

ELMAR – Supporting South Baltic SMEs to enter the international supply chains & sales markets for boats & ships with electric propulsions

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Sales & supplier market analysis Poland

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1. Introduction
2. Sales market analysis Poland
3. Supplier market analysis Poland
4. Conclusions

1. Introduction

Water e-mobility in Poland:

- Water e-mobility sector in Poland is at the early stage of development
- Manufacture and operation of electric boats and ships are not supported by the government
- Polish shipyard industry is characterised by a large unused production potential
- The sector of water e-mobility that is particularly well-developed is boat and yacht manufacture, specifically vessels with motor propulsion
- Inland waterway transport passengers and goods is of very little significance
- There potential of inland waterways is also used to a little extent

However...

1. Introduction

However:

- Polish shipyards are capable of designing, manufacturing and equipping high quality electric boats and ships (e.g. car and passenger ferries)
- There is an increasing interest in sailing, especially in motorboats
- More and more port and marinas are being upgraded and expanded
- Seaside resorts provide more and more water attractions (e.g. ships for tourists, water trams)
- The offer of electric boats charter companies is increasing
- Actions are taken to improve the quality of the inland waterways e.g. canal via the Vistula Split
- In 2017 Poland joined the AGN (*European Agreement on Main Inland Waterways of International Importance*)

That is why Polish water e-mobility market is worth attention

2. Sales market analysis Poland

Water transport and tourism (1/2):

- 770 km of seashore and internal sea waters: Gdańsk Bay, Szczecin Lagoon, Vistula Lagoon
- International Waterway in Poland: E30 (connecting the Baltic Sea with the Danube river in Bratislava); E40 (connecting the Baltic Sea in Gdańsk with the Black Sea); E70 (connecting the Netherlands with Russia and Lithuania)
- Total length of inland waterways – 3,659 km: 2,413 km – navigable rivers; 644 km – canalized sections of rivers; 344 – canals; 258 km – navigable lakes (5.6% meets the parameters of international inland waterways – 206 km)
- The longest navigable rivers: Vistula (941 km); Odra (711 km); Bug (587 km); Warta (407 km); Narew (300 km)
- Over 7,000 lakes – the biggest lakes: Śniardwy (113 km²); Mamry (103 km²); łąbsko (71 km²); Dąbie (56 km²)

2. Sales market analysis Poland

Water transport and tourism (2/2):

- Just in Mazury region there are over 150 lakes in the quite zone – no boats or ships with internal-combustion engine are allowed there
- The greatest tourist sailing routes: The Great Mazurian Lakes Trail (110 km – semi-loop); The Żuławy Loop (300 km); The Great Wielkopolska Loop (680 km)
- Good conditions for water trams in big cities: Bydgoszcz (Brda river); Gdańsk (Martwa Wisła river & Gulf of Gdansk); Poznań (Warta river); Szczecin (Odra river); Toruń (Vistula river); Warszawa (Vistula river); Wrocław (Odra river) and in smaller towns such as Elbląg, Mrągowo, Piła, Szczecinek, Zegrze
- Prospective water areas for the operation of passenger and car-passenger ferries: Hel Peninsula, Vistula Peninsula, Wolin

2. Sales market analysis Poland

Tourism and watersports on inland waters (1/2):

- 2.3% households have some watercraft (boat, kayak, dinghy)
- 2.6% household members are able to sail (0.4% of which at advanced level)
- Over 13% of Poles take part in sailing cruises as crew members (at least once every few years)
- Ongoing improvement of tourism and watercraft infrastructure: ports and marinas, waterways, facilities (e.g. electricity for battery charging)
- Over 300 upgraded ports and inland marinas (and it is increasing) equipped with amenities
- No need for a sailing licence to operate boats with 10 kW engine

2. Sales market analysis Poland

Tourism and watersports on inland waters (2/2):

