

••• Nederland Maritiem Land

••• High Tech, Hands On

The Dutch Maritime Cluster

Monitor 2020

Summary



Maritime
by Holland.
High Tech, Hands On

Maritime Cluster: High Tech, Hands On

Ecorys has carried out this annual monitoring study for the maritime cluster on behalf of the Ministry of Infrastructure and Water Management and in cooperation with Stichting Nederland Maritiem Land. The Dutch maritime cluster consists of the following sectors: shipping, shipbuilding, offshore (energy), inland shipping, dredging, ports (cargo handling), navy, fishing, maritime services, yachtbuilding/watersport industry and marine equipment supply.

The maritime cluster in 2019

The cluster generated a direct added value of €19.7 billion in the Netherlands. Indirectly, € 5.1 billion was also added. The maritime cluster generates approximately 3.1% (2018: 3.2%) of the gross domestic product (GDP) of the Netherlands. In 2019, the maritime cluster employed 284,917 people, of which approximately 189,669 were direct labourers. As a result, the total number of employees in the maritime cluster is equal to 3.0% (2018: 3.0%) of employment in the Netherlands.

In 2019 the total number of people employed in the Netherlands grew by 1.9%. The direct employment in the maritime sector grew by 1.5%. Indirect employment declined with 3.2%. Reason for this are slightly lower employment multipliers in 2019. This implies that the backward effects of the cluster are smaller. A job in the maritime cluster generates a slightly smaller number of jobs in sectors that work for the maritime cluster.

The direct added value of the maritime cluster has been rather constant (equal to -0.4%) compared to the figures for 2018. The development of direct added value of the cluster is lower than the GDP growth of the Netherlands (+4.7%). The indirect value added grew by 2.1%. For total value added this means a minimal increase of 0.1% compared to 2018.

The total export of the maritime cluster amounted to € 30.4 billion in 2019, an increase compared to 2018 (€ 27,8 billion). The export of the cluster has grown. The biggest sector is the ports sector. Second is the shipping sector with an estimated export figure of € 6.3 billion in 2019. The maritime cluster accounts for roughly 6% of all Dutch export value (total € 516 billion).

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

Sustainability – Maritime Masterplan: 30 zero emission vessels in 2030

The goal of the 'Masterplan for a zero emissions maritime industry' is to have thirty zero emission vessels in 2030. It is the basis for a long term expansion of the sustainability goals of the Dutch shipping industry. The focus of the plan is the financing and development of technologies to put virtually 100% zero emission vessels into service by – among other things – setting up about thirty pilot projects for shipping and inland shipping.

There is a special role for the Dutch Ministry of Defence and Rijkswaterstaat (Ministry of Infrastructure and 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 industry", 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	Vice-admiral R. Kramer
S. Hassing, Vice President	J. Kweekel
R. Paul, Treasurer, till the 1st of September 2020	J.B. Mulder
B. Buchner	J.S. Ort
K. Damen	K.J. Overtoom
G. Eggink	R. Quick
G.J. van Goch	A.P.H. Vergoesen
J.J. Hopman	T. Wouterse, Treasurer a.i., from the 1st of September 2020

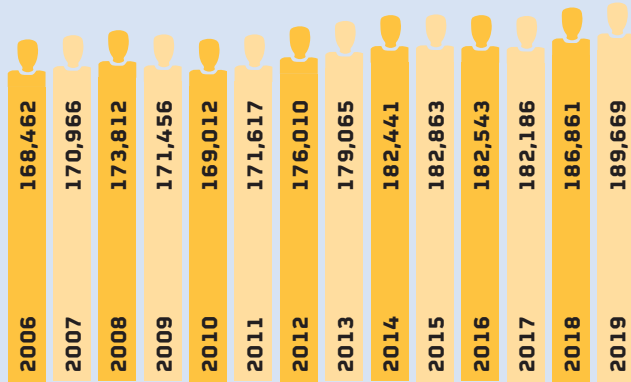
Contacts NML office:

Arjen Uytendaal, Managing Director
Nathalie Nipius-ter Reegen, Management Assistant
Roegzana Ramdjan, Office Manager
Sabine Marsé, Senior Communication Advisor
Vincent Verweij, Communication Advisor and Webmaster
Willeke Ruijtenberg, Communication Advisor
Ghazaleh Ghandi-Sehat, Finances

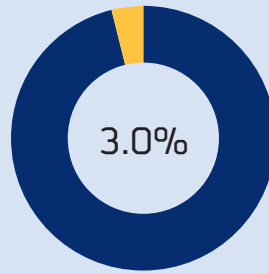


FACTS & FIGURES HUMAN CAPITAL

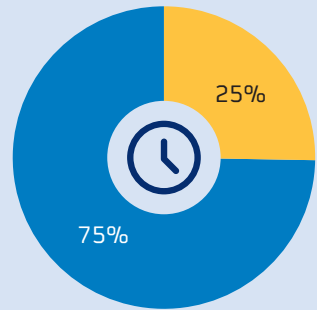
Employed directly in the maritime industry



