



OFFSHORE PATROL VESSELS

OPV

**GLOBAL OFFSHORE PATROL VESSELS
MARKET REPORT 2015-2016**

MARKET SUMMARY

Offshore Patrol Vessels (OPVs) are the fastest growing segment of the Naval Vessels Market. At least 24 countries are known to have a total of 136 OPVs on order and 30 countries have plans for up to another 276 at a total value of over \$60 billion. The total number of OPVs on order has increased by 4% in the last year, while the number planned has also increased by 4%.

The total number of OPVs in operation worldwide has increased from 681 to 776 in the last year, but an additional 49 Chinese and 16 Taiwanese vessels, previously not included, but now classified as OPVs have been added to the total. Disregarding these additional vessels, the world OPV fleet has actually grown by 4.4% in the last year.

Asia has the largest proportion of the current fleet (44%) and the numbers on order (46%). Japan and India have 50% of the Asian vessels between them, while India alone has 26% of the total vessels on order worldwide. The proportion of the total number of OPVs on order worldwide, in South America, has increased from

13%-15% over the last year, while in Europe, the proportion on order has increased from 8% to 19% of the worldwide total and in North America, from 6% to 15%.

OPVs can be broadly classified into two types: 1) High-end war-fighting vessels with expensive weapon systems and C4I suites and 2) More basic patrol vessels, designed for sustained low intensity missions and equipped with basic gun armaments, standard navigation sensors and built to commercial standards.

Which of these types a country chooses depends on its particular naval requirements, resulting from its geographic location, political aspirations and intended role of its naval force. However, the majority of OPV programmes are of the low-cost, multi-role variety. These are being used in an increasing number of roles, including fishery protection, pollution control, fire-fighting, salvage or search and rescue (SAR), counter-narcotics, humanitarian operations and exclusive economic zone (EEZ) patrol.

KEY REQUIREMENTS

**ACTIVE PROGRAMMES &
EXPECTED ACQUISITIONS**

ACTIVE PROGRAMMES & REQUIREMENTS

Selected acquisition and modernisation from around the world...

EUROPE



Belgium

The first of two new 52 metre patrol vessels for the Naval Component of the Belgian Armed Forces was launched on the 14th April 2015 by French shipbuilder Socarenam. The 448-tonne vessels are being procured under a EUR 26.6 million (\$ 36.9 million) contract announced by Belgium's Ministry of Defence in February 2013. Second of class Pollux (P 902) is expected to be launched in October 2015.

Cyprus

Approval has been given for the Naval Command to procure 2 OPVs. It is believed that EUR 120 million (\$159 million) has been allocated to the project, but no delivery timescales have been announced.

France

The P400 OPVs will be retired before the new BATISMAR vessels enter service in the early 2020s. 15 vessels are planned (some sources

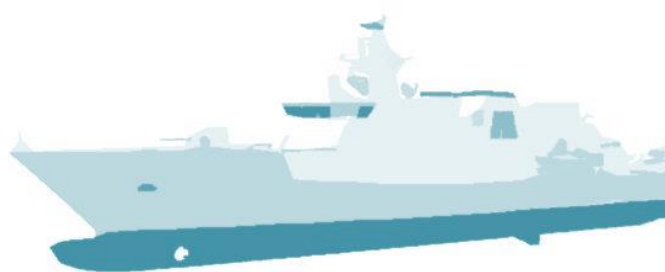
state that up to 20 vessels are planned). In order to cover the capability gap, the French Navy has re-rolled 9 Type A 69 D'Estienne d'Orves-class light frigates, which are due to leave service from 2015-2021.

Greece

The Coast Guard issued a tender for a 60 Metre OPV in 2007, but nothing further has been reported.

Ireland

The Naval Service Replacement Programme is for the replacement of all eight patrol ships by 2025.



ACTIVE PROGRAMMES & REQUIREMENTS

Italy

Italian state shipyard Fincantieri and Italian defence group Finmeccanica have signed a contract to build a new class of OPVs for the Italian Navy. In a €3.5 billion (\$3.9 billion) deal, up to six multi-purpose offshore patrol ships, known as PPAs, will be built, with options for four more. The PPA vessels will be delivered in 2021, 2022, 2023, 2024 (two units) and 2025.

Poland

The Polish Navy has plans for 4 Offshore Patrol Vessels (OPVs).

Portugal

The Portuguese Navy is planning to buy 4 Stanflex 300 modular patrol ships from the Royal Danish Navy. No contract signature or delivery dates have yet been confirmed.

Spain

Spain has awarded Navantia a EUR 400 million (\$558 million) contract to build two more Buque de Acción Marítima (BAM) patrol vessels for the Spanish Navy.

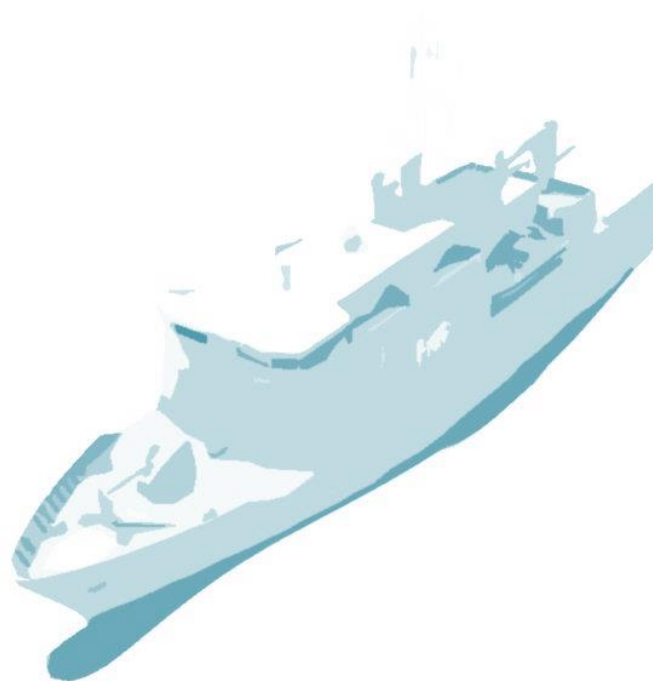
U.K.

