



UK Hydrographic
Office

Information describing users and uses of paper charts

NCWG 7
24th & 25th
November
2021

What did we want to know?

- › Who is using Paper Charts
- › Where are they?
- › What are they using them for?
- › How do we react to changing market conditions and requirements

Market Segments

SOLAS – (International Convention for the) Safety Of Life At Sea

SOLAS Vessels

ECDIS Mandated	ECDIS Not Mandated
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Historically core market Focus for digital products	Future core paper market? Size? Makeup? Requirements?
Tracker survey	Targeted survey

Non SOLAS Vessels

e.g. fishing, leisure

Small Craft Offering SNCs do sell to this market as well

› Research

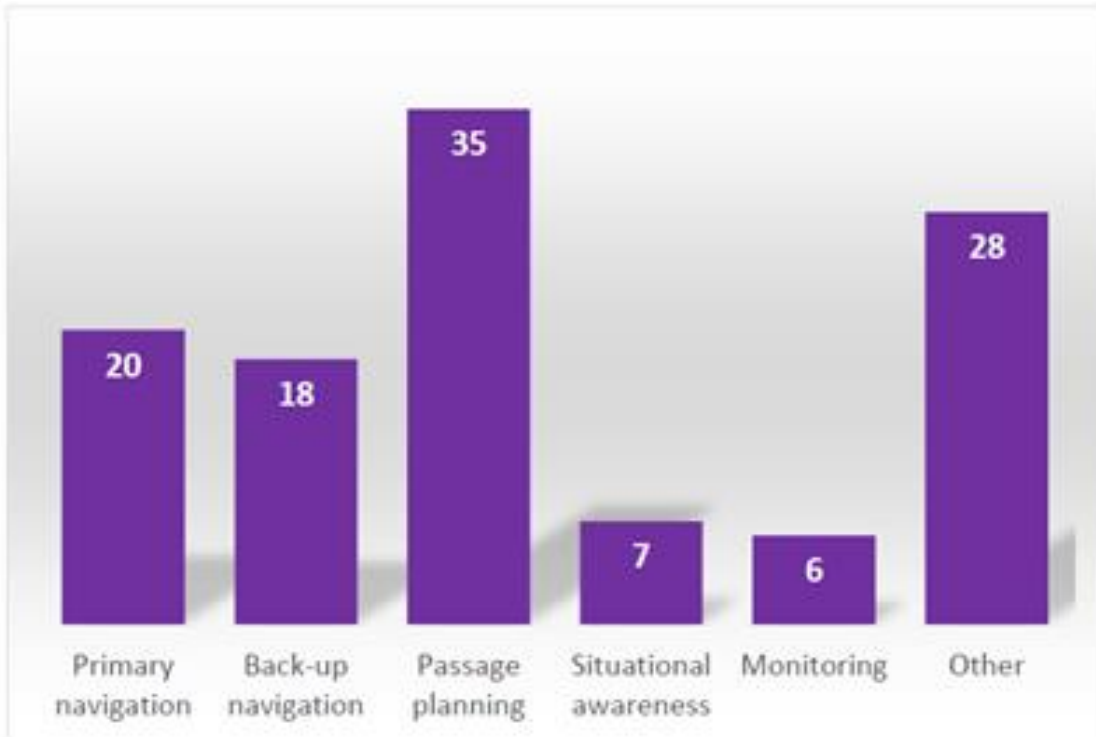
- › Survey Oct/Nov 2020 – SOLAS regulated but below ECDIS mandation vessels
- › Survey Summer 2020 – SOLAS regulated, typically ECDIS mandated vessels
- › Sales Research



