

T R A N S P O R T A T I O N R E S E A R C H I N S T I T U T E



I N S T I T U T E O F S C I E N C E A N D T E C H N O L O G Y • T H E U N I V E R S I T Y O F M I C H I G A N

A N N A R B O R , M I C H I G A N

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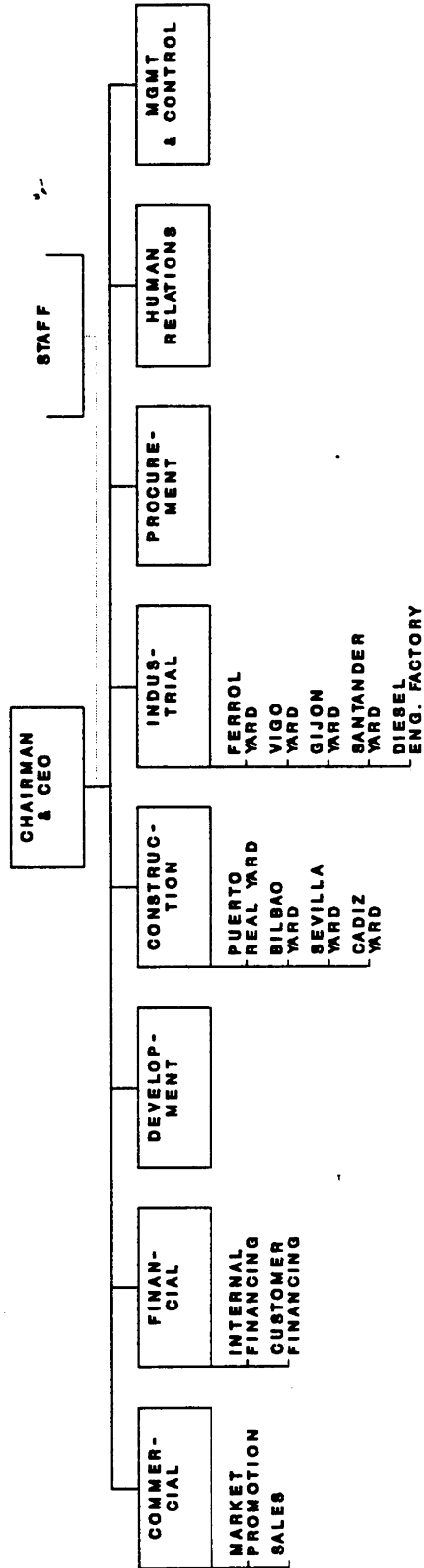
ASTILLEROS
ESPAÑÓLES
THE GROUP - THEIR FIGURES

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ANN ARBOR, APRIL 14-15, 1993

