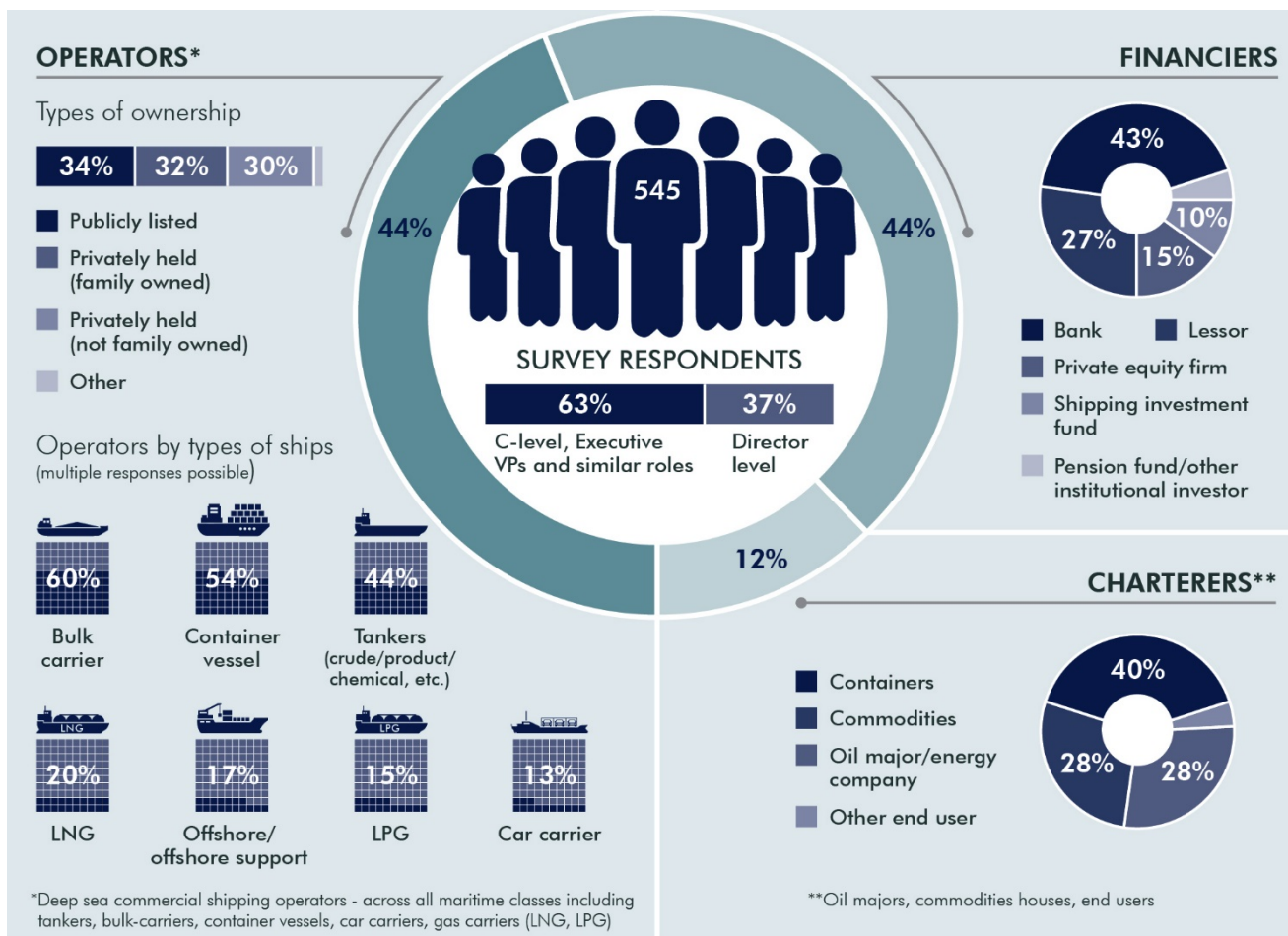


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JANUARY 2021



Survey demographics

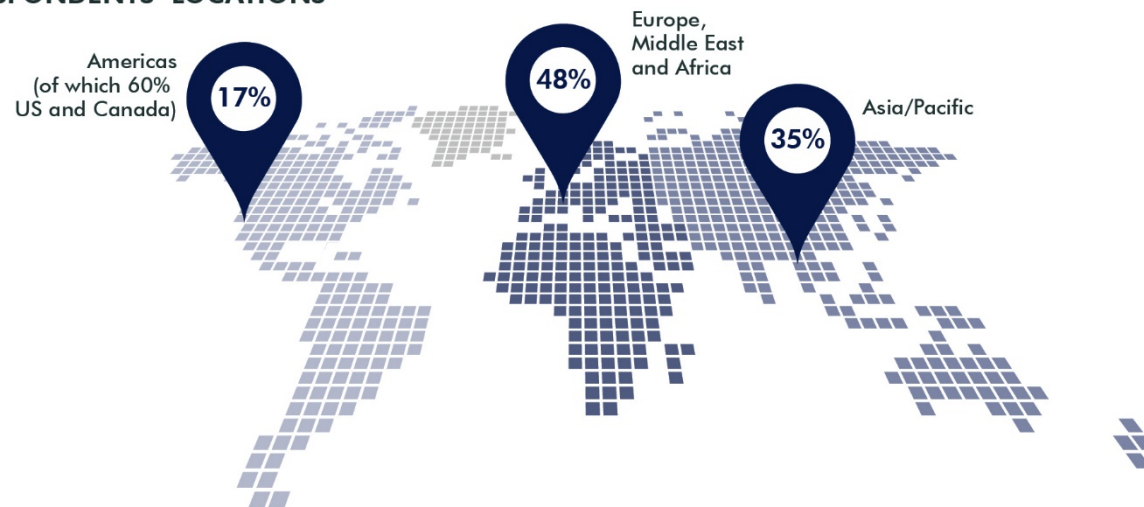


