

••• The Dutch Maritime Network

••• Advancing the blue economy

# The Dutch Maritime Cluster Monitor 2023

## Summary



# Advancing the blue economy

**On behalf of the Ministry of Infrastructure and Water Management (IenW) and in collaboration with the Dutch Maritime Network (NML), Ecorys and the Erasmus Center for Urban, Port and Transport Economics (Erasmus UPT) carried out the annual monitoring study for the maritime cluster.**

## **The maritime cluster in 2022**

The turnover of the maritime cluster amounted to €95,2 billion in 2022. The cluster generated a direct added value of approximately €25,9 billion in the Netherlands. An additional €5,2 billion was added indirectly. The maritime cluster thus generates approximately 3,2% (2021: 3,0%) of the gross domestic product (GDP) of the Netherlands. In 2022, the maritime cluster employed 305.765 employees, of which approximately 201.914 were direct labor. The maritime cluster therefore provides 3,0% (2021: 3,0%) of employment in the Netherlands.

The direct added value of the maritime cluster has increased by 21% compared to the 2021 figures. The direct added value has therefore increased faster than direct employment (+2,5% compared to 2021). This means there is a strong corona recovery. Total employment (including indirect effects) has even increased by 6,0% in 2022.

The total exports of the maritime cluster amounted to more than €59,5 billion in 2022. In 2021 this was only €52,0 billion. The export performance of the maritime cluster has therefore grown strongly. Of a total export from the Netherlands of €731 billion, the maritime cluster's share is 8,1%.

## **Combined port and maritime cluster 2022**

The direct added value of the combined port and maritime cluster amounted to €50,4 billion in 2022. A significant increase compared to 2021 and 2020 (2021: €39,0 billion and 2020: €32,8 billion). The combined direct employment in the port and maritime cluster was equal to 303.960 in 2022 (measured in employees).

As soon as the indirect added value is included, an additional €22,0 billion of added value is realized, bringing the total added value of the combined cluster to €72,4 billion in 2022. The cluster's total employment impacts add up to 575.490 workers in 2022.

When we compare this data to Dutch GDP, the direct added value contribution of the combined cluster to Dutch GDP is 5,3% and when the indirect effects are also included, the contribution of the combined cluster is 7,5% to Dutch GDP for 2022. In recent years, the contribution to added value has increased significantly from 6,2% in 2020 and 6,8% in 2021.

In 2022, 3,0% of direct employment in the Netherlands is due to the combined port and maritime cluster. When the indirect effects are also included, the combined port and maritime cluster provides 5,7% of employment in the Netherlands.

# Maritime Master Plan for a future-oriented maritime sector

The maritime sector is extremely broad: from ports to offshore, from fishing to coastal and inland shipping and from knowledge institutes to services. But the sector has one common denominator: ships. These are essential for transport, food production, coastal protection and defense. In addition, they play a fundamental role in the generation of renewable energy at sea.

The Maritime Master Plan focuses on the development, construction and use of climate-neutral ships. By investing in this now, the Netherlands can bridge the gap between R&D and broad market scale-up and strengthen and expand its international competitive position in the four strategic markets of coastal and inland shipping, marine engineering (dredging), offshore wind and maritime safety.

The Maritime Master Plan aims to develop, build and use 40 reliable and competitive climate-neutral demonstration ships. The plan thus kickstarts the energy transition of the maritime sector in the Netherlands, gives a boost to the Dutch economy and invests in the maritime autonomy of the Netherlands and Europe.

## Members of the Board

Rob Verkerk *Chair*  
Willem Bentinck  
Bas Buchner  
Roel de Graaf  
Annet Koster  
Boudewijn Siemons *Treasurer*  
Sander Vergroesen

## NML office

Verena Ohms *Board Secretary*  
Ludmilla van der Meer *Management Assistant*  
Vincent Verweij *Communication Advisor*  
Ghazaleh Ghandi-Sehat *Financial employee*



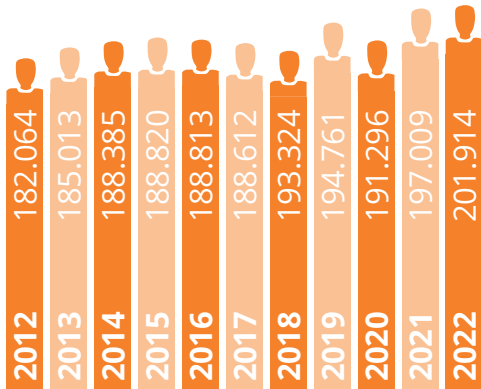
**MARITIEM  
MASTERPLAN**  
NET ZERO 2030

