



Shipping Working Group

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The European Dredging Industry

A Maritime Success Story

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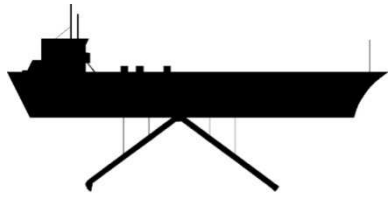
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Agenda

- Belgian Dredging Federation
- Introduction to Dredging
- Dredging in Figures



Fédération Belge du Dragage
Belgische Federation der Baggerwerken

- founded in 1938
- represents the Belgian Dredging Companies
- 2 world leaders (top 4)
- with a turnover (2009): € 3.0 bn
- +/- 8,000 European direct employment
- ~16,000 indirect employment (*supply and service companies*)





Introduction to Dredging



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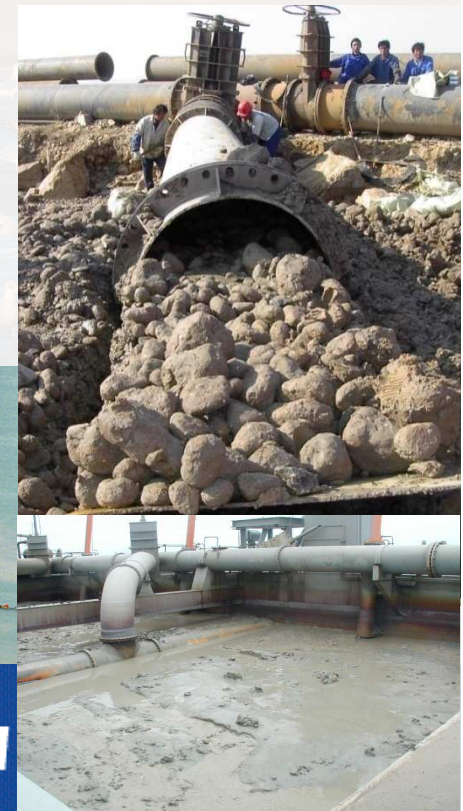


Dredging means transporting

Dredging is the maritime transportation of natural materials from one part of the water environment to another by specialised dredging vessels.

Dredging vessels transport

- Sand
- Rock
- Gravel
- Silt



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Dredging vessels support:

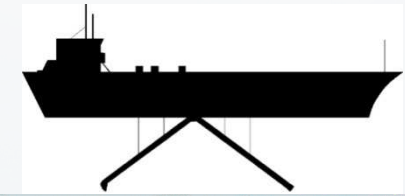
- ✓ Port infrastructure development,
- ✓ Land reclamation for commerce,
- ✓ Land reclamation for residences,
- ✓ Land reclamation for recreation,

Without dredging no harbours, no ports, no access channels.