BAE Systems Maritime – Naval

Ships has been awarded a £348 million (\$ 558 million) contract by the UK Ministry of Defence (MoD) to construct three new offshore patrol vessels (OPVs) to be built for the Royal Navy (RN). Planned delivery of the three ships is scheduled for 2017-18.

Ukraine

Plans to acquire an OPV of around 1,000 tons.



ASIA-PACIFIC



Australia

A fleet of 20 Offshore Combatant Vessels (OCVs) of 1,500 tons equipped with modular mission systems is planned under Project 1180. First approval is planned for 2018 and the selected design will incorporate the capabilities presently provided by the RAN's separate patrol boat, hydrographic and minehunter fleets.

However, the 2013 White Paper on Defence reported that a stop-gap replacement would be sought for the Armidale Class patrol boats, with mine warfare and survey vessels to be upgraded. It also stated that 'a modular multi-role vessel remains a possible longer-term capability outcome.'

India

5 new 95 metre OPVs are to be built at Pipavav Shipyard. There are also plans to acquire up to 16 55 metre ASW patrol ships.

7 OPVs for the Coast Guard have been contracted to be constructed, with delivery to begin from 2018.

Korea (South)

6 new OPVs are to be acquired by the Maritime Police. These will include three 3,000 ton helicopter-capable ships and three 1,500 ton ships.



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New Zealand

The New Zealand Defence Force (NZDF) has a requirement for a third offshore patrol vessel (OPV) for the Royal New Zealand Navy (RNZN).

Philippines

Plans to procure 2 offshore patrol craft are included in the 2012- 2016 modernization plan. A total of 18 OPVs are eventually planned – they may be operated by the Coast Guard.

Sri Lanka

The Sri Lankan Navy C-in-C stated a requirement for 5-6 OPVs in September 2010, reflecting a need to re-balance fleet capabilities with more emphasis on EEZ surveillance. A contract for 2 Sankalp class vessels was signed in April 2013.

Thailand

Up to 5 more Krabi Class OPVs are possible, subject to funding.

Vietnam

6 OPVs are reportedly under construction in local yards for the Coast Guard.

In November 2013, the Indian government extended Vietnam credit worth \$100 million, to fund procurement of four Indian-made OPVs for the Vietnam People's Navy.



LATIN AMERICA & THE CARIBBEAN



Brazil

Five large OPVs (NPO 1800) are planned, with ultimately up to 12 vessels to be procured.

A large family of OPVs, the 500t MACAÉ-class is being procured, with seven units already in service and six additional vessels planned in Phase 1 of the programme, with a further 11 projected in Phase 2, and 19 in Phase 3, for a total of 43.

Colombia

The CPV46 programme is for 14 locally built OPVs, by COTECMAR of a South Korean STX design, with the first unit to be laid down in 2015. Two Fassmer OPV80 vessels have already been commissioned and orders for two additional batches are expected soon (three vessels by 2019 and two more by 2030).

Cuba

Cuba has modified two trawlers (BH390 and 391) into fighting ships to replace their old and retired KONI-class frigates. They could serve as patrol vessels, but their combat capability is doubtful.

Ecuador

Damen has been selected for two Stan Patrol 5009 OPVs to be built locally.

Mexico

In July 2014, SEMAR was awarded a contract to build four newly modified OAXACA-class OPVs, fitted with a BAE Systems 57mm Mk3 gun.



Peru

In mid-September 2013 the Peruvian Navy (MGP) selected an OPV design from South Korea's STX Offshore & Shipbuilding, and signed an \$83 million contract for licensed- production of five vessels at Peru's SIMA shipyards.

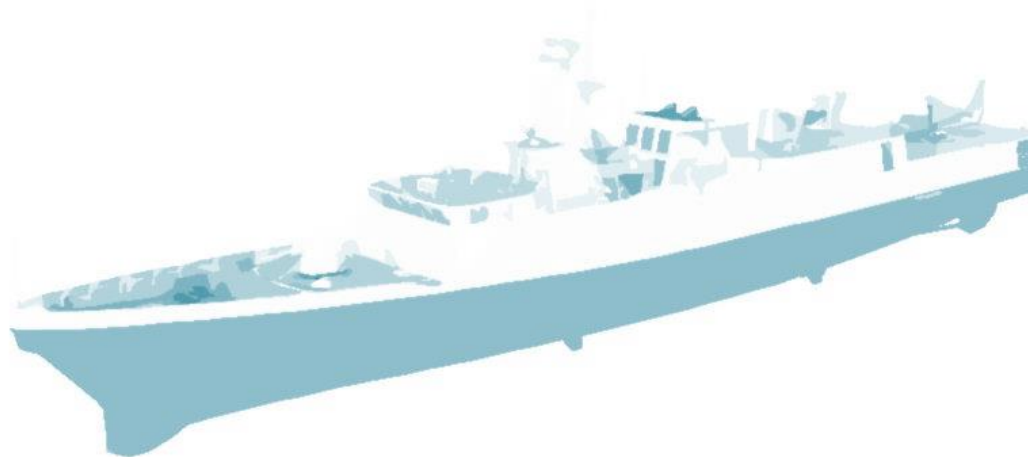
The MGP in 2012 announced plans to build 10 500-ton exclusive economic zone patrol vessels at SIMA.