For more information about the Maritime Masterplan, visit [maritiemmasterplan.nl](https://maritiemmasterplan.nl)

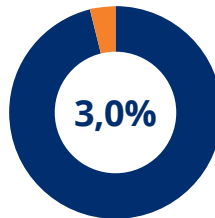
# Facts & Figures

## Human Capital

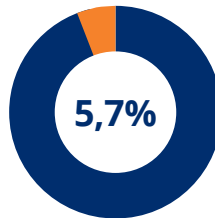
### Directly employed in the maritime cluster



The maritime cluster employed **305.765 people** in 2022, of which **201.914** were direct labor



The maritime cluster provides **3.0%** of employment in the Netherlands.

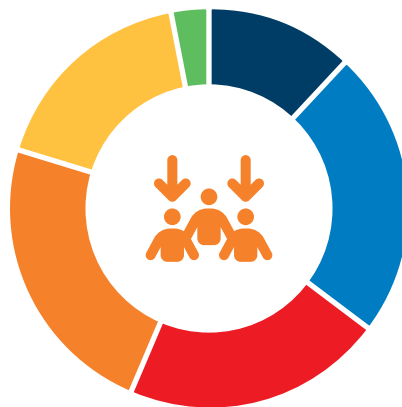


The combined port and maritime cluster provides **5.7%** of employment in the Netherlands.



