

018 – June 2005

POLISH SHIPYARDS

General

The shipbuilding industry still ranks high in the Polish economy and holds the fifth place in the world's shipbuilding league well behind South Korea, Japan, China and Germany.

When considering Poland's great trade deficit, the industry was the third major Polish exporter in 2001 and it still contributes a certain share to the improvement of the country's balance of trade. After the breakdown of the communist regime and the collapse of the COMECON and the Warsaw Pact, Poland had to encounter severe problems caused by the fading away of traditional customers and not clarified payments from clients in the former Soviet Union. Almost all shipyards have been facing the threats of bankruptcy and those that survived so far have been given repeatedly massive direct and indirect financial aid by the Polish Government. There is evidence that a last minute state aid to the ailing industry was granted on the 30th of April 2004, a couple of hours before the accession to the European Union.

The European Union had given Poland permission to grant aid to shipbuilders in order to counterbalance competition from South Korean shipyards. On January 25th 2005 the Council of Ministers voted for the project of a resolution on subsidies to contracts for certain types of seagoing vessels. The resolution is to bring into effect TDM Temporary Defence Mechanisms for Polish shipyards in the way of extending direct subsidies to contracts for building four types of ships, i.e. chemical tankers, container carriers, product carriers and LNG gas carriers. The TDM system is financed by the State Treasury through the Agency of the Ministry of Economics and Labour. The subsidies reach 6 % of a contract's value. The proposed resolution assumes that within 3 years i.e. from 2005 - 2007, the payments will amount to 375 million Polish zloty.

Although developing appropriate understanding for the huge potential of social unrest in the Polish shipbuilding industry, the historical role of the country and Solidarnosc as the birthplace of the



worker's movement, the role they have played in bringing the communist regimes in Eastern Europe to a temporary end, and the brutal challenge of unfair competition from the Far East, Poland at the end of the day will not be able to avoid the Opening of Procedures by the Commission according to Article 87 of the Treaty because of sustained subsidies apart from the EU Temporary Defence Mechanisms.

Despite a drop in employment, going down from 70.000 people in the 1980s to 37.000 by the end of the 1990s and 16.000 in 2004, the shipbuilding industry remains an important segment of the national economy, with another 80.000 employees in the marine equipment supplier's industry. The shipbuilding sector is almost fully export-orientated, with more than 90 percent of the production being designated for export – a unique situation in the Polish economy – of which 80 percent go to the European Union countries, Germany and the Scandinavian countries being the biggest customers and supporters of the Polish economy.

The industry's major weaknesses were and unfortunately still are:

- overcapacities
- lack of state of the art production technologies
- lack of financial capabilities
- low productivity due to poor labour efficiency
- unproportionally high labour force
- non compliance with Western European (EU) environmental standards
- no covered dry docks

In other words the legacy of a state owned industry being part of a planned, communist economy. In addition to that, the elite of the labour force is migrating from Polish shipyards into Western Europe.

The strengths of the Polish shipbuilding community are

- good R&D capabilities
- cheap labour costs and a
- strong, domestic equipment suppliers industry



Over the period of 1996 – 2000 Polish shipyard production was relatively stable at a level of approximately 500000 cgt. This was the first period of an attempt to restructure and consolidate the Polish shipbuilding industry. From 2000 onwards the sector had considerably deteriorated as the industry was adversely affected by domestic and external factors. When newbuildings were contracted in 2000, prices were extremely low and the complexity of orders was relatively high. This and the excessively high exchange rate of the zloty and a slowdown of the economy in Europe and the USA, negatively influenced the financial situation of the enterprises. Paired with high prices for raw materials and energy, plus the aggressive marketing campaigns of the Asian shipbuilders spearheaded by the Koreans, this resulted in a very difficult situation which hit almost all shipyards and culminated in the 2002 bankruptcy of Stocznia Szczecinska Porta Holding when the shipyard lost its financial liquidity. Financial problems also affected the Gdynia Shipbuilding Group and forced the diesel engine manufacturer H. Cegielski to temporarily stop production because of liquidity problems (i.e. unpaid invoices from the Polish shipyards).

A second phase of restructuring and consolidating was initiated during the EU accession phase, but again no serious genuine private investors were willing to take stakes in this ailing industry.

So in principle the industry remained under the ownership, influence and responsibility of the Polish Government. Although under completely different legal bankruptcy systems, the pattern of “restructuring” in Poland is to a very high extent similar to that of Korea. Shipyards go repeatedly bankrupt, each time being given massive aid by the Government and generous debt forgiveness by the state owned banks in order to be finally re-established under a slightly changed company name, but with almost no improvement of the production technologies because of financial shortages.

In 2004 the situation of the Polish shipbuilding industry changed a little when in a partly speculation driven order boom, Korea and China were not willing anymore to add low priced contracts to their bulging order books and shipowners started to buy ships progressively in Poland, where capacities seemed to be available – but reality was teaching a different story in the end. Many projects were delayed with all the financial and commercial consequences questioning the reliability of the Polish shipbuilding industry.

Now the industry might be facing the third major attempt to consolidate the shipbuilding activities in Poland. Szczecin New Shipyard, the Gdynia Shipbuilding Group and some selected Polish equipment suppliers shall form the Polish Shipyard



Consortium. A platform for increased internet-based communication of shipyards and marine equipment suppliers is available to the Gdynia and Szczecin Shipyards as well as to the Technical Universities of Gdansk and Szczecin based on the AVEVA-Tribon portal allowing for further standardization of production and materials/equipment. This Tribon data base will be accomplished by the Polish marine equipment suppliers data base developed by CTO.