PC:MI039392

AESA ORGANIZATION

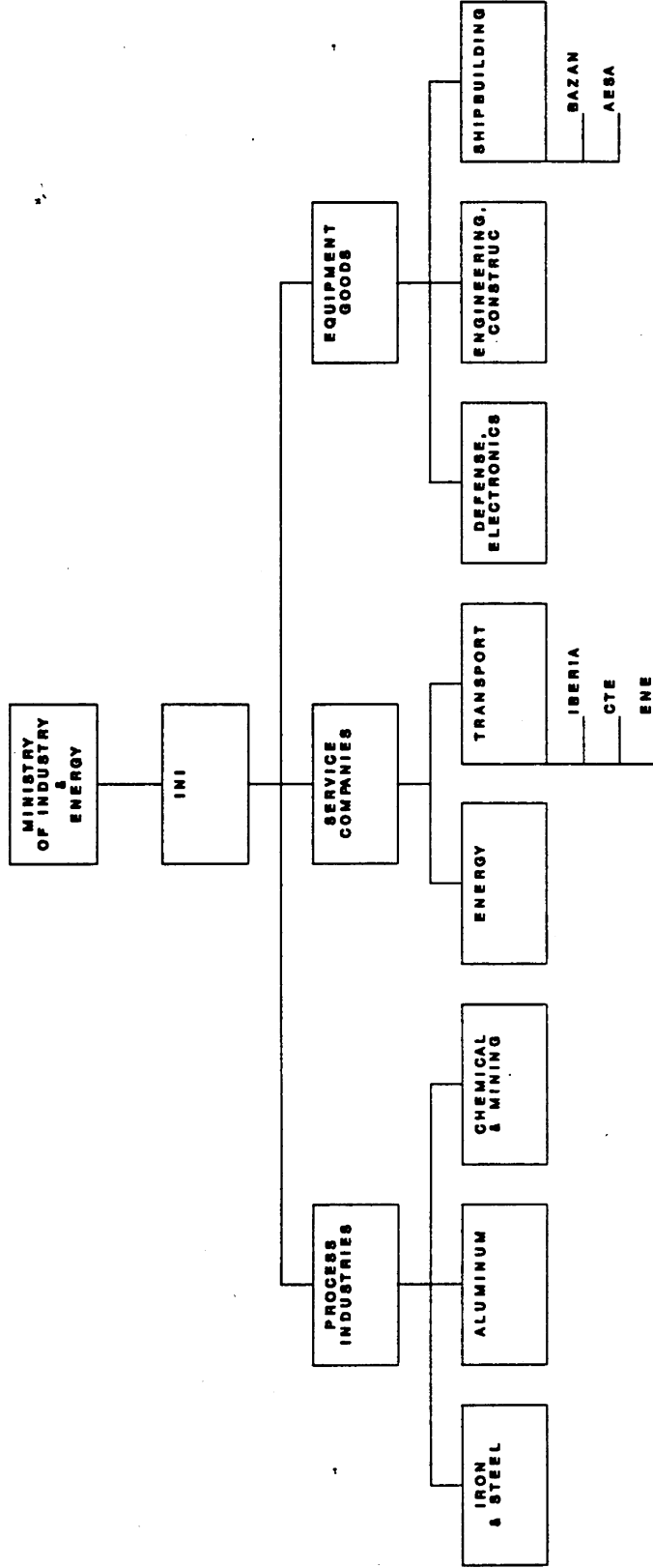


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ASTILLEROS ESPAÑOLES: FACTS AND FIGURES

	<u>1987</u>	<u>1992</u>
* NUMBER OF YARDS	13	9
* WORKFORCE	17,000	10,000
* SALES	M Pts 36,000	100,000
	M US\$ 300	1,000
OF WHICH, FOR EXPORT:	50 %	75 %
* WORLD MARKET SHARE:	1-1.5 %	2,5-3 %

MORE THAN 1,000 SHIPS DELIVERED TO MORE THAN 50 COUNTRIES

ASTILLEROS ESPAÑOLES: CURRENT POSITION

ORDERBOOK AT JAN 1st, 1993:

- * 19 SHIPS UNDER CONSTRUCTION
- * 740,000 GT
- * 380,000 CGT
- * 185 BILLION PTS. (1.85 BILLION US \$)

CONTRACTS FROM 1987 THRU 1992:

- * 126 SHIPS
- * 2,330,000 GT
- * 1,460,000 CGT
- * 434 BILLION PTS. (4.34 BILLION US \$)

SHIPS DELIVERED 1987-1992:

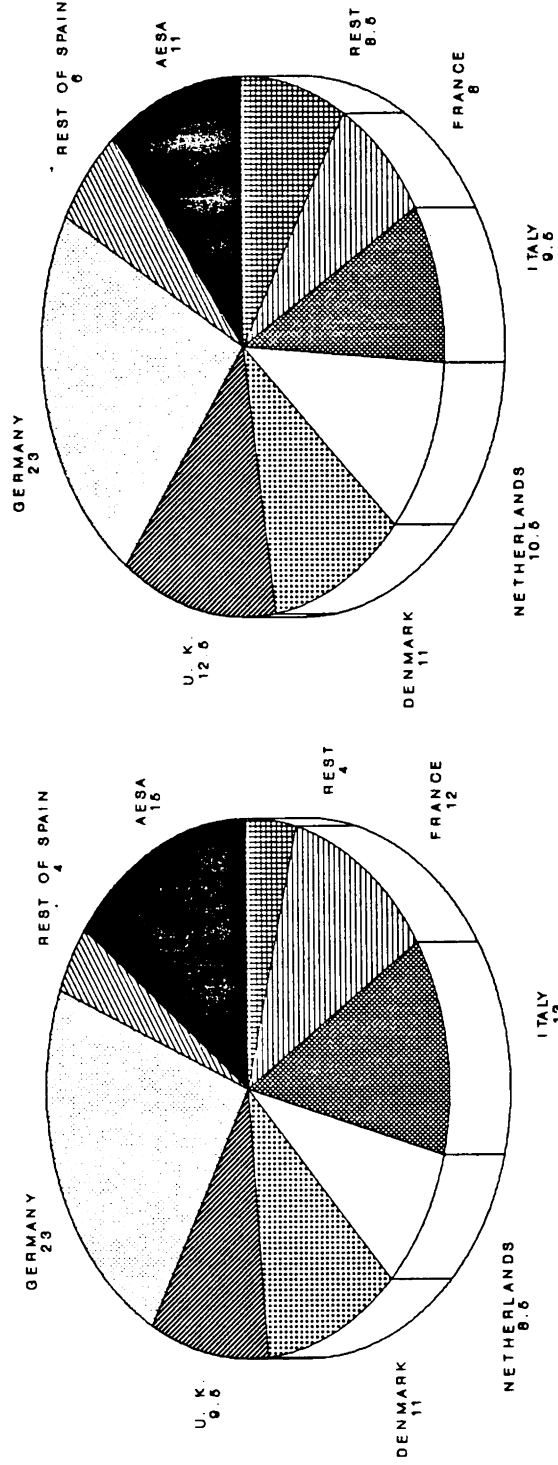
- * 120 SHIPS
- * 1,470,000 GT
- * 1,025,000 CGT
- * 290 BILLION PTS. (2.9 BILLION US \$)