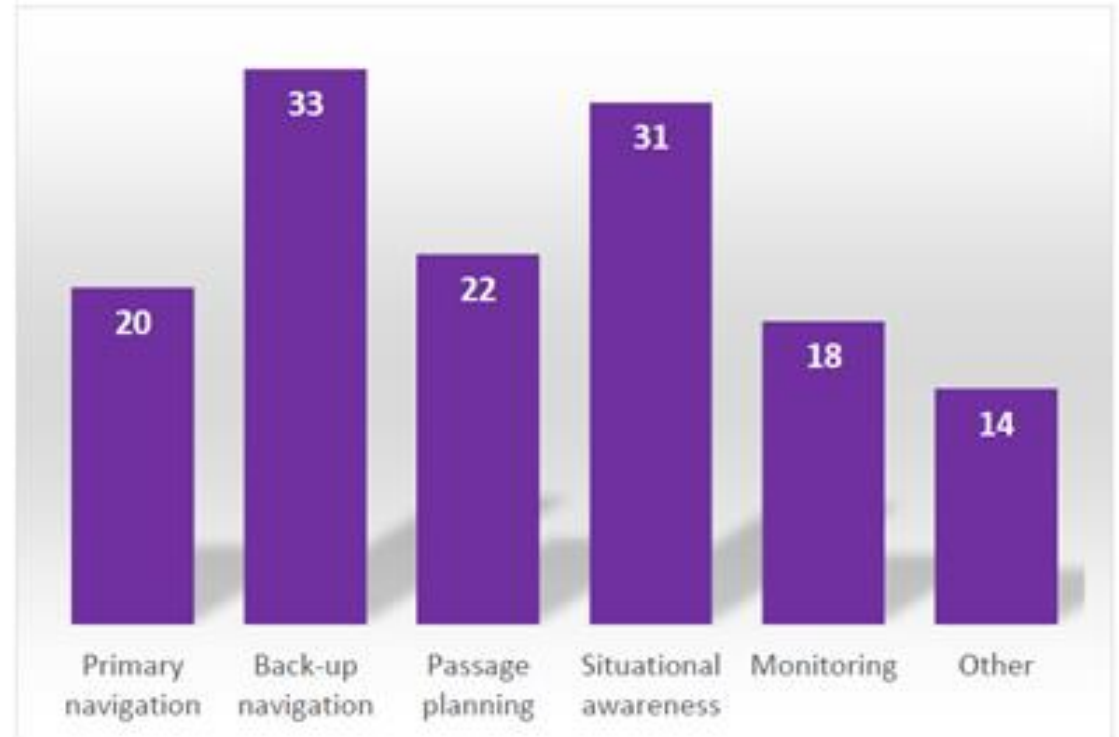
What is paper used for now?

Larger typically ECDIS vessels

Fleet Managers



Mariners

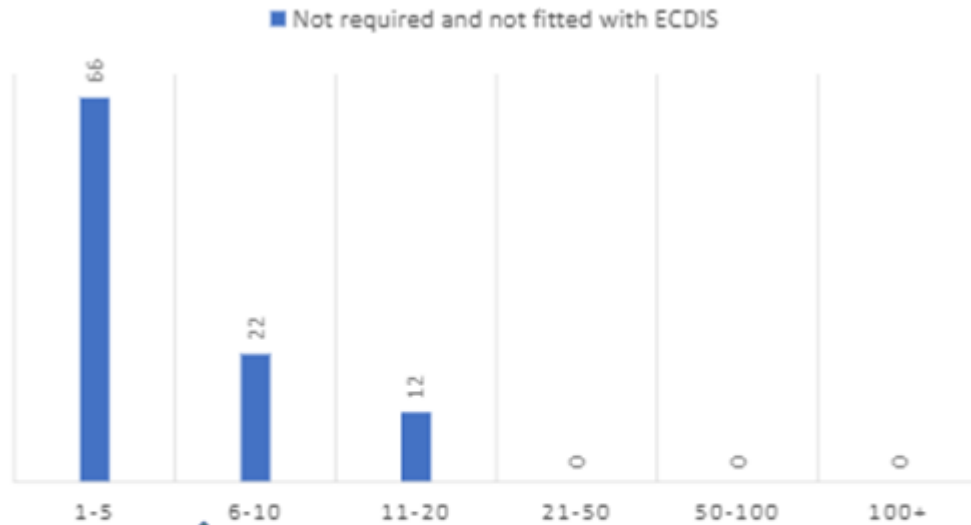




Fleet profile

Non-ECDIS Mandated Vessels

NON-ECDIS FITTED VESSELS (%)



