

Maritime Market Snapshot 2019 the Netherlands

October 25th 2019



Commissioned by:
Business Finland

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1. SHIPYARDS

- Two shipyards dominate the regular shipbuilding landscape in The Netherlands: Damen Shipyards and Royal IHC
- In the offshore maintenance segment there is the regular main player Damen Shiprepair, they have also acquired the Singapore owned Keppel Verolme (Rotterdam),
- in the regular The Dutch super yacht sector has witnessed a remarkable increase over the past five years. The main yacht builders capable of building 100+ meter yachts are Feadship (Royal De Vries and Royal Van Lent) and Oceanco.
- Small to medium sized shipyards are:
 - Newbuilding: Ferus Smit, Tecla Bodewes Group (three shipyards), Veka Group, Niestern Sander, Holland Shipyards, Neptune and Royal Bodewes
 - Ship repair: Niestern Sander (owned by ship owner Wagenborg)
 - Yachts >50 m: Royal Huisman, Amels (Damen), Heesen, Moonen, Icon, HJB and Vitters
 - Inland ship construction: Kooiman Group, De Kaap, Concordia (acquired recently by Damen) and several brokers with shipbuilding capacity

DAMEN SHIPYARDS GROUP

Ship repair

Offshore
and Ship
building

Web-site	www.damen.com
Location	Gorinchem (headquarters), 32 yards worldwide
Ownership	100% Damen family owned
Type of ships	Tugs and workboats, small cargo vessels, yachts, offshore and crewing suppliers, dredgers, naval and inspection vessels
Company information	Largest shipyard in NL, with yards in a.o. Vietnam, Qatar, Romania, Turkey and China. USP is fast delivery of (semi)standardised vessels and a strong customer focus. Ship repair and offshore conversions at Damen Shiprepair (15 shipyards worldwide). Strong sales position in upcoming markets in S-America and Africa. Turnover : € 2 bln, employees: 12,000 (3,500 in NL), annual deliveries 2018: 176.
Contact information	CEO: René Berkvens Tel: 0183-639911 E-mail: rene.berkvens@damen.com
Business potential for Finnish suppliers	Most sourcing and engineering is done in The Netherlands, but increasingly decisions are made by the local yards. Key strategy: takeover major shiprepair docks, increasing focus on expedition cruisers and passenger vessels in all sizes, running for large submarine order in NL. Core market tugs under pressure since 2017. Very broad range of products needed, competitive pricing and after sales services is a must. General suppliers and dedicated navy, dredging, fishing, offshore as well.



ROYAL IHC

Offshore
and Ship
building

Web-site	www.ihcmerwede.com
Location	Kinderdijk (headquarters)
Ownership	Indofin 62% (private owned, De Bruin family) rest by Rabobank (10%) and personnel (28%)
Type of ships	Custom built trailing suction hopper dredgers and cutter suction dredgers. Standard beaver dredgers. Offshore construction vessels are going slow. At the moment working on several dredgers/cutters for Deme as well as international governments.
Company information	Turnover 2018 € 942mio with 3,000 employees. Five locations in Holland, largest ships are constructed in Krimpen/Rotterdam area and Kinderdijk. Hull building in NL/Turkey. The company is currently in reorganizing processes, and wants to further optimize and internationalise production. Besides shipbuilder, supplier of dredging and special components as well.
Contact information	CEO: Dave VanderHeyde Tel: +31 (0) 184-411555 E-mail: info@ihcmerwede.com
Business potential for Finnish suppliers	Marine equipment suppliers: offshore and dredging. Technical co-operation with Finnish yards or technology players, possibly in the field of arctic operations, mining, wind farms or life cycle support.



Web-site	www.feadship.nl
Location	Aalsmeer (Royal De Vries), De Kaag (Royal Van Lent)
Ownership	De Vries family, Louis Vuiton MH
Type of ships	Superyachts up to 160 meter. Currently 18 projects under construction, totalling a record of 1,380 m.
Company information	Feadship is since 1949 the commercial co-operation of De Vries, Van Lent and De Voogt Naval Architects. In 2008 Louis Vuiton took over Van Lent. Hull construction at Slob Shipyard. De Vries Shipyards in Aalsmeer and Makkum. Recent construction of a new yard in Amsterdam (<160m).
Contact information	CEO: Henk de Vries Tel: +31 23 524 7000 E-mail: info@feadship.nl
Business potential for Finnish suppliers	Top notch superyacht building, with much of the engineering in-house. Possible cross over with Finnish suppliers to the cruise shipping sector. Apart from marine equipment, also possibilities for luxury leisure equipment. Energy saving solutions have the attention, as well as new materials and domotica.