ASTILLEROS ESPAÑOLES: ORDERBOOK BY COUNTRY

(JAN 1st. 1993)

<u>COUNTRY</u>	<u>NUMBER OF SHIPS</u>	<u>CGT</u>
1. SPAIN	4	65,000
2. NORWAY	9	200,000
3. MEXICO	4	97,000
4. UK	1	28,000
5. MOROCCO	1	15,000
EXPORT	79%	84%
DOMESTIC	21%	16%

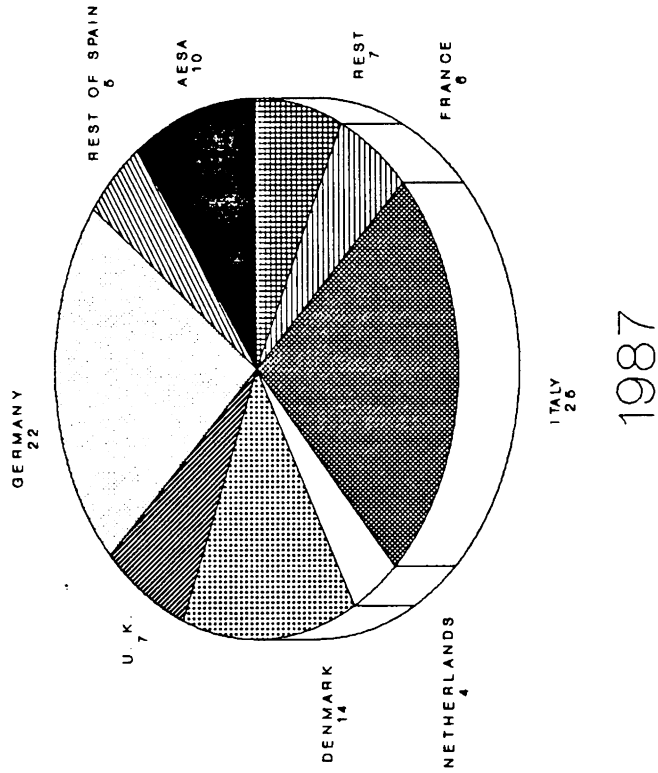
AESA'S MARKET SHARE IN EEC CAPACITY (% CGT)



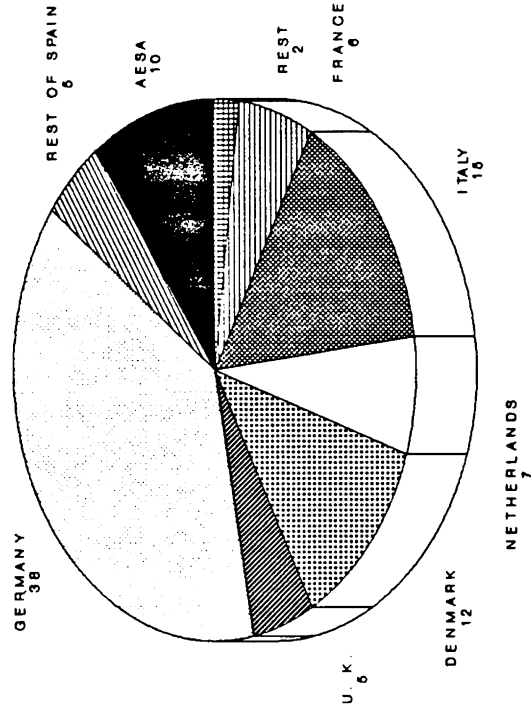
1992

1987

AESA'S MARKET SHARE IN EEC ORDERBOOK (% CGT)

