


**B – Marine and maritime economic activities (MEAs)**
**Overview of relevant maritime economic activities in PORTUGAL at NUTS-0 level**

Maritime economic activity	Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year	
<b>0. Other sectors</b>						
0.1	Shipbuilding (excl. leisure boats) and ship repair	Shipbuilding € 44.524.268 (2012) Repair € 46.137.446 (2012) N.B. actual number – not in billion	Shipbuilding 1.417 (2012) Repair 1.609 (2012) N.B. actual number – not in *1000	Shipbuilding 83 (2012) Repair 211 (2012)	Shipbuilding Turnover € 76.245.173 in 2012 Repair Turnover € 136.823.707 in 2012	Statistics Portugal
0.2	Water projects	€ 64.854.595 (2012) N.B. Value for companies registered under hydraulic engineering. N.B. actual number – not in billion	1.325 (2012) N.B. Value for companies registered under hydraulic engineering. N.B. actual number – not in *1000	48 (2012) N.B. Value for companies registered under hydraulic engineering.	Turnover € 235.925.378 in 2012 N.B. Value for companies registered under hydraulic engineering.	Statistics Portugal
<b>1. Maritime transport</b>						
1.1 1.2	Deep-sea shipping Short-sea shipping (incl. Ro-Ro)	€ 33.876.645 N.B. Includes all maritime shipping N.B. actual number – not in billion	569 N.B. Includes all maritime shipping N.B. actual number – not in *1000	50 N.B. Includes all maritime shipping	Turnover € 304.262.999 in 2012 N.B. Includes all maritime shipping	Statistics Portugal
1.3	Passenger ferry	€ 3.954.523 (2012)	360 (2012)	122 (2012)	Turnover €	Statistics Portugal



Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
	services	N.B. actual number – not in billion	N.B. actual number – not in *1000		10.201.717 in 2012	
1.4	Inland waterway transport	€ 16.741.625 (2012) N.B. actual number – not in billion	594 (2012) N.B. actual number – not in *1000	43 (2012)	Turnover € 33.618.849 in 2012	Statistics Portugal
<b>2. Food, nutrition, health and ecosystem services</b>						
2.1	Fish for human consumption	€ 156.583.629 (2012) N.B. Includes all fisheries companies N.B. actual number – not in billion	10.796 (2012) N.B. Includes all fisheries companies N.B. actual number – not in *1000	4.005 (2012)	Turnover € 434.368.957 in 2012 N.B. Includes all fisheries companies	Statistics Portugal
2.2	Fish for animal feeding	€ 137.177.698 N.B. Includes all animal feed N.B. actual number – not in billion	3.172 (2012) N.B. Includes all animal feed N.B. actual number – not in *1000	113 (2012) N.B. Includes all animal feed	Turnover € 1.472.047.838 in 2012 N.B. Includes all animal feed	Statistics Portugal
2.3	Marine aquaculture	€ 754.172 (2012) N.B. actual number – not in billion	814 (2012) N.B. actual number – not in *1000	472 (2012)	Turnover € 33.417.033 in 2012	Statistics Portugal
2.4	Blue biotechnology	N/A – the sector is not recognized as such yet.	N/A – the sector is not recognized as such yet.	N/A – the sector is not recognized as such yet.	N/A – the sector is not recognized as such yet.	N/A
2.5	Agriculture on saline soils	N/A	N/A	N/A	N/A	N/A
<b>3. Energy and raw materials</b>						



Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
3.1	Offshore oil and gas	0 (Extraction) Oil refining € 293.016.425 (2012) Gas production € 4.575.633 (2012) N.B. actual number – not in billion	0 (Extraction) Oil refining 1.861 (2012) Gas production 24 (2012) N.B. actual number – not in *1000	0 (Extraction) Oil refining 15 (2012) Gas production 4 (2012)	0 (Extraction) Oil refining Turnover €10.413.346.456 in 2012 Gas production Turnover €10.195.127 in 2012	Statistics Portugal
3.2	Offshore wind	€ 2.304.742.873 (2012)	4.333 (2012)	776 (2012)	Turnover € 687.6515.359 in 2012	Statistics Portugal
3.3	Ocean renewable energy	N.B. This refers to all forms of electricity production. Energy from offshore wind and ocean renewable is practically inexistent. N.B. actual number – not in billion	N.B. This refers to all forms of electricity production. Energy from offshore wind and ocean renewable is practically inexistent. N.B. actual number – not in *1000	N.B. This refers to all forms of electricity production. Energy from offshore wind and ocean renewable is practically inexistent.	N.B. This refers to all forms of electricity production. Energy from offshore wind and ocean renewable is practically inexistent.	
3.4	Carbon capture and storage	0	0	0	0	0
3.5	Aggregates mining (sand, gravel, etc.)	€ 70.282.944 N.B. Comprising mining not only in maritime areas. N.B. actual number – not in billion	2.690 (2012) N.B. Comprising mining not only in maritime areas. N.B. actual number – not in *1000	367 (2012) N.B. Comprising mining not only in maritime areas.	Turnover € 227.392.703 in 2012. N.B. Comprising mining not only in maritime areas.	Statistics Portugal



Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
3.6	Marine minerals mining	N/A	N/A	32 (2012) N.B. Comprising mining not only in maritime areas.	N/A	Statistics Portugal
3.7	Securing fresh water supply (desalination)	0	0	0	0	0
<b>4. Leisure, working and living</b>						
4.1	Coastal tourism					
4.2	Yachting and marinas	€ 37.372.227 N.B. The value includes recreational ports and marinas, bullfighting activities, and the organization of other leisure activities. N.B. actual number – not in billion	€ 4.015 (2012) N.B. The value includes recreational ports and marinas, bullfighting activities, and the organization of other leisure activities. N.B. actual number – not in *1000	2.366 (2012) N.B. The value includes recreational ports and marinas, bullfighting activities, and the organization of other leisure activities.	Turnover € 129.107.929 in 2012 N.B. The value includes recreational ports and marinas, bullfighting activities, and the organization of other leisure activities.	Statistics Portugal
4.3	Cruise tourism	Included in the values for 1.3 Passenger ferry services.	Included in the values for 1.3 Passenger ferry services.	Included in the values for 1.3 Passenger ferry services.	Included in the values for 1.3 Passenger ferry services.	Statistics Portugal
<b>5. Coastal protection</b>						
5.1 – 5.2	Coastal protection against flooding and	N/A	N/A	N/A	N/A	N/A

COUNTRY FACT-SHEET :

**PORTUGAL**



SUPPORT TEAM for the  
ATLANTIC ACTION PLAN



PROMOTING **SMART SUSTAINABLE AND INCLUSIVE** GROWTH  
FOR THE ATLANTIC AREA

Maritime economic activity		Gross Value Added (EUR, billion)	Employment (*1000)	Number of enterprises	Other indicators	Source & Reference year
	erosion					
5.3	Protection of habitats	NA	N/A	N/A	N/A	N/A




**Breakdown of maritime economic activities in the Atlantic NUTS2 regions of Portugal.**

Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
<b>0. Other sectors</b>			
0.1	Shipbuilding (excl. leisure boats) and ship repair	Shipbuilding activities are mainly concentrated in Lisboa and Norte, with some expression in the Algarve. There are shipyards with relevant capacity, however they are exposed to competition with countries with lower labour costs. The competitive advantages of portuguese shipbuilding and ship repair industries lay on location, weather conditions and skilled labour. they are strategic sectors in Portugal, providing employment and generating wealth in a wide range of industries.	Portugal is a country of international significance in this sector, with one of the leading shipyards in Europe and the third in the world in some market segments. The turnover of the 50 largest companies (employing about 3.100 workers) reached approximately €M 250 in 2010.
			Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014)  Blue growth for Portugal (COTEC 2011)  HELM - PwC economy of the Sea Barometer (PwC Portugal, 2013)
0.2	Water projects	N/A	N/A
<b>1. Maritime transport</b>			
1.1	Deep-sea shipping	Portugal is strategically positioned on the Atlantic coast of the Iberian Peninsula, at the intersection of the main equatorial and southern routes	For 2013, in the main ports of the country 1.425.198 containers (2.190.495 TEU) were moved and 10.262 ships
1.2	Short-sea shipping (incl. Ro-Ro)		
			Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014)  Blue growth for Portugal (COTEC



