



# Technical Visit of a Dredger

EuDA

Thursday 5<sup>th</sup> March 2015, Zeebrugge

European Dredging Association 2015



# Agenda

- EuDA
- Introduction to Dredging



# What is EuDA about ?



## *EUROPEAN DREDGING ASSOCIATION*



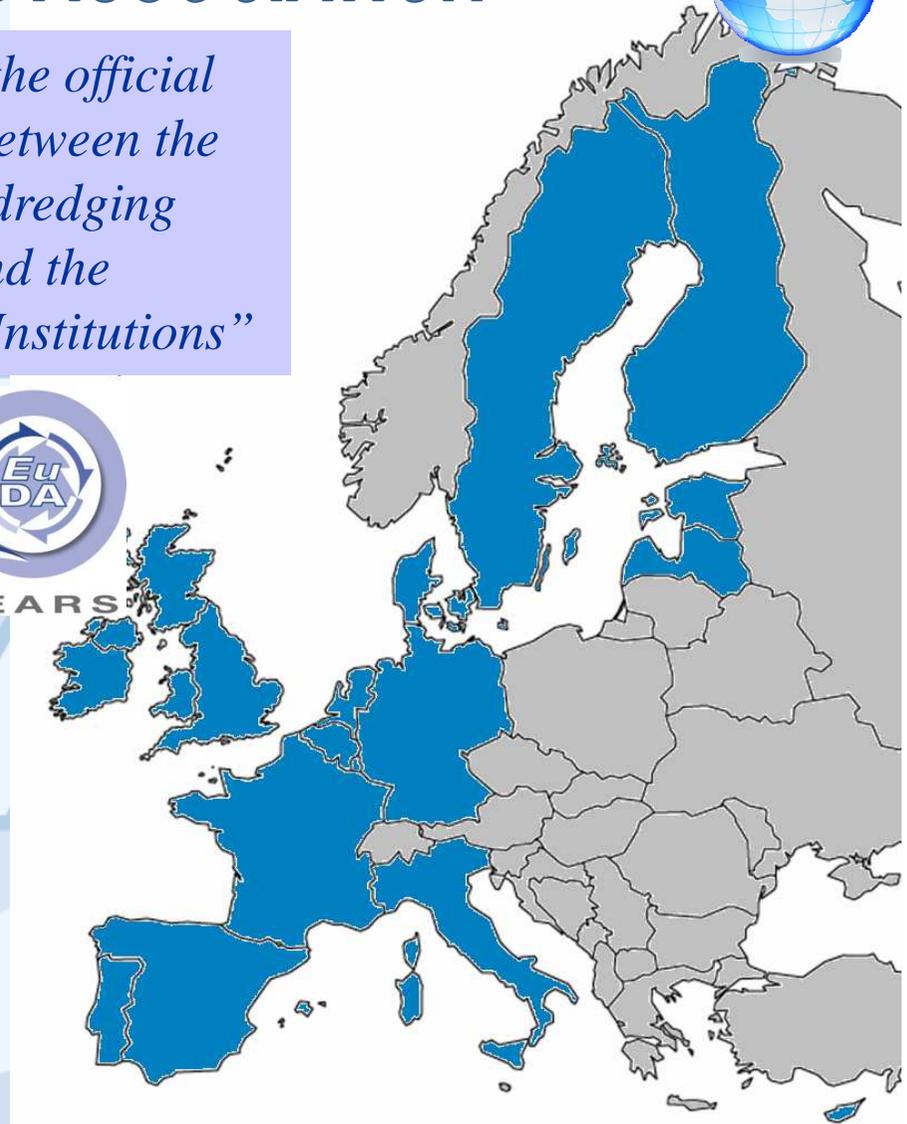


# EUROPEAN DREDGING ASSOCIATION



- founded in 1993
- represents the European Dredging Companies
- from 16 EU Members States
- world leaders (top 4)
- with a turnover (2013): € 8.3 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”*





