

Netherlands Sea Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Netherlands Sea Freight Transport Market size is estimated at USD 6.31 billion in 2025, and is expected to reach USD 7.82 billion by 2030, at a CAGR of 4.4% during the forecast period (2025-2030).

The Netherlands is the maritime center of Europe. It is also home to one of the strongest and most complete maritime clusters in the world. Its all-round suitability and high standards characterize the maritime cluster in the Netherlands.

This strong position is made possible by a multifaceted maritime industry, a very diverse fleet of sea-going vessels, Europe's largest inland navigation fleet, and the highest port capacity in Europe. In addition, the Netherlands is a global leader in the provision of offshore services and the development of complex maritime systems.

Over half the freight transported to and from the Netherlands is carried by seagoing vessels. At seaport terminals, cargo is transhipped for further transport by road, rail, waterways, and pipelines.

The government of the Netherlands has been actively supporting the development of the Dutch Maritime Network (Stichting Nederland Maritiem Land) and the branding of its trademark "Maritime by Holland."

The government also intends to strengthen the position of seaports, for example, by further developing Maasvlakte 2 in Rotterdam, through new sea locks in IJmuiden and Terneuzen, and by investing in roads, railways, and waterways that connect to ports. This will boost the maritime industry's growth in the Netherlands.

Netherlands Maritime Market Trends

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Cross Border E-commerce Growth

Global e-commerce expansion continues to redefine the shape and complexity of supply chains. It is no secret that the world of e-commerce has been booming for a while. The popularity of online shopping continues to increase rapidly in the Netherlands. Dutch cross-border e-commerce is increasing significantly, with 95% of Dutch consumers shopping online nowadays, according to a survey. Over Q1 2023, Dutch consumers spent approximately EUR 1 billion (USD 1.08 billion) on foreign e-commerce sites. This figure is higher than that obtained in the previous quarter and an increase of about EUR 100 million (USD 107.62 million) when compared to the same period in 2022.

It is interesting to note that China is one of the most popular countries for cross-border purchases originating in the Netherlands. According to a Cross-Border E-commerce Shopper Survey conducted in 2022, about four out of ten Dutch respondents who purchased goods online from outside the country did so through a website in China. The growth of cross-border ecommerce promotes international trade. The growing cross-border ecommerce is supporting the growth of the maritime industry in the Netherlands.

Re-exports Contributing to the Market Growth

In 2022, the Netherlands exported EUR 731.4 billion (USD 787.13 billion) worth of goods, of which EUR 368.3 billion concerned re-exports. It is the first time that the value of re-exports exceeded domestic exports. Statistics Netherlands (CBS) reports this in conjunction with the publication Dutch Trade in Facts and Figures 2023. In 2022, the value of re-exports was nearly 58% higher than in the pre-pandemic year 2019. As a result, the total export value also increased by EUR 236.5 billion (USD 254.52 billion) (48%). The larger increase in the value of re-exports is partly due to the relatively sharp rise in re-exports of mineral fuels. These saw a substantial price increase in 2022, partly due to the outbreak of the war in Ukraine.

In 2022, more than half (55%) of Dutch goods exports were destined for the five main export partners: Germany, Belgium, France, the United Kingdom and the United States. Exports to nearby trading partners, in particular, consisted largely of re-exports. For Germany, France, Italy, and Spain, the share amounted to more than 60% in 2022. Re-exports of crude petroleum and (liquefied) natural gas play a major role here. When looking at exports to the UK, domestic exports are most important, with re-exports accounting for 41%. These re-exports contributed to the growth of the maritime industry in the Netherlands in 2022.

Netherlands Maritime Industry Overview

The maritime industry of the Netherlands is fragmented in nature, with a mix of global and local players, which makes the sector highly competitive. Some of the strong players in the country include Maersk, NleDutch, Eimskip, DFDS, Nirint Shipping B.V.

Local enterprises dominate the market in the Netherlands. The growth of cross-border e-commerce has aided the majority of firms in expanding their operations. The Netherlands' imports and exports rely heavily on sea freight transportation, which allows companies to capture a large portion of the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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