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		of maritime traffic. The Port of Sines is one of the few deep water ports in Europe, and one of the few ports along the Atlantic and Iberian coasts. The main ports are: Viana do Castelo; Douro e Leixões; Aveiro;; Figueira da Foz; Lisboa; Setúbal; Sines.	(164.019.422 GT) were recorded. The fleet of merchant ships registered and controlled in Portugal in 2011 totaled 37 vessels and 176.143 GT.	2011) Instituto Portuário e dos Transportes Marítimos, IP. <a href="http://www.imarpor.pt">www.imarpor.pt</a>
1.3	Passenger ferry services	N/A	Number of passengers (sea and river): 28.534 (2010); 31.850 (2011); 27.923 (2012). In M passengers.	Instituto da Mobilidade e Transportes, IP ( <a href="http://www.imtt.pt">www.imtt.pt</a> )
1.4	Inland waterway transport			
<b>2. Food, nutrition, health and ecosystem services</b>				
2.1	Fish for human consumption	Fishing and related activities such as processing and commerce of the fish, is a sector with large tradition and significant social relevance, which nonetheless exceed its expression at the level of the main national macroeconomic aggregates. Portugal imports more than a half of all the fish it consumes. Nonetheless, Portugal is the largest per	In 2013 there were 8.233 registered fishing vessels (99.929,40 GT). Total landings reached 148.875,6 tons in 2013 (29% in Centro; 19% in Lisboa; 19% in Norte, 15% in the Algarve), worth 235.223,4 € thousand.	Direcção-Geral de Recursos Naturais, Segurança e Serviços Marítimos ( <a href="http://www.dgrm.min-agricultura.pt">http://www.dgrm.min-agricultura.pt</a> )  Statistics Portugal ( <a href="http://www.ine.pt">www.ine.pt</a> ) Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014)  HELM - PwC economy of the Sea



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		capita consumer of fish in the EU, and is in the top three countries with the highest fish consumption per capita in the world.		Barometer (PwC Portugal, 2013)
2.2	Fish for animal feeding	There are three companies processing fish for animal feeding, mainly for aquaculture, and for export markets.	N/A	N/A
2.3	Marine aquaculture	Portugal has favorable natural conditions to develop aquaculture activities. The production of fish is still underdeveloped, representing less than 10% of fish catches. Recently initiatives have been launched to promote the production of shellfish (e.g. oysters and mussels) offshore.	Total production area was 1247 ha in 2012. Total production in 2012: €M 53.659 (47% in Centro and 45% in the Algarve).	Statistics Portugal (www.ine.pt)
2.4	Blue biotechnology	The sector is still taking off, led by research made in public institutions and by researchers who spin-off to star their companies. There is much scientific knowledge accumulated in this area that now begins to produce	N/A	N/A





Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		marketable results.		
2.5	Agriculture on saline soils	A few scattered and very small-scale initiatives for the production of salicornia in Lisboa and Centro.	N/A	N/A
<b>3. Energy and raw materials</b>				
3.1	Offshore oil and gas	The prospect of conventional energy resources, particularly oil, has increased significantly. Potential for economic exploitation of methane hydrates throughout the offshore area South and Southwest of mainland Portugal has been confirmed.	N/A	Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014).
3.2	Offshore wind	The renewable energy sector represents about 3% of GDP, yet fundamentally on land. Portugal has potential and ideal conditions for the development of energy sources in the maritime space, but there is not yet a sector dedicated to the exploration of offshore renewable energy.	Several wind and wave energy pilot projects have been implemented in Norte and Azores regions. In 2012 an offshore wind project of 27 MW, was approved. There are also two wave energy plants production in Pico Island (Azores) and Peniche (Centro).	Blue growth for Portugal (COTEC 2011)  Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014)
3.3	Ocean renewable energy			
3.4	Carbon capture and storage	Nonexistent.	N/A	N/A



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
3.5	Aggregates mining (sand, gravel, etc.)	This activity focuses mainly on dredging, essential for the operation and security of Ports and waterways (coastal and inland), obtaining materials for construction, and creation and maintenance of infrastructures.	The turnover of companies registered under extraction of gravel, sand and crushed stone (NACE) accounted for € 223,404,081 in 2011.	<p>Estatísticas da Produção Industrial 2011 (Statistics Portugal, 2012).</p> <p>Estudo da Evolução de uma Área de Extracção de Areias na Margem Algarvia (Daniela Maria e Silva Gonçalves, Universidade de Aveiro, 2009).</p>
3.6	Marine minerals mining	The potential in metallic mineral ores includes zinc, copper, cobalt, gold, silver and manganese. However this potential needs confirmation through further research studies and prospecting.	N/A	Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014)
3.7	Securing fresh water supply (desalination)	Nonexistent.	N/A	N/A
<b>4. Leisure, working and living</b>				
4.1	Coastal tourism	The sun and sea tourism is the main tourist product of Portugal. In addition to typical leisure activities associated with the beach, the main sports in this category are sailing, windsurfing, rowing and canoeing, surfing and diving. The internationalization of	There are more than 160 surf schools, some 4.000 surfboards are traded over a year, in a sector which is estimated to represent approximately €M 100 annually. There are over 600 companies registered as	<p>Estratégia nacional para o Mar 2013-2020 (Direcção-Geral de Política do Mar, 2014)</p> <p>Blue growth for Portugal (COTEC 2011)</p>



Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		<p>sporting activities, such as surfing are examples of new activities in this area: Peniche was ranked as the " Wave Capital", the of Ericeira was classified as "World Surfing Reserve", the "Wave of Nazaré" and the recognition of Azores as a new global destination.</p>	<p>maritime tour-operators.</p>	
4.2	Yachting and marinas	<p>Nautical tourism is one of the 10 strategic tourist products for Portugal. Recreational boating and cruises are sectors with high growth potential in the short term. There are recreational ports and marinas all along the coast, and cruise tourism has experienced high growth in recent years, especially in the Lisbon region.</p>	<p>Portugal has over 30 marinas / recreational ports and over 13,000 berths - the Algarve (31%) and Lisbon (21%) are the major sites. Portugal was the 6th European destination most visited by cruise passengers in 2012 (1.2 million passengers), placing it 11th in the ranking of European countries with the greatest direct impact of the cruise industry (€ 207 million in 2012), according to the ECC (European Cruise Council).</p>	<p>10 produtos estratégicos para o desenvolvimento do turismo em Portugal - Turismo Náutico (Turismo de Portugal, 2006)</p> <p><a href="http://expresso.sapo.pt/portugal-ja-e-o-6-destino-europeu-em-cruzeiros=f841011">http://expresso.sapo.pt/portugal-ja-e-o-6-destino-europeu-em-cruzeiros=f841011</a></p>
4.3	Cruise tourism			





Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
<b>5. Coastal protection</b>			
5.1 – 5.2	Coastal protection against flooding and erosion	Meteorological conditions and orographic and geological features have contributed to the occurrence of floods in the basins of major rivers and small and medium scale flooding. Regarding erosion, Portugal is exposed to possible rise in sea level, and as such subject to overtopping and coastal erosion, with consequent destruction of beaches and dune systems. Solutions to these problems have mostly reactive in nature, although plans and studies exist to prevent these situations from occurring.	N/A
5.3	Protection of habitats	The existence of an extensive and fragile seafront, which is densely populated for the most part, has contributed to the occurrence of negative environmental impacts.	N/A



**Description of the most relevant marine and maritime economic activities (selected on the basis of their potential in terms of employment growth, sustainability, competitiveness).**

According to the National Strategy for the Sea 2013-2020 (Estratégia Nacional para o Mar 2013-2020):

- Fishing - catching levels have remained constant over the last few years, essentially due to the renovation and increased efficiency of the fleet, although the number of registered fisherman and fishing vessels have decreased.
  - Aquaculture - Increasing internal demand for fish and shellfish, together with the improvement in technologies and accumulated scientific knowledge may contribute to the further development of aquaculture, and particularly the production of mollusks.
  - Blue biotechnology - commercial exploitation of resources, such as the utilization of marine organisms in bioproducts with industrial, pharmaceutical, medical, cosmetic and technologic applications is expected, given the significant support to R&D activities in this domain over the last years.
  - Renewable energies - increased investment in offshore wind energy is expected.
  - Ports, transports and logistics - commercial shipping has progressed significantly over the last years, through increasing availability of infrastructures and capacity to attain specific traffic requisites, such as import/export and transshipment of containers or oil products, natural gas and coal.
  - Leisure and tourism - Recreational boating and cruise tourism are expected to increase in the short term. Coupled with the traditional and consolidated sun and sea tourism, other nautical sports activities are increasing.
  - Shipbuilding and ship repair - restructuring of shipyards is undergoing. The tradition of the country, together with internationally recognized knowledge and competences in these areas are expected to contribute to reverse the downturn of this industry in the last years.
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- Marine activities is regulated at the national level by the Lei de Bases do Ordenamento do Espaço Marítimo (Lei n.º 17/2014) - <https://dre.pt/pdf1sdip/2014/04/07100/0235802362.pdf>