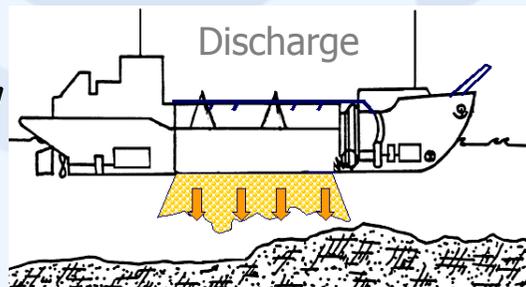
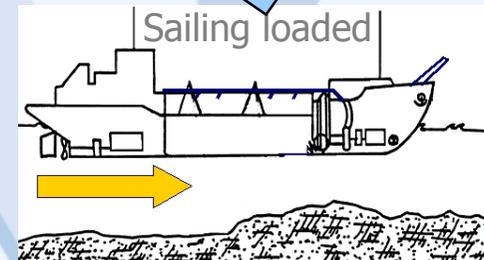
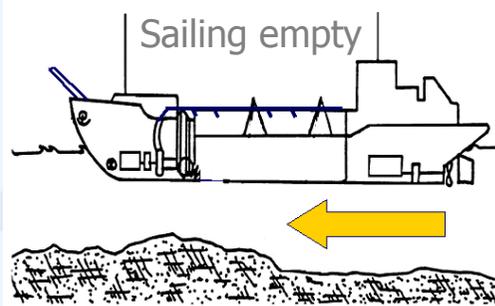
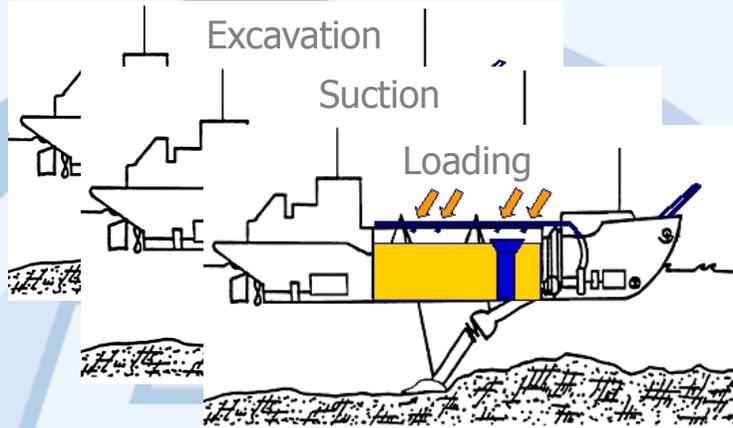
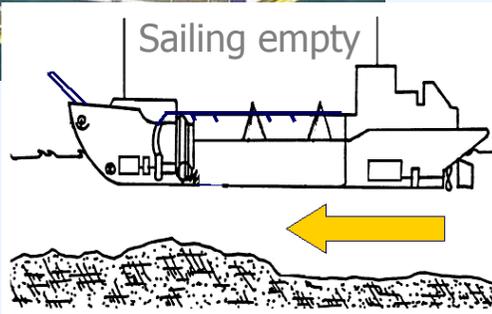
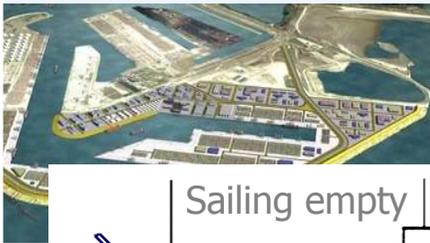
# Introduction to Dredging



# Dredging means transporting



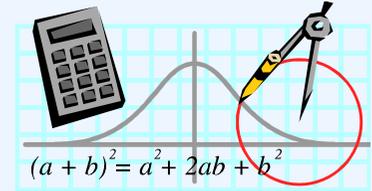
- Sand
- Rock
- Gravel
- Silt



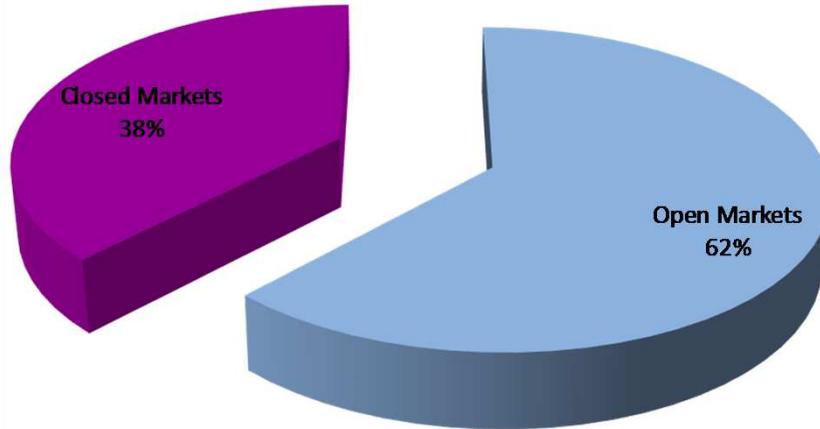
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# Dredging Economics



