



Maritime Monitor 2024

News

16 December 2024 #Sustainability Downloaded on 30-05-2026

The maritime industry in hard digits

Last week, the Maritime Monitor 2024 was launched. The Maritime Monitor is published annually on behalf of the Ministry of Infrastructure and Water Management (IenW). As the umbrella organisation for the maritime cluster, the Netherlands Maritime Land (NML) has a coordinating role. The report paints a picture of the various trends at play within the maritime sector, through hard figures. It is important to communicate that the monitor in general terms concerns the 2023 figures.

The latest edition of the Maritime Monitor uses the three main themes **'People'**, **'Economy'** and **'Sustainability'** to illustrate the state of the Dutch maritime sector:

As a shipping representative and NML member, the KVNR is closely involved in the report, and for each main theme we asked one of the in-house experts to share their findings on the subject of shipping.

People

Economy

Sustainability

People - Noa Vork

The main theme **'People'** covers a comprehensive overview of the current workforce in the maritime cluster, including seafaring. This sub-area provides information on the employed people within the entire maritime cluster and the relevant trends of that labour market.

Looking at the figures, several points stand out. First is the number of people employed in maritime shipping remains relatively stable, this initially seems like a positive development but

with the growing demand for personnel, this would ideally see an increase. We should also remember that this is all seafaring and shore positions, but only of those on the payroll of Dutch companies. Due to the highly internationalised labour market, the 20,000 or so seafarers are not shown.

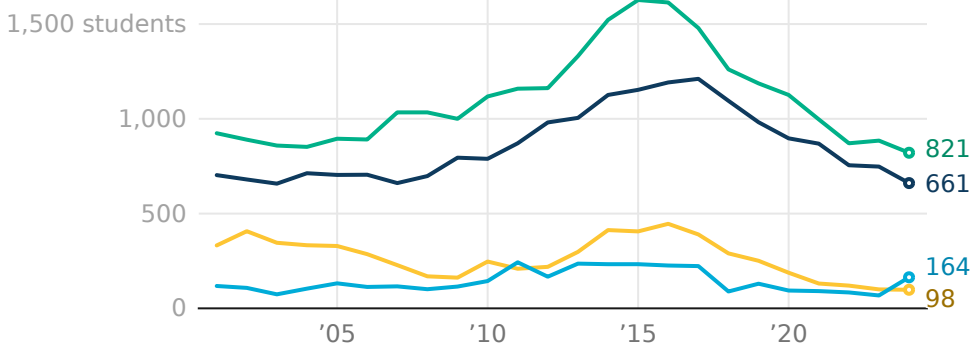
It is also notable that the percentage of women within the maritime cluster just does not seem to be able to break through the 20% barrier. Enrolment in maritime education has also been steadily declining in recent years. Knowing that the latter will be down again by 2024 shows that we as a sector need to broaden our horizons and actively work together to create a more inclusive and attractive working environment. There is untapped potential among target groups that we currently do not know how to reach sufficiently.

We see these challenges reflected within our own KVNR project 'GaTochVaren!' as well. Of the young people interested in the seafaring profession who enthusiastically sign up, as many as 88.6% are male.

Total number of students in regular Dutch maritime education

note: Secondary vocational education (MBO) and higher vocational education (HBO)

— HBO — MBO 4 — MBO 3 — MBO 2



NB: The reference date is October 1 of the relevant year.

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Economy - Renze Boersema

At first glance, the year 2023 appears to be an economically bad year for shipping, but this is only the case if 2023 is being compared to the year 2022. In fact, the year 2022 was an economic peak year for the entire cluster. That year, the companies in the cluster achieved a combined turnover of €98.6 billion, which was about 4.1% of gross domestic product at the time.

It is important to stress that the corona pandemic and the war in Ukraine affected the prices of raw materials, energy and fuels. Together, this has had a major impact on sales and pricing across the cluster. All this contributed to 2022 being an above-average 'good' year for the sector in economic terms.

In 2023, this uncertainty has normalised somewhat, reflected in a decrease in total turnover to €92.7 billion, which still represents 3.5% of gross domestic product.

Zooming in on shipping, we see that shipping itself also shows a correction compared to 2022 due to, among other things, increased labour costs to compensate for inflation. Nevertheless, compared to the long-term average (2011-2023), 2023 remains a very good year when looking at, for instance, the direct value-added of maritime shipping.

Maritime shipping remains a major pillar of our economy in 2023. The improved financial performance of the sector is also necessary to further shape the further sustainability and rejuvenation of the fleet in the coming years.

