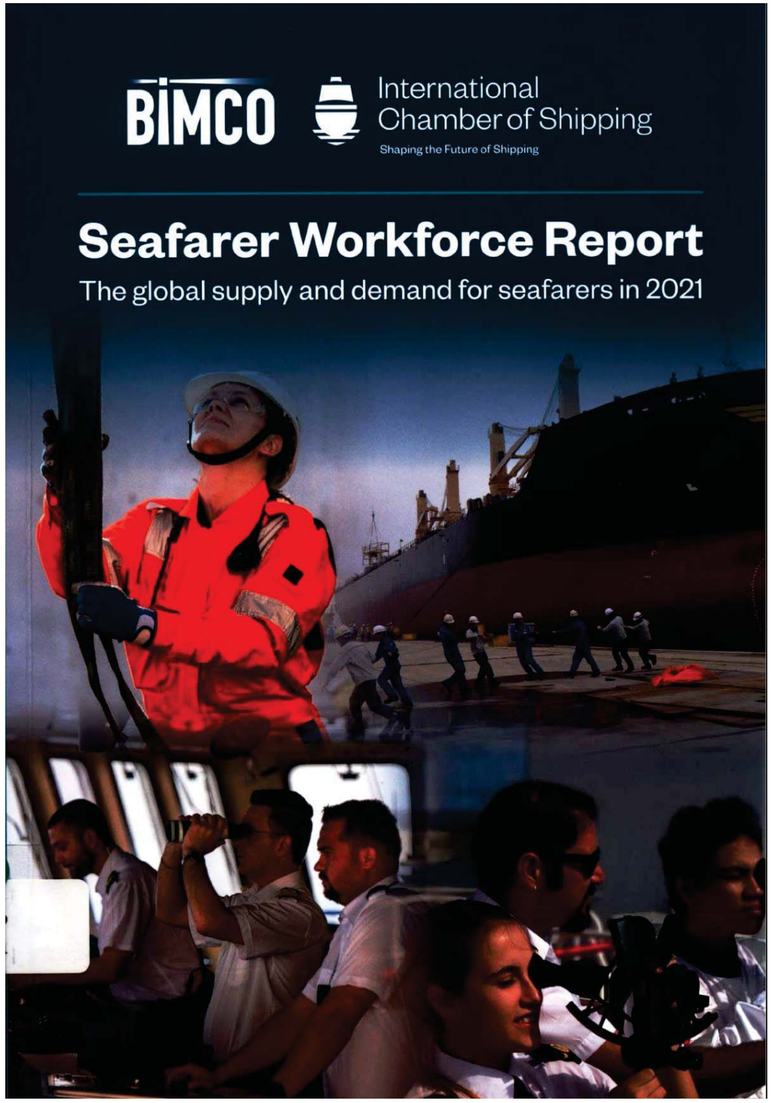

MARINA

The Manila Times® Maritime Forum 2025

Rizal Park Hotel, 19 June 2025

Leveraging Seafaring Locations, Leadership and Labor



Estimated Global Seafarer Supply

The global supply of seafarers in 2021 is estimated at 1,892,720 seafarers, of which 857,540 are officers and 1,035,180 are ratings.

Since the 2015 report, the supply of STCW certified seafarers available to the internationally trading world merchant fleet has increased, with both numbers of qualified officers and ratings continuing to grow. The number of STCW certified officers is now estimated at 857,540 – a percentage increase of 10.8% since 2015. Meanwhile, the report estimates an 18.5% increase in the number of STCW certified ratings since 2015. The table below provides a summary of how the estimated global supply of seafarers has increased since 2010.

***Estimated global supply of seafarers 2010–2021*[1]**

	2010	2015	2021
Officers	624,000	774,000	857,540
Ratings	747,000	873,500	1,035,180
Total	**1,371,000**	**1,647,500**	**1,892,720**

Source: Country Questionnaire, 2021

According to estimates of national contributions to the current global supply of seafarers, the five countries reporting the largest numbers of seafarers in 2021 are shown below. Together, these five seafarer supply countries represent 44% of the global seafarer workforce supply.

Estimated five largest seafarer supply countries 2021

	All Seafarers	Officers	Ratings
1	Philippines	Philippines	Philippines
2	Russian Federation	Russian Federation	Russian Federation
3	Indonesia	China	Indonesia
4	China	India	China
5	India	Indonesia	India

Source: Country Questionnaire, 2021

According to data collected from shipping companies, the five main nationalities of STCW seafarers working within the world merchant fleet are shown below. This closely resembles the countries estimated to supply the largest proportion of the seafarer workforce.