Web-site	www.oceancoyacht.com
Location	Alblasserdam
Ownership	Mohammed al-Barwani
Type of ships	Superyachts up to 140 meter (expanding their capacity). Motoryachts, and recently also a large sailing yacht.
Company information	This company has changed ownership a few times in the last ten years (South African owners, Greek owner and now Omani owner). Current owner invests in the yard and seems to have a long term perspective. In 2019 they took over a large construction site in Zwijndrecht.
Contact information	CEO: Marcel Onkenhout Tel: +31 78 699 5399 E-mail: info@oceanco.nl
Business potential for Finnish suppliers	This yacht builder works structurally with subcontractors and limited in house fabrication. Hull construction done by Zwijenburg yard, super structures from Poland. Their new campus in Zwijndrecht offers possibilities to all kind of suppliers, from steelworks to innovative new solutions. Marstrat can make matches if needed.



2. MAIN SHIP DESIGN & ENGINEERING COMPANIES

- Ulstein Sea of Solutions (www.seaofsolutions.nl). Contact Edwin van Leeuwen (+31 10 475 0011). Design of offshore construction ships
- Vuyk Engineering Rotterdam (www.vuykrotterdam.com). Contact Marc Oele (+31 10 450 2500). Part of the IHC group. Design and engineering of dredgers, offshore ships, special ships, operational consultancy to heavy lift ship owners
- Offshore Ship Designers (www.offshoreshipdesigners.com). Contact Michiel Wijsmuller (+31 25 554 5070). Design of offshore suppliers and tugs
- Groot Ship Design (www.grootshipdesign.nl). Contact Bart Groot, +31 592 675 767). Shipdesign coastal vessels (bulkiers, tankers, container feeders, MPP)
- De Voogt Naval Architects (www.feadship.nl). Contact Mrs. Bregje Lodewicus (+31 23 524 7000). Design and engineering of superyachts
- C-Job & Partnes (www.c-job.com.nl). Contact Bas Jan Faber (+31 88 02 43700). Quickest growing design bureau in the Netherlands, 5 locations including Ukrain and USA. Ship design and engineering, Buidling supervision and on-site project assistance.
- Conoship (www.conoship.com) . Contact Geert Dokter (+31 50 5268822). Shipdesign/detailengineering coastal vessels (bulkiers, tankers, container feeders, MPP)
- Gusto MSC (www.gustomsc.com). Contact Nils van Nood (+31 10 288 3000). Large player in customized offshore designs.

3. MAJOR MARINE ENGINE, PROPULSION AND MACHINERY MANUFACTURERS, MAJOR MACHINE WORKSHOPS

- Bosch Rexroth – production of drives and automation technology; Dutch subsidiary in Boxtel, tel +31-411 651 95, www.boschrexroth.com
- Huisman Equipment – turn key engineer and manufacturer of pipelaying systems, drill ships and heavy cranes, tel +31-88 070 2222, www.huismanequipment.com
- Kranendonk BV – carpentry and ships interiors, tel +31-10-4329011, www.kranendonkbv.nl
- C-Nautical – custom built winches and deck equipment, tel +31-598 361 664, www.c-nautical.com
- Veth Propulsion – fast growing thruster supplier, tel +31-78 6152266, www.veth.net
- Wärtsilä – world wide distribution of spareparts, design and integration of special propulsion systems, recently added automation, tel +31-88-9804000, www.wartsila.com/nld
- Yanmar Europe – marine engines, European distribution center, tel +31-36 5493200, www.yanmar.nl
- Alpatron Marine – world renowned supplier of bridge solutions, tel +31-10 45340000

4. MAJOR MARINE DEALERS, AGENTS, CONSULTANTS

- Eriks – www.eriks.nl (former econosto: valves and fittings trading house)
- Hendrik Veder Group – www.hendrikvedergroup.com (rigging and cables)
- Marstrat – www.marstrat.nl (maritime consultants)
- Pon Power – www.pon-cat.com (marine engines and spares)
- Promac – www.promac.nl (engines, castings, cranes, misc.)
- CIG Groningen – www.centralindustrygroup.com (several equipment)
- Schmitt Anchors – www.schmitt-anchors.nl (anchors and cables)
- Theunissen Technical Trading – www.tttbv.nl (components)

Port repair and services in Rotterdam area by: Damen Shiprepair, Eerland Shiprepair, Rotterdam Offshore Group, Serdijn Port Repair and Wetering Ship Repair. Often combined with dealerships and spare part services.