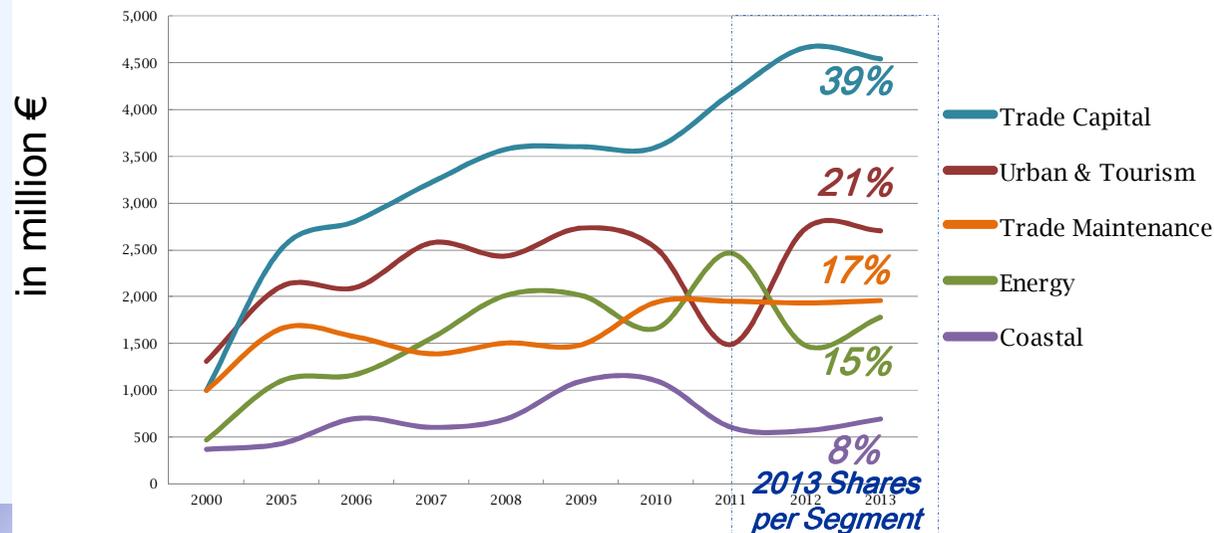
Turnover (2013) € 14 bn



Annual turn-over dredging industry compared with other industries (in billion €, 2013)

Royal Dutch Shell	209
Toyota Motor	182
ArcelorMittal	57
A.P. Møller-Mærsk Group	36
World Dredging Industry	14

## Turnover evolution per driver



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# European Dredgers' Business Model

## From National Dredgers to International Maritime Builders



### 👍 **DREDGING PLUS:**

focus on dredgers' technology + focus on other sciences!

Paradox: Focus + No Focus ??



Results:

- 👉 high added value
- 👉 acyclical industry through diversification in geography and in activities
- 👉 creation of new opportunities