Co-operation with Vietnam

Poland has been taking a very active part in the development of the shipbuilding industry in communist Vietnam. The Vietnam shipbuilding Industry Corporation Vinashin has imported equipment worth more than 50 million USD from Polish companies. The equipment was part of a 70 million USD credit agreement between Poland and Vietnam which will expire by the end of 2005.

Apart from Poland, massive support is given by Korea (Hyundai) and Japan to develop management know how and production technologies. Boosted by the current boom in shipbuilding and strongly assisted by the leading equipment supplier countries from Europe, the Vietnamese shipbuilding industry soon will reach the declared goal of an increased domestic share in production.

Statistics

In comparison – the order book of the Korean shipyards at the end of the last year is almost ten times bigger – 918 ships – valued at USD 57.7 billion, enough to keep the yards in Korea busy until early 2008!

In 2003 Polish shipyards have built 14 ships, 16 less than in 2002, with a total of 478000 dwt and a value of 415 million USD, 300 million down on 2002.

In 2004 Polish shipyards have built 25 ships with a total of 545700 dwt equivalent to 448700 cgt.

Production output in cgt

	1999	2000	2001	2002	2003	2004
Gdynia Group	240.000	330.000	325.000	360.000	110.000	240.000
Szczecin New	200.000	140.000	135.000	90.000	175.000	184.000
Others	18.000	24.000	17.000	45.000	1.100	26.000
Total	458.000	494.000	477.000	495.000	286100	450.000

Production output number of ships

	1990	2000	2001	2002	2003	2004
Gdynia Group	11	21	17	16	4	9
Szczecin New	17	9	8	5	9	8
Others	6	4	3	9	1	8
Total	34	34	28	30	14	25

Order book newbuildings in cgt

	1990	2000	2001	2002	2003	2004
Gdynia Group	460.000	1,350.000	1,160.000	870.000	1,000.000	1,140.000
Szczecin New	600.000	670.000	720.000	350.000	570.000	900.000
Others	15.000	17.000	28.000	9.500	50.000	65.000
Total	1,075.000	2,037.000	1,908.000	1,129.500	1,620.000	2,105.000

Order book number of ships

	1990	2000	2001	2002	2003	2004
Gdynia Group	34	57	46	32	36	42
Szczecin New	31	35	32	15	26	40 *)
Others	3	5	5	4	13	13
Total	68	97	83	51	75	95

*) included in this number are (2) ships being transported in sections to Vietnam and assembled there.

Order Book as per 31st December 2004

Commercial vessels

Gdynia Shipyard Group

- (2) LPG carriers; 78500 m³
- (12) Car carriers; 6600 cars
- (4) Car carriers; 2000 cars
- (4) Container ships; 4400 TEU
- (16) Container ships; 2700 TEU
- (1) Multipurpose ship; 48000 t
- (2) Multipurpose ships; 45000 t (2000TEU)

Stocznia Szczecinska Nowa

- (6) Con-Ro ships; 18250 t (660 TEU)
- (13) Container ships; 3100 TEU
- (8) Container ships; 2800 TEU
- (4) Container ships; 1730 TEU
- (5) Chemical tankers; 39850 t
- (3) Multipurpose ships; 23700 t

Gdanska Stocznia Remontowa

- (1) Container ship; 582 TEU
- (1) Ferry; 3350 cgt
- (1) Ferry; 2388 cgt
- (2) Ferries; 878 cgt
- (2) Offshore Supply Vessels; 2200cgt
- (3) Multipurpose ships; 3600 cgt
- (3) Aids to Navigation; 300cgt

Stocznia Polnocna

- (3) Fishing vessels; 170 cgt

Stocznia Remontowa Gryfia

- (1) Ferry; 114 cgt

Naval vessels

SMW Stocznia Marynarki Wojennej

- (6) *Gavron Class* Multipurpose Meko Type Corvettes; 1600 tons full load, Project 621.
- () *Kormoran Class* MCM Mine Counter Measures; 400 - 500 tons, Project 257.
- () *XXXX Class* Fast Patrol Boats for Indonesia; 192 tons, Project XXXX

plus conversions of the ex USN *O.H.Perry Class* frigates and former Royal Norwegian Navy *Kobben Class* submarines.

Stocznia Remontowa Gryfia

- (5+5) ST-610 OPVs Offshore Patrol Vessels for Kystvakt, Norway.

Since the 1990s the Polish shipbuilders have been trying to focus on the higher end of production, i.e. container vessels, reefers, ferries, LPG carriers, chemical and product tankers as well as naval shipbuilding and repair according to NATO standards - but the production in reality is still limited to less sophisticated vessels with low added value.

The Polish shipbuilding and ship repair industry in principal consists of three major groups of companies in the geographical areas of Gdansk/Gdynia and Szczecin accounting for 80 % of the number and value of ships sold.

Shipyards



Gdynia Shipyard Group Gdynia Shipyard Stocznia Gdynia SA

ul. Czechoslowacka 3
81-969 Gdynia
Poland
Tel. + 48 58 627 15 00
Fax + 48 58 627 08 79
www.stocznia.gdynia.pl

General

Established in 1922 as a repair yard. After the second world war the name was changed to "Paris Commune Shipyard" and the Soviet Union became one of the premier customers initiating the first shipbuilding boom in the late 1950s and early 1960s with a series of 35 ships of the "Melitopol Class". In 1976 the second dry dock was commissioned and in 1991 the yard was renamed Gdynia Shipyard JSC, after it was on the verge of bankruptcy and had to be bailed out by the Government. It is now under the ownership of the Ministry of State Treasury. The birthplace of Solidarnosc - Gdansk Shipyard - was taken over by Gdynia Shipyard and the Gdynia Shipyard Group was formed.