Jurisdictional coverage

COMPANY TURNOVER

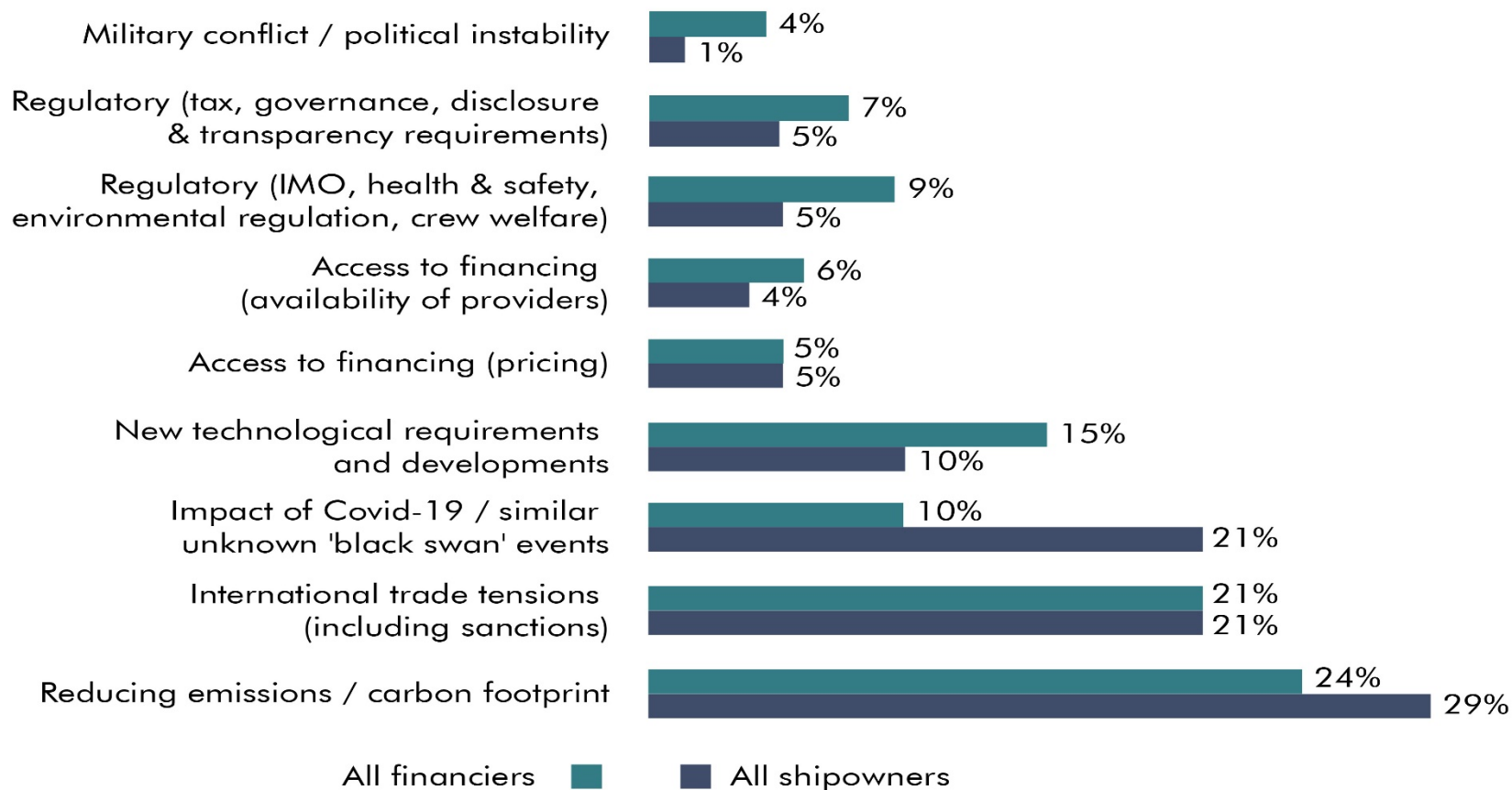


RESPONDENTS' LOCATIONS



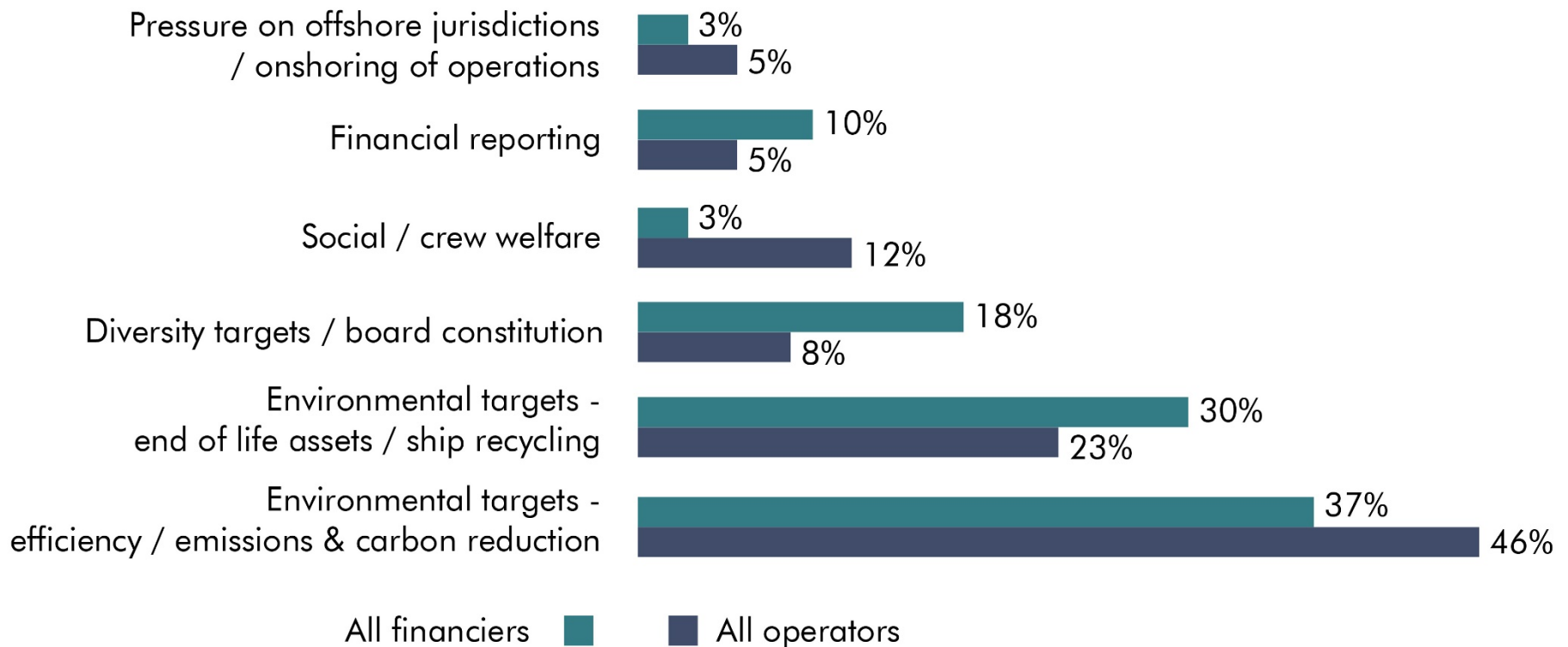
Challenges facing the industry

In your view, what are the biggest challenges for the maritime industry in the next five years? (1st rank shown)



