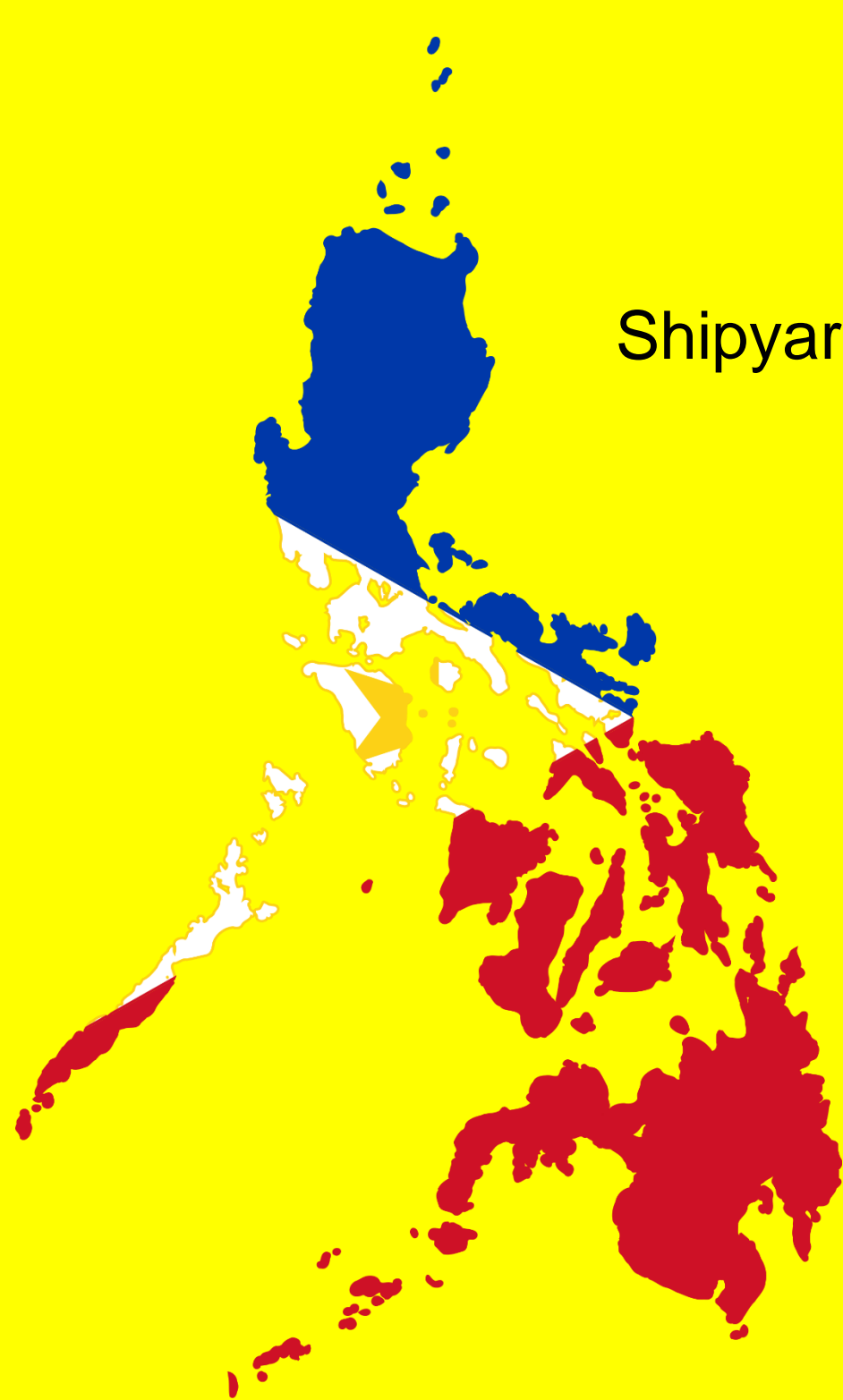
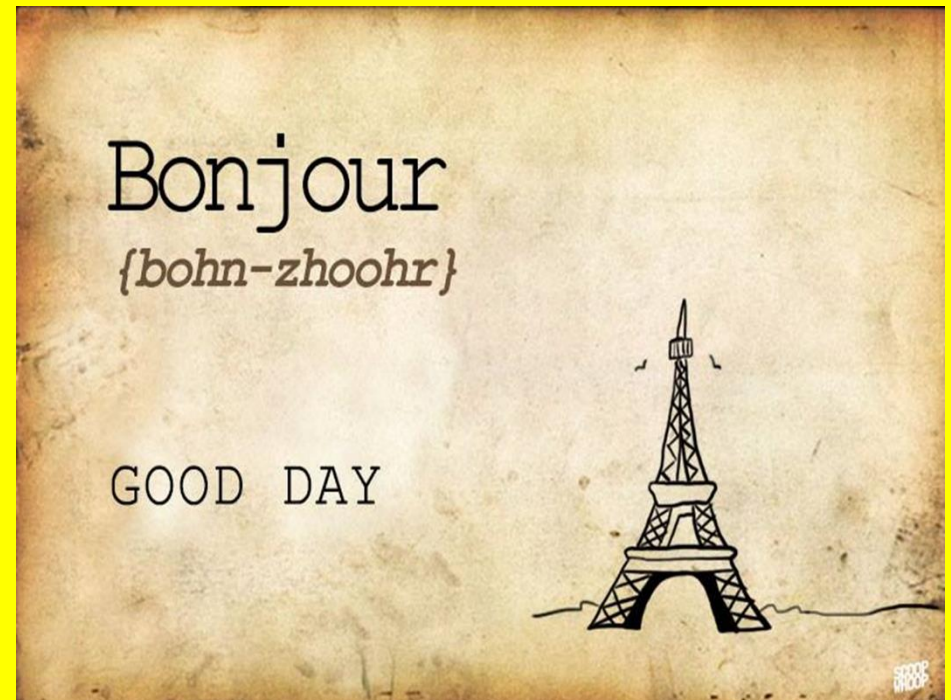