Uruguay

Uruguay reportedly wants to lease 3 OPVs. DCNS may have been selected. Alternatively, 2 OPVs may be built in a local shipyard, under a license with ENVC of Portugal, based on the Navio de Patrulha Oceanica 2000 design.

Venezuela

6 Stan Patrol 5009 OPVs and 6 Stan Patrol 4207 CPVs ordered at a cost of \$302 million.



MIDDLE EAST & AFRICA



Ghana

Three more OPVs are reportedly to come from South Korea.

Mauritania

Mauritania has developed a five-year plan to build its navy into a force capable of defending the country's 235,000 km² exclusive economic zone. The plan includes the acquisition of two 60m vessels, which are under construction.

Mauritius

The Mauritius National Coast Guard ordered an initial OPV from Indian shipbuilder Garden Reach Shipbuilders and Engineers in 2011. This OPV was launched in August 2013 and was expected to be delivered in September 2014.

Morocco

The first OPV 70-class patrol vessel for the Royal Moroccan Navy was

commissioned in mid-2011. More ships are projected (3?).

Nigeria

The first of two Chinese built P18N offshore patrol vessels (OPVs) ordered by Nigeria arrived in Lagos on the 6th February. The second P18N, NNS Unity (F92) will arrive in the country later in 2015. A further 10 OPVs are planned to enter service by 2020.



ACTIVE PROGRAMMES & REQUIREMENTS

Seychelles

India donated a second SDB Mk 5 patrol boat to the Seychelles on the 7th November 2014 in order to forge closer strategic ties with the island republic and counter China's growing influence in the Indian Ocean.

INS Tarasa was handed over to the Seychelles Coast Guard (SCG).

South Africa

The South African arms procurement agency Armscor issued two separate requests for

proposals (RfPs) on the 3rd December 2014 for three 'multimission' offshore patrol vessels (OPVs) and three 'multimission' inshore patrol vessels (IPVs).

Turkey

Dearsan Shipyard and RMK Marine were chosen to build the 88.6 metre Turkish Coast Guard search and rescue (SAR) offshore patrol vessel (OPV).

fendercare

marine

Fendercare Marine has been a proud supplier of marine hardware to the Ministry of Defence and navies throughout the world since 1999.

We recently won contracts with BAE Systems and Babcock (Defence Support Group) to support their work with the UK Royal Navy.

Our work with BAE Systems naval ships included the provision of rudder blades, rudder stocks, sleeves/liners for rudder stock, anchors, chain and deck equipment for three new Offshore Patrol Vessels (OPVs).

Fendercare Marine was chosen for this contract based on our past experience working with BAE Systems and our track record of working on the Amazonas class vessels.

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NORTH AMERICA



Canada

The Arctic Offshore Patrol Ship (AOPS) project was approved in 2007 for up to 8 vessels. Irving Shipbuilding of Halifax won the contract to develop the ships in July 2012. Construction of the first ship is due to begin in 2015, with all 8 scheduled for delivery from 2018-2023. The project is estimated to cost CAN\$3.1 billion (\$2.45 billion).

U.S.A

The U.S. Coast Guard (USCG) has placed into service its first Legend class National Security Cutter (NSC), which is to be home-ported on the Atlantic coast.

Fourth in class USCGC Hamilton (WMSL 753) was commissioned on the 6th December 2014 in its home port of Charleston, South Carolina.

A fifth NSC – the future USCG James (WMSL 754) – was launched in May 2014 at Ingalls and is expected to be handed over

in the third quarter of 2015.

Construction of the sixth in class USCG Munro (WMSL 755) is progressing, while the build of the seventh NSC USCG Kimball (WMSL 756) is expected to commence in early 2015 for a 2018 delivery.

As the centrepiece of the USCG fleet's recapitalisation effort, a fleet of eight NSCs is being acquired to replace the coastguard's ageing fleet of 10 Endurance class cutters.

Northrop Grumman is building the 4,112-ton NSCs at its Ingalls yard in Pascagoula, Mississippi, under the coast guard's US\$24 billion Deepwater acquisition programme.

The Offshore Patrol Cutter (OPC) programme is expected to procure 25 vessels, making it one of the largest ever USCG acquisition efforts.