90% of non-ECDIS fitted vessels are in fleets of 10 or fewer

TRADING PROFILE



75% are trading regionally/locally

50% not fitted with ECDIS
50% fitted with ECDIS

- 50% dual
- 50% single

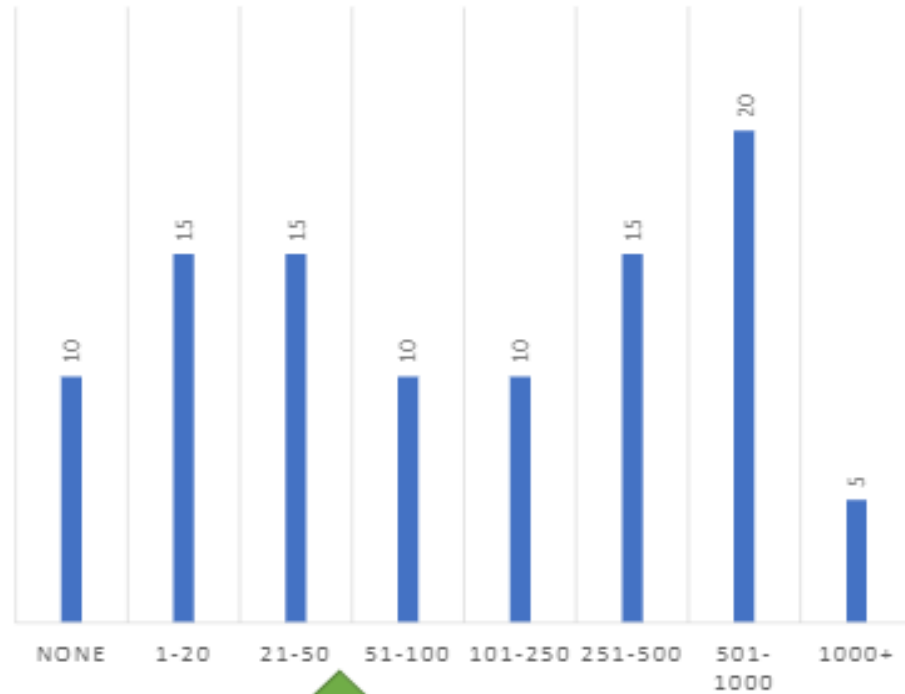
Half of this segment could be using digital already



Paper Holdings

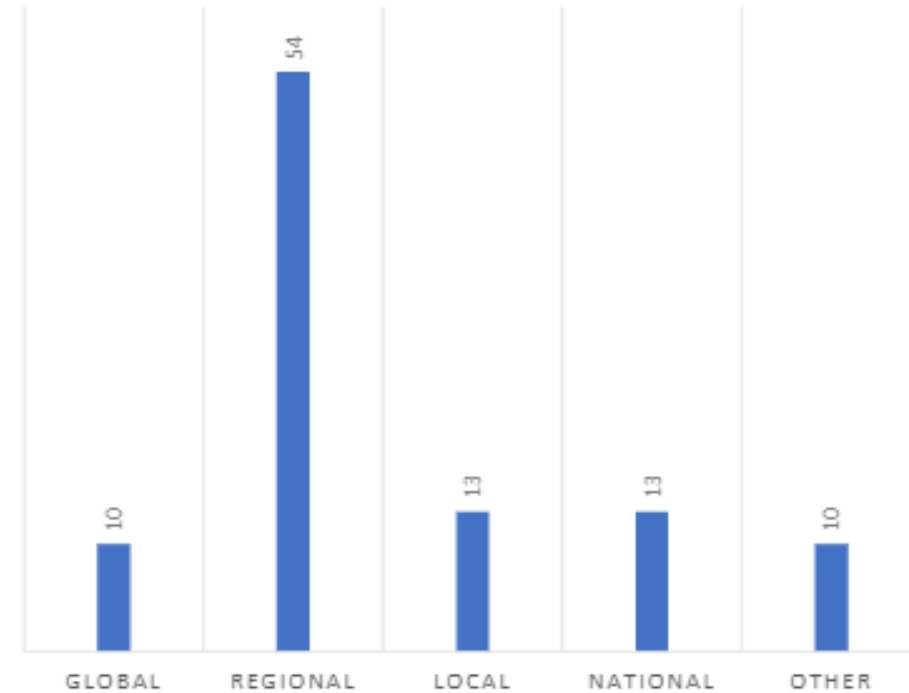
Non-ECDIS Mandated Vessels

Roughly, how many paper charts are carried onboard (%)?



50% carry fewer than 100 charts

What is the coverage of your paper portfolio (%)?



Globally trading vessels have dual ECDIS?