# Shipyard Association of the Philippines (ShAP)



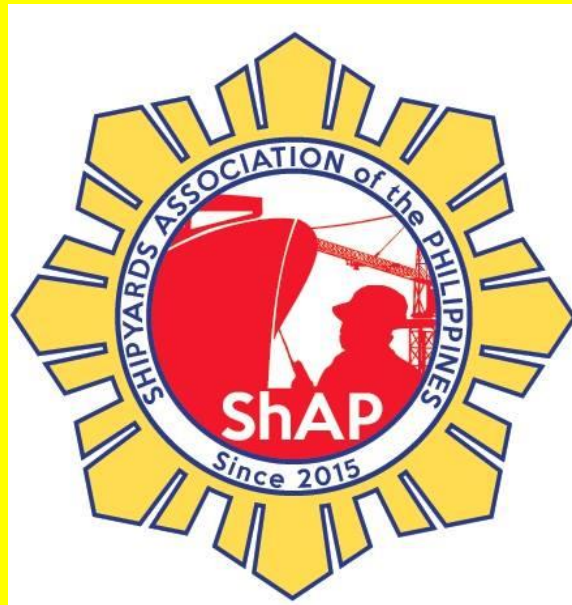
# MABUHAY!

- **Mabuhay** is a Filipino greeting, usually expressed as *Mabuhay!*





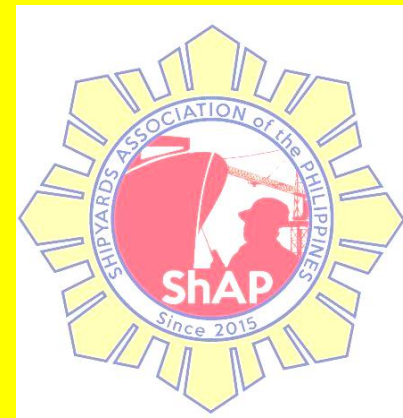
# Shipyard Association of the Philippines



also known as ShAP



## NATION-WIDE SHIPYARD ASSOCIATIONS



- Japan - SAJ and CAJS
- Korea - KOSHIPA
- China - CANSI
- Singapore - ASMI
- Brazil - SINAVAL
- India - SAINDIA
- Indonesia - IPERINDO
- Philippines - ShAP



# OUR MEMBERS



## Current Members:

33 Members and counting (including Foreign Shipyards)

## Overall Membership:

111 Overall (100% Gov't mandated membership)

# FOUNDING MEMBERS



Gensan Shipyard & Machine Works, Inc



Philippine Iron Construction and Marine Works, Inc.



Herma Shipyard Corporation



Western Shipyard Services, Inc



SAFI Shipyard Inc.



Tsuneishi Heavy Industries Cebu, Inc.



Keppel Subic Shipyard, Inc.



Keppel Batangas Shipyard, Inc.



Austal Marine Philippines



# FOUNDING MEMBERS

BRADEX Phil Shipbuilding & Marine, Inc.