In mid 1999 there were speculations that Gdynia Shipyard might take over Finland's Masa Yard belonging to the Kvaerner Group a "David versus Goliath" action being in sharp contrast to the financial "strength" and consolidation of the Group.

In 2003 both the financial and employment situation of the Group was and today is extremely critical. While Gdynia Shipyard was still in the process of bringing into effect the restructuring plan, in agreement with the Development Agency Agencja Rozwoju Przemyslu S.A. with the target of assuming recovery of the financial liquidity and establishing long lasting competitiveness on the



market, the news spread in May 2005 that a new Consortium of the state owned shipyards is in the process of being formed.

A new 1100 t gantry crane supplied by KCI KONE was completed in 2001 after the 900 t crane had collapsed in a violent storm in 1999.

Dimensions 106 m high and 153 m wide.

Gdynia Shipyard was the number 1 in Europe in 2003 and in 13th position in the world in terms of production volume in cgt - compensated gross tonnage, well ahead of shipyards like Dalian, Odense, Kawasaki, Hudong or Mitsui! In 2004 the Gdynia Shipyard Group fell behind Dalian, Odense, Kawasaki and Hudong now ranking on 18th position. The workforce of Gdynia shipyard is 6250 at present, the Group having a total of 11000. the order book contains 41 vessels worth over USD 1.7 billion for deliveries into 2007.

Although running its own design bureau, research and design support is given to the shipyard both by the Technical Universities in Gdansk and Szczecin and the Center of Ship Research CTO Centrum Techniki Okretowej S.A. in Gdansk.

Main products

Container carriers up to 5.000 TEU, product and chemical tankers up to 35.000 dwt, crude oil tankers up to 105.000dwt, multi purpose vessels up to 40.000 dwt, LPG gas carriers up to 80.000 cft,

Ro-Ro car carriers up to 6.000 cars, Ro-Pax vessels, multi purpose open-type bulk forest products carriers, reefers up to 68.000 cuft.

Gdynia Shipyard is worldwide known for its vehicle carriers of the 8168 type. The recent delivery of a total of 19 vessels contracted so far – *Morning Courier* – will be employed on the South Korea – Europe route ordered by Isle of Man based Ray Car Carriers Ltd. with Israeli entrepreneur Rami Ungar behind. He is said to hold already shares in Gdynia Shipyard Group.

The Gdynia Shipyard Group obviously acquired low tech container ship and car carrier orders recently. Although a repeat business, new regulations like the ISPS Code and high steel prices, have been forcing the yard to costly installations which in combination with raising material prices and delays in delivery, strongly put the financial reliability of the Group under massive pressure. Repeat business, apart from advantages, also implicates the necessity of setting design office capacities temporarily free, which

might be desperately needed for more complex ship designs after some while, when the experts have settled in other industries.

The company accumulated a total of 26 car carrier contracts over the years, 11 of which have been already delivered and the same number for container vessels while number 9 is under construction at present.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Dry docks			
1	240 x 40 x 8	120.000	(1) 500 t gantry crane
2	389 x 70 x 8	400.000	(1) 1100 t gantry crane

Another (26) jib cranes from 5 to 150 ton*s and a floating crane of 150 ton*s accomplish the heavy weight lifting gantry cranes.

Deliveries in 2003 and 2004

Ship's name	Year	Hull number	Type	Shipowner
<i>Norasia Enterprise</i>	2003	8243/2	container	Amaranta
<i>Westwood Victoria</i>	2003	8228/3	multipurpose	Westwood
<i>Hual America</i>	2003	8168/4	car carrier	America Maritime / Ray Car Carriers
<i>Discoverer</i>	2003	8200/7	container	Hansa
<i>Westwood Olympia</i>	2004	8228/4	multipurpose	Westwood
<i>Oranjeborg</i>	2004	8222/4	multipurpose	Wagenborg
<i>Hual Africa</i>	2004	8168/5	car carrier	Africa Maritime / Ray Car Carriers
<i>Amber Arrow</i>	2004	8168/6	car carrier	Amber Maritime / Ray Car Carriers
<i>Commander</i>	2004	8230/6	container	Winter
<i>Ivory Arrow</i>	2004	8168/7	car carrier	Ivory Maritime
<i>Challenger</i>	2004	8200/8	container	Challenger
<i>Kota Perkasa</i>	2004	8200/9	container	Mate
<i>Morning Calm</i>	2004	8168/8	car carrier	Calm Maritime / Ray Car Carriers
<i>Morning Courier</i>	2005	8168/9	car carrier	Ray Car Carriers



Stocznia Gdańska
– Grupa Stoczni Gdynia S.A.

Gdansk Shipyard
Stocznia Gdanska
Gdynia Shipbuilding Group
Grupa Stoczni Gdynia S.A.

ul. Na Ostrowiu 15/20

80-873 Gdansk

Poland

Tel. + 48 58 769 16 00

+ 48 58 769 21 00

Fax + 48 58 769 23 23

www.stocznia.gda.pl



General

The site of the former Gdansk (Lenin) Shipyard has been reduced to 1/5 and occupies only the island, while the area on the mainland is intended to be converted into a business centre. Some of the slipways and building berths are now idle and will be scrapped as shipbuilding construction of the Gdansk Shipyard has completely moved to the adjacent island. This process is very similar to what has happened in Copenhagen (Burmeister & Wain) in 1996 and is happening now in Shanghai-Pudong (Shanghai Shipyard) but under completely different economic conditions.

The former Gdansk Shipyard is supplying sections to Gdynia where they are assembled. This is an other process that does not contribute to an increased productivity of the Group. As long as available, smaller Polish shipyards make use of the idling slipways to build their ships there.

