

••• Nederland Maritiem Land

••• High Tech, Hands On

The Dutch Maritime Cluster

Monitor 2021

Summary



**Maritime
by Holland.**
High Tech, Hands On

Maritime Cluster: High Tech, Hands On

Ecorys has carried out this annual monitoring study of the maritime cluster on behalf of the Ministry of Infrastructure and Water Management and in cooperation with Stichting Nederland Maritiem Land.

The maritime cluster in 2020

The cluster generated a direct added value of € 18.8 billion in the Netherlands. Indirectly, € 4.7 billion was added. The maritime cluster generates approximately 2,9% (2019: 2,9%) of the gross domestic product (GDP) of the Netherlands. In 2020, the maritime cluster employed 266,650 people, of which approximately 187,750 was direct employment. As a result, the total number of employees in the maritime cluster is equal to 2,8% (2019: 3,0%) of total employment in the Netherlands.

In 2020 the total number of people employed in the Netherlands decreased with 0,5%. The direct employment in the maritime sector decreased with 1,8%. Indirect employment declined with 15,3%. Reason for this are the lower employment multipliers in 2020. Main cause were the effects of the worldwide corona pandemic on the global economy. This implies that the backward effects of the cluster are smaller. A job in the maritime cluster generates, as opposed to last year, a slightly smaller number of jobs in sectors that work for the maritime cluster.

The direct added value of the maritime cluster has declined (-3,5%) compared to the figures for 2019. The development of direct added value of the cluster is lower than the GDP growth of the Netherlands (-1,6%). The indirect value added grew by 4,6%. For total value added this means a decrease of 2,0% compared to 2019.

The total export of the maritime cluster amounted to € 30,3 billion in 2020, an increase compared to 2019 (€ 29,6 billion). The export of the cluster has grown. The biggest sector measured in export performance is the ports sector. Second is the shipping sector with an estimated export figure of € 5,9 billion in 2020. The maritime cluster accounts for roughly 6,3% of all Dutch export value (total € 483 billion).

Sustainability – Maritime Masterplan: 50 zero emission vessels in 2030

The goal of the 'Masterplan for a zero emissions maritime industry' is to have fifty zero emission vessels by 2030. It is the basis for a long term expansion of the sustainability goals of the Dutch maritime industry. The focus of the plan is the financing and development of technologies to put virtually 100% zero emission vessels into service by setting up fifty pilot projects for shipping and inland shipping. In addition, the design and production process of these ships will be digitalized and robotized as much as possible.

There is a special role for the Dutch Ministries of Defence and Infrastructure & Water Management. They are willing to participate as launching customers. The recovery after the Corona pandemic provides opportunities to fast-track a maritime energy transition. "I foresee The Netherlands as world leader in sustainable shipbuilding and shipping", says Rob Verkerk, Chairman of Nederland Maritiem Land (Maritime by Holland). "This initiative ensures that the Dutch government will be the first to sail with zero emission vessels. Besides that, it will also strengthen our international competitive position."

Members of the Board:

R. Verkerk (Chairman)
B. Buchner
A. Koster
J.B. Mulder
J.S. Ort
B. Siemons (Treasurer)
A.P.H. Vergroesen

NML office:

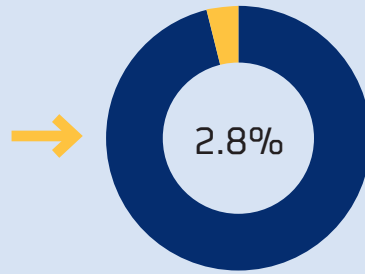
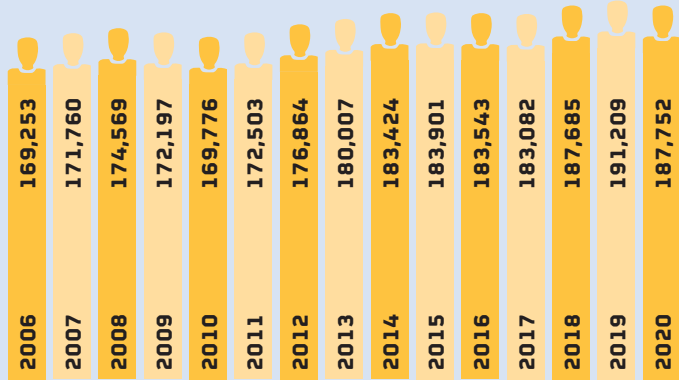
Verena Ohms, Board Secretary
Nathalie Nipius-ter Reegen, Management Assistant
Sabine Marsé, Senior Communication Advisor
Vincent Verweij, Communication Advisor and Webmaster
Manuëla Zorgdrager, Communication Officer
Ghazaleh Ghandi-Sehat, Finances

Check maritimebyholland.com for more
information about the Dutch maritime cluster



