



European Shipowners commissioned Deloitte to deliver a **data-driven benchmarking study** on the EU maritime sector's global competitiveness.

'European shipping has played a **significant role in maintaining the EU's position as a leader in international supply chains.**'

Deloitte, 2025

The research compares Europe's position against **six leading international shipping hubs**, pinpointing best practices in policy, taxation, finance, regulation, and workforce development. It highlights critical policy gaps, assesses their impact, and sets out **concrete, actionable recommendations** to strengthen Europe's maritime edge.

Find out more:



European Shipowners

ECSA | European Community Shipowners' Associations

The voice of European shipping

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Deloitte

EU Shipping Competitiveness Study



www.ecsa.eu



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Keep European Shipping Internationally Competitive



Develop a **forward-looking European maritime strategy**



Maintain **Maritime State Aid Guidelines (SAGs)**



Recognise **shipping as a cornerstone of Europe's security** and a prerequisite for a strong maritime cluster



Aligning Regulations & Reducing Administrative Burden



Align EU regulations with **IMO/ILO** conventions



Cut red tape and reduce reporting requirements



Digitalise administrative processes



Closing the Investment Gap



Use EU and national ETS revenues to **bridge the price gap with clean fuels** and support investments in clean tech



Facilitate access to **finance for shipowners** in Europe



Expand the **toolbox of financing and funding solutions**



Promoting Upskilling and Reskilling



Train **250,000 European seafarers** for new fuels & digital solutions



Strengthen international framework of **IMO STCW-convention** and update framework for **mutual certification** recognition in the EU



Enhance the **attractiveness of seafaring as a profession**



Why this matters



Shipping is a **cornerstone of Europe's food, energy and supply chain security**



Shipping is at the **forefront of the energy transition** and carries **76% of the EU's external trade**



EU shipping is growing steadily, but others are growing faster, posing a competitiveness challenge



35%

EU share of the world's fleet



76%

of Europe's external trade is enabled by shipping



40 bn

Needed in annual investments for EU shipping's energy transition