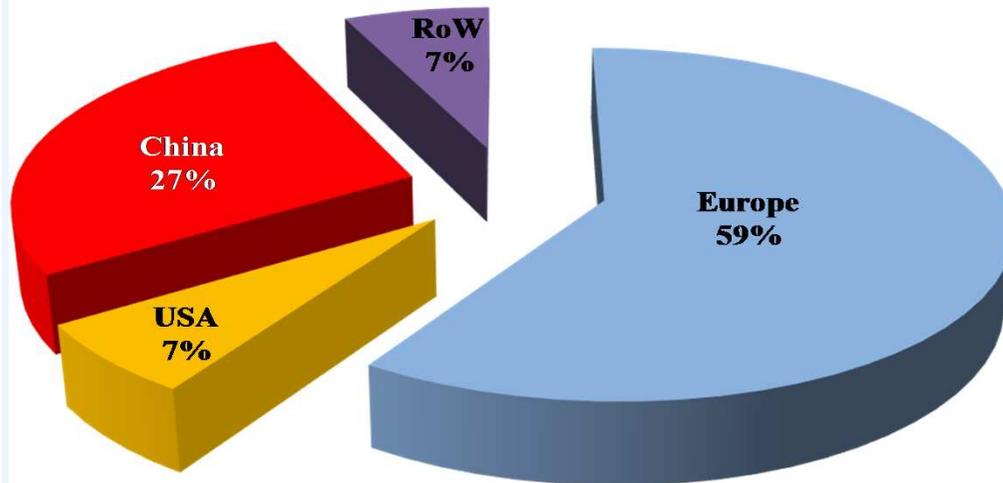


# European Dredgers' Business Model

## High added value



World Dredging Market shares for selected Areas



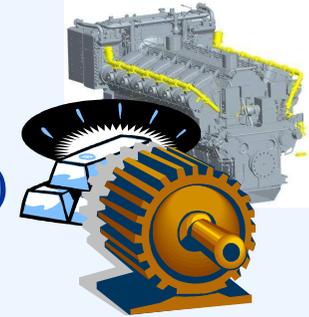
high-tech, high added value, high-wage





# European Dredgers' Business Model

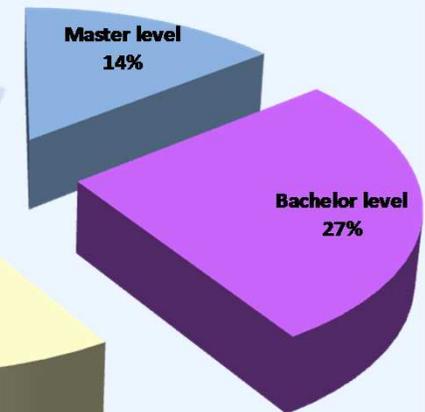
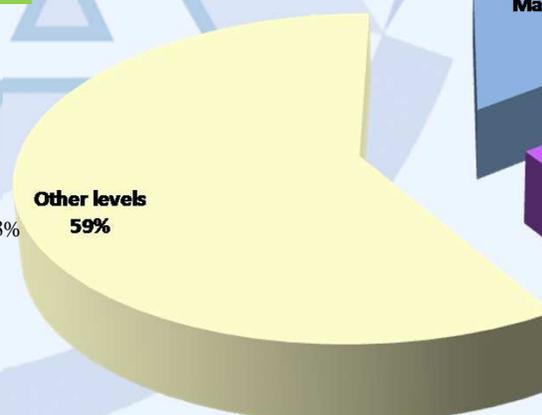
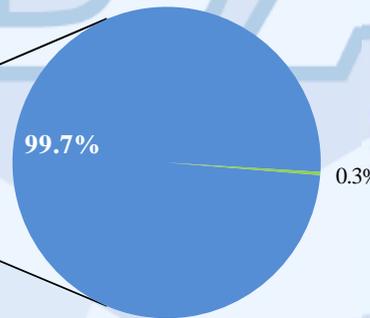
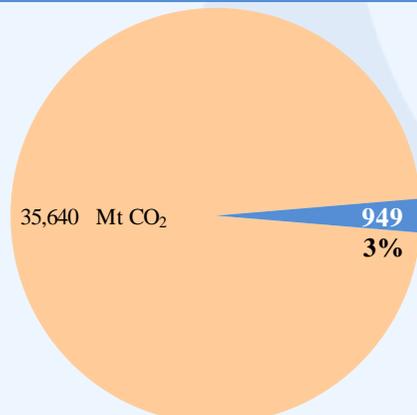
High added value (capital intensive & innovative)



- 2/3 of world's dredging projects (70% outside EU) bringing however 90% return back to Europe
- 7 billion € investments from 2008 to 2012
- 2.5% of total turnover invested in R&D
- largest, most powerful & most technologically advanced Fleet

Maritime Sector (2012):  
3% of global CO<sub>2</sub> emissions

European Dredging Fleet:  
0.3% of Maritime CO<sub>2</sub> emissions



Other CO<sub>2</sub> Sources   Shipping   European Dredging Fleet

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# European Dredgers' Business Model



Acyclical industry (diversification geography/activities)

Dredging is not a problem  
... it is part of the solution !

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

☞ 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”*

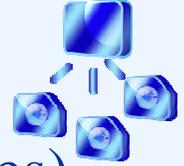
☞ Contaminated sediments on seabed or riverbeds:

☞ *“Environmental dredging”*





# European Dredgers' Business Model



Acyclical industry (diversification geography/activities)

- ✓ Energy enterprises including
  - ↳ Oil & Gas exploration & delivery
  - ↳ Offshore Wind Farms
- ✓ Aggregate mining
- ✓ Coastal Protection & Tourism





# European Dredgers' Business Model

## Creation of new opportunities

Coastal protection

Safe Place of Refuge

Nature development



EcoShape

*"Multipurpose Island"*

**Vlaamse Baaien**  
Veilig, natuurlijk, aantrekkelijk, duurzaam, ontwikkelend

HGO InfraSea Solutions



# 20<sup>th</sup> Anniversary Conference

## Key Messages



In 20 years European dredging companies have evolved

- ☞ from “*mud pushers*” to **World Leaders**;

- ☞ from *specialised sub-contractors* to **main contractors**;

European dredgers continue to provide **indispensable services** to the waterborne transport logistic chain.

In 20 years, European dredging companies have continuously innovated, together with their clients, and

- ☞ increased their performance and efficiency;

- ☞ increased their added value for their clients;

- ☞ broaden their portfolio of more diversified services worldwide.