One - Maritim - has already bought a dock from the famous yard's legacy. Synergia 99, a company of the Gdynia Shipbuilding Group is managing the assets of the Gdansk shipyard but progress is very slow and hampered by speculation, bureaucracy and lack of serious investors.

Main products

Container vessels, reefers, Ro-Ro/passenger ferries, multipurpose vessels, partly equipped hulls, ship's sections, superstructures

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Slipway B1	280 x 36	18000	(1) 50 t (2) 150 t
Slipway B2	185 x 28	7000	(1) 50 t (1) 150 t
Slipway B3	202 x 30	8000	(1) 50 t (1) 150 t
Outfitting Quays	450 272		(4) 50 t (2) 16 t





Szczecin New Shipyard Ltd. Stocznia Szczecińska Nowa Sp.zo.o.

ul. Hutnicza 1
71-642 Szczecin
Poland

Tel + 48 91 450 14 46
+ 48 91 459 11 88
Fax + 48 91 459 11 77
+ 48 91 459 20 91

www.ssn.pl

General

The shipyard in Szczecin has experienced the most radical financial troubles since the economic and political opening of the country. Nevertheless the management has not only succeeded in getting rid of some heavy burdens from the past but has

simultaneously risen the motivation of its workers. Szczecin New Shipyard holds among others orders for eight chemical carriers valued at nearly USD 460 million from Norwegian shipowner Odfjell.

Main products

Product and chemical tankers up to 50.000 dwt, RoRo and RoPax up to 30.000cgt, container ships up to 4000 TEU, multipurpose ships up to 25.000 dwt, reefers, partly equipped hulls and ship's sections.



Deliveries in 2003 and 2004 – Szczecin New Shipyard – Stocznia Szczecińska Nowa

Ship's name	Year	Hull number	Type	Shipowner
<i>Bow Sun</i>	2003	B588-III/1	product chemical	Odfjell
<i>Libra Rio</i>	2003	B178-I/4	container	Chelsea
<i>Libra Santos</i>	2003	B178-I/5	container	Amasia
<i>APL Shanghai</i>	2003	B178-I/6	container	Azalea
<i>APL Jakarta</i>	2003	B178-I/7	container	Alessa
<i>Montemar Europa</i>	2003	B170-III/4	container	Adria
<i>Robert Rickmers</i>	2003	BB170-III/15	container	Rickmers
<i>Bow Star</i>	2004	B588-III/2	product chemical	Nordic Leasing
<i>Bow Spring</i>	2004	B588-III/3	product chemical	Odfjell
<i>Suomigracht</i>	2004	B587-IV/6	multipurpose	Spliethoff
<i>Statengracht</i>	2004	B 587-IV/5	multipurpose	Spliethoff
?	2004	B 170-III/18	container	?
<i>Norasia Alya</i>	2004	B178-I/8	container	Alena
<i>Norasia Polarix</i>	2004	B178-I/9	container	Wieland
<i>Norasia Andes</i>	2004	B178-I/10	container	Anke Ritscher
<i>Norasia Atlas</i>	2005	B178-I/11	container	Peter Dohle



REMONTOWA

Remontowa Group

Gdansk Shiprepairyard „Remontowa“ Stocznia Remontowa S.A.

ul. Na Ostrowiu 1
80-985 Gdansk
Poland
Tel. + 48 58 307 16 00
+ 48 58 307 10 11
Fax + 48 58 301 25 32
www.remontowa.com.pl



Northern Shipyard Stocznia Polnocna S.A.

ul. Marynarki Polskiej
80-958 Gdansk
Poland
Tel + 48 58 309 60 000
+ 48 58 309 61 02
Fax + 48 58 305 32 86
+ 48 58 301 69 65
www.northship.com.pl

General

The shipyard was established in 1952. Remontowa has become a leader amongst European ship repair yards and a major player on the world market. Together with Northern Shipyard a member of the group, Remontowa can offer repair service and newbuilding capabilities both in the field of commercial and naval shipbuilding.

Main products and services

Ship conversions including lengthening and repairs, design and construction of new ships, offshore and steel structures.

Facilities

Remontowa has purchased a 200-ton floating crane from Flender Werft Luebeck, Germany in July 2003. The Schottel-propelled floating crane is properly suited for maneuvering in the yard's canals.

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating docks			
I	255 x 44	135000	(2) 25 t
II	225 x 37	85000	(2) 20 t
III	176 x 26.2	20000	(2) 10 t
IV	164 x 25.8	18000	(2) 10 t
V	136 x 24	8000	(1) 6 t (1) 3 t
VI	92 x 16	1500	(1) floating crane



General

Stocznia Polnocna – Northern Shipyard was established in 1945 and was first named shipyard No. 3. Until 1950 the shipyard was engaged in ship repairs when it started to specialise in fishing vessels and was named Northern Shipyard. In 1955 the co-operation with the Polish Navy started and up to the early 1990s the shipyard had been building military ships for the Navies of Poland, the Soviet Union, Bulgaria, former Yugoslavia, East Germany and Syria. During the same period the shipyard was also building highly sophisticated vessels such as superseiners and supertrawlers for owners in Great Britain and France. In 1975 the shipyard was given the name “Bohaterow Westerplatte”. The number of employees at that time was 5000. Maximum length of ships 125 m. In 1993 the yard was transformed into a joint-stock company and its full name since then had been Stocznia Polnocna S.A. Northern Shipyard.



