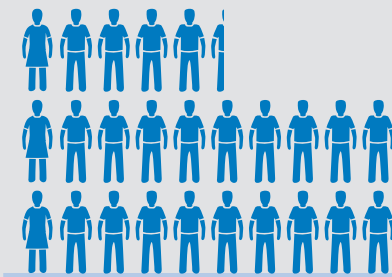




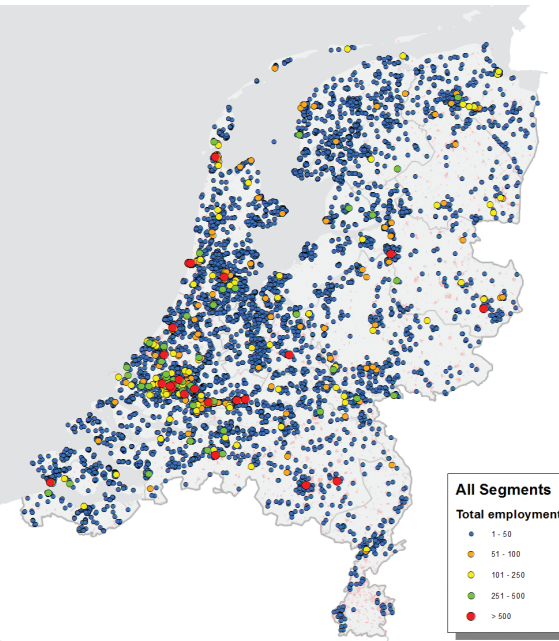
## FACTS & FIGURES HUMAN CAPITAL



253,000 employees in the maritime sector



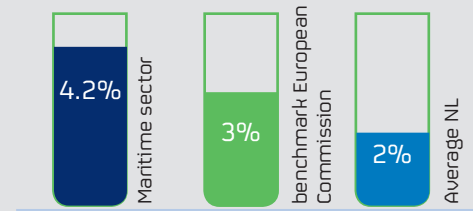
Total employment



Regional spread of establishments of Dutch enterprises



## FACTS & FIGURES INNOVATION



R&D expenses in percentage GDP

Global leader in innovative solutions



High Tech, Hands On

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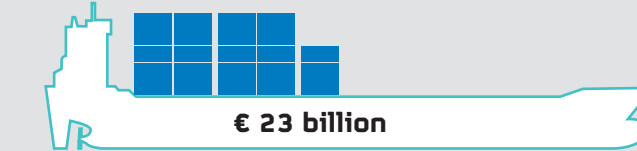
# The Dutch Maritime Cluster

## High Tech, Hands On

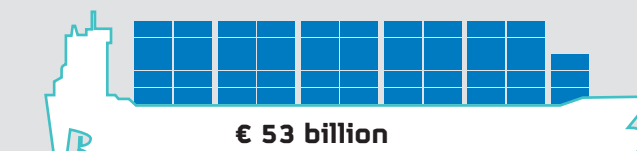
## Monitor 2015 summary



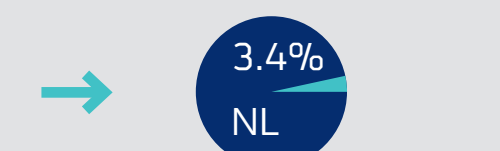
## FACTS & FIGURES TRADE



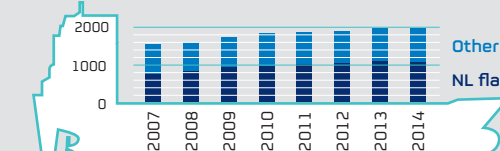
Total value added 2014



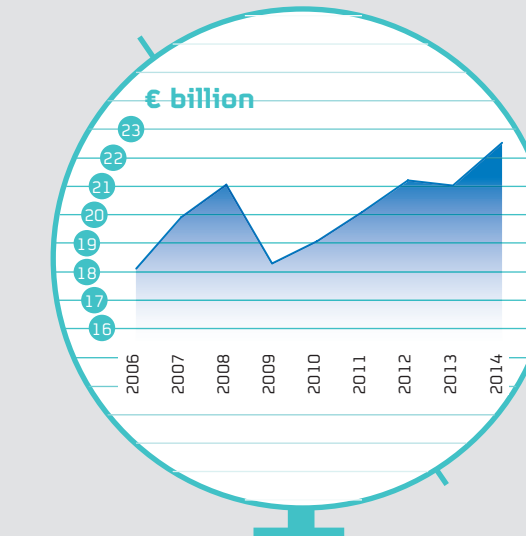
Production value 2014



GDP



Vessels under Dutch flag



Development export value



The maritime cluster and coherence

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# Maritime sector: High Tech, Hands On

For centuries the maritime sector has been a significant part of the Dutch business community. Thriving on the core principles of cooperation, innovation and entrepreneurship, the sector has become a global leader in delivering innovative solutions to the international markets.

Working in the maritime sector requires a special combination of a can do mentality and professionalism. Adventurous, independent, no-nonsense and guts. Any man or woman willing to take on the challenge, awaits a sustainable career. One that is internationally oriented and based on centuries of experience.

The Dutch maritime sector is customer oriented and complete. Empathetic, daring, a global leader and a frontrunner in finding solutions others do not see or dare to see. Customised solutions based on quality, craftsmanship, experience, and innovation. The Dutch maritime sector is reliable. A deal is a deal.