ESG priorities

Please rank your top three ESG priorities in order of importance for your decision making (1st rank shown)



Some key findings



1. Across all stakeholders and regions - Reducing emissions is the No 1 priority



1. ESG is higher on the agenda for financiers – 90% regard ESG as having some to crucial important



1. Financing new technology remains a sticking point



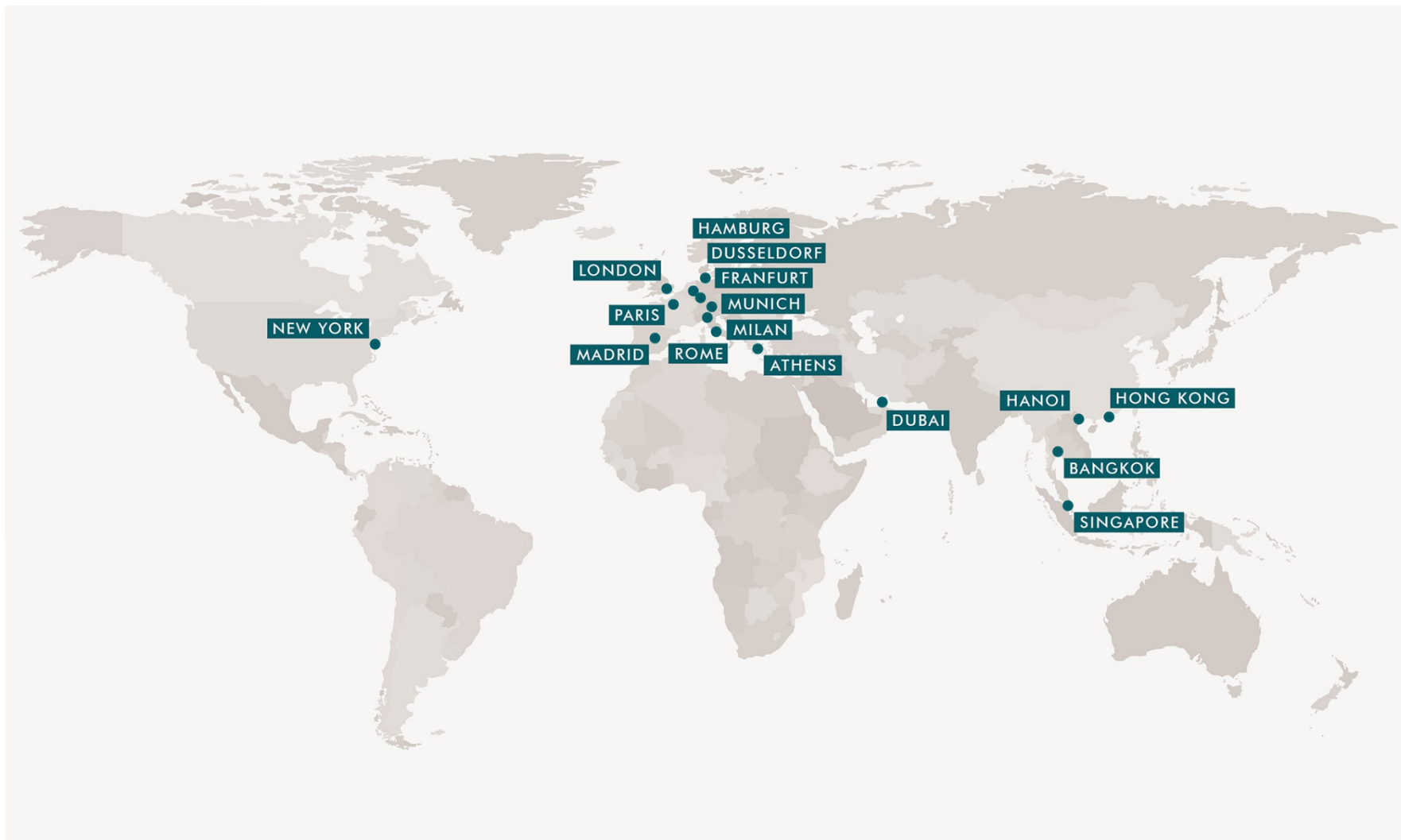
1. Decarbonisation looks set to drive greater collaboration and JVs



1. Almost half of respondents looking to governments to fund clean tech and research into new fuels



1. Hesitation over adopting new technology – the first mover problem



ATHENS BANGKOK DUBAI DUSSELDORF FRANKFURT HAMBURG HANOI HONG KONG
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