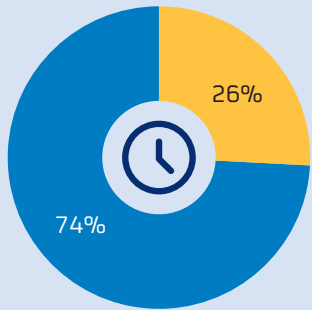
FACTS & FIGURES HUMAN CAPITAL

Employed directly in the maritime industry



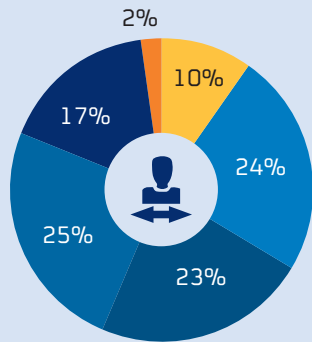
Total employment the Netherlands

In 2020 266.650 people were employed in the maritime industry (directly and indirectly)



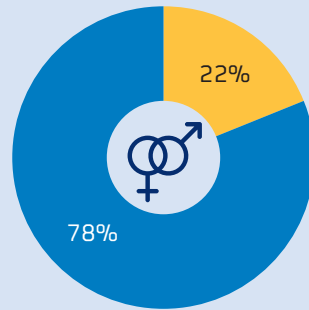
Employment

- Fulltime
- Parttime



Age structure

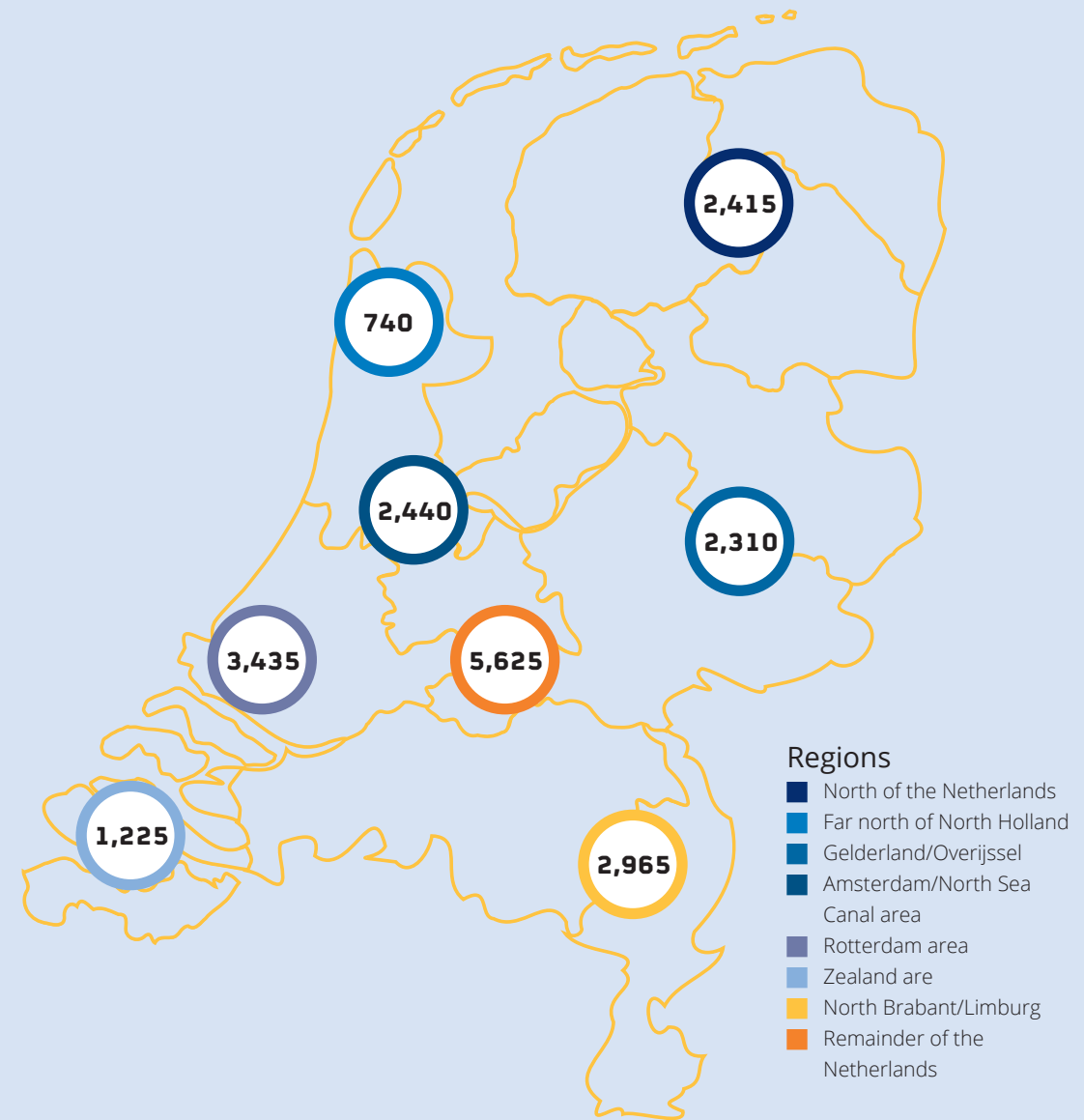
- 18 - 25
- 26 - 35
- 36 - 45
- 46 - 55
- 56 - 65
- over 66