Stichting Nederland Maritiem Land (NML) is an organisation that connects twelve maritime sectors: ports, offshore, maritime suppliers, shipbuilding, ship operating, dredging, maritime services and knowledge institutes, inland shipping, Royal Navy, watersports/yacht building and fisheries. Together, this 23 billion euro industry comprises 12,000 companies employing more than 253,000 people.

## Members of the Board:

W. van Sluis (chair)  
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Vice Admiral b.d. W. Nagtegaal  
A.H.J. Otto  
K.J. Overtoom  
A.H.P. Vergroesen  
Lieutenant General R. Verkerk  
A.A.N. Vink  
H.P.F. Voorneveld  
P. Zoeteman

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## The Dutch maritime cluster : impressive numbers

In 2014, the direct and indirect production value was almost € 53 billion. The total value added amounted to € 22.6 billion, including 5.2 billion indirect value added. This means the maritime cluster generates 3.4% of the total GDP of The Netherlands. The sector provided employment for around 253.000 people, which is around 2.9% of total employment in The Netherlands. Of these jobs, 163,000 were of direct employment.

These numbers are based on a concentration of maritime related companies in the western part of the country and a concentration of maritime related jobs in the wider area of Rotterdam.

## Evolution of the Dutch maritime cluster up to 2014

In 2014 total employment in the Dutch maritime cluster increased by 8,100 persons (direct plus indirect employment) compared to 2013 employment figures. The greatest increase (7.400 persons) was due to increased indirect employment. Total production value and value added also increased by € 1,300 million (2.5%), respectively € 750 million (3.3%). **In 2014 the maritime**

cluster performed better compared to the Dutch economy as a whole where employment decreased with 0.2% (compared to a 3% increase for the maritime cluster) and the increase in Dutch GDP (+3%) was smaller compared to the increase in value added of the maritime cluster (+3.3%). Total exports of the maritime cluster amounted to € 22.5 billion in 2014. This means the cluster has a share of 4% of total Dutch exports of goods and services.

Fishing, shipping, shipbuilding, the navy and inland shipping generated a (direct) value added in 2014 which was below the level of 2006. For the sectors shipping and inland shipping this is caused by low tariffs resulting from overcapacity in the sector. The fishing sector suffers from lower fish catches. In the shipbuilding industry the lower value added results from a lower employment number. The added value of the navy has declined due to a cutback in expenses.

The number of employees in 2014 is more stable compared to the added value in 2006. In the sector dredging, the number of employees increased the most, followed by the sectors ports, offshore, maritime services, shipping and marine equipment supply. Employment in the sectors navy, fishing, shipbuilding and the watersports industry declined. In inland shipping (direct) employment remained stable.

## Future developments

The importance of the offshore industry for the maritime sectors has increased significantly over the past years and has provided a large boost to several maritime sectors. During the second half of 2014, oil prices have dropped. In 2015 this situation has remained nearly unchanged. For 2015 this has resulted in lower investments by the offshore oil- and gas industry: there is a slowdown in offshore development and in rig building. These developments in the offshore industry will have effects for the Dutch maritime cluster and it is expected that these effects will show in the 2015 figures.

## Contacts NML Office:

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Wendy Hobma, office manager  
Roegzana Hoesenie, event coordinator / project support  
Michiel Spitzer, senior communications advisor  
Bianca Visser, financial- and administrations clerk

Learn more about the Dutch maritime cluster: [www.maritimebyholland.com](http://www.maritimebyholland.com)

## Labour market

'Stable'. That's how the 2014 labour market in the maritime cluster is characterised. There are no significant bottlenecks regarding the supply of qualified staff, although individual companies might have problems in fulfilling specific vacancies. In most sectors the number of vacancies is modest, between 10 and 20 per 1.000 jobs. This is in line with the national picture of the Dutch economy.

The future labour market in most sectors is uncertain. If the economy recovers, most companies expect problems with obtaining qualified staff. In line with the trend in recent years this demand consists almost fully of highly qualified technical engineers. Due to an increasing complexity of labour processes and increasing computerisation there is less demand for lower skilled staff.



## Contact:

Leon Maas,  
secretary Human  
Capital Council

Most sectors face a relative large proportion of elderly employees. This is in particular a problem in sectors in which family business traditionally plays an important role, such as in inland shipping, the watersports industry and yacht building. These sectors have a relative high share of owners and employed relatives over 55 years of age. For these sectors succession of companies is a serious point of attention in the coming years.

## Innovation

In 2013, the expenses for R&D by the Dutch maritime cluster amount to 4.2% of the value added. This is considerably higher than the current average of 2% (of the GDP) for the Dutch economy as a whole. The Dutch maritime cluster performs better compared to the benchmark set for R&D by both the European Commission (3% of GDP) and the Dutch government (2.5% of GDP).



## Contacts:

Michael Steenhoff,  
secretary Innovation  
Council

Marnix Krikke,  
secretary TRI  
Maritiem

## Export

Total exports of the maritime cluster amounted to € 22.5 billion in 2014. This means the cluster has a share of 4% of total Dutch exports of goods and services. In 2015, the regions of South East Asia, Gulf of Mexico and Arabian Gulf have been elected as new maritime hotspots. Brazil also remains an important point of focus. The Trade Council Nederland Maritiem Land will develop an action plan for the three priority regions together with the Topsector Water.

Focus points are; better promotion of the Dutch product, more market insight, structural monitoring of trade missions and the development of bilateral cooperation programs.



## Contact:

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secretary Trade Council