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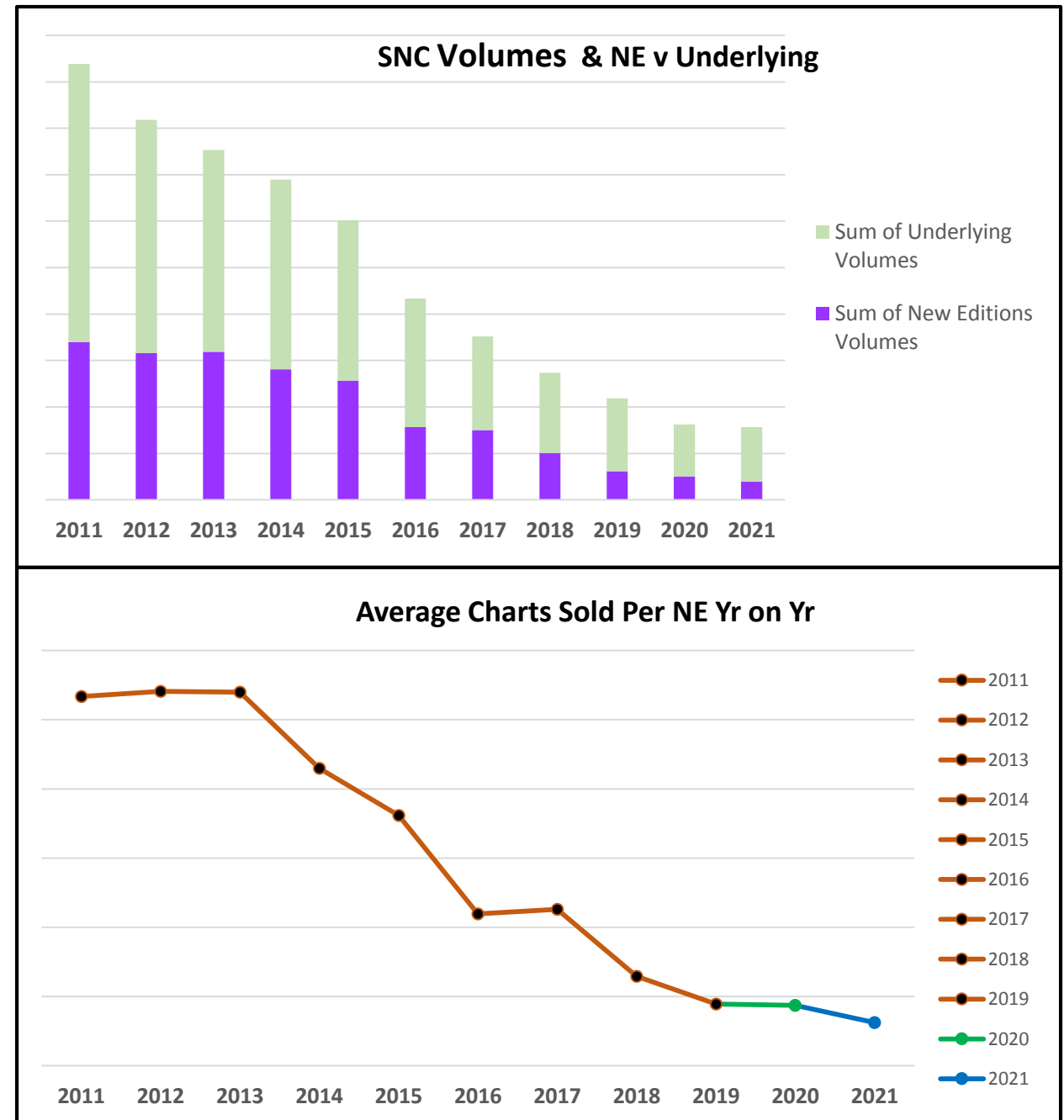
In summary

- Smaller commercial vessels are hard to reach for surveying
- Most owners run small fleets, trading regionally or more locally
- 50% of ECDIS fitted vessels carry paper as back up
- 50% of ships carry fewer than 100 charts, 25% carry 500+
- Only 10% of vessels carry a global portfolio
- 70% charts are purchased from Chart Agents but 95% purchase fewer than 50 charts per year
- 0% will carry more paper, 37% will carry fewer charts
- 68% will fit ECDIS in the next 5 years
- **Electronic charting is being used in all market sectors**

Sales Research

Sales falling at around 20% per year

- › Indications of regional differences
- › Possible signs of decline flattening
- › Continued use of paper even when dual ECDIS is present
- › Change in proportion of New Edition sales vs Underlying
 - › Use of POD and Print-to-Order



Customer Voice

Market is complex

- › Some sub-segments are seeing an increase in paper usage
- › There are regional/segment differences
- › There is some continued use of paper even when dual ECDIS is present

Concerned over costs

- › Declining coverage
- › Print On Demand Investment

The customer values our products



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Thank you

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