Gender

- Male
- Female

Regional spread of 21,155 Dutch maritime organisations



Regions

- North of the Netherlands
- Far north of North Holland
- Gelderland/Overijssel
- Amsterdam/North Sea Canal area
- Rotterdam area
- Zealand are
- North Brabant/Limburg
- Remainder of the Netherlands

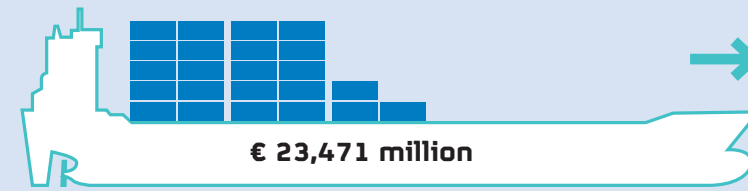
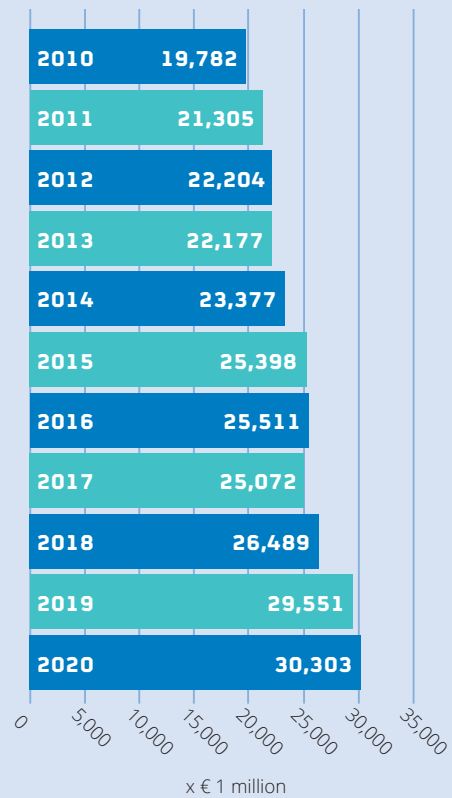
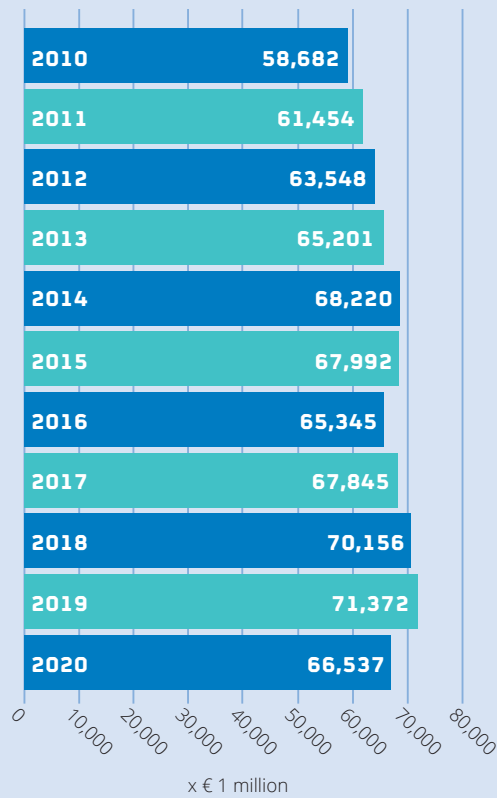


FACTS & FIGURES TRADE

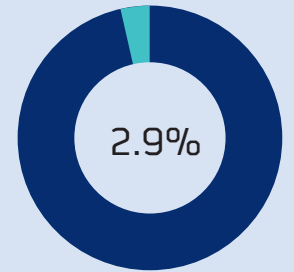


Development revenue

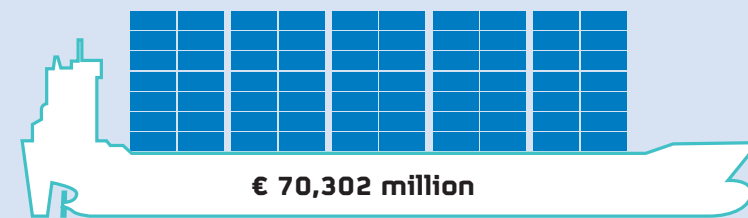
Development export value



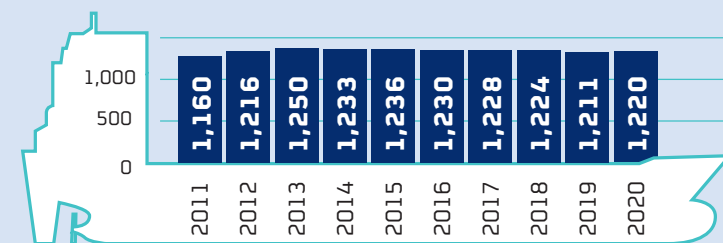
Added value 2020



Percentage of GDP the Netherlands



Production value 2020



Vessels under Dutch fleet management

The maritime sub clusters and their dependencies



Nederland Maritiem Land

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