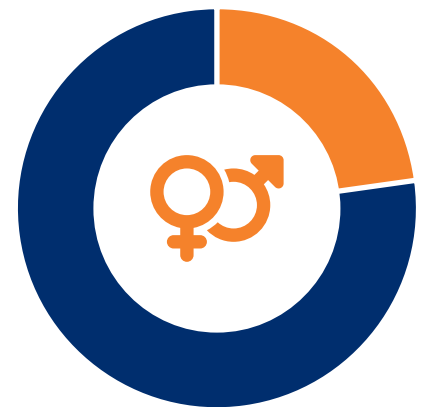
#### Employment

- Fulltime **74%**
- Parttime **26%**



#### Age structure

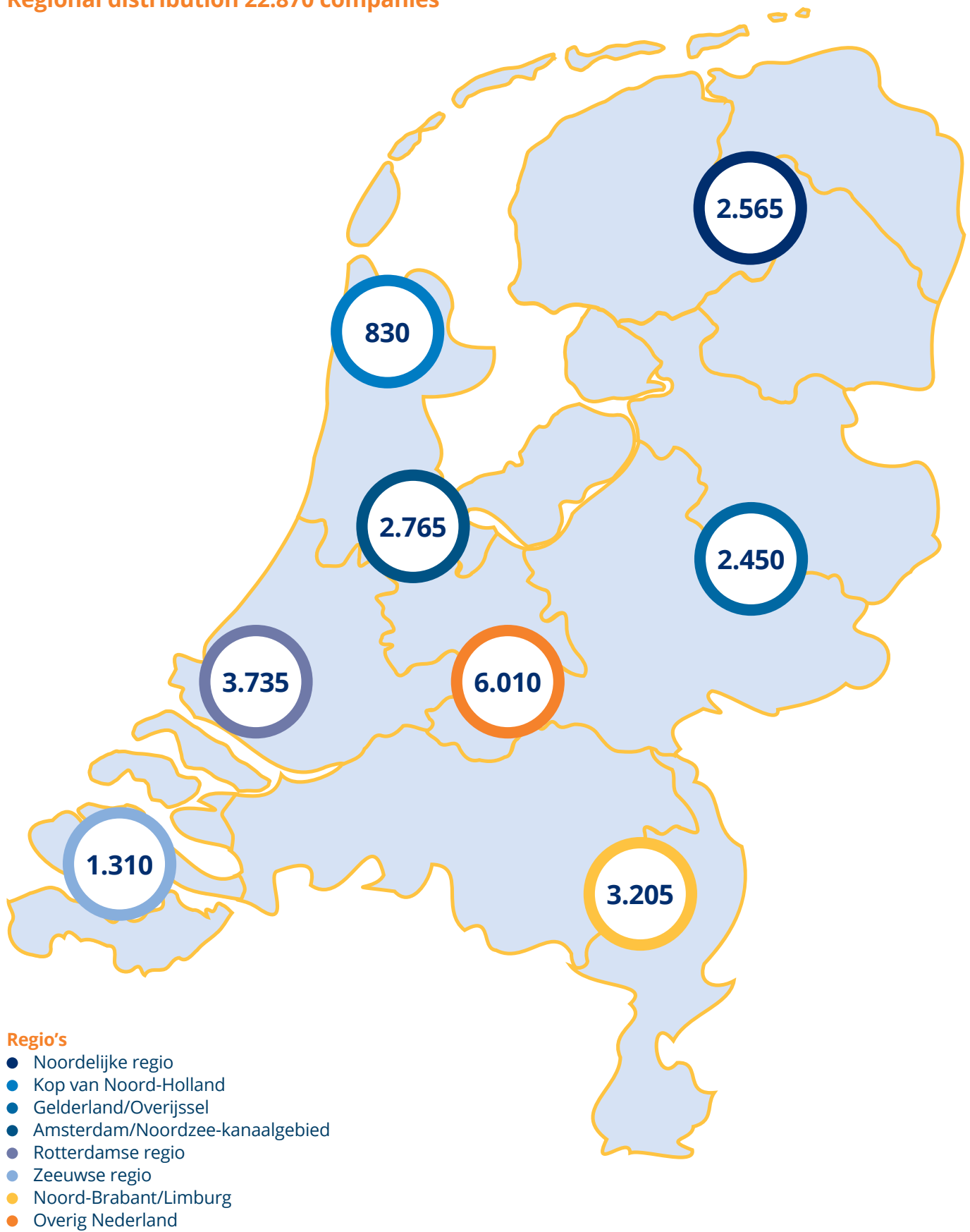
- 18 t/m 25 years **12%**
- 26 t/m 35 years **23%**
- 36 t/m 45 years **21%**
- 46 t/m 55 years **23%**
- 56 t/m 65 years **17%**
- 66 years and older **3%**



#### Gender

- Male **77%**
- Female **23%**

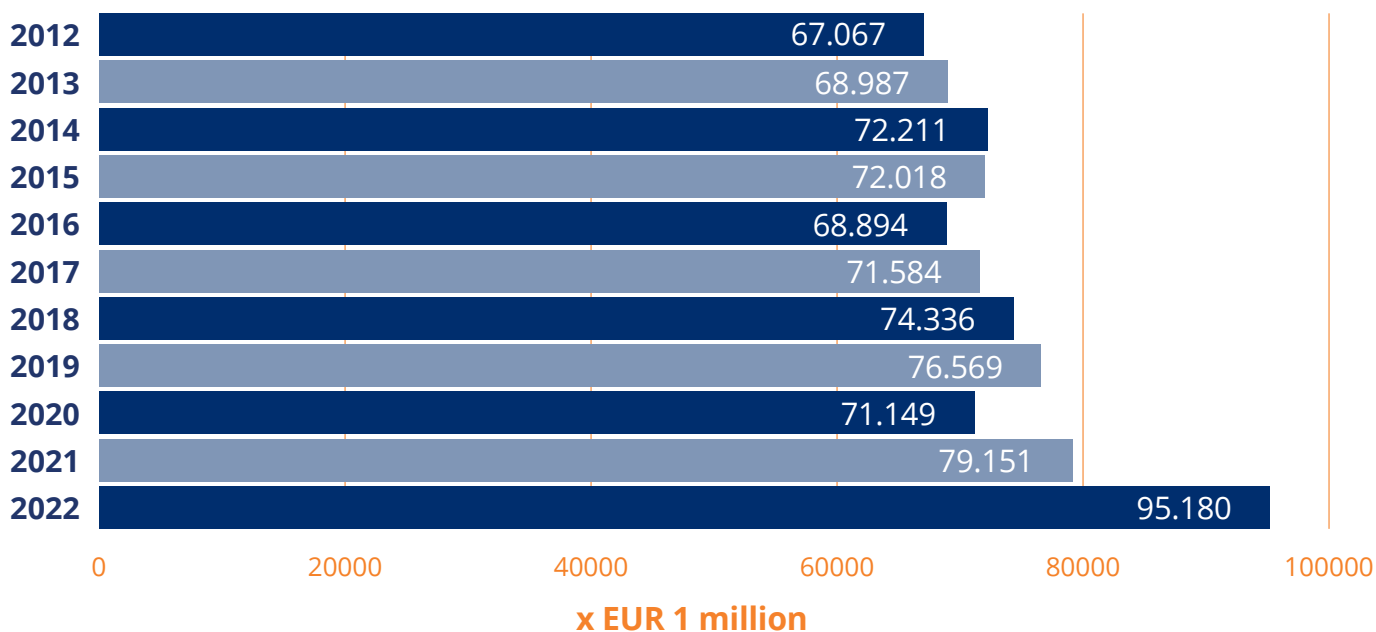
## Regional distribution 22.870 companies