# 20<sup>th</sup> Anniversary Conference

## Key Messages



In 20 years, European dredging companies have become **stronger**, more **resilient** and more **profitable**.

However, they need **unhindered access** to markets worldwide.

European dredgers build more and more knowledge from a broader and broader range of disciplines and have become experts in the **management of complexity** which implies:

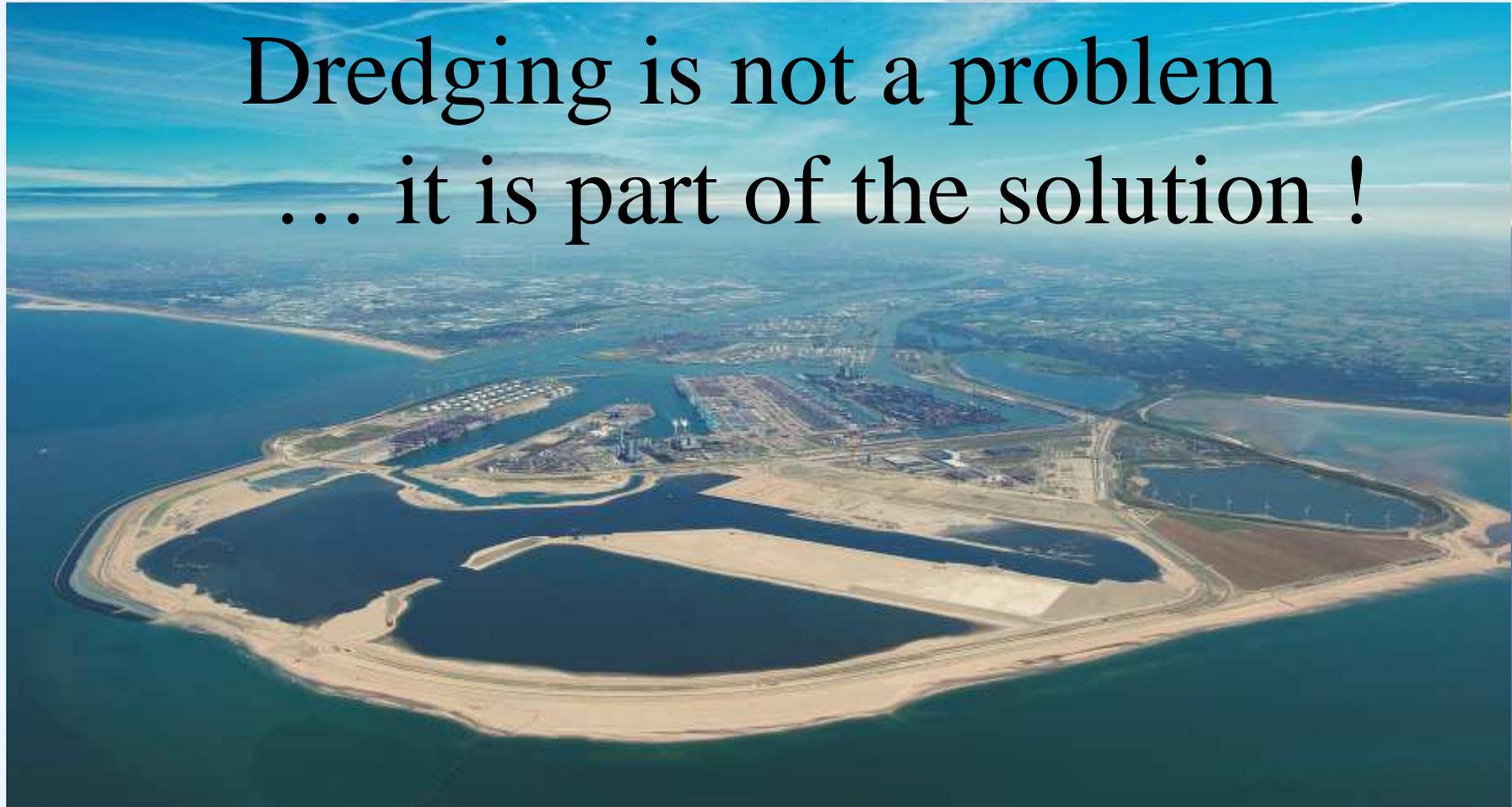
- ✓ solving complex engineering problems but also
- ✓ the management of multidisciplinarity;
- ✓ the management of multiculturality;
- ✓ the building of mutual trust with clients and stakeholders.



# Conclusions



Dredging is not a problem  
... it is part of the solution !





# Thank you !

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