The high involvement in naval shipbuilding is illustrated by the deliveries to the Polish Navy: 1971 Type 771A Ammunition Transport Ship, 1971 Type 771 Landing Crafts and a *Moma Class* Survey Ship, 1970-73 Type 664 Fast Torpedo Boats, 1973 *Grunwald* Type 776 Command Ship, 1974 *Piast Class* Type 570 Salvage Ships, *Nawigator Class* Type 863 Electronic Surveillance Ships, 1982 *Heweliusz Class* Survey Ships, 1986 Type 620 Corvette, 1988 Type 888R Training Ship, 1989 - 1991 *Lublin Class* Type 767 Medium Landing Crafts, 1994 Type 660 Guided Missile Boats, 2001 Type 890 Logistic Support Ship and Type 130 *Bereza Class* Multipurpose Support Ship.

Main products

Commercial Shipbuilding

Multipurpose container vessels up to 650 TEU, car-passenger ferries, tugboats, offshore supply vessels, fishing boats and trawlers, fishery protection vessels.

Conversions and repairs

VOC Volatile Organic Compound recovery plant retrofitting, FSO conversions and upgradings, conversions of Ro-Ro ships into cable layers, ferry conversions.

Naval Shipbuilding

Corvettes, coastal and logistics support ships, landing crafts and ships, salvage and electronic warfare ships, command vessels, guided missile boats, mine countermeasures, patrol boats.

Facilities

Dimensions (m)	Capacity (dwt)	Cranes
Side Launching Way		
88 x 13.5 m	1500 t	
Side Launching Way		
125 x 18.6 m	3150 t	
Outfitting Quays		
400 m		(2) 26 t (1) 25 t

Deliveries in 2003 and 2004 – Remontowa Group

Ship's name	Year	Hull number	Type	Shipowner
<i>Filla</i>	2003	B599/1	small passenger ferry	Shetland Islands
<i>Vea</i>	2004	B309/1	trawler -purse seiner	Vea AS
<i>Saturn</i>	2004	B 840/1	tug	Citicom Estonia
<i>Daggri</i>	2004	B600/1	double ended car/ passenger ferry	Shetland Islands Council
<i>Dagalien</i>	2004	B600/2	double ended car/ passenger ferry	Shetland Islands Council
<i>Bastoe III</i>	2005	1141	double ended car/ passenger ferry SKS 212	Bastoe Fosen
<i>Bute</i>	2005	1333	Ro-Ro car/passenger ferry	Caledonian Mac Brayne
<i>Sunbusserne</i>		1064 1&2	passenger ferries	under construction



Stocznia Remontowa GRYFIA SA

Gryfia Shipyard Szczecinska Stocznia Remontowa Gryfia S.A.

ul. Ludowa 13

71-700 Szczecin

Poland

Tel. + 48 91 424 23 53

+ 48 91 424 25 51

Fax + 48 91 424 23 19

www.gryfia.com.pl

General

Gryfia Shipyard has been in the repair business and newbuilding of smaller ships since more than 50 years. The yard is situated on an island about 35 miles from the mouth of the Odra river where it flows into the Baltic Sea. It is the second largest ship repair yard in Poland. In 2004 nearly 200 ships were overhauled.

The Szczecin based yard holds a contract for five ST-610 type OPVs for the Norwegian Coast Guard – Kystvakt – with an option for five more.

The contract had been signed on February 12, 2005 between Gryfia and Remoey Management AS – (3) units in firm contract with (3) options – and Remoey Shipping AS – (2) ships + (2) options against stiff competition from Norwegian and Spanish yards. Designer: Skipsteknisk AS, Alesund, Norway in close co-operation with the owners. The vessels will be armed in Norway and shall operate up to 330 days per year along the entire coast line, featuring DP Dynamic Positioning

system, a helicopter deck and a work deck aft. The propulsion will be diesel-electric with two azimuth thrusters in the stern plus a bow thruster. Speed: 16 knots. Crew: 20. The vessels will have (2) FRC Fast Rescue Crafts reaching speeds up to 40 knots. Classification Society: DNV.

Dimensions:

Length: 47.20 m, Breadth: 10.30 m, Draught: 5.00 m

The contract which was signed between Gryfia and Ramoey Shipping, is worth USD 54 million. Construction work of the first ship will have to be completed in spring 2006, the other 4 ships will be ready in 2007.

Gryfia has won quite recently a spectacular order for patrol boats from a country in the Middle East.

Main products

Newbuildings: car and passenger ferries, ferry boats, fishing trawlers

Repairs: bulkers, tankers, general cargo ships, fish factory trawlers,

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating docks			
I	156.5 x 26.0 x 5.9	7.200	10 +10
II	46.3 x 14.5 x 3.2	650	-
III	137.0 x 21.5 x 5.5	5.200	7 + 7
V	216.3 x 34.8 x 7.7	15.000	20 +20
Pontoons (3 off)			
	91.0 x 16.0 x 4.5		

Deliveries in 2003 and 2004 – Gryfia Shipyard

Ship's name	Year	Hull number	Type	Shipowner
<i>Krossfjord</i>	2004	PN 04	trawler-purse seiner	Hamre
<i>Torghatten</i>	2004	PN 03	car/passenger ferry	Torghatten Traffikselskap
<i>Torgtind</i>	2004	PN 02	car/passenger ferry	Torghatten Traffikselskap
<i>Angvik</i>	2005		passenger ferry	Kristiansund Kommunale Sundbatvesen





Naval Shipyard Gdynia SMW Stocznia Marynarki Wojennej

ul. Smidowicza 48

81-127 Gdynia

Poland

Tel + 48 58 625 01 48

Fax + 48 58 625 01 47

e-mail ebochan@navship.pl

www.navship.pl



General

The Naval Shipyard is located in Gdynia-Oksywie in the vicinity of the Naval Base. The yard was established in 1922 as the Navy Harbour Shop, started the construction of newbuildings in the 1930s and became the Polish Navy's primary shipyard. Since 1989 the shipyard is active in commercial shipbuilding as well. The yard has conducted hundreds of repairs of naval and commercial vessels including numerous lengthening projects, major modifications and retrofits.