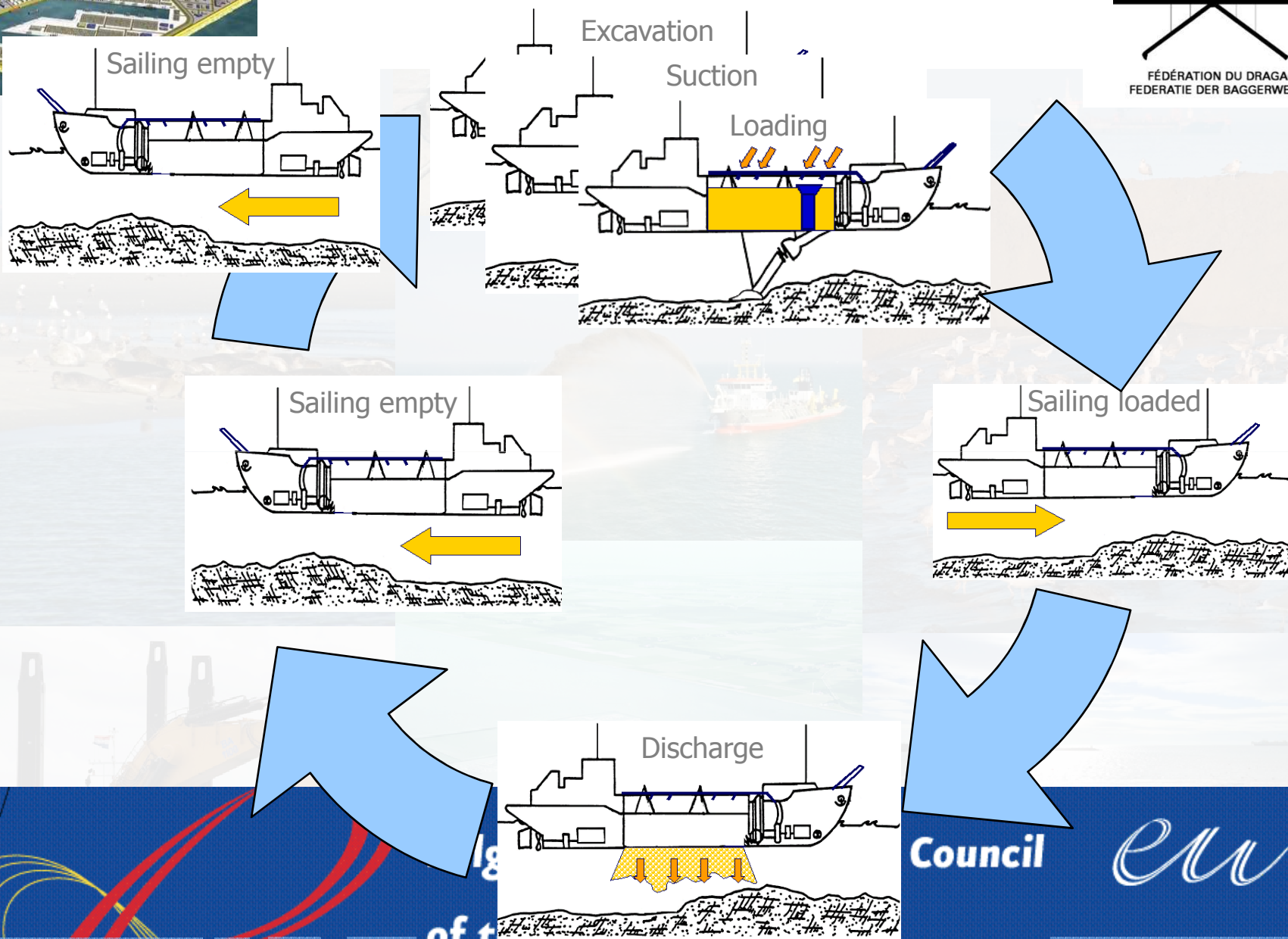
Ultimately it means no economic development and no global trade.

Around 80% of the largest population centres in the world are found in coastal areas

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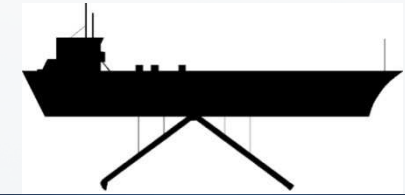


A Typical Dredging Cycle



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Dredging vessels support:

- ✓ Energy enterprises including
 - ↳ Oil & Gas exploration & delivery
 - ↳ Offshore Wind Farms