5. BIG TURN KEY CONTRACTORS

- Alewijnse Holding – www.alewijnse.com (E&A)
- Bakker Sliedrecht – www.bakkersliedrecht.com (E&A), part of the PON group
- Central Industry Group – www.centralindustrygroup.com (Steel packages, design, equipment)
- CroonWolter & Dros Electrotechniek – www.croonwolterendros.nl (Electrical installations)
- Eekels TBI – www.eekels.com (E&A)
- Heinen & Hopman – www.heinenhopman.com (HVAC)
- Marine Service Noord – www.marine-service-noord.nl (Engine room installation)
- Wolfard & Wessels – www.wolfard.nl (Engine room installation), part of the Heinen Hopman group
- Alpatron – www.alpatronmarine.com (integrated bridge solutions)

6. SHIPBUILDING ASSOCIATIONS / COOPERATIONS



- Netherlands Maritime Technology (NMT)- www.maritimetechnology.nl (shipyards and suppliers)



- IRO – www.iro.nl (oil and gas supply industries)



- Since October 2019 most HISWA members have moved to NMT www.maritimetechnology.nl



- Dutch Maritime Network – www.maritiemland.nl (maritime cluster)



- DEAL Drecht cities – www.dealdrechtcities.nl (marketing promotion six drecht cities and economic development company for Dutch Maritime Delta)

7. SHIPOWNERS

- Anthony Veder (gas and chemical tankers, www.anthonyveder.com)
- Boskalis (including tug operator Smit International, Fairmount, and heavy transport specialist Dockwise, www.boskalis.com)
- Holland America Line (cruise ships, European branch, www.hollandamerica.com)
- Jumbo Shipping (heavy transports, www.jumbomaritime.nl)
- Spliethoff (including short sea operator Wijnne & Barends and heavy transport Big Lift, www.spliethoff.com)
- Van Oord (dredging and offshore, www.vanoord.com)
- Vroon (including Vroon Offshore Services, MPI Offshore, Ivy Ships and Lifestock express, www.vroon.nl)
- Royal Wagenborg (including ship/shiprepair yard Niestern Sander, www.wagenborg.com)

8. PORTS

- Port of Rotterdam, by far the biggest port in the Netherlands. Almost 1600 companies at the location, added value of 45,6 bln Euro (www.portofrotterdam.com)
- Eemshaven, second port, located in the northern part of the Netherlands (www.groningen-seaports.com)
- Most ports have similar focus on the future e.g.:
 - - Logistics, port concepts
 - - Smart port
 - - Green ports
 - - Sustainable ports



9. OIL AND GAS COMPANIES

Oil and gas majors:

- Royal Dutch Shell, head office in The Hague (www.shell.nl)
- NAM (www.nam.nl)
- Oranje Nassau Group (www.oranje-nassau.com),
- Tulip (www.tulipoil.com), several international (tax) headoffice

Offshore contractors:

- Allseas Engineering (offshore pipeline construction and subsea installation, (www.allseas.com)
- Bluewater (FPSO, FSO, Single point moorings (www.bluewater.com)
- Fugro (geotech, survey, subsea, geoscience and –consultancy (www.fugro.com)
- Heerema Marine Contractors (transport, installation and removal of offshore facilities and subsea operations (www.hmc.heerema.com)
- SBM Offshore (floating production and mooring systems (www.sbmoffshore.com)

10. BIG PROJECTS (1)

Offshore wind

Spectacular increase of offshore wind capacity in the North Sea create many opportunities for European energy companies, offshore installation firms, shipyards, shipowners and technical companies