Newbuildings up to 7000 dwt and 105 m length over all.

The yard has a history in building warships and auxiliaries for the Polish Navy. During the late 1950s and early 1960s a fleet of large Patrol Boats was built, in the early 1970s (8) small ASW *Grozny Class* vessels of the Type 912M were delivered, a few years later (16) *Pilica Class* Fast Patrol Boats of the Type 918/919M were built for the Polish Coast Guard and Navy. Well into the 1980s a total of (16) Medium Landing Ships of the well known type 773 *Polnochny Class* were built for foreign navies. A series of (17) *Goplo Class* mine sweepers of the Type 207 featuring GRP hulls was completed in 1994.

Deliveries in 2003 and 2004 – Naval Shipyard Gdynia – SMW Stocznia Marynarki Wojennej

Ship's name	Year	Hull number	Type	Shipowner
<i>Suomenlinna II</i>	2004	NS 301	passenger ferry	Suomenlinnan
<i>Heroeyfford</i>	2004	B 63	trawler	Solvskjaer
<i>Newfoundland Lynx</i>	2004	198	trawler	FPI
<i>Du</i>	2004	NS 701/1	bunker barge	CLT Nantes
<i>Gwen</i>	2004	NS 701/2	bunker barge	CLT Nantes

Main Products

Commercial Shipbuilding

Dredgers, tugs, multipurpose container ships, bulkers, product tankers, shipbuilding structures, standby rescue vessels, small ferries.

Naval Shipbuilding

Multipurpose corvettes, fast patrol boats, MCM and ASW vessels, LST (M) and LCU landing ships and crafts, offshore patrol vessels, small torpedo boats, coastal oilers, degaussing ships, auxiliaries. SMW Stocznia Marynarki Wojennej will be building (1) *Garwon Class* multipurpose frigate for the Polish Navy under the MEKO licence from Blohm & Voss Hamburg, with an option for (5) more. The hull was finished some years ago already but outfitting is delayed for financial reasons.

Recently some medium sized landing ships were supplied to Yemen and currently a series of fast patrol craft is under construction for Indonesia.

Orderbook

- (5) Patrol boats for Indonesia
- (1) Bunker barge for CLT Nantes; NS 702
- (2) Reefer/Containers' hulls ca. 80 meters for Vaagland, Norway, partly outfitted.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating dock			
	150 x 27 x 8	20000	(2) 8 t
Mechanical lift dock			
	100 x 22 x 4.5	6500	up to 50 t
Outfitting Quays			
2800 m, 6-9 m deep			



Ustka Shipyard Ltd. Stocznia Ustka Sp.zo.o.

ul. Westerplatte 1

76-270 Ustka

Poland

Tel + 48 59 814 40 21

Fax + 48 59 814 43 52

www.stoust.com.pl

General

Established in 1945 as Stocznia Ustka S.A., this shipyard was established in June 2002 under a slightly new name and is today specialised in GRP water crafts, like work boats, fishing vessels, patrol boats and yachts.

Ustka is also a leading manufacturer of free-fall lifeboats in full compliance with the European Union's MED Marine Equipment Directive.

Under the name of Stocznia Imienia E. Kwiatowskiego the yard has delivered small inland minesweepers of the *TR 25 Class*, based on the design of fishing vessels, to the Polish Navy in 1983.



Small shipyards

Production of small shipyards in Poland is rising fast and some of the yards have specialised in niches gaining highest reputation on international markets.



Alkor Shiprepair Yard Ltd. Alkor Sp. zo. o.

ul. Doki 1
80-863 Gdansk
Poland
Tel. + 48 58 769 19 19
Fax + 48 58 769 19 17
www.alkor.pl

General

Specialised in ship repair and lengthening, steel replacement, stainless steel and aluminium sections.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating dock			
	155 x 24.7	8000	(2) 5 t



ALU International Ltd. ALU GROUP Grupa Alu

ul. Wielopole 7
80-556 Gdansk
Poland
Tel. + 48 58 343 28 20
Fax + 48 58 343 28 21
www.alu.com.pl

General

The ALU Group consists of

- ALU International (Holding)
- ALU International Shipyard
- ALU Tczew

and is headquartered in Gdansk.

ALU International Shipyard employs approximately 140 individuals and is specialised in the welding of aluminium hulls and ship structures.

One of the most spectacular structures was the 40 tons funnel construction for a RCCL cruise ship in co-operation with Aluship Technology. Sub-supplier to Polish, German and Dutch shipyards as well as ship owners in Iceland, Norway and Sweden.

Main products

Yachts, boats, wheelhouses, hulls and superstructures.





Aluship Technology Ltd.

ul.Doki 1
80-958 Gdansk
Poland
Tel. + 48 58 769 15 74
Fax + 48 58 769 17 74
www.alushiptechnology.com

General

The roots of Aluship Technology are in Hamburg, where an industrial designer named Goetz Linzenmeier founded a company specialised in aluminium yacht building. In 1993 production was moved to Gdansk because of much lower workmanship costs. Apart from hulls, Aluship Technology is now specialising in aluminium superstructures for cruise ships and ferries, ship's sections for fast ferries, catamaran hulls and hundreds of tons of wheelhouses.