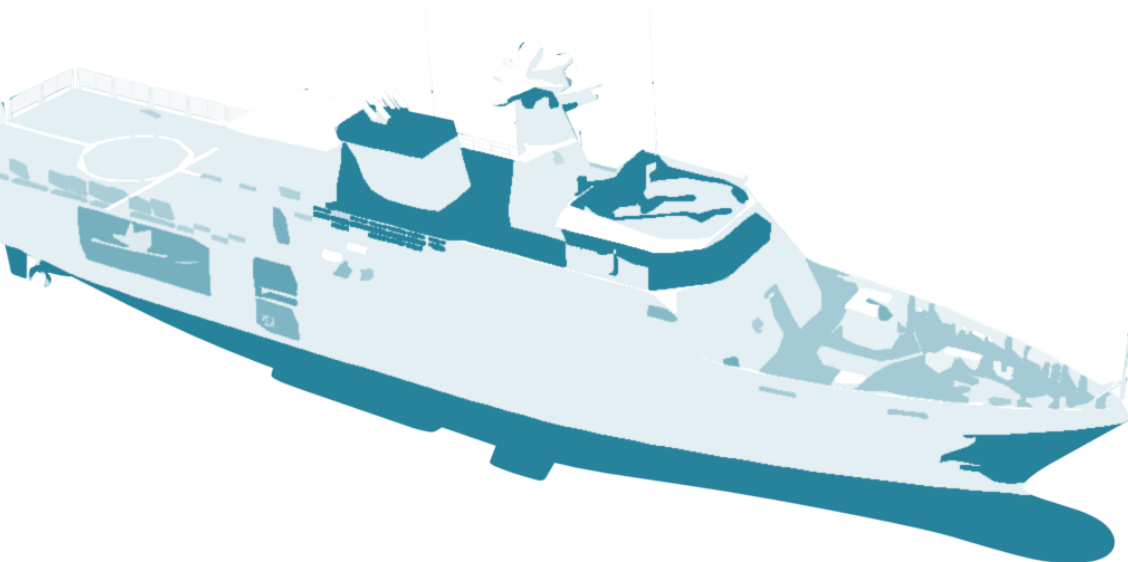
ACTIVE PROGRAMMES & REQUIREMENTS

*FRC – Fast Response Cutter
(Sentinel class)*

24 under contract - 34 total
planned?
4-6 ships per year being procured

Offshore Patrol Cutter (OPC)
3 designs to be reduced to 1
(Phase II)

Down-Select scheduled for late
2014 or early 2015 – 25 planned to
replace 13 Famous Cutter Class
and 14 Reliance Class ships.



HOLDINGS

WORLD OFFSHORE PATROL VESSEL INVENTORIES

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
ANGOLA	2 DAMEN 6210 CLASS 5 OPV	
ARGENTINA	2 CHEROKEE CLASS 1 OLIVIERI CLASS 1 SOTOYOMO CLASS 5 HALCON CLASS (COAST GUARD) 1 PATROL SHIP (COAST GUARD)	

**POWER
IN MOTION**

OPV "20 DE JULIO"



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of Naval, Maritime and Riverine Industries



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HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
AUSTRALIA	<p>3 OPVs (CUSTOMS)</p> <p>1+7 CAPE CLASS (CUSTOMS)</p>	<p>Up to 20 offshore combat vessels (OCVs) may be procured by 2030 under project 1180. First approval is planned for 2018.</p> <p>Delivery march 2013 – August 2015</p>
AZERBAIJAN	<p>1 BRYZA CLASS</p> <p>1 SHELON CLASS</p>	
BANGLADESH	<p>1 MADHUMATI CLASS</p> <p>5 PADMA CLASS</p> <p>6 ISLAND CLASS</p> <p>2 KARNAPHULI CLASS</p> <p>1 HAIZHUI CLASS</p>	1 OPV possibly planned
BELGIUM	2 52 METRE PATROL VESSELS	First commissioned 2014; second in 2015

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
BRAZIL	<p>6+6 (34) MACAE CLASS (NAPA 500)</p> <p>12 GRAJAU CLASS</p> <p>4 BRACUI CLASS</p> <p>3 90 METRE OPVs</p>	<p>Class of 12 projected by 2016 – 1st commissioned 2009. All 12 phase 1 approved. Up to 46 planned in total – 15 in phase 2; 19 in phase 3</p> <p>Originally built for Trinidad & Tobago</p> <p>5 NPO 1800 planned (up to 12 eventually)</p>
BRITISH INDIAN OCEAN TERRITORY	<p>1 FISHERY PATROL SHIP</p>	
BRUNEI	<p>4 DARUSSALAM CLASS</p>	
CAMEROON	<p>1 FLAMANT CLASS</p> <p>1 BAKASSI CLASS</p>	
CANADA	<p>1 SIR WILFRED GREWFELL (COAST GUARD)</p> <p>1 LEONARD J COWLEY CLASS (COAST GUARD)</p> <p>2 CAPE ROGER CLASS (COAST GUARD)</p> <p>1 TANU CLASS (COAST GUARD)</p>	<p>Up to 8 AOP class planned for delivery from 2018-23</p>