- ✓ Environmental Remediation

- ✓ Coastal Protection

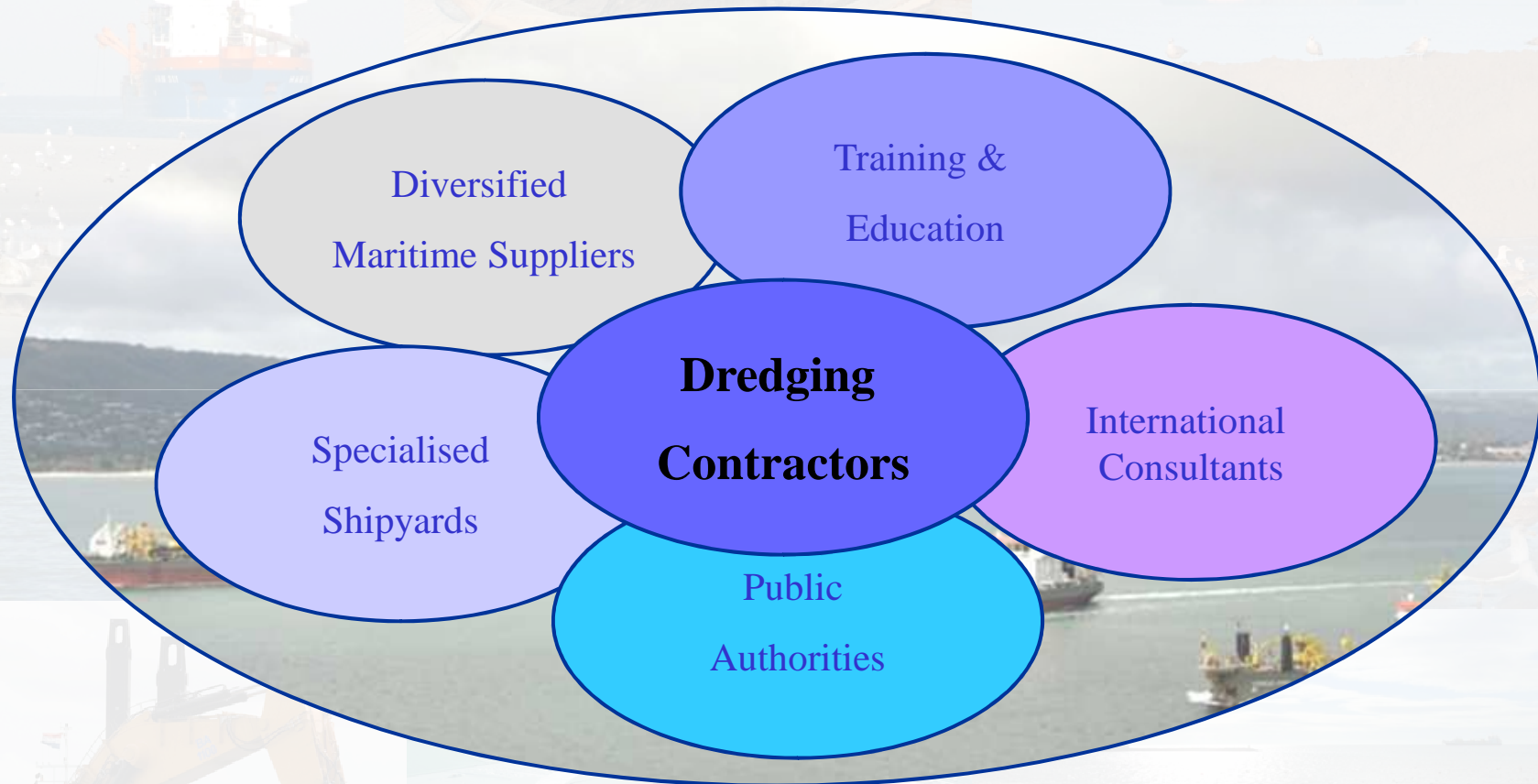
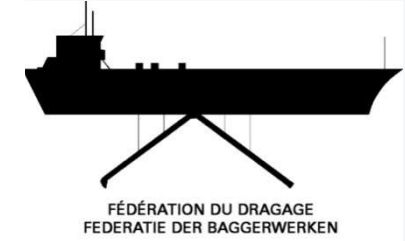


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Dredging is essential to the European Maritime Cluster





Dredging in Figures



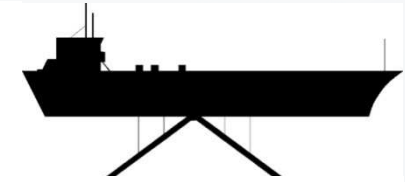
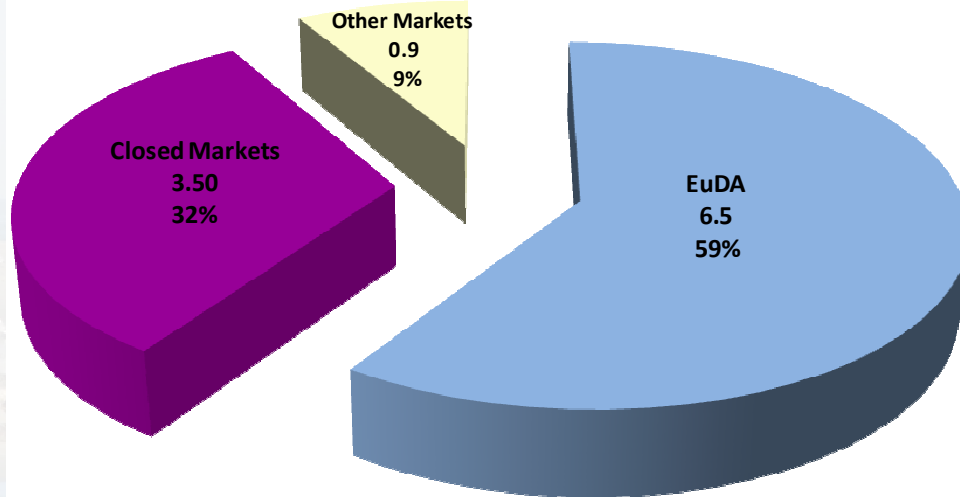
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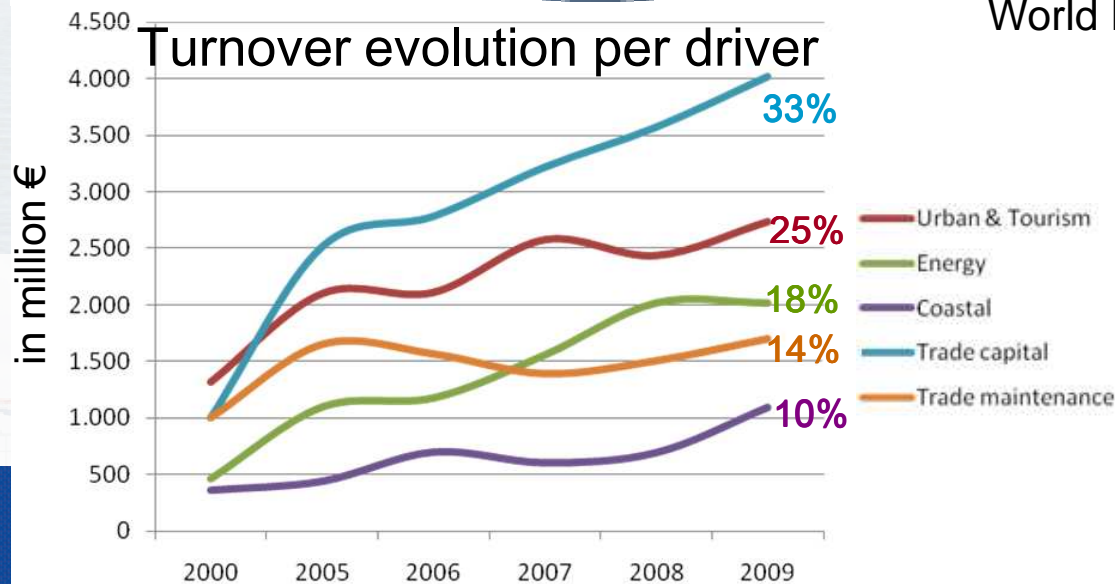
Economic Powerhouse