Aluship Technology owns as a subsupplier the most modern semi-automated laser operated flat section production line for aluminium in Poland and has plans to extend the automation processes in a new built 10000 m² hall. The number of employees is 75 which can be increased very flexibly to more than 200 if necessary in both areas - aluminium and steel. Aluship Technology holds a delivery contract with Aker Finnyards for 5000 tons of steel which might be increased to 10000 tons per year.

Main products

Production of hulls for yachts and megayachts, fast patrol boats, SAR vessels, superstructures for cruise ships and ferries, ship sections, funnels and wheel houses.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Slipway	175 x 32		(1) 150 t

References

Shipyards: Meyer Werft, Lloyd Werft, Aker MTW.
Operators: RCCL, NCL, Aida, DFDS, Brittany Ferries.



Baltic Shipyard Stocznia Baltyk S.A.

ul.Czarny Dwor 2/4
80-325 Gdansk
Poland
Tel. + 48 58 553 09 42
Fax + 48 58 553 69 71

General

Maintenance, overhauls and repairs of ships and equipment.



Crist Ltd. Crist Sp.zo.o.

ul. Swojska 12
80-867 Gdansk
Poland
Tel. + 48 58 769 33 00
Fax + 48 58 769 33 01
www.crist.com.pl

General

This company was established in 1990 by two naval engineers and is specialised in ship sections up to 2000 tons, semi equipped hulls up to 100 m length as well as fully equipped vessels up to the same length.

The list of customers in Western and Nordic countries is very impressive. To name only a few: Damen, Maaskant, Bodewes shipyards and Hoekman Maritime in Holland, Havyard Leirvik, Umoe Mandal, Flekkefjord Slip and Kleven Maritime in Norway, Sietas and Meyer Werft in Germany.



A floating dock with a lifting capacity of 1200 tons offers the possibilities of performing conversions and repairs of vessels up to 70 m length.

Production plants

- Plant no. 1 Gdansk, ul. Swojska 12
 Plant no. 2 Gdansk, ul. Ujscin 10
 Plant no. 3
 Plant no. 4 Gdansk, ul. Budowniczych Portu
 Polnocnego 25
 Plant no. 5&6 Gdansk, ul. Budowniczych Portu
 Polnocnego 17

Main products

Trawlers, mussel dredgers, offshore supply vessels, research ships, pilot boats. Ship and offshore structures, aluminium constructions.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating dock		2000	

Deliveries in 2003 and 2004, newbuildings

2003

- (1) trawler for Danish owner
- (1) fishing vessel for Flekkefjord
- (2) mussel dredgers for Danish owner
- (1) container vessel for Bodewes
- (2) fishing vessels for Iceland
- (3) mussel dredgers for Maaskant
- (3) beam trawlers for Maaskant
- (2) beam trawlers for Hoekman Maritime

2004

- (1) mussel dredger for Maaskant
- (1) offshore supply vessel for Flekkefjord Slip
- (3) trawlers for Chantiers Piriou
- (2) trawlers for Alustar
- (1) beam trawler for Maaskant
- (2) trawlers for Torshavnar Skipasmidja
- (1) mussel dredger for Alustar
- (1) pilot boat for MWB Motorenwerke Bremerhaven

several building blocks for Meyer Werft



Damen Shipyards Gdynia S.A.

ul. Tetmajera 58
 81-421 Gdynia
 Poland
 Tel. + 48 58 622 14 10
 Fax + 48 58 622 76 06
www.damen.pl



General

Damen Shipyards Gdynia was founded in 1991 as one of the first private shipyards in Poland. The company became a member of the Dutch Damen Shipyards Group in 1996. The yard specialises in vessels under 300 tons and provides also ship repair services. Number of employees: 60.

Main products

Harbour, coastal and seagoing tugs, pollution fighting vessels, fast rescue boats, pilot boats, hydrographic research vessels, sailing and motor boats, yachts, floating hotels, buoy laying/aids to navigation vessels, fishing boats.

Facilities

All vessels up to 300 tons are launched and docked by a floating crane.

Stocznia Remontowa
Kolobrzeg

Kolobrzaska Stocznia Remontowa „DOK“

ul. Stoczniaowa 14b
78-100 Kolobrzeg
Poland
Tel./Fax + 48 94 351 72 52
www.dok.portkolobrzeg.pl/

General

Approximately 80 shiprepairs (ship hull conservations) per year. Primarily fishing vessels from Polish, Scandinavian and German shipowners.



Maritim Ltd.

ul. Siennicka 25
80-758 Gdansk
Poland
Tel. + 48 58 300 67 10
Fax + 48 58 301 42 93
www.maritim-shipyard.pl



Maritim Ltd. was founded in 1994 and is a privately owned shipyard specialised in hulls and ship's sections up to 600 tons. The company offers the building of ship sections in Polish yards as well as outside Poland and the detachment of personnel at the client's yard or during the voyage. More than 40000 tons of shipconstructions were manufactured in 2004. Maritim has bought its own dock in the former Gdansk shipyard measuring 90 x 31 m. Highest flexibility and customer satisfaction was demonstrated when the hull for Kleven's OSV Viking Energy was built in 3 months. The same applies for the bow section of Chantiers de l'Atlantique's QM 2. Number of employees: 800.

Main products

Ship hulls and structures, steel constructions and off shore structures.

References

Shipyards like Ulstein, Kleven, Havyard, Simek, Sietas, Kroeger, Chantiers de l'Atlantique.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Dock	90 x 31		



Morska (Marine) Ship Repair Yard Morska Stocznia Remontowa

ul. Ludzi Morza 16
72-602 Swinoujscie
Poland
Tel. + 48 91 321 62 41
Fax + 48 91 321 61 44
www.msr.com.pl

General

This shipyard is ideally situated on the Southern coast of the Baltic Sea, at the mouth of the Odra river. This yard has also experienced some severe financial troubles in the past. Nevertheless one of the most prominent long-term customers is Oesterreichischer Lloyd, because of the very good quality of their work at an average number of 10 shiprepairs per year. Number of employees: 450 workers plus 600 subcontractors upon demand.

