

**FINCANTIERI**

Trieste, 22 November 2012



## WORLD SHIPBUILDING SCENARIO

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*At a glance...*

2007 – 2010 Market demand heavily dropped down



- Far East shipyards rising production capacity
- Halved demand volumes expected for next years compared to pre-crisis situation



Need to increase competitiveness

# CRUISE SCENARIO TODAY: NEEDS AND VALUE DRIVERS



## Needs



## Value drivers

### SHIPBUILDER



- SAFETY
- INCREASING COMPETITIVENESS
- SPEED UP AND SIMPLIFY INSTALLATION METHODS
- LOW ENVIRONMENTAL IMPACT

- SAFETY
- COMFORT
- LOW ENVIRONMENTAL IMPACT

### PASSENGERS



- SAFETY
- FUEL EFFICIENCY
- WEIGHT REDUCTION
- LOW ENVIRONMENTAL IMPACT
- DECREASING COST PER CABIN

### SHIP OWNERS



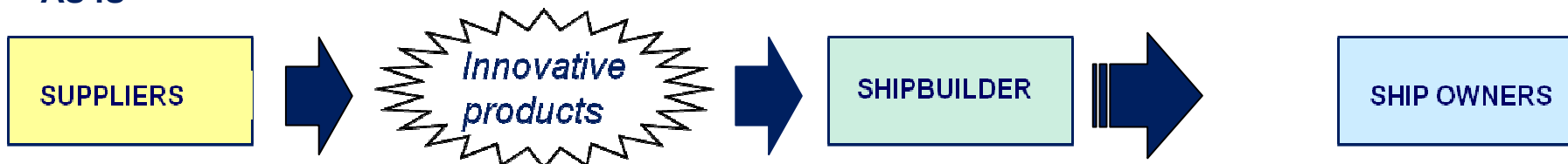
- SAFETY
- ENERGY EFFICIENCY
- GREEN TECHNOLOGIES
- SUSTAINABLE DEVELOPMENT

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## FOCUS ON SHIPBUILDER NEEDS (1 / 3)

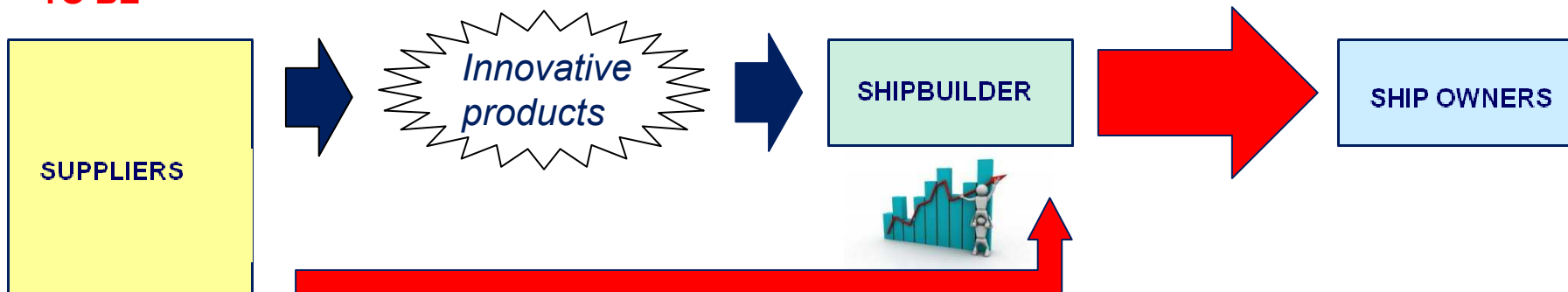
### Innovations introduction process

#### "AS IS"



- New products are offered to the Shipbuilder but their introduction on board is often not successful due to a lack of “value reward” recognition for innovation
- This situation leads to a wide use of traditional products and solutions

#### "TO BE"



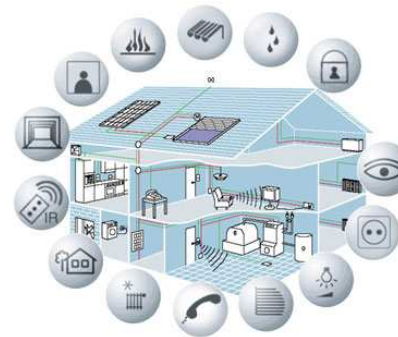
- Suppliers supporting Shipbuilder in order to effectively promote innovations to Ship Owners
- Working jointly focusing on a Life Cycle Cost minimization approach
- Emphasize benefits for the Ship Owners

## FOCUS ON SHIPBUILDER NEEDS (2 / 3)

### Innovative solutions



"BUILDING"



- Follow Building and Civil market trends
- Get inspiration and adapt to the Naval sector constraints

# FOCUS ON SHIPBUILDER NEEDS (3 / 3)

...Some specific areas of interest



## Current situation

### INSULATION

- Some innovative products have been introduced
- Better performances than traditional ones (E.g., ULTIMATE)

### GLASS WALLS

- Traditional glass types
- High solar factor ratio

### FLOOR SURFACES

- Some innovative products have been introduced
- Thinner thickness than traditional



## Improvements / Trends



Labour Intensive activity



- Reduce installation incidence on Total Cost
- Pre-insulated ducts for HVAC system



Lack of innovations



- Energy production
- Hybrid solutions (E.g., glass core coupled with high-performance skins)



Cost of materials still high



- Innovative materials with Marine certifications
- Weight reduction
- Overall cost reduction