		2021	2022	2023	Δ23-22
Omzet		8,01	10,33	9,60	-7,1%
waarvan export		6,00	7,75	7,22	-6,8%
Productiewaarde		7,94	10,25	9,55	-6,8%
Toegevoegde waarde	direct	2,04	2,86	2,41	-15,6%
	indirect	1,15	1,09	1,09	-0,1%
	totaal	3,19	3,95	3,50	-11,4%
Werkgelegenheid (in werknemers)	direct	7.400	7.430	7.500	0,9%
	indirect	9.327	9.065	8.925	-1,5%
	totaal	16.727	16.495	16.425	-0,4%

Sustainability - Nick Lurkin

The shipping industry is steadily making a transition to more sustainable technologies and fuels. In 2023, CO2 emissions from the shipping sector on Dutch territory fell to 5 million tonnes of CO2, partly due to stricter emission standards. These emissions are the calculated emissions from all seagoing vessels that were in the Dutch part of the continental shelf in 2023.

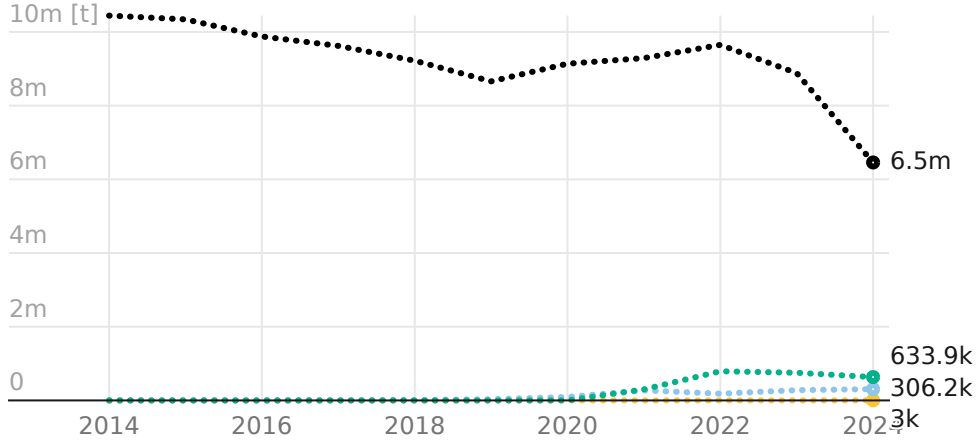
For emissions from ships over 5,000 GT sailing under the Dutch flag, the KVNR primarily looks at emissions reported at the European level:

There is also something to be said about the development of alternative fuels. Indeed, globally, the proportion of ships that can run on alternative fuels is rising. By 2023, 7.4% of the operational fleet could operate on renewable fuels, with almost 50% of new ships equipped to do so. LNG remains key, but methanol, LPG and ammonia are gaining ground, especially in container shipping.

The use of wind assistance (WASP) is also increasing, with dozens of Dutch ships using it to reduce their fuel consumption. Battery systems are also on the rise, although these are mainly hybrid systems. The fact is that alternative fuels are still far too few in volume compared to fossil fuels, as the Port of Rotterdam Authority's bunker data show:

Bunker volumes Port of Rotterdam over the past 10 years

••• Fossil fuels [t] ••• Biofuels (blended) [t] ••• Methanol [t] ••• LNG [t]



NB: Data bunker volumes untill Q3-2024

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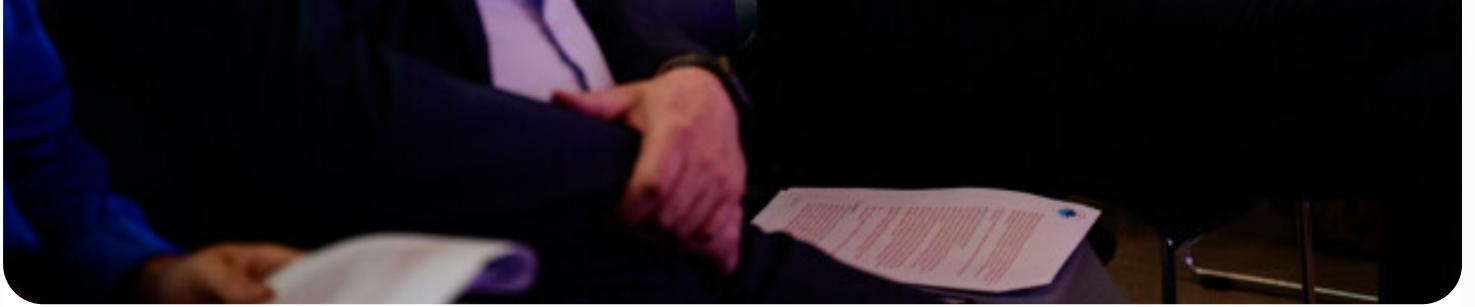
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