Five main nationalities of STCW seafarers as indicated by shipping companies 2021

	All Seafarers	Officers	Ratings
1	Filipino	Filipino	Filipino
2	Chinese	Chinese	Chinese
3	Ukrainian	Ukrainian	Indian
4	Russian	Indian	Ukrainian
5	Indonesian	Russian	Indonesian

Source: Company Questionnaire, 2021

1 The estimates for 2021 are not directly comparable to previous reports due to changes in approaches to data collection and definitions used in the scope of the report. Sources: Seafarer Workforce Report Country Questionnaire (2021), Manpower Reports 2015 and 2010.

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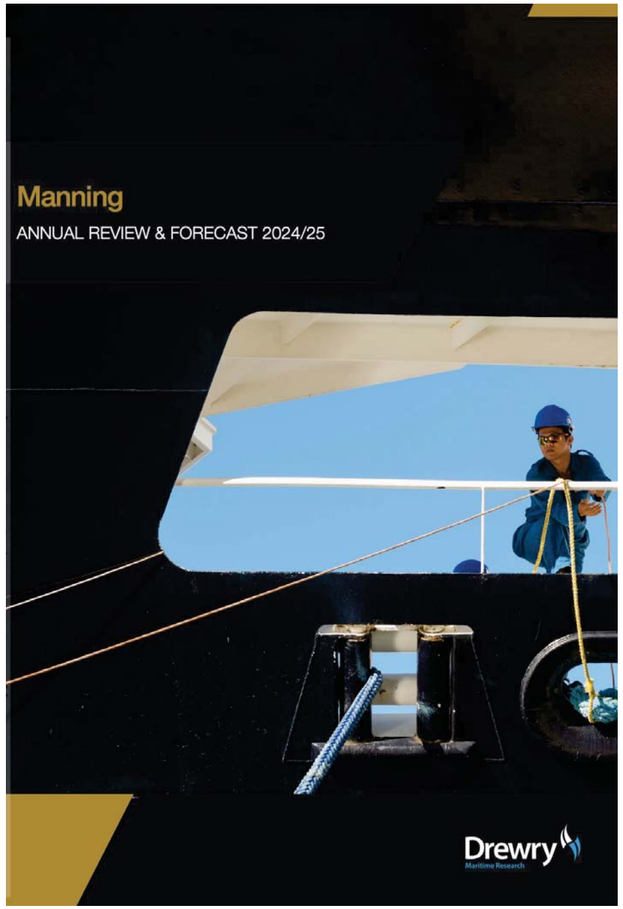
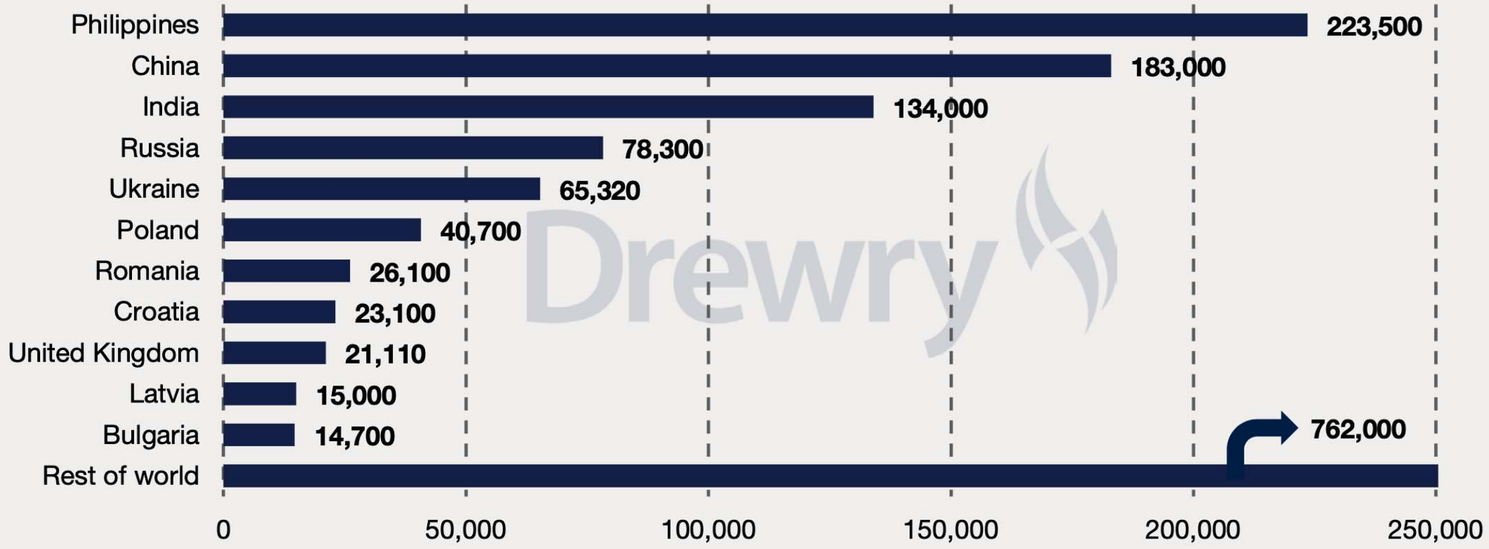
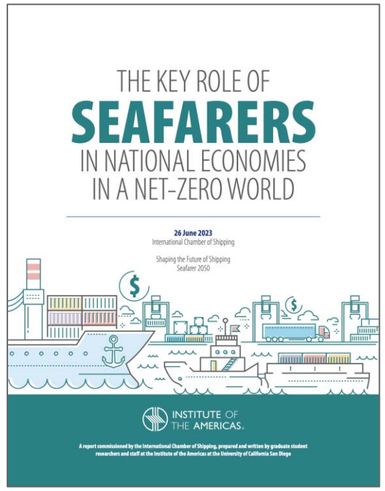