- Increasing popularity of sailing (yachting) and motorboat sports in Poland
- Increasing popularity of motorboat cruises and houseboats
- Increasing number of registered new motorboats in Poland
- Development of small chartering companies, particularly in inland waters (lakes, tourist resorts)
- Developing market of tourist transport in towns located by water and in tourist resorts (recreational cruises)
- Polish yachting market increases annually by 10%

2. Sales market analysis Poland

Prospective markets for boats and electric ships – products:

- Small tourist boats for passengers (tourist resorts by the rivers and lakes)
 - Water trams (towns by the rivers)
 - Small recreational boats with electric/solar propulsion (rivers, lakes)
 - Engines, batteries, control systems and electric propulsion systems
 - Service of electric ships and boats on inland waters
 - Elements of charging infrastructure
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- Car-passenger ferries on the sea as an alternative to car journeys (along with power charging)

2. Sales market analysis Poland

Prospective markets for boats and electric ships – customers:

- Local administration by the rivers (water trams)
- Regional administration (ferries)
- Water tourism operators (tourist ships)
- Owners of the hotels located by lakes and rivers (electric boats)
- Charter companies (electric boats)
- Individuals (electric boats and electric engines)
- Owners of boats who decided to change propulsion from motor to electric

3. Supplier market analysis Poland

Production of sea vessels:

- Participation of Polish enterprises (shipyards) in the design and manufacture of Norwegian electric ferries (strong support of Polish engineers – designers)
- 22nd place for Poland among ship manufacturers worldwide (many companies of different sizes)
- Specialization in ship renovation and rebuilding, focusing of specialist vessels
- Good design and technological base, many years of experience, attractive prices of the Polish shipyard industry
- Large amount of high-qualified specialists working in design and construction studios – innovative solutions for foreign shipyards
- The Association of Polish Maritime Industries FORUM OKRĘTOWE unites 5 shipyards and nearly 50 companies producing equipment for new ships (www.forumokretowe.org.pl)

3. Supplier market analysis Poland

Production of tourist ships and boats (1/2):

- Large yachting sector – more than 900 companies (all private), 11% of which are shipyards producing yachts and boats
- Companies located in the Northern Poland region – the Baltic coast, Mazury and Augustów area
- Annual output – approx. 20,000 yachts and motorboats
- Poland – the European leader in the manufacture of motorboats from 6 to 9 meters with outboard engine (over 50% of the production) and the second in the world after the USA
- 95% of the production is exported, primarily to Norway, France, Germany, and the USA
- Polish export of yachts constitutes 60% of the overall EU yacht export (next are: Finland – 9.1%; Italy – 5.6%)

3. Supplier market analysis Poland

Production of tourist ships and boats (2/2):

- Numerous companies that produce necessary appliances, equipment, instruments for yachts such as motors, gas and electrical installations, lighting systems, water installations, navigation devices, furniture, kitchen equipment etc.
- Advanced co-operation with specialised transport enterprises (logistics, spedition, transport)
- Market leaders – shipyards (70% of the total production): DELPHIA YACHTS KOT (Olecko), GALEON (Straszyn), SUNREEF YACHTS (Gdańsk), OSTRÓDA YACHT (Ostróda), BALT-YACHT (Augustów), MODEL ART/PARKER (Ostróda), ŚLEPSK (Augustów)
- The Polish Chamber of Marine Industry and Water Sport unites approx. 110 members – industry specific companies (www.polboat.eu)

4. Conclusions

Suggestions for water e-mobility enterprises :

- Polish shipyards are able to manufacture any type of watercraft from the smallest motorboats to luxury yachts, in co-operation with the best designers
- Poland enjoys a great potential in the field of design and manufacture of the equipment and the construction of ships, ferries and electric boats (co-operation)
- Currently, only small electric motorboats, usually in charter, can be encountered on the rivers and lakes
- There is a prospective market for recreational boats with electric propulsion and small tourist boats – water trams (with accompanying devices) and also houseboats
- Poland still has large unused potential for tourist and water sport market – new trend – water e-mobility – has great development opportunities

