



DREDGING IN FIGURES

2007



Assignment & Survey method

- Develop and publish regularly key facts and figures about the industry

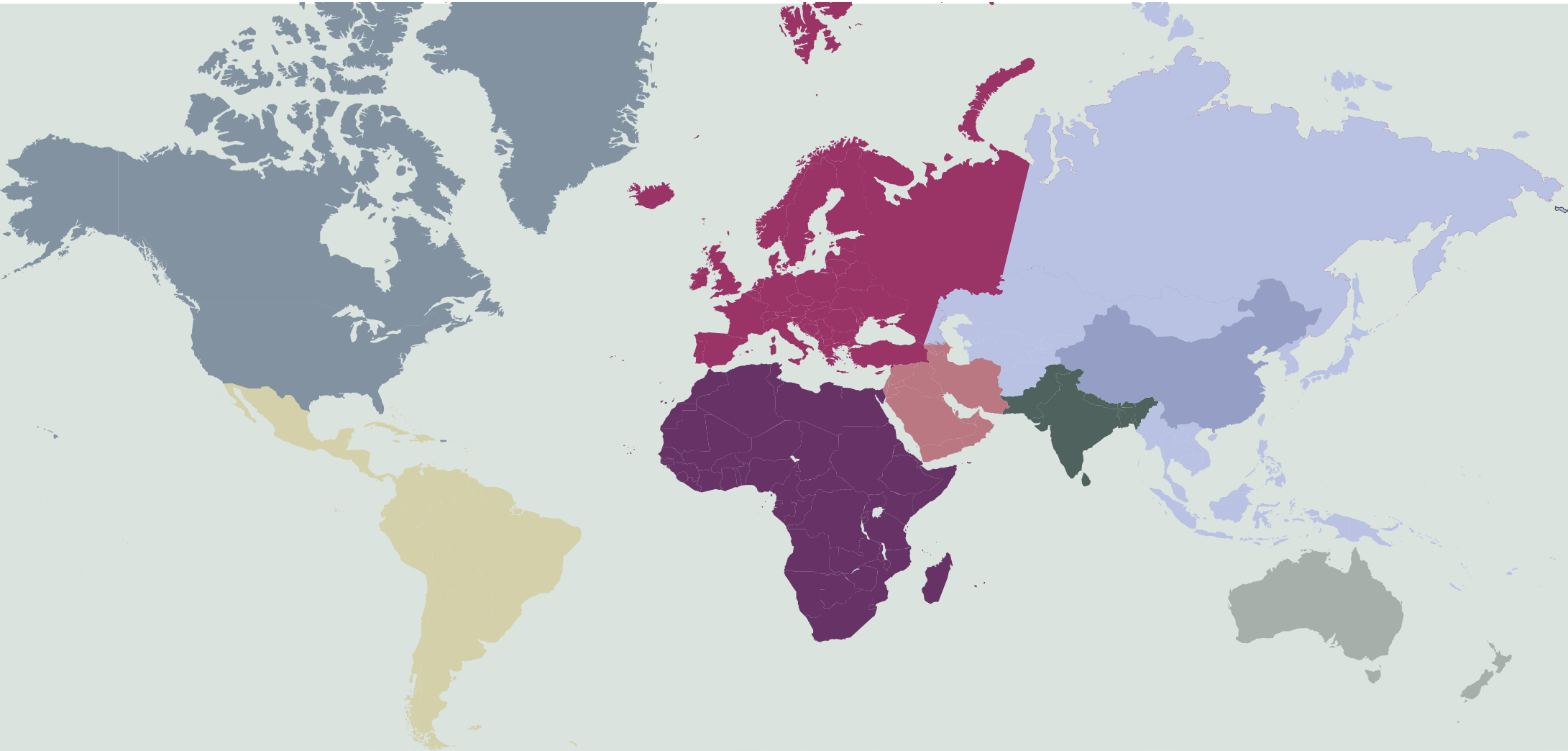
- Method

- Delphi survey amongst members
- Company reports

- Members IADC

DEME NV, Zwijndrecht (Belgium); Jan De Nul NV, Aalst, (Belgium); Rohde Nielsen A/S, Copenhagen (Denmark); Penta-Ocean Construction Co. Ltd., Tokyo (Japan); TOA Corporation, Tokyo (Japan); Hyundai Engineering & Construction Co. Ltd., Seoul (Korea); Royal Boskalis Westminster NV, Papendrecht (Netherlands); Van Oord NV, Rotterdam, (Netherlands); Flota Proyectos Especiales, S.A. (Grupo ACS), Madrid (Spain); Gulf Cobla LLC, Dubai (UAE), National Marine Dredging Company, Abu Dhabi (UAE)

Definition regions



Turnover per region 2007

in mln. €

	open market	closed market	total	%
Africa	430	100	530	6%
North America	15	550	565	6%
Latin America	400	40	440	5%
Europe	1,640	65	1,705	18%
Middle East	3,035	50	3,085	33%
India	325	210	535	6%
Asia	335	350	685	7%
China	150	1,365	1,515	16%
Australia	275	10	285	3%
total	6,605	2,740	9,345	

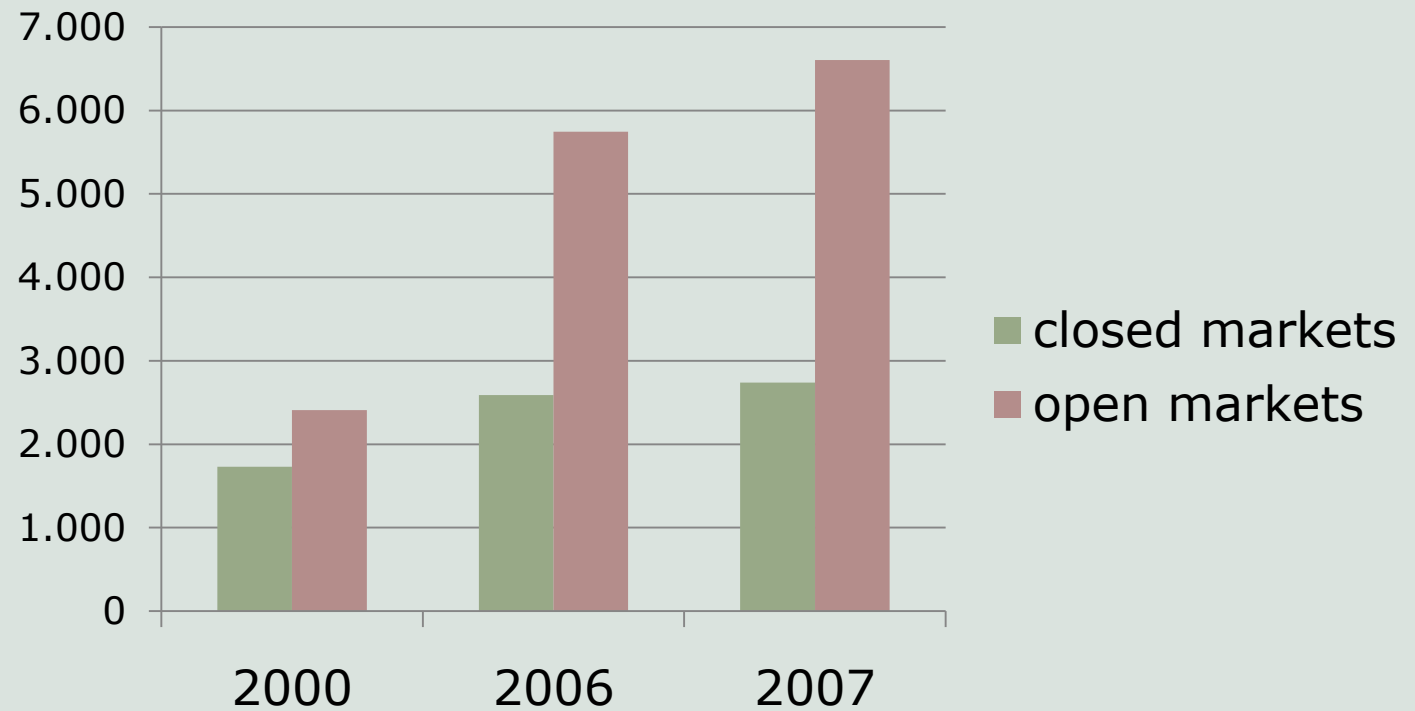
(including € 1,110 in stone works)



Development per region

	2007 in mln. €	change last year	change 2000
Africa	530	18%	121%
North America	565	-24%	-37%
Latin America	440	17%	42%
Europe	1,705	7%	113%
Middle East	3,085	30%	1302%
India	535	29%	133%
Asia	685	0%	63%
China	1,515	6%	63%
Australia	285	2%	185%
total	9,345	12%	126%

Market shares



- Turnover IADC members in 2007 € 5,715 (2006: € 4,745) *dredging only*
- IADC members' share of *total* market 61% (2006: 57%)
- IADC members' share of *open* market 87% (2006: 83%)



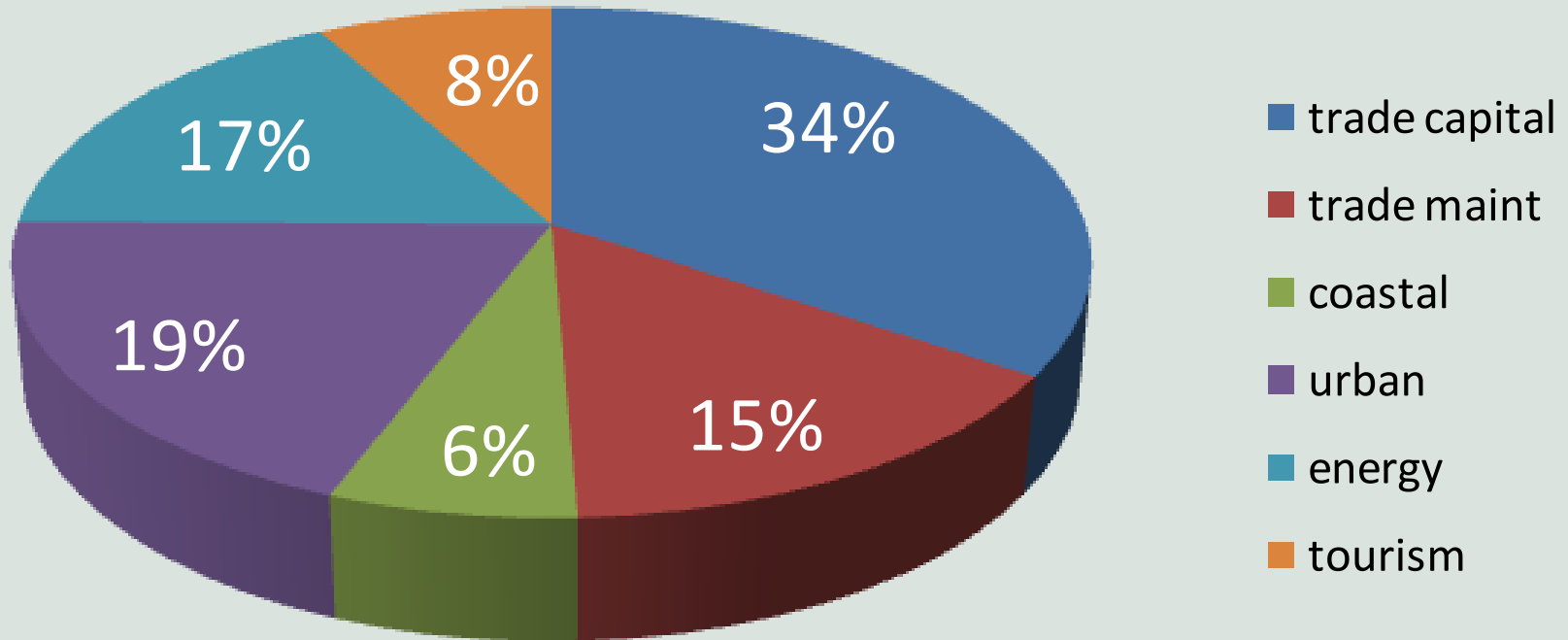
Industry drivers

- Trade
 - Capital
 - Maintenance
- Coastal Defense
- Urban Development
- Energy
- Tourism
- Environment

- Environmental Aspects
 - Integrated in other drivers;
 - Purely environmental dredging not substantial;
 - In all projects EIA, monitoring, mitigation and compensation



Turnover per driver 2007



Development per driver

	2007 in mln. €	change last year	change 2000
trade capital	3,220	16%	222%
trade maintenance	1,390	-11%	39%
coastal	605	-14%	68%
urban	1,810	27%	48%
energy	1,555	32%	238%
tourism	765	11%	681%
total	9,345	12%	126%

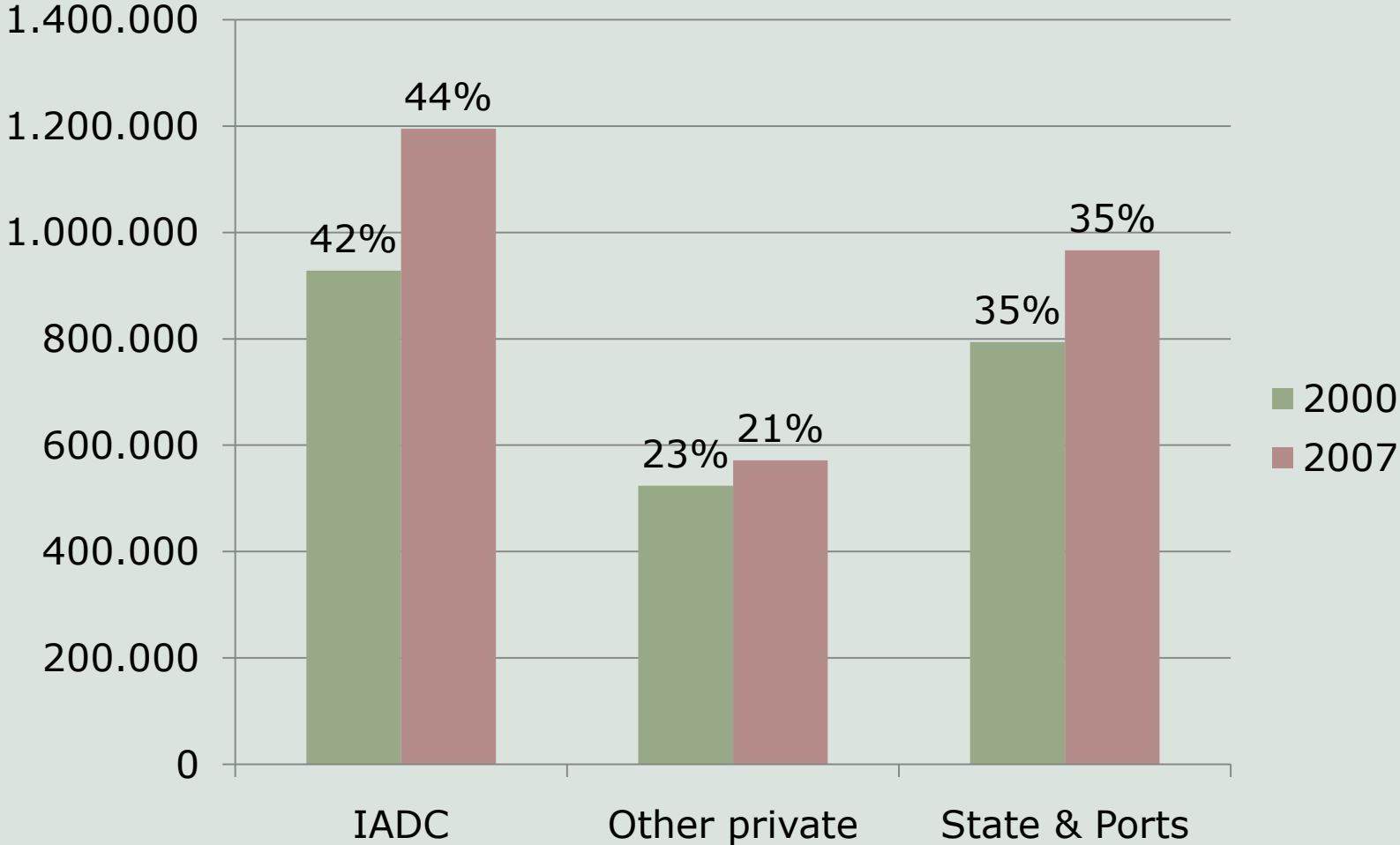


Industry drivers - conclusions