In 2019 284,917 people were employed in the maritime industry (directly and indirectly)

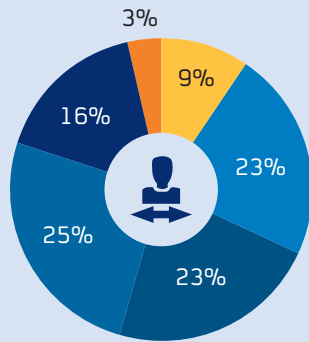


Total employment the Netherlands



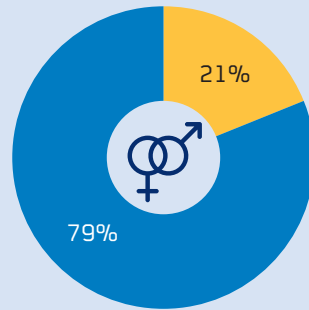
Employment

- Fulltime
- Parttime



Age structure

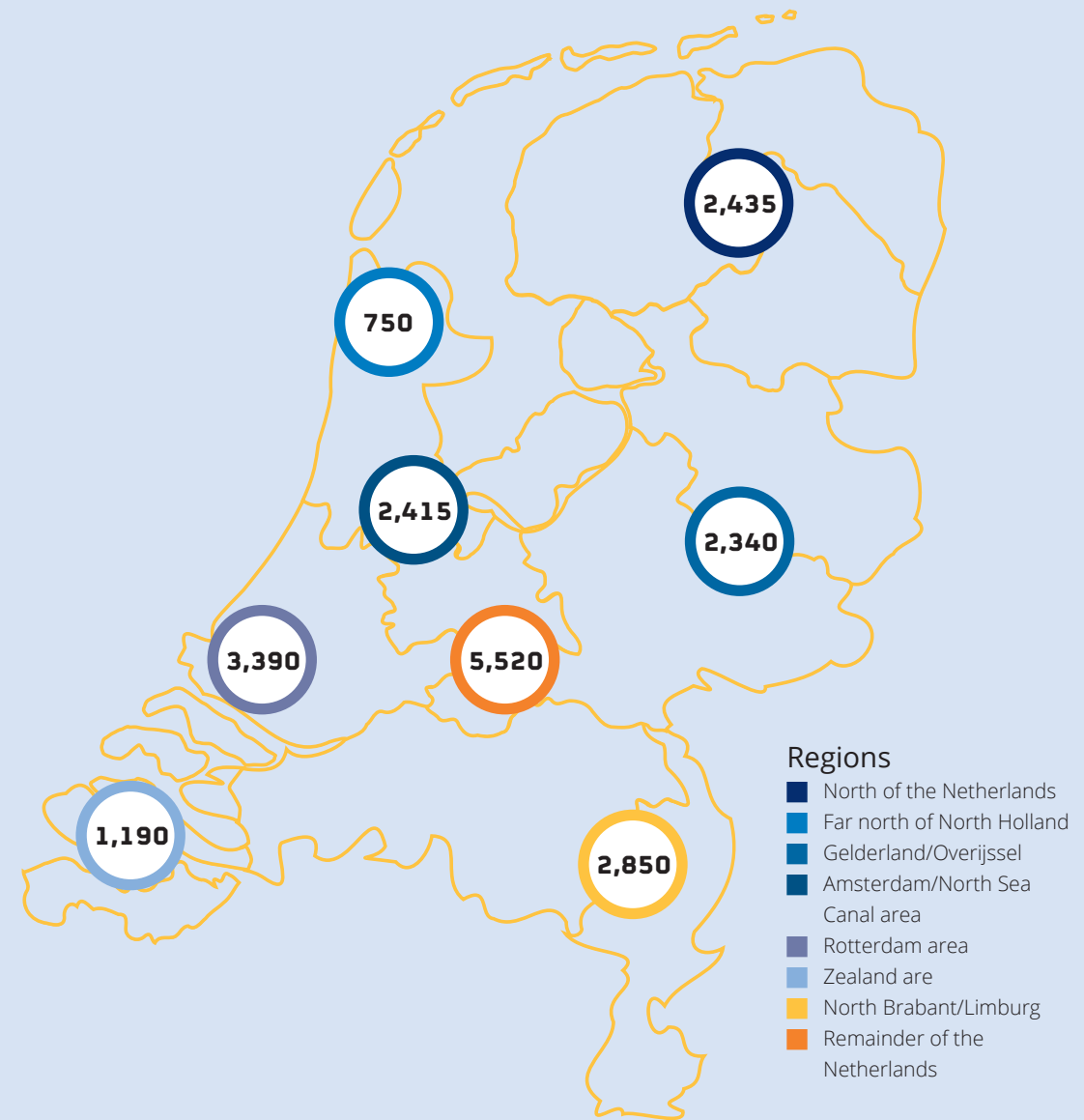
- 18 - 25
- 26 - 35
- 36 - 45
- 46 - 55
- 56 - 65
- over 66



