
		Downstream	81.260	0,000	81.260
		Total	310.540	50.270	356.075
	Multiplier	2,153	1,209	1,916	

**Fig. 1.1 - Gross domestic product at market price: comparison between the maritime sector and select branches of the economy, 2000 (millions of euro)**



**Fig. 1.2 - Work units: comparison between the maritime sector and select branches of the economy, 2000**



Source: Censis, 2002

**Tab. 1.2. - A comparison between select European maritime sectors (\*)**

	Economic impact (% of total GDP)	Employment impact (v.a. employees)	
		Direct	Total
Italy	2.3	185,830	356,075
Europe 15 + Norway	1.6	1,500,000	2,400,000
Netherlands	3.7	137,000	193,000
United Kingdom	3.5	250,000	423,000

(\*) The comparison of data is made solely for indicative purposes, as the aggregates compared in gathering and calculating the data are not homogenous

Source: Censis calculations based on various sources, 2002

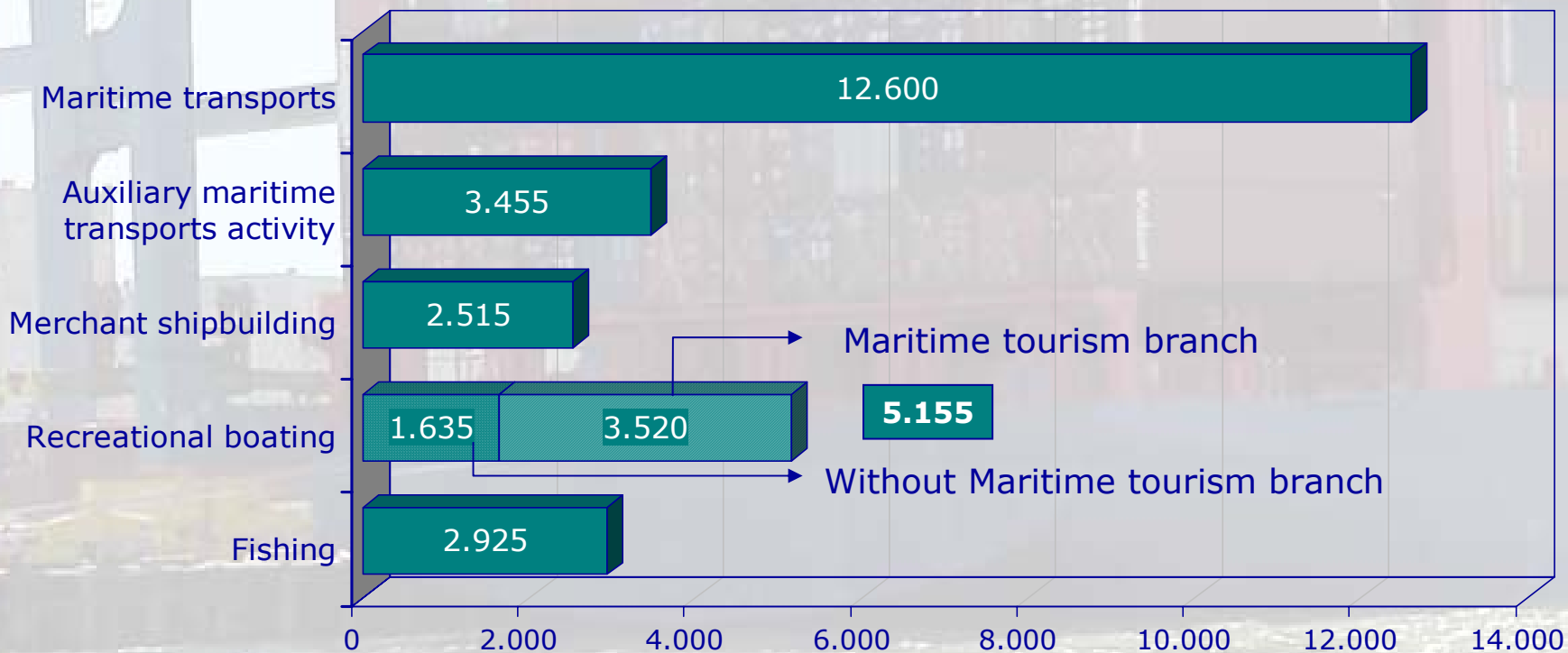


# Industrial maritime activities



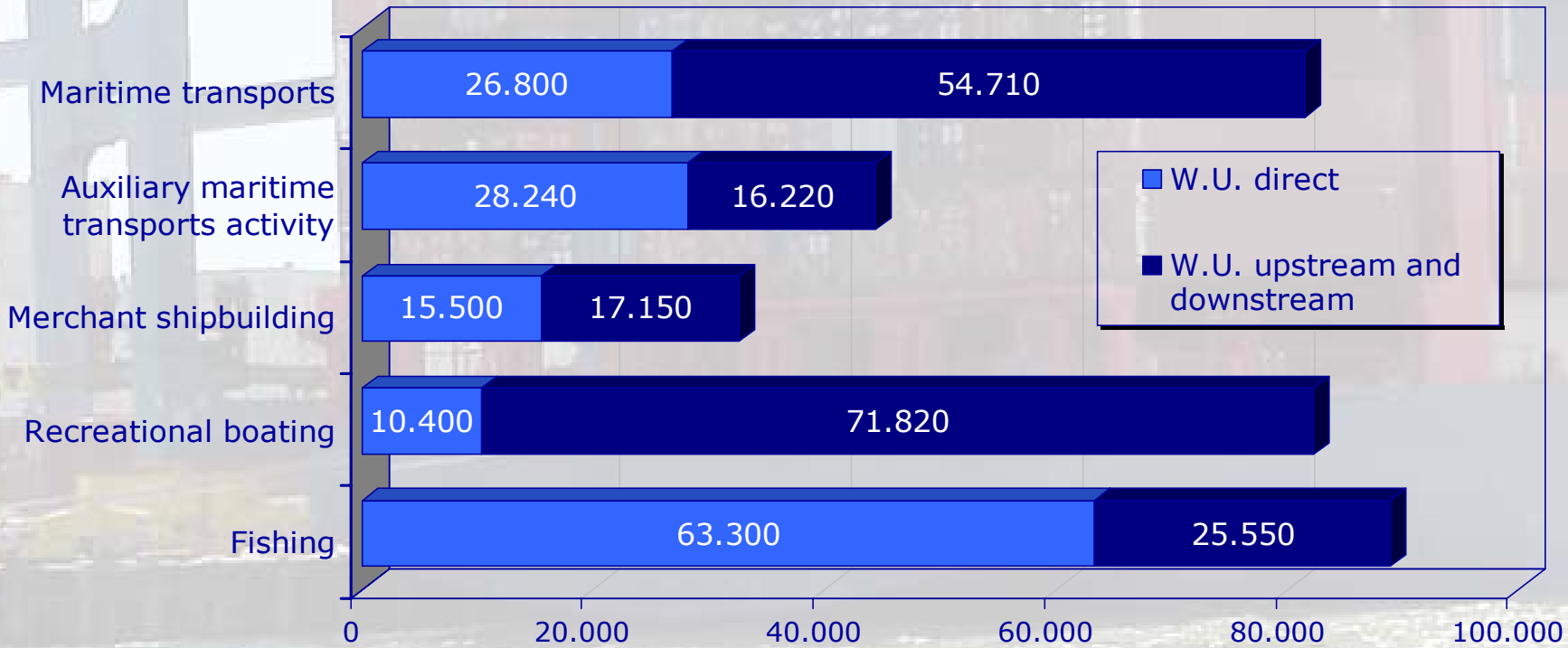
# GDP

GDP of five maritime industry sectors  
Million Euro - Year 2000

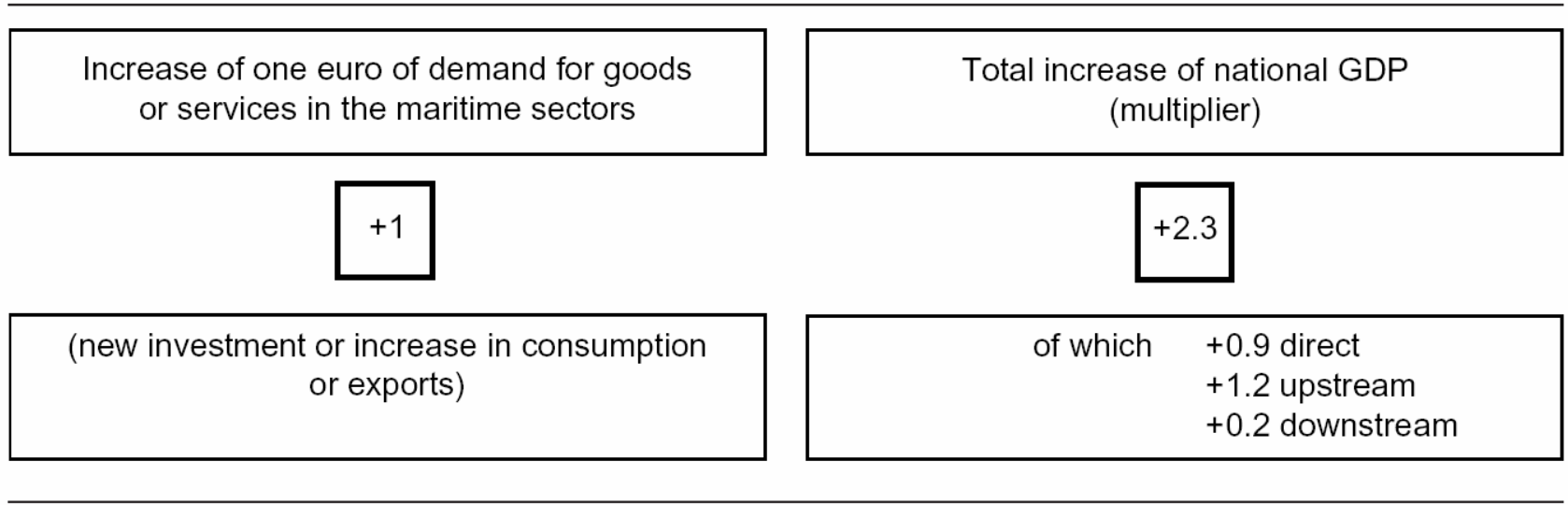


# Employment

Work Unit: Comparison between sectors: directs, upstream, downstream  
Year 2000



**Fig. 2.2 - Production multiplier for the maritime industry, 2000**



Source: Censis, 2002

Maritime transports	+1	→	+2,709
Maritime transport support services	+1	→	+1,826
Merchant shipbuilding	+1	→	+3,526
Recreational boating (with turism downstream)	+1	→	+2,284 (+5,019)
Fishing	+1	→	+2,198

**Fig. 2.5 – Employment multiplier for the maritime industry, 2000**

Increase of one work unit  
in the maritime sectors

+1

(deriving from an increase in demand for goods  
and services produced by the maritime sectors)

Total increase of work units  
in the national economic system  
(multiplier)

+2.2

of which +1.0 direct  
+0.6 upstream  
+0.6 downstream

Source: Censis, 2002

Maritime transports	+1	→	+3,041
Maritime transport support services	+1	→	+1,574
Merchant shipbuilding	+1	→	+2,106
Recreational boating (tourism branch included)	+1	→	+2,040 (+7,906)
Fishing	+1	→	+1,404

# 1992-2000 Evolution

Comparison between principal industrial maritime activities characteristics  
 Years 1992 and 2000 (Million Euro)

		1992	2000	Var. % 1992 - 2000	
<b>Input Output</b>	GDP (net of duplication)	16.925	24.230	43,2%	
	Duplications	1.480	2.420	63,5%	
	Exports	6.700	13.985	108,7%	
	Multiplier	2,465	2,333		
<b>Work units (AWUs )</b>	AWU S	direct	167.420	144.240	-13,8%
		upstream	80.580	85.040	5,5%
		downstream	88.790	81.260	-8,5%
		Total	336.790	310.540	-7,8%
	Multiplier	2,012	2,153		