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
CAPE VERDE	<p>1 GUARDIAO CLASS</p> <p>1 KONDOR I CLASS</p>	
CHILE	<p>3 PILOTO PARDO CLASS</p>	
CHINA	<p>1 HAIXUN 21 CLASS (MARITIME SAFETY ADMINISTRATION)</p> <p>1 HAIXUN 31 CLASS (MARITIME SAFETY ADMINISTRATION)</p> <p>1 HAIXUN 11 CLASS (MARITIME SAFETY ADMINISTRATION)</p> <p>1 HAIXUN 051 CLASS (MARITIME SAFETY ADMINISTRATION)</p> <p>1 HAIXUN 01 CLASS (MARITIME SAFETY ADMINISTRATION)</p> <p>1 HAIXUN 022 CLASS (MARITIME SAFETY ADMINISTRATION)</p> <p>1 TYPE 718 (COAST GUARD)</p> <p>2 JIANGHU CLASS (COAST GUARD)</p> <p>49 OFFSHORE PATROL SHIPS (COAST GUARD)</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
COLOMBIA	<p>2 +1 ARC 20 DE JULIO CLASS</p> <p>1 RELIANCE CLASS</p> <p>1 BALSAM CLASS</p> <p>1 + (3) 40 METRE PATROL VESSELS</p> <p>3 STX-DESIGNED OPVs</p>	
CONGO-BRAZZAVILLE	4 PATROL CRAFT	
COTE D'IVOIRE	1 PATRA CLASS	<p>Operational status doubtful</p> <p>3 33-metre patrol boats are on order from Raidco Marine</p>
DENMARK	2 + 1 KNUD RASMUSSEN CLASS (ARCTIC PATROL SHIPS)	Third vessel approved for service entry in 2016
DOMINICAN REPUBLIC	1 BALSAM CLASS	
ECUADOR	3 ISLA FERNANDINA (VIGILANTE) CLASS (COASTGUARD)	Two Stan Patrol 5009 OPVs to be built locally
EQUATORIAL GUINEA	<p>2 KIE NTEM CLASS</p> <p>2 PV 50M CLASS</p> <p>1 PV88 CLASS</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
ESTONIA	1 SILMA CLASS (BORDER GUARD) 1 KINDRAL KURVITS CLASS (BORDER GUARD)	
FALKLAND ISLANDS	1 FISHERY PATROL SHIP	
FAROE ISLANDS	2 PATROL SHIPS (COASTGUARD)	
FINLAND	1 IMPROVED TURSAS CLASS (BORDER GUARD) 2 TURSAS CLASS (BORDER GUARD) 1 UVL 10 CLASS (BORDER GUARD)	
FRANCE	1 L'ADROIT CLASS (GOWIND) 1 LAPEROUSE CLASS 4 P400 CLASS 9 D'ESTIENNE D'ORVES CLASS 1 TRAWLER TYPE 1 LE MALIN CLASS 3 FLAMANT CLASS 0 + 3 (1) PATROL SHIPS	On loan from DCNS for initial 3 year period (2012-2015) Service life to 2020 1st life expires in 2015, last in 2021 Service entry from 2015
GABON	2 P400 CLASS	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
GERMANY	<p>3 BAD BRAMSTEDT CLASS COAST GUARD)</p> <p>1 BREDSTEDT CLASS (COAST GUARD)</p> <p>2 SASSNITZ CLASS (COAST GUARD)</p>	
GHANA	<p>2 LURSSON FPB 45 CLASS</p> <p>2 BALSAM CLASS</p> <p>4 SNAKE CLASS</p>	<p>3 more reportedly to come from South Korea</p>
GUYANA	<p>1 RIVER CLASS</p>	
ICELAND	<p>2 AEGIR CLASS (COAST GUARD)</p> <p>1 THOR (ULSTEIN UT 512L) CLASS (COAST GUARD)</p>	
INDIA	<p>3+1 SARYU CLASS</p> <p>6 SUKANYA CLASS</p> <p>6 SDB MK.5 CLASS</p> <p>10 CAR NICOBAR CLASS</p> <p>2 + 6 SANKALP CLASS (COAST GUARD)</p> <p>2+1 SAMUDRA CLASS (COAST GUARD)</p> <p>4 SAMAR CLASS (COAST GUARD)</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
INDIA (cont.)	<p>6 VIKRAM CLASS (COAST GUARD)</p> <p>3 VISHWAST CLASS (COAST GUARD)</p> <p>2+3 RANI ABBAKKA CLASS (COAST GUARD)</p> <p>7 PRIYADARSHINI CLASS (COAST GUARD)</p> <p>4 TARA BAI CLASS (COAST GUARD)</p> <p>7 SAROJINI NAIDU CLASS (COAST GUARD)</p> <p>8 RAISHREE CLASS (COAST GUARD)</p> <p>0 + 7 OPVs (COAST GUARD)</p> <p>3 + 17 AADESH CLASS PATROL SHIPS (COAST GUARD)</p>	<p>Contract for construction awarded to Larsen & Toubro. Delivery scheduled to begin in 2018; one vessel every 6 months.</p>
INDONESIA	<p>4 KAKAP CLASS</p> <p>4 SINGA CLASS</p> <p>2 DISASTER RESPONSE SHIPS (COAST GUARD)</p> <p>2 DAMEN 6210 CLASS (COAST GUARD)</p> <p>2 BISMA CLASS (POLICE)</p> <p>5 NS-395 CLASS (POLICE)</p>	<p>New patrol craft are reportedly under construction</p>
IRAQ	<p>4 FATEH CLASS</p> <p>2 AL BASRA CLASS</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
IRELAND	<p>1+2 MODIFIED ROISIN CLASS</p> <p>1 EITHNE CLASS</p> <p>2 ROISIN CLASS</p> <p>3 P21 CLASS</p> <p>2 P41 PEACOCK CLASS</p>	<p>Delivery 2014-2016; 2nd vessel due mid-2015</p>
ITALY	<p>0+6 PPA</p> <p>6 COMMANDANTE CLASS</p> <p>4 CASSIOPEA CLASS</p> <p>1 GREGORETTI CLASS (COAST GUARD)</p> <p>2 LUIGI DATTILO CLASS (COAST GUARD)</p> <p>0 + 2 DAMEN STAN PATROL 5509 (CUSTOMS)</p>	<p>Option on 4 more PPAs</p> <p>OOSD – 2020</p> <p>Contract signed in May 2013</p>
JAPAN	<p>2 SHIKISHIMA CLASS (COAST GUARD)</p> <p>10 SOYA CLASS (COAST GUARD)</p> <p>1 IZU CLASS (COAST GUARD)</p> <p>1 MIURA CLASS (COAST GUARD)</p> <p>1 KOJIMA CLASS (COAST GUARD)</p> <p>7 OJIKA CLASS (COAST GUARD)</p> <p>1 NOJIMA CLASS (COAST GUARD)</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
JAPAN (cont.)	10 SHIRETOKO CLASS (COAST GUARD) 3 HIDA CLASS (COAST GUARD) 3 ASO CLASS (COAST GUARD) 9 HATERUMA CLASS (COAST GUARD) 2+4 (6) KUNIGAMI CLASS (COAST GUARD) 14 TESHIO CLASS (COAST GUARD) 2 TAKATORI CLASS (COAST GUARD) 4 AMAMI CLASS (COAST GUARD) 3 TSURUUGI CLASS (COAST GUARD) 20+2 TOKARA CLASS (COAST GUARD) 2 MIZUHO CLASS (COAST GUARD) 2+4 IWAMI CLASS (COAST GUARD)	
KAZAKHSTAN	2+1 KAZAKHSTAN CLASS	One more expected
KENYA	1 HARAMBEE CLASS 2 SHUPAVU CLASS 1 PATROL SHIP	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
KOREA (SOUTH)	<p>3 MAZINGER CLASS (COAST GUARD)</p> <p>6 430 TON CLASS (COAST GUARD)</p> <p>1 SAMBONGHO CLASS (COAST GUARD)</p> <p>1 DAEWOO TYPE (COAST GUARD)</p> <p>4 BUKHANSAN CLASS (COAST GUARD)</p>	6 new OPVs to be acquired by Maritime Police
LEBANON	1+ (2) OPV	Delivered November 2012; 2 more may be ordered
LATVIA	1 VALPAS CLASS (COAST GUARD)	
LITHUANIA	3 FLYVEFISKEN CLASS	
MALAYSIA	2 LANGKAWI CLASS (COASTGUARD)	
MALDIVES	1 SDB MK5 CLASS (COAST GUARD)	
MALTA	1 SAETTIA MK. III CLASS	Requirement for one more OPV
MAURITANIA	<p>1 ABOU BEKR BEN AMER CLASS</p> <p>1 LARGE PATROL CRAFT</p> <p>1 ARGUIN CLASS</p>	
MAURITIUS	<p>0+1 VIKRAM CLASS (COAST GUARD)</p> <p>1+1 CAR NICOBAR CLASS (COAST GUARD)</p>	<p>Delivered in 2014</p> <p>Transferred from Indian Navy in 2014 and 2015</p>