Main products and services

Maintenance and repair of vessels up to 20000 dwt alongside (120m) with dry docking possibility up to 6000 dwt. Aluminium structures, conversions and lengthenings.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating docks		Dock cranes	
	110 x 18.5 m	3500 tons	(3) 5.0 t
	118 x 19.8 m	4500 tons	(1) 6.3 t
		Mobile cranes	
			(1) 20 t
			(3) 8 t
			(2) 40 t
			(1) 100 t



Shiprepair Yard Nauta S.A. Stocznia Remontowa Nauta S.A.

ul. Washingtona 1
81-342 Gdynia
Tel. + 48 58 661 72 15
Fax + 48 58 620 36 37
www.nauta.pl



General

Nauta S.A. is the holding company of "Nauta Hull" and 13 more companies like "Elektro Nauta", "Techno Nauta", "Nauta Turbo" or "Motor Nauta". A deep restructuring process has culminated in a significant reduction of the workforce by more than 30 percent and a financial consolidation of Nauta S.A.

All business is monitored by the Nauta holding company securing financial reliability, while for example all shipbuilding and repair work is executed by Nauta Hull.



Nauta-Hull Ltd. Nauta-Hull Sp.zo.o.

ul. Waszyngtona 1
81-342 Gdynia
Poland
Tel. + 48 58 621 27 28
Fax + 48 58 621 23 34

General

One of the best equipped repair yards in the Baltic Sea, specialised in repairs, newbuildings and conversions. Established in 1926, this yard was in a poor financial situation in 2003 before being taken under the umbrella of Nauta S.A. Holding. Major customers come from Sweden, Norway, Denmark, Germany, Russia, Iceland and Italy. Shiprepair Yard Nauta holds AQAP 110; 1995 certification for NATO vessel repairs.

Main products

Sea and harbour tugs, fire fighting boats, chemical tankers, cold storage vessels, fishing boats, icebrakers, general cargo vessels, rescue vessels, barges and naval vessels.

Facilities

No.	Dimensions (m)	Capacity (dwt)	Cranes
Floating dock I			
	76 x 123	1200	(1) 3 t
Floating dock II			
	120 x 18	3500	(2) 6 t
Floating dock III			
	135 x 21	4500	(2) 8 t
Ship elevator			
	60 x 12.40	600	

NAVIKON SRY LTD

POLISH SHIP REPAIR YARD



NAVIKON SRY Ltd. Polish Shiprepair Yard

ul. Soltana 6
72-602 Swinoujscie
Poland
Tel. + 48 91 322 08 80
Fax + 48 91 322 08 86
www.navikon.pl
www.navikonpaint.pl
www.navikon-stal.pl

General

Established in 1991 Navikon Shiprepair Yard and three more subsidiaries form the Navikon Group. Specialised in ship repairs and building of steel structures up to 300 t. Number of employees 180. Cooperation with Polish, French, German and Scandinavian shipyards.

Facilities

Time-sharing of docks with Polish shipyards.

No.	Dimensions (m)	Capacity (dwt)	Cranes
Berths up to 300 m			
			20 and 50 t mobile cranes 16, 100 and 200 t looting cranes





Pomerania Shipyard Ltd. Stocznia Pomerania Sp.zo.o.

ul. Gdanska 36
70-952 Szczecin
Poland
Tel. + 48 91 814 50 00
Fax + 48 91 814 50 01
www.stpomerania.pl

General

Privately owned shipyard established in 1999 after the investors had purchased the Parnica Shiprepair Yard. Repaired 32 ships in 2002 and converted another 5. Had some financial problems in 2003 primarily caused by overdue payments of its customers. 2003 was marked by two major conversions of one mega yacht and a research vessel. The company is under receivership at present.



Shipyard Radunia International Ltd. Stocznia Remontowa Radunia S.A.

ul. Na Ostrowiu 1
80-837 Gdansk
Poland
Tel. + 48 58 301 68 31
Fax + 48 58 301 01 16
www.raduniaint.com.pl

General

Headquartered in Gdynia, specialised in ship repair and conversion. This yard is like Pomerania under receivership.

Tczew Shipyard Ltd. Stocznia Tczew Sp. zo. o.

ul. Czatkowska 2a
83-110 Tczew
Poland
Tel. + 48 58 531 22 01
Fax + 48 58 531 30 08



Wisla Shipyard Ltd. Stocznia Wisla Sp.zo.o.

ul. Przelom 1
80-543 Gdansk-Stogi
Poland
Tel. + 48 58 307 39 53
Fax + 48 58 307 39 13
www.stoczniawisla.com.pl



General

Tradition in shiprepair dates back to 1888, when a shipyard was established for servicing the icebreakers, tugs and barges very close to the old mouth of the river Wisla.

As part of a modernisation project Wisla Shipyard has acquired a new 90 ton mobile crane in 2004 and started to invest in a new production plant for ship sections in 2005.

Main products

Ship sections for Dutch, French, German, Norwegian and Swedish shipyards like Damen, Maaskant, DCN, Sietas, Meyer Werft, Thyssen Nordseewerke, Kleven, Kvaerner, apart from major Polish shipyards. Small and medium size aluminium hulls of speciality ships like fast patrol boats, rescue vessels, sailing and motor yachts, catamarans, superstructures for mega yachts and fishing vessels.

Austrian Marine Equipment Manufacturers

www.amem.at