Gender

- Male
- Female

Regional spread of 20,890 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

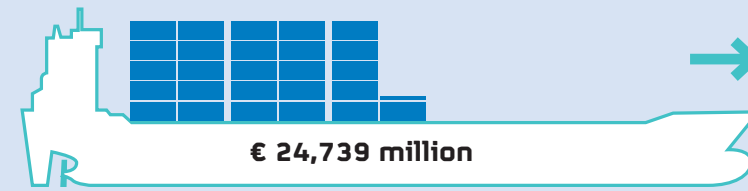
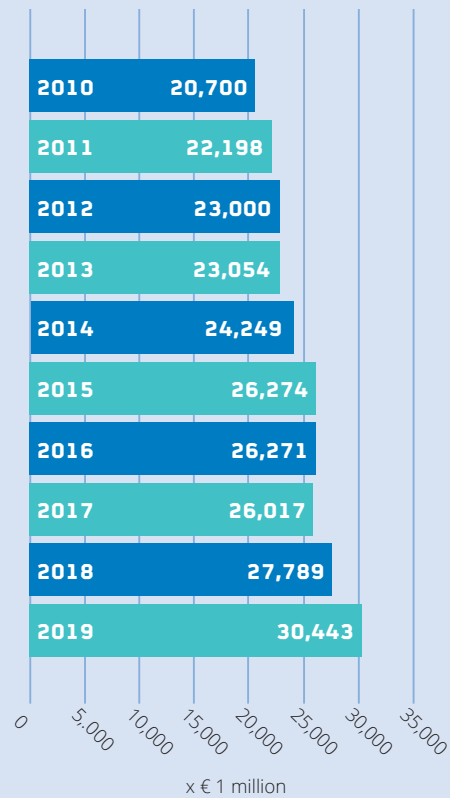
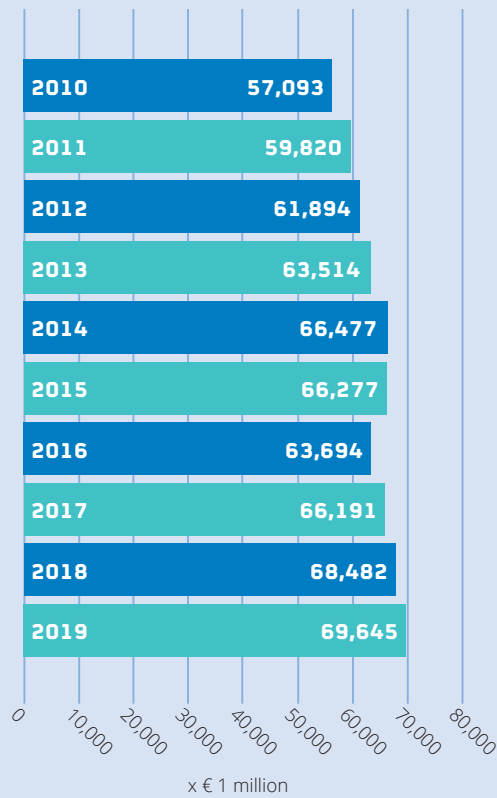


FACTS & FIGURES TRADE

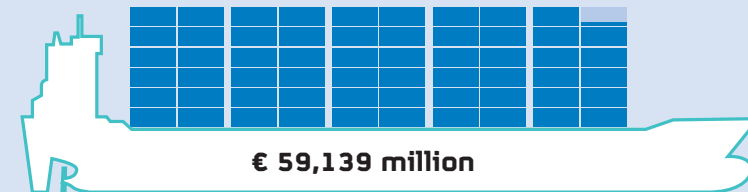


Development revenue

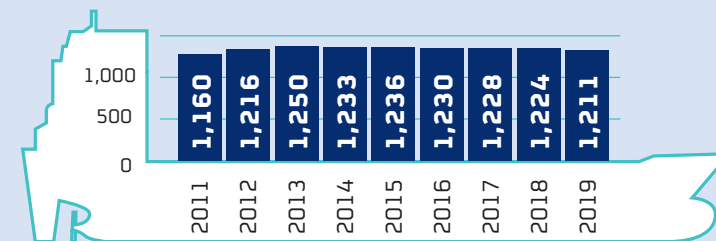
Development export value



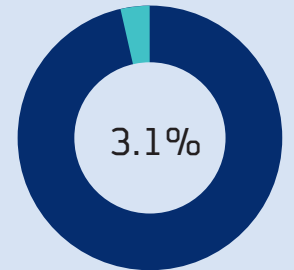
Added value 2019



Production value 2019



Vessels under Dutch fleet management



GDP percentage the Netherlands

The maritime cluster and its coherence



Nederland Maritiem Land

Contact details

Willemswerf
Boompjes 40
3011 XB Rotterdam

+31 10 747 00 76
info@maritiemland.nl
maritiemland.nl



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