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
MEXICO	<p>4 HOLZINGER CLASS</p> <p>3 SIERRA CLASS</p> <p>2 DURANGO CLASS</p> <p>2 DURANGO 'MOD' CLASS</p> <p>11 VALLE CLASS</p> <p>6 URIBE CLASS</p> <p>4 + (4) OAXACA CLASS</p> <p>2 DEMOCRATA CLASS</p>	<p>Further 4 ships possible 2014-2018</p>
MOROCCO	<p>4 OSPREY MK.II CLASS</p> <p>6 CORMORAN CLASS</p> <p>5 RAIS BARGACH CLASS</p> <p>1 PATROL VESSEL</p> <p>1 BIN AN ZARAN CLASS</p>	<p>Commissioned 2011 – further ships projected (3?)</p>
MYANMAR	<p>2 OSPREY CLASS</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
NAMIBIA	<p>1 ELEPHANT CLASS</p> <p>1 GRAJAU CLASS</p> <p>1 PATROL SHIP (ORYX)</p> <p>1 OSPREY FV 710 CLASS (GOVERNMENT MARITIME FORCES)</p> <p>2 PATROL SHIPS (GOVERNMENT MARITIME FORCES)</p>	
NETHERLANDS	4 HOLLAND CLASS	
NEW ZEALAND	2 OTAGO CLASS	One more OPV is required, but of a new class
NIGERIA	<p>1+1 P-18N OPVs</p> <p>4 BALSAM CLASS</p>	Acquired from China. Plan to acquire 10 more OPVs BY 2020
NORWAY	<p>1 ARCTIC CLASS (COAST GUARD)</p> <p>3 NORDKAPP CLASS (COAST GUARD)</p> <p>5 NORNEN CLASS (COAST GUARD)</p> <p>1 PATROL VESSEL (COAST GUARD)</p>	
OMAN	<p>3 AL BUSHRA CLASS</p> <p>2 PATROL AND RESCUE SHIPS</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
PAKISTAN	4 BARKAT CLASS (MARITIME SECURITY AGENCY)	
PANAMA	2 DICIOTTI CLASS	Reportedly donated by Italian Coast Guard (unconfirmed)
PERU	0+5 STX DESIGNED OPVs 1 CARVAJAL CLASS (COAST GUARD)	Delivery mid-2015-2016
PHILIPPINES	2 AGUINALDO CLASS 0+1 82 METRE OPV 4 SAN JUAN CLASS (COAST GUARD)	Plans for 2 OPVs in 2012-2016 modernisation plan Ordered from France in October 2012
POLAND	0+1 SLAZAK CLASS	4 more OPVs planned
PORTUGAL	2 VIANA DO CASTELO CLASS 3 CACINE CLASS	Plans for 4 more cancelled 4 Stanflex 300 planned from Denmark
QATAR	0+2 46 METRE VESSELS	On order from turkey – OPVs?
RUMANIA	1 DAMEN OPV 900 (BORDER POLICE) 3 PATROL VESSELS	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
RUSSIA	<p>4 KOMANDOR CLASS (BORDER GUARD)</p> <p>9 ALPINIST CLASS (BORDER GUARD)</p> <p>18 SORUM CLASS (BORDER GUARD)</p> <p>1 SPRUT CLASS (BORDER GUARD)</p> <p>17 PROJECT 1496/1496M CLASS (BORDER GUARD)</p> <p>3+4 (18) RUBIN CLASS (BORDER GUARD)</p> <p>2 MODIFIED OKEAN CLASS (BORDER GUARD)</p> <p>0+1 PROJECT 22100 PATROL SHIP (BORDER GUARD)</p> <p>0+1 (5) PROJECT 22160 PATROL SHIPS (BORDER GUARD)</p> <p>2 PROJECT 22120 CLASS PATROL SHIPS</p>	<p>Total of 25 planned by 2020</p> <p>Commissions 2015</p>
SENEGAL	<p>1 FOUTA CLASS</p> <p>2 POPENGUINE CLASS</p> <p>1 NJAMBUUR CLASS</p> <p>1 KEDOUGO OPV 45 CLASS</p>	
SEYCHELLES	<p>1 TOPAZ CLASS</p>	
SLOVENIA	<p>1 SVETLYAK CLASS</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
SOUTH AFRICA	<p>1 OFFSHORE PATROL SHIP (GOVERNMENT MARITIME FORCES)</p> <p>3 OFFSHORE PATROL VESSELS (GOVERNMENT MARITIME FORCES)</p>	3 OPVs planned - Project Biro
SPAIN	<p>4 DESCUBIERTA CLASS</p> <p>4 SERVIOLA CLASS</p> <p>3 ALBORAN CLASS</p> <p>4+2 METEORO CLASS</p> <p>4 PATROL SHIPS (GOVERNMENT MARITIME FORCES)</p>	BAM programme – 2 more on order
SRI LANKA	<p>0+2 SANKALP CLASS</p> <p>1 SUKANYA CLASS</p> <p>1 RELIANCE CLASS</p> <p>1 JAYESAGARA CLASS</p> <p>1 VIKRAM CLASS</p>	Contract signed in April 2013
SURINAME	1 PROJECT 414	
SWEDEN	<p>3 KBV 001 CLASS (COAST GUARD)</p> <p>1 KBV 181 CLASS (COAST GUARD)</p> <p>2 KBV 201 CLASS (COAST GUARD)</p> <p>3 KBV 288 CLASS (COAST GUARD)</p>	