Figure 2.3 Seafarer supply by country, 2024



Source: Drewry Maritime Research



The Philippines has been the leading provider of sea-based workers since 1987. The country currently accounts for approximately 30% of the world's The presence of Filipinos in the Manila cluster is essential due to their significant contributions to economic activity, trade, employment, and expertise in various maritime-related sectors. The cluster leverages the country's strategic geographical location, abundant maritime resources, skilled workforce, and supportive policies to drive growth and development in the national economy and the global maritime industry.

One crucial aspect of the Filipino contribution to the maritime cluster is their role as seafarers. Since 1987, the Philippines has emerged as the leading provider of sea-based workers globally. In fact, the country currently accounts for approximately 30% of the world's seafarers[15]. This extensive presence is reflected in the composition of international vessel crews, where approximately one in every five crew members is Filipino

Current Statistics Overview

Filipino seafarers as the "seafarers of choice" [1]

- US$6.545 billion in 2021
- US$6.716 billion in 2022
- US$6.852 billion in 2023
- US$6.941 billion in 2024

[1]Bangko Sentral ng Pilipinas (BSP)



Overseas Filipino seafarers deployed [2]

- 345,517 in 2021
- 385,239 in 2022
- 578,626 in 2023
- 435,323 in 2024

[2]Department of Migrant Workers (DMW)



Certificated Seafarers[3]

Male	767,379 ***(92.04%)***
Female	66,325 ***(7.96%)***
TOTAL	**833,704**

[3] MARINA Integrated Seafarer's Management Online (MISMO) System (as of 31 May 2025)



PRESENTATION ON DIGITALIZATION AT THE 11TH IMO HTW SESSION

The MARINA highlighted its digitalization initiatives on seafarers' certification through a presentation of the MARINA Integrated Seafarers Management Online (MISMO) system at the IMO HTW 11.

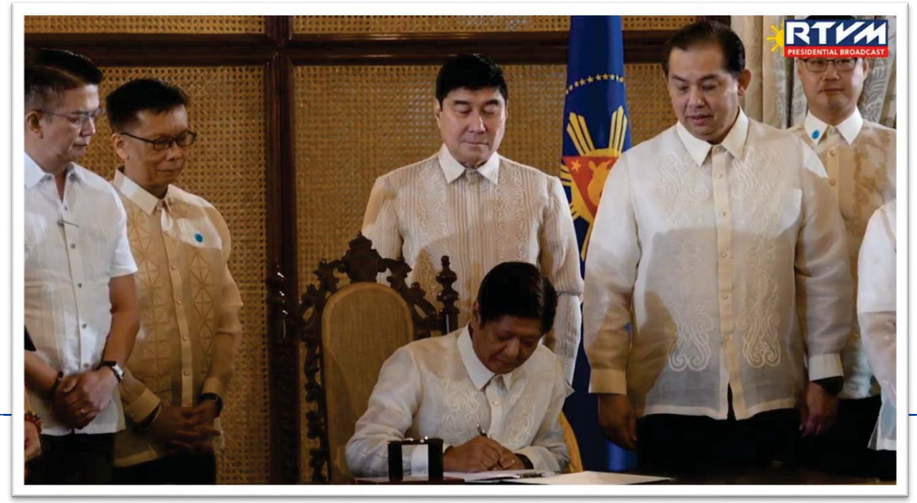
- Streamlining seafarer certification
- Enhancing efficiency and transparency
- Preventing fraudulent and spurious certificates
- Implementing systems integration with the Norwegian Maritime Authority (NMA) and the International Chamber of Shipping (ICS)





