

5.7 Patrol Vessels

5.7.1 Summary

The used international market for patrol vessels will be limited as most nations have the ability to build these types of vessels. Most shipbuilders have the ability to build these types of patrol vessels (over 100 tons) at fairly inexpensive prices favoring new procurement programs vice relying on the used international market. With the growing number of indigenous shipbuilders, new construction patrol vessel programs worldwide will further restrict this element of the used ship market over the next twenty years.

Typically, prospective recipients for patrol vessels are utilizing this market as a last resort and usually receive these vessels almost free with very little modernization effort included in the transfer package. That being said; there are still patrol vessels that are available on the international market for resale as well as prospective candidates that will procure some of these vessels.

Up to seven countries including Canada, France, India, Italy, South Korea, Turkey and the United States will be the primary suppliers from 2004 through 2013. Over 70 vessels could be available for transfer in this time frame. Prospective candidates include virtually every nation that operates a small coastal force.

The following table depicts those nations that must be considered prospective suppliers and primary prospective recipients for used vessels from 2004 through 2013:

Prospective Suppliers of Used Patrol Vessels (2004-2013)	Primary Prospective Recipients of Used Patrol Vessels (2004-2013) (Complete List in Prospective Recipient Section)		
Canada	Albania	Estonia	Seychelles
France	Cambodia	Latvia	Sierra Leone
India	Costa Rica	Lithuania	Slovenia
Italy	Cyprus	Myanmar	Sri Lanka
South Korea	Djibouti	Nicaragua	Syria
Turkey	Dominican Republic	Panama	Tanzania
United States	Eritria	Senegal	Yemen

patrols in a nation's coastal waters. Armaments on these vessels typically include minor (40mm and smaller) caliber guns.

Many countries that currently operate patrol vessels do build them indigenously with several additional entrants likely in the future. Unlike most other types of ships discussed (cruisers, destroyers, frigates etc), many shipbuilding countries of the world do have the ability (sometimes with foreign assistance) to build patrol vessels considering the general simplicity and size of this type of vessel.

In general, it must be noted that builders of patrol vessels can build these vessels at fairly inexpensive prices favoring new procurement programs vice relying on the used international market. Some of the newer entrants from Asia and South America may be even more price competitive further lessening the reliance on the used international market.

In regards to the patrol vessels currently in operation in the world's sea services, it can be stated that most sea services utilize these types of vessels to the end of their effective service lives (25-35 years). With an aging inventory worldwide combined with the relatively little funding required for new procurement programs, most patrol vessels will not be transferred.

5.7.2 Navies, Coast Guards, and Police Forces With Patrol Vessel Requirements

Every nation with a coastline operates patrol vessels in their respective sea services such as the navy, coast guard, police or custom agencies. However, this section is only going to address patrol vessels that are 100 tons and larger that typically conduct long-range multi-day



5.7.3 Prospective Suppliers

Generally speaking, the nations that will be mentioned in this report as prospective suppliers are those sea services that are currently operating patrol vessels built since 1985. There are considerably more classes in service that were built from the 1950s through 1984, however, the transfer of these will be likely be restricted to those situations where the recipient country has no funds and the supplying country wishes to make a political statement of support. The majority of patrol vessels that may appear on the used international market (built since 1985) generally are well past their mid-life point although they could still be candidates for transfer from 2004 through 2013.

Nations that have the ability to build their own patrol vessels indigenously will do so, and those that can acquire the funding for new vessels built in a foreign yard will also use that method. The nations that will utilize the used international market will more than likely fall outside the two categories listed above and will probably have no other choice but to procure a used patrol vessel, even though those candidates may be nearing the end of their effective service lives. If the used vessel is in good material condition and the receiving sea service believes that it can maintain the transferred vessel, it becomes a good candidate for procurement. As an example, Uruguay procured Coast Guard Cape class patrol boats from the United States to fill a requirement even though the vessels were built in the 1950s. Uruguay literally had no other alternatives and received the patrol vessels as a grant from the United States Government.

Nations that currently operate patrol vessels that may be candidates (built after 1985) for transfer to a recipient nation over the next decade (2004-2013) are listed as follows with the year built, vessel class, number available and country:

Year Built	Class	Number Available	Country
1986	Type 200	2	Canada
1986-1988	P 400	10	France
1983-1985	Jija Bai	7	India
1985-1986	Rajkiran Mk 2/3	6	India
1985	Mario Graban	8	Italy
1987	Genna	1	Italy
1979-1985	Sea Wolf	23	South Korea
1989-1990	Bukhansan	4	South Korea
1985-1987	SAR 35	4	Turkey
1993-1998	Cyclone	12	United States

5.7.4 Prospective Recipients

Prospective recipients for used patrol vessels will more than likely be coastal sea services that do not have the financial resources to procure new vessels and/or probably do not have the shipbuilding capacity to realize an indigenous program. For the recipient sea service, the used international market is probably the best choice and some times the last resort in gaining access to affordable vessels.

The nations most likely to take advantage of these markets are those to be found in what has been typified as "Small Coastal." There may be a few exceptions as a few of these countries have some shipbuilding capability and may not seek assistance.

SMALL COASTAL			
Albania	El Salvador	Kenya	Samoa
Angola	Equatorial Guinea	Kiribati	Senegal
Anguilla	Eritrea	Latvia	Serbia/Montenegro
Antigua	Estonia	Lebanon	Seychelles
Bahamas	Faeroe Islands	Lithuania	Sierra Leone
Barbados	Falkland Islands	Madagascar	Slovenia
Belize	Fiji	Maldives Islands	Solomon Islands
Benin	Gabon	Malta	Sudan
Bermuda	Gambia	Marshall Islands	Surinam
Cambodia	Georgia	Mauritania	Syria
Cameroon	Ghana	Mauritius	Tanzania
Cape Verde	Grenada	Micronesia	Togo
Comoros	Guatemala	Mozambique	Tonga
Congo, Republic of	Guinea	Myanmar	Trinidad
Cook Islands	Guinea Bissau	Namibia	Turks, Caicos
Costa Rica	Guyana	Nicaragua	Tuvalu
Cuba	Haiti	Palau	Vanuatu
Cyprus, Republic of	Honduras	Panama	Virgin Islands
Djibouti	Iceland	Papua New Guinea	Yemen
Dominica	Iraq	St. Kitts/Nevis	
Dominican Republic	Ivory Coast	St. Lucia	
East Timor	Jamaica	St. Vincent	

On the other hand most of the "EEZ-Focus" nations have an ability to build their own patrol vessels and relatively few will consider the used ship market when searching for patrol vessels.

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