Turnover (2009) € 10.9 bn



Annual turn-over dredging industry compared with other industries (in billion €, 2009)

Royal Dutch Shell	190
Toyota Motor	154
ArcelorMittal	45
A.P. Møller-Mærsk Group	35
World Dredging Industry	11



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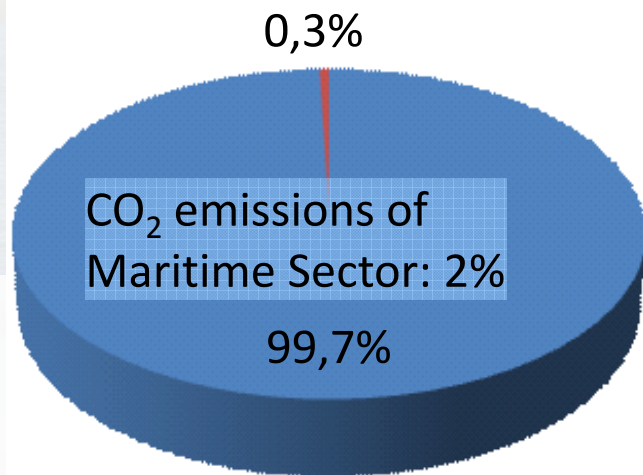
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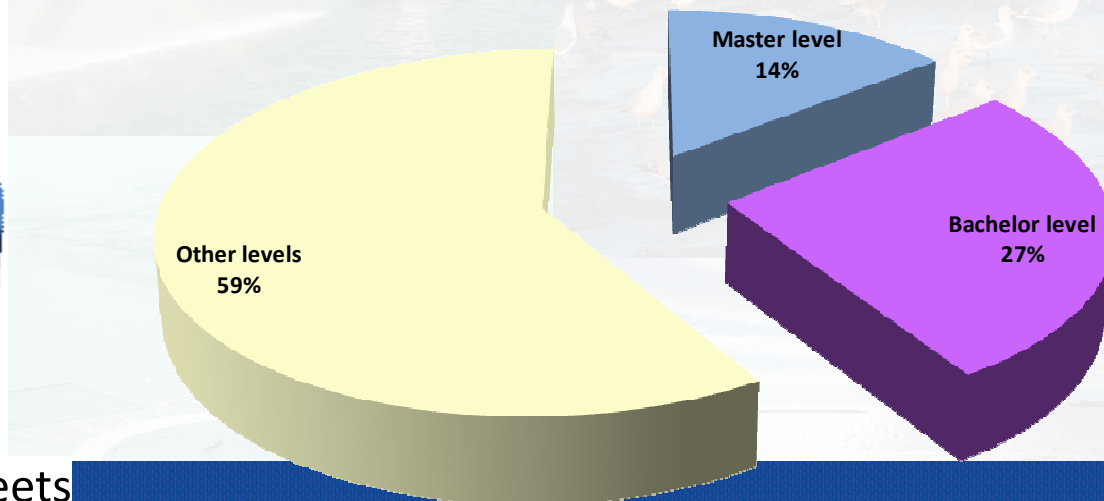
A Capital intensive & innovative Sector

- 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

1st largest and most technologically advanced Fleet



■ Maritime Sector ■ Dredging fleets



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Thank you !

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