R & LT Shipyard & Realty Dev't Corp

Sea Rudder Corporation



Chesteel Marine Shipyard

VDR Marine & Industrial Inc.



Josefa Slipways Corp

RRT Marine Shipyard

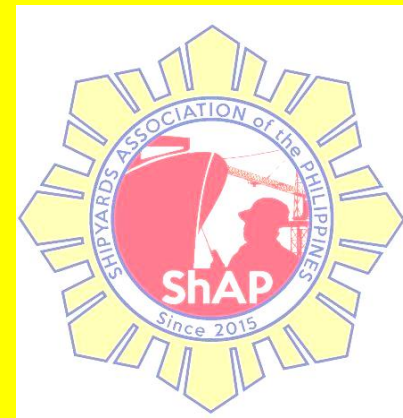
McFish Shipyard Corporation

Pier 44 Shipyard & Devt Corp





# ORGANIZATION



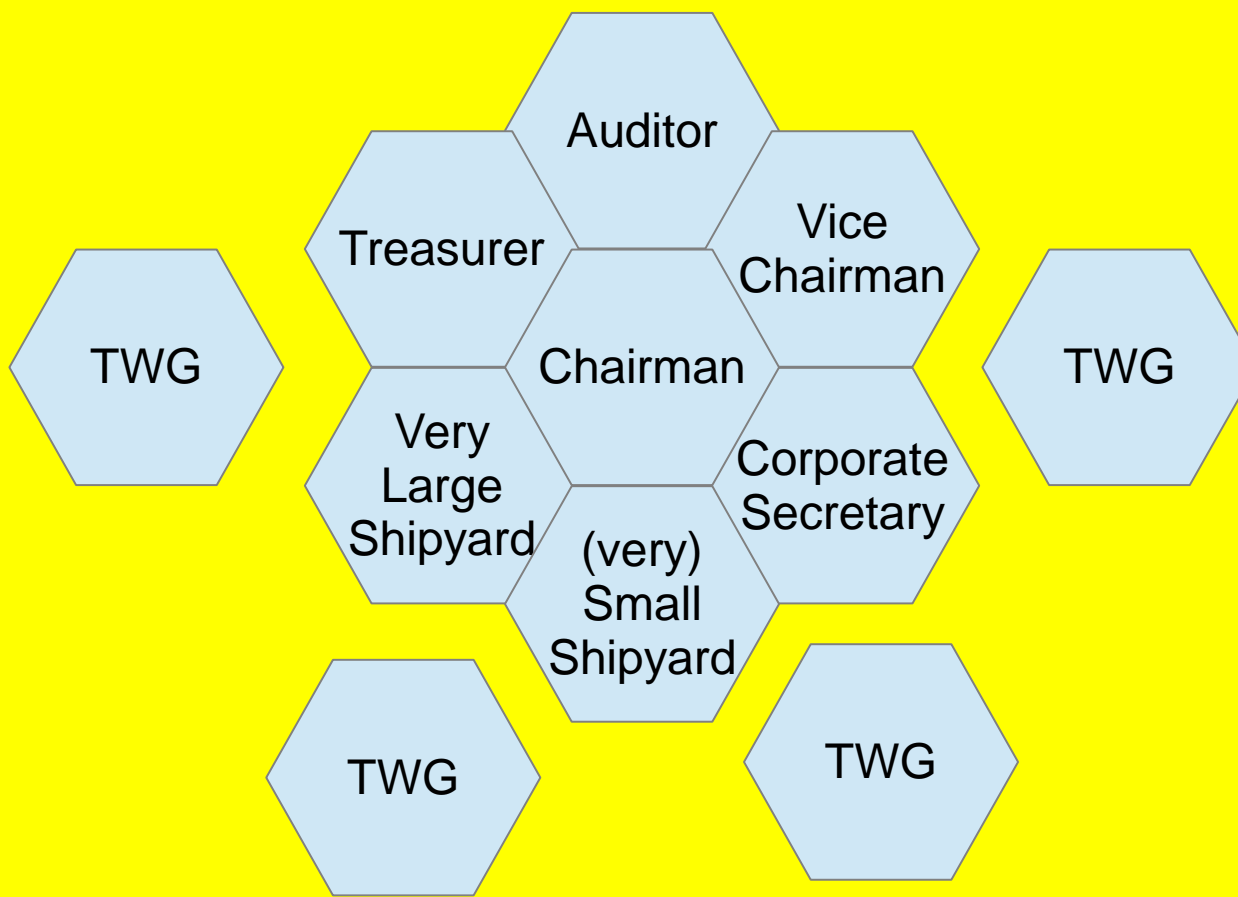
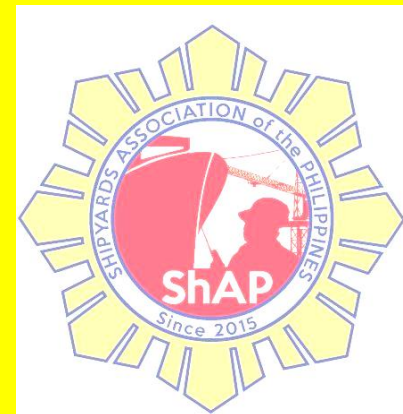
How is ShAP organized?