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REPUBLIC ACT NO. 12021: SIGNING OF THE LAW AND THE IRR



President Ferdinand Romualdez Marcos Jr. signed the Republic Act No. 12021 on 23 September 2024.



DMW Secretary and MARINA Administrator signed the Implementing Rules and Regulations (IRR) of the Magna Carta of Filipino Seafarers in a ceremony at the Malacañang Palace.









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KEY AGREEMENTS UNDER STCW CONVENTION



REPUBLIC OF THE PHILIPPINES
DEPARTMENT OF TRANSPORTATION
MARITIME INDUSTRY AUTHORITY

List of Countries with Existing Bilateral Agreements for Recognition of Certificates Pursuant to Regulation I/10 of the STCW Convention, 1978, as amended

1. Anguilla*
2. Antigua and Barbuda
3. Australia
4. Bahamas
5. Barbados
6. Belgium
7. Belize
8. Bermuda*
9. Brazil
10. British Virgin Islands*
11. Brunei
12. Cambodia
13. Canada
14. Cayman Islands*
15. Croatia
16. Cyprus
17. Denmark
18. Dominica
19. Egypt
20. Eritrea
21. Falkland Islands*
22. Georgia
23. Gibraltar*
24. Greece
25. Guernsey*
26. Hong Kong
27. Iran
28. Ireland
29. Isle of Man*
30. Italy
31. Jamaica
32. Japan
33. Jersey*
34. Jordan
35. Kuwait
36. Liberia
37. Lithuania
38. Latvia
39. Luxembourg
40. Malaysia
41. Malta
42. Marshall Islands
43. Mongolia
44. Montserrat*
45. Netherlands
46. Norway
47. Panama
48. Poland
49. Portugal
50. Qatar
51. Saint Christopher
52. Saudi Arabia
53. Singapore
54. South Africa
55. South Korea
56. Spain
57. St. Helena*
58. St. Vincent and the Grenadines
59. Sweden
60. Switzerland
61. Thailand
62. Turks and Caicos Islands*
63. Ukraine
64. United Kingdom*
65. Vanuatu

*Under one agreement with the United Kingdom as Red Ensign Group

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The agreement under Regulation I/10 of the STCW Convention, 1978, as amended, pertains to the recognition of certificates issued by or on behalf of another Party to the Convention.

This regulation is essential in ensuring that seafarers certified in one country can have their certificates recognized and accepted for service on ships registered under the flag of another country that is also a Party to the Convention.

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EU-ASEAN SUSTAINABLE CONNECTIVITY PACKAGE (SCOPE)

The Sustainable Connectivity Package (SCOPE) Seafarers was launched on 11 November 2024 - European Union extending technical assistance to the Philippines.

Improving the maritime education, training and certification of Filipino seafarers

The inception phase of SCOPE has been recently completed. It focused on laying the groundwork for its successful implementation of the technical assistance. Key activities during this phase include:

- Engagement with the maritime stakeholders;
- Consultation with MARINA to identify actions taken and being undertaken
- Monitoring updates on actions addressing European Commission findings





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ENHANCING TRANSPORT AND CONNECTIVITY LOGISTICS

- Enhancement of key RoRo ports
- Modernization of inter-island passenger ferries
- Establishment of maritime industrial parks



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MARITIME INDUSTRY DEVELOPMENT PLAN

- To develop maritime industrialization
- To enhance ship registry and shipbuilding capabilities
- To improve education and training of seafarers, including welfare and wellbeing
- To maximize geographical advantage of seafaring locations



MARINA stands ready to lead,
to serve, and to collaborate
with all of you.



Charting a CLEAN COURSE SAFELY SAILING TOGETHER

Thank You!

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