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
TAIWAN	<p>2 HO HSING CLASS (COAST GUARD)</p> <p>1 TEH HSING CLASS (COAST GUARD)</p> <p>16 OPVs (COAST GUARD)</p>	
THAILAND	<p>1 KRABI CLASS</p> <p>3 HUA HIN CLASS</p> <p>1 VOSPER THORNEYCROFT CLASS (POLICE)</p> <p>2 HAMELN TYPE (POLICE)</p>	Up to 5 more possible, subject to funding
TRINIDAD AND TOBAGO	<p>1 ISLAND CLASS (COAST GUARD)</p> <p>2 CHACACHACARE CLASS (COAST GUARD)</p>	
TUNISIA	<p>3 BIZERTE CLASS</p> <p>6 KONDOR 1 CLASS (NATIONAL GUARD)</p>	
TURKEY	<p>4 DOST CLASS (COAST GUARD)</p>	New patrol craft required
U.A.E	<p>2 OPVs (COAST GUARD)</p>	
U.K.	<p>3 RIVER CLASS</p> <p>1 MODIFIED RIVER CLASS</p> <p>2 JURA CLASS (SFPA)</p> <p>1 MINNA CLASS (SFPA)</p>	3 Multi-mission OPVs contracted for delivery in 2017-2018

HOLDINGS

COUNTRY	CURRENT OPVs	FUTURE PLANS
U.S.A.	<p>3+4 (1) LEGEND CLASS (COAST GUARD)</p> <p>8 HAMILTON AND HERO CLASSES (COAST GUARD)</p> <p>13 FAMOUS CUTTER CLASS (COAST GUARD)</p> <p>14 RELIANCE CLASS (COAST GUARD)</p> <p>8+16 (10) SENTINEL CLASS (COAST GUARD)</p> <p>1 EDENTON CLASS (COAST GUARD)</p>	<p>To replace Hamilton-class</p> <p>For replacement by OPC</p> <p>For replacement by OPC</p> <p>Fast response cutter – current programme for 24 units, but 58 ultimately required</p> <p>Offshore Patrol Cutter (OPC) – 25 required</p>
URUGUAY	1 WANGEROOGE CLASS	Plans to acquire 2-3 OPVs
VENEZUELA	<p>4 +(2) GUAUIQUERI CLASS</p> <p>3+1 (2) GUAICAMACUTO CLASS (COAST GUARD)</p> <p>0+6 STAN PATROL 5009</p>	Last commissions in 2015. Two more may be acquired
VIETNAM	<p>1+3 DAMEN 9014 CLASS</p> <p>4 TT400TP CLASS (COAST GUARD)</p>	