ShAP has a General Administration Secretariat as well as Focused Technical Working Groups (TWGs) all working under a Board of Directors





# ShAP ORGANIZATION





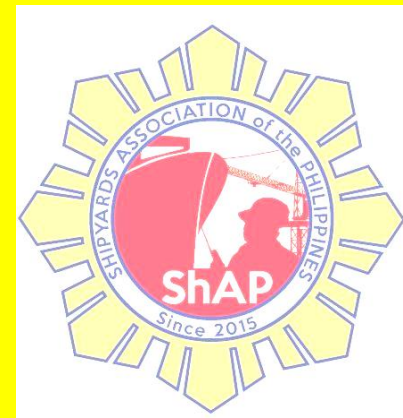
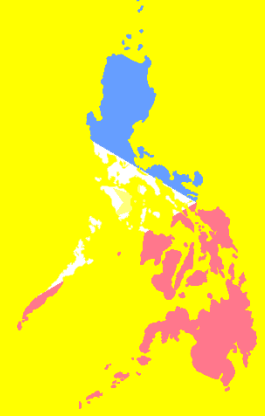
# SECRETARIAT's role

General Administration, Communications & Membership



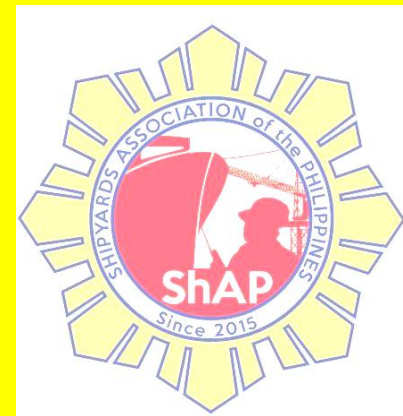
## ShAP TWG's role

- Human Resources, Training and Education
- Technical Standards, Consultations and Proposals
- Regulatory and Public Relations



# PURPOSE

ShAP exists to promote the interests of shipyards in the Philippines.



## Business Areas of Member Shipyards

- Ship Building
- Ship Repair
- Ship Recycling
- Offshore Fabrication
- Terrestrial Fabrication



# SB-SR SCOPE TODAY

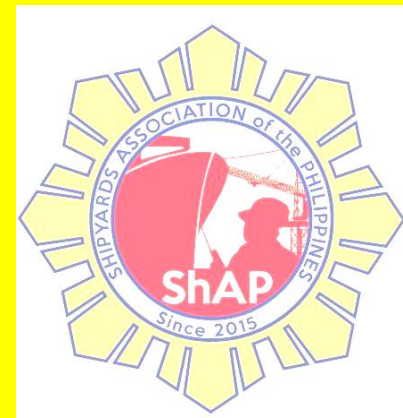
- 2,000,000 GT Built per year
- 110 shipyards
- 48,000 employed
- 90% income of domestic shipyards from Ship Repair and not from Ship Building



# NEW INVESTMENTS



- New Shipyards (>\$10M USD)
- New Graving Docks, Slipways and Floating Drydocks by Existing Yards (>\$50M USD)
- Expanding Ship-lift Capacities (>\$2M USD)
- Blossoming Alternative Ship Repair / Ship Launching facilities such as airbags and rollers (>\$10M USD)



# INDUSTRY DEVELOPMENT INITIATIVES

- Master-Planned Maritime Hub by BOI / DTI (~ \$100M USD)
- Existing and Re-Introduction of Incentives and New Investment Perks (PEZA)
- Alignment of Current Fleets to National Requirements for Growth (focus on Public Safety and RoRo facilitation)



# GOALS & DIRECTIONS



- New Builds - from the current 2,000,000 GT annually to 4,000,000 GT within 3 years
- Elimination of Wooden Hull Passenger Vessels (> 50 PAX)
- Transition of traditional home-built outrigger fleets towards safer marine engineered and outfitted vessels.



Merci and have a nice day!!