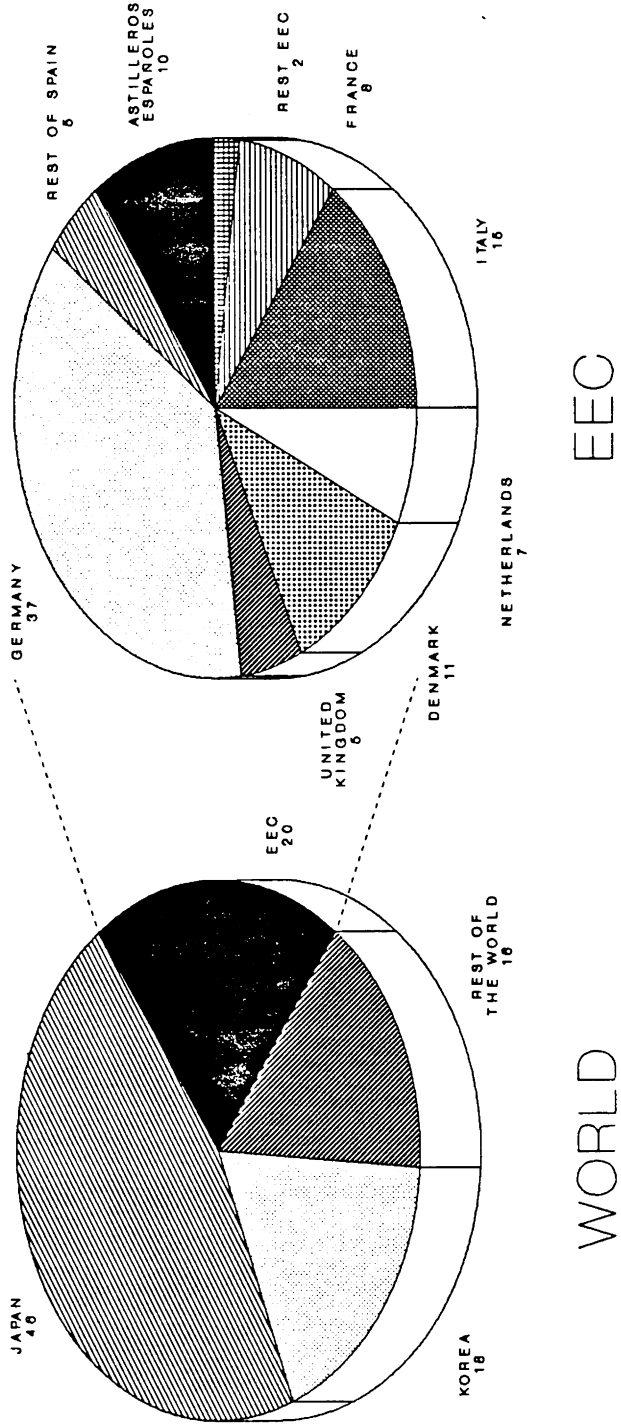


1987

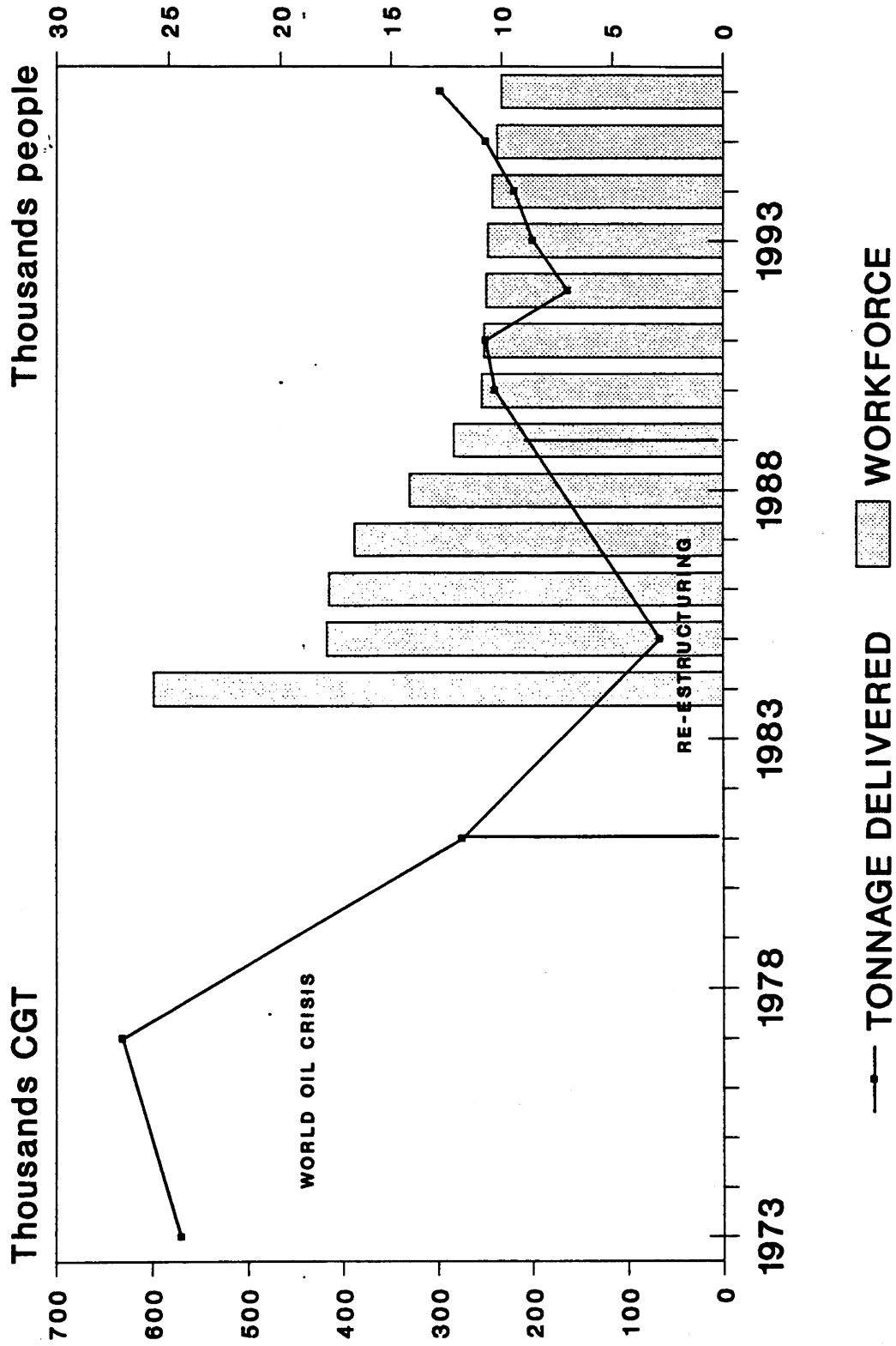


1992

ASTILLEROS ESPAÑOLES' MARKET SHARE DELIVERIES(%CGT) CURRENT POSITION



ASTILLEROS ESPAÑOLES



ASTILLEROS ESPAÑOLES: PRODUCTIVITY EVOLUTION

IN THE WHOLE GROUP:

- 40% REDUCTION IN WORKFORCE (1987 - 1992)
- CLOSE TO 50% MORE PRODUCTIVITY

IN PUERTO REAL SHIPYARD:

- CLOSE TO 50% WORKFORCE REDUCTION
- 3.5 TIMES MORE CGT/MAN.YEAR

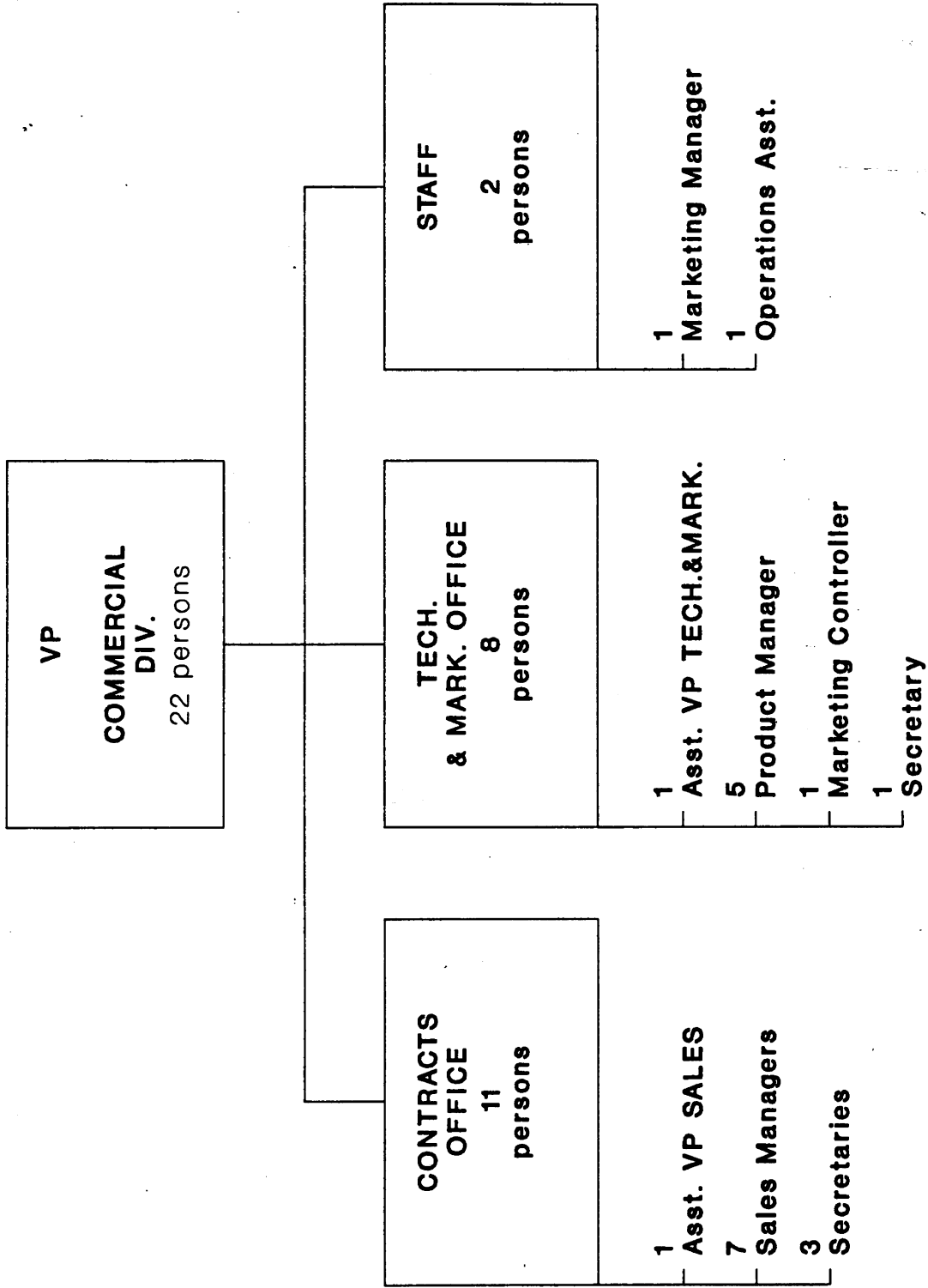
ASTILLEROS ESPAÑOLES

TECHNOLOGICAL COOPERATION

- * **COOPERATION AGREEMENT**
M.H.I. (JAPAN)
- * **PARTICIPATION IN THE EUREKA 353 'FASP' PROJECT**
E.E.C. COUNTRIES
- * **CAD/CAM. PROGRAMS**
SENER (SPAIN)
KOCKUMS (SWEDEN)
- * **MODULAR CABINS DESIGN AND CONSTRUCTION**
MASA YARDS (FINLAND)
- * **FERRIES AND PASSENGER VESSELS DESIGN**
ELOMATIC (FINLAND)
- * **COOPERATION AND LICENCES**
SULZER (SWITZERLAND)
MAN B&W (DENMARK)
MOSS ROSEMBERG (NORWAY)
- * **ECOLOGICAL E3 VLCC PROJECT**
BREMER VULKAN (GERMANY)
CHANTIERS DE L'ATLANTIQUE (FRANCE)
FINCANTIERI (ITALY)
HOWALDTSWERKE DEUTSCHE WERFT (GERM.)

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