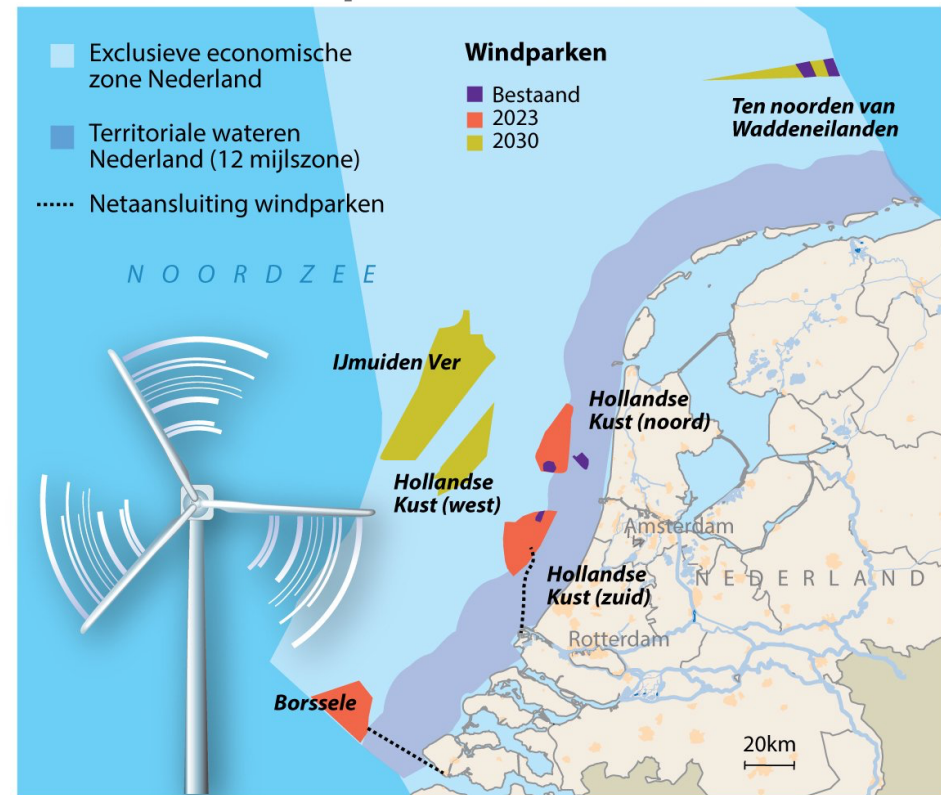
like Sif. Radical innovations drive cost price of installation down.

Ambition: 4,5 GW 2023, 7 GW 2030

Key players:

- Eneco and Shell
- Van Oord and Boskalis
- Siemens
- SIF Group
- Huisman
- Seazip
- Royal IHC
- Vroon

Nederlandse windparken in de Noordzee



bron: rijksoverheid.nl

ANP

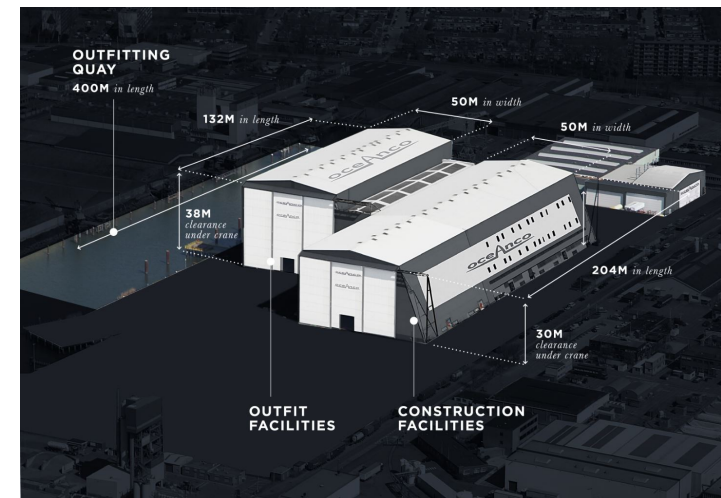
10. BIG PROJECTS (2)

Professionalisation of superyacht builders: new facilities

New shipyard Royal Van Lent in Amsterdam



New shipyard and R&D/building facility Oceanco in Zwijndrecht



11. TOWARDS A SMART FUTURE

Key policy strategies:

- **Smart ships**, cooperation in the Netherlands seems to be shattered. Many initiatives are taken, current projects e.g.:
 - Joint Industry Project Autonomous Shipping
 - Smart shipping
 - Safer Autonomous Systems
 - Programme Maritime operations
- **Smart ports**
 - Green ports
 - Sustainable port
 - Port logistics
- **Smart maintenance**
 - in close cooperation with suppliers and shipowners, information is gathered and used to optimize maintenance within the shipping- and offshore industry.
- **Environmental affairs**
 - main developments are visible within the shipping and port industries. Energy transition and clean ship's are main topics



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