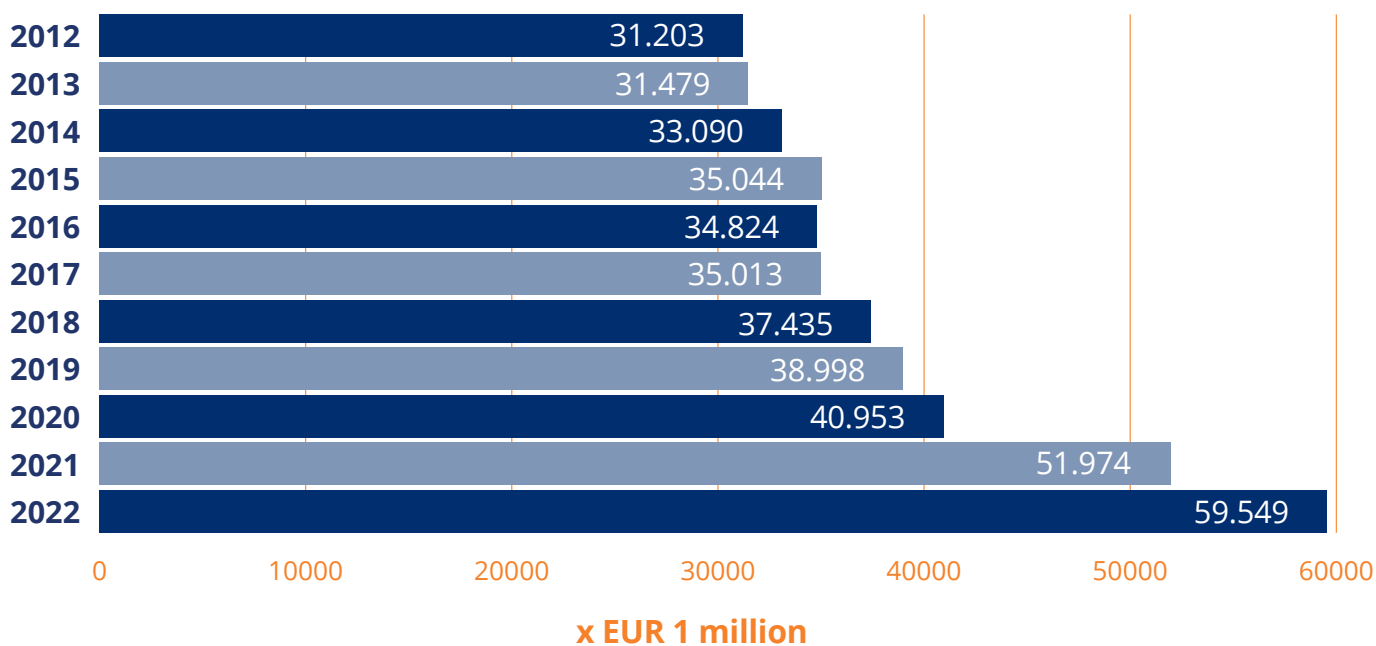
# Facts & Figures

## Economy

### Turnover of the maritime cluster

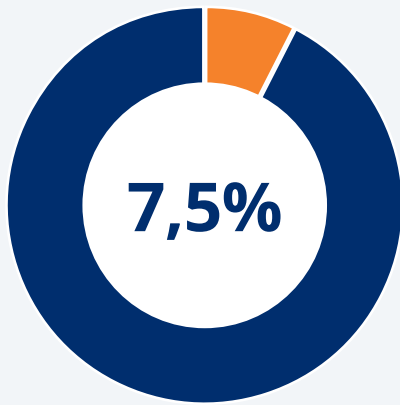


### Export of the maritime cluster

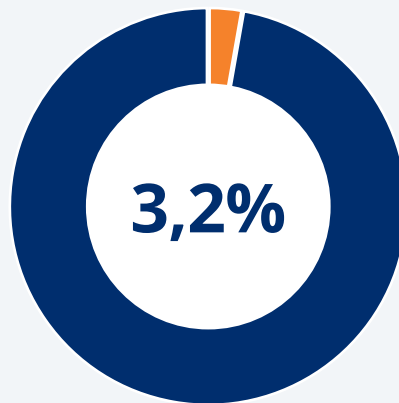




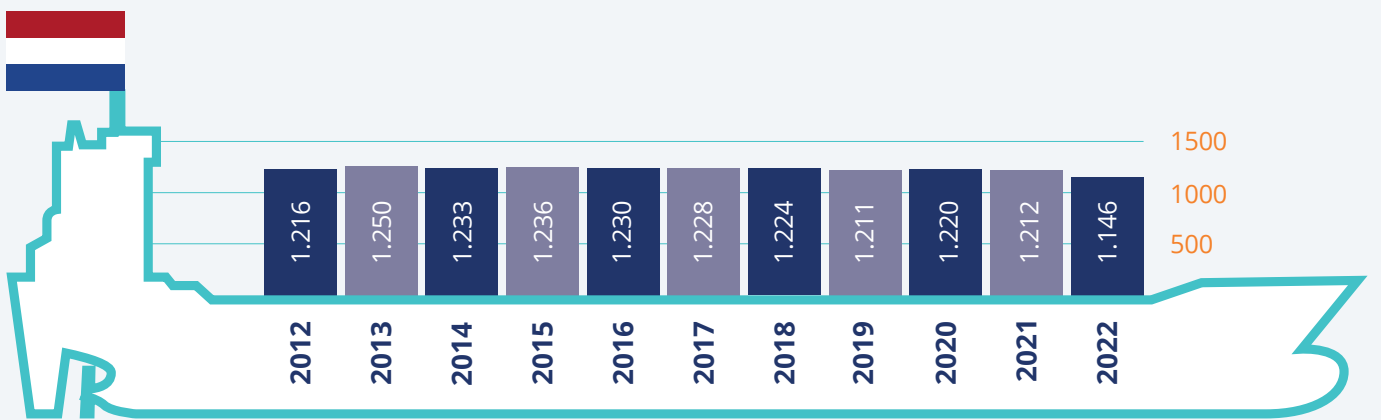
Added value 2022



Percentage combined port and maritime cluster (direct and indirect) of Dutch GDP



Percentage of Dutch GDP (direct + indirect)



Number of ships flying the Dutch flag

## Sea shipping and inland shipping

- Transport of goods and people over water



## Ports

- Loading, unloading and transshipment
- Storage
- Water transport services
- Freight traffic intermediaries



## Maritime services

- Bunkering and ship suppliers
- Classification providers
- Insurance companies
- Maritime research and training institutes
- Legal services and financing



## Shipbuilding

- New vessel construction
- Ship repair
- Superyacht building



## Maritime suppliers

Supply of products and technical services, such as:

- Electrotechnical and mechanical installations
- Coatings
- Interior construction
- Engineering services
- Project management
- Safety analyses







## Yacht building and water sports industry

- Design and yacht construction
- Marinas
- Repair and maintenance
- Yacht brokerage
- Retail and wholesale
- Boat rental
- Sailmakers



## Fisheries

- Cutter fishing
- Inland fishing
- Sea fishing (pelagic fishing)
- Fish farming (mussel and oyster culture)



## Dredging

- Coastal and bank works
- Beach replenishment
- Dredging activities
- Nature development
- Area planning/design
- Sand and gravel extraction
- Flood protection
- Port development
- Structural hydraulic engineering
- Land reclamation



## Offshore Energy

- Delivery of products and services
- to energy companies, for example construction
- and maintenance of offshore wind farms



## Royal Navy and Marine Corps

- Protection of Dutch territory including the Caribbean parts of the Kingdom
- Contribution to NATO fleets
- National tasks, including clearing explosives in the North Sea, hydrographic tasks, securing ports, supporting the Coast Guard
- Protection of our maritime trade routes



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