CLICK TO VIEW THE FULL MAP



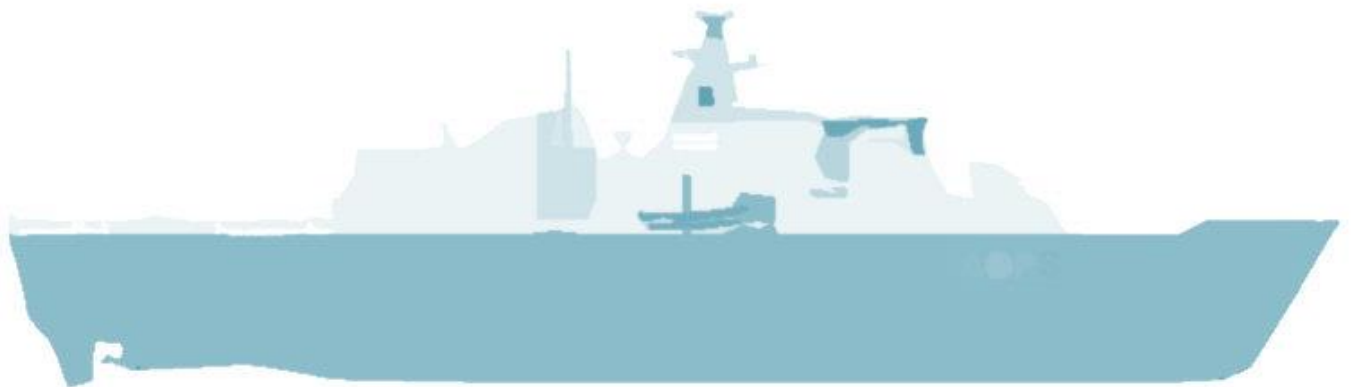
KEY FUTURE OPV PLANS

HOLDINGS: OPV REGIONAL FLEETS (84 COUNTRIES)

S.AMERICA (15)	AFRICA (16)	EUROPE (24)	M.EAST (6)	ASIA (21)	N.AMERICA (2)
ARGENTINA (10)	ANGOLA (5)	BELGIUM (2)	IRAQ (6)	AUSTRALIA (4+7)	CANADA (5)
BRAZIL (25+6)	CAMEROON (2)	DENMARK (2+1)	LEBANON (1)	AZERBAIJAN (2)	USA (47+20)
CHILE (3)	CAPE VERDE (2)	ESTONIA (2)	MOROCCO (17)	BANGLADESH (15)	
COLOMBIA (7+1)	CONGO (4)	FAROEES (2)	OMAN (5)	BRIT IND (1)	
DOM.REP (1)	COTE D'IVOIRE (1)	FINLAND (4)	QATAR (0+2?)	BRUNEI (4)	
ECUADOR (3+2)	EQUATORIAL GUINEA (5)	FRANCE (20+3)	TUNISIA (9)	CHINA (58)	
FALKLANDS (1)	GABON (2)	GERMANY (6)		INDIA (73+36)	
GUYANA (1)	GHANA (8)	ICELAND (3)		INDONESIA (19)	
MEXICO (34)	KENYA (4)	IRELAND (9+2)		JAPAN (97+10)	
PANAMA (2)	MAURITIANA (3)	ITALY (13+8)		KAZAKHSTAN (2+1)	
PERU (1+5)	MAURITIUS (1+2)	LATVIA (1)		KOREA SOUTH (15+5)	
SURINAM (1)	NAMIBIA (6)	LITHUANIA (3)		MALAYSIA (2)	
TRINIDAD & TOBAGO (3)	NIGERIA (5+1)	MALTA (1)		MALDIVES (1)	
URUGUAY (1)	SENEGAL (5)	NETHERLANDS (4)		MYANMAR (2)	
VENEZUELA (7+7)	SEYCHELLES (1)	NORWAY (10)		N.Z. (2)	
	S.AFRICA (4)	POLAND (0+1)		PAKISTAN (4)	
		PORTUGAL (5)		PHILIPPINES (6+1)	
		RUMANIA (4)		SRI LANKA (4)	
		RUSSIA (56+6)		TAIWAN (19)	
		SLOVENIA (1)		THAILAND (7)	
		SPAIN (19+2)		VIETNAM (5+3)	
		SWEDEN (9)			
		TURKEY (4)			
		U.K.(7+3)			

HOLDINGS: OPV REGIONAL FLEETS (84 COUNTRIES)

S.AMERICA (15)	AFRICA (16)	EUROPE (24)	M.EAST (6)	ASIA (21)	N.AMERICA (2)
TOTAL FIGURES					
(100+21)	(58+3)	(187+26)	(38+2?)	(342+63)	(52+20)
(13%+15%)	(7%+3%)	(24%+19%)	(5%+2%)	(44%+46%)	(7%+15%)
				JAPAN, INDIA, S.KOREA (185+51) (24%+38%)	
[FIGURES AFTER + SIGN ARE ON ORDER]					
OVERALL TOTALS (776+136) ON ORDER					



HOLDINGS: OPV REGIONAL FLEETS (84 COUNTRIES)

COUNTRIES WITH PLANS TO PROCURE OPVs (NOT YET UNDER CONTRACT)

Australia (20)
Bangladesh (1)
Brazil (46)
Canada (8)
Colombia (4)
Cyprus (2)
France (15-20)
Greece (1)
India (21)
Italy (4)
Japan (6)
Korea South (6)
Lebanon (2)
Malta (1)
Mexico (4)
Morocco (3)
New Zealand (1)
Nigeria (10)
Peru (10)
Philippines (18)
Poland (4)
Portugal (4)
Russia (23)
South Africa (3)
Sri Lanka (5-6)
Thailand (5)
Ukraine (1)
Uruguay (3)
U.S.A. (35)
Venezuela (4)

TOTAL 276



29 September - 01 October, 2015
Meliá Roma Aurelia Antica, Rome, Italy

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- Gain technical insight and understanding into the latest designs with presentations from public and private sector shipyards
- Benefit from strategic analysis of current maritime security concerns delivered by Admirals and Commander from navies and coast guards
- Share lessons learnt from a vast array of mission sets, ranging from law enforcement to environmental protection, gain insight into adapting OPV design to emerging missions
- Explore the latest technological developments in modularity, systems arrangement, propulsion and ship-based unmanned systems

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