The European Dredging Industry
A Maritime Success Story
• Introduction to EuDA & Dredging

• Dredging in Figures

• Political actions?
founded in 1993
represents the European Dredging Companies
from 16 EU Members States
world leaders (top 4)
with a turnover (2010): € 7.0 bn
+/- 25,000 European direct employment
>50,000 indirect employment (supply and service companies)

“EuDA is the official interface between the European dredging industry and the European Institutions”
Introduction to Dredging
Dredging means transporting:

- Sand
- Rock
- Gravel
- Silt

European Dredging Association 2012

Discharge
It also means supporting waterborne Transport

Dredging is not a problem

…it is part of the solution!

- Port expansion in densely populated and urbanised areas:
  - “Reclaim land on the sea”

- Ports’ access for bigger ships:
  - “Access channel deepening”

- Guaranteed navigational depth:
  - “Maintenance dredging”

- Contaminated sediments on seabed or riverbeds:
  - “Environmental dredging”

“Around 80% of the largest population centres in the world are found in coastal areas” R. Waterman

European Dredging Association 2012
Dredging facilitates and protects other coastal activities:

- Energy enterprises including
  - Oil & Gas exploration & delivery
  - Offshore Wind Farms
- Aggregate mining
- Coastal Protection
Dredging in Figures
A Capital intensive & innovative Sector

- 2/3 of world’s dredging projects (70% outside EU) bringing however 90% return back to Europe
- 5 billion € investments from 2008 to 2011
- 2.5% of total turnover invested in R&D
- largest, most powerful & most technologically advanced Fleet

Maritime Sector: 2% of global CO₂ emissions
Dredging Fleet: 0.3% of Maritime CO₂ emissions

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Global competition for European Dredgers

high-tech, high added value, high-wage

low-tech, low added value, low-wage
Dredging Economics

Dredging industry’s annual turnover compared with other industries (in billion €, 2010)

- Royal Dutch Shell 278
- Toyota Motor 166
- ArcelorMittal 59
- A.P. Møller-Mærsk Group 42
- World Dredging Industry 12

Turnover (2010) €12.0 bn

- EuDA 7.0 58%
- Other Free Markets 0.5 4%
- Closed Markets 4.5 38%

Turnover evolution per driver

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<thead>
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<th>Segment</th>
<th>2000</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
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Segment Share

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Europeans are World Leaders

- Competitiveness
  - European Dredgers are world leaders
  - Innovation: High Tech Industry

- Global Competition
  - Level Playing Field
  - Market Access

“To be world leaders is a moving target, not a destination”

“The only way to maintain global leadership and keep growing is to innovate”

“Competition can only be fair when all play by the same rules and have the same access to markets”
Political actions?
Global Level Playing Field

European Dredging Companies need:

- Fair, consistent and socially responsible global labour regulations.

- Same international norms and standards for all (regarding environment, safety and work conditions).

- Fair and consistent fiscal policies.

- Concrete action against unfair competition practices, including temporary mechanisms to counterbalance these.

- Open and accessible World markets.

- Fair access to funding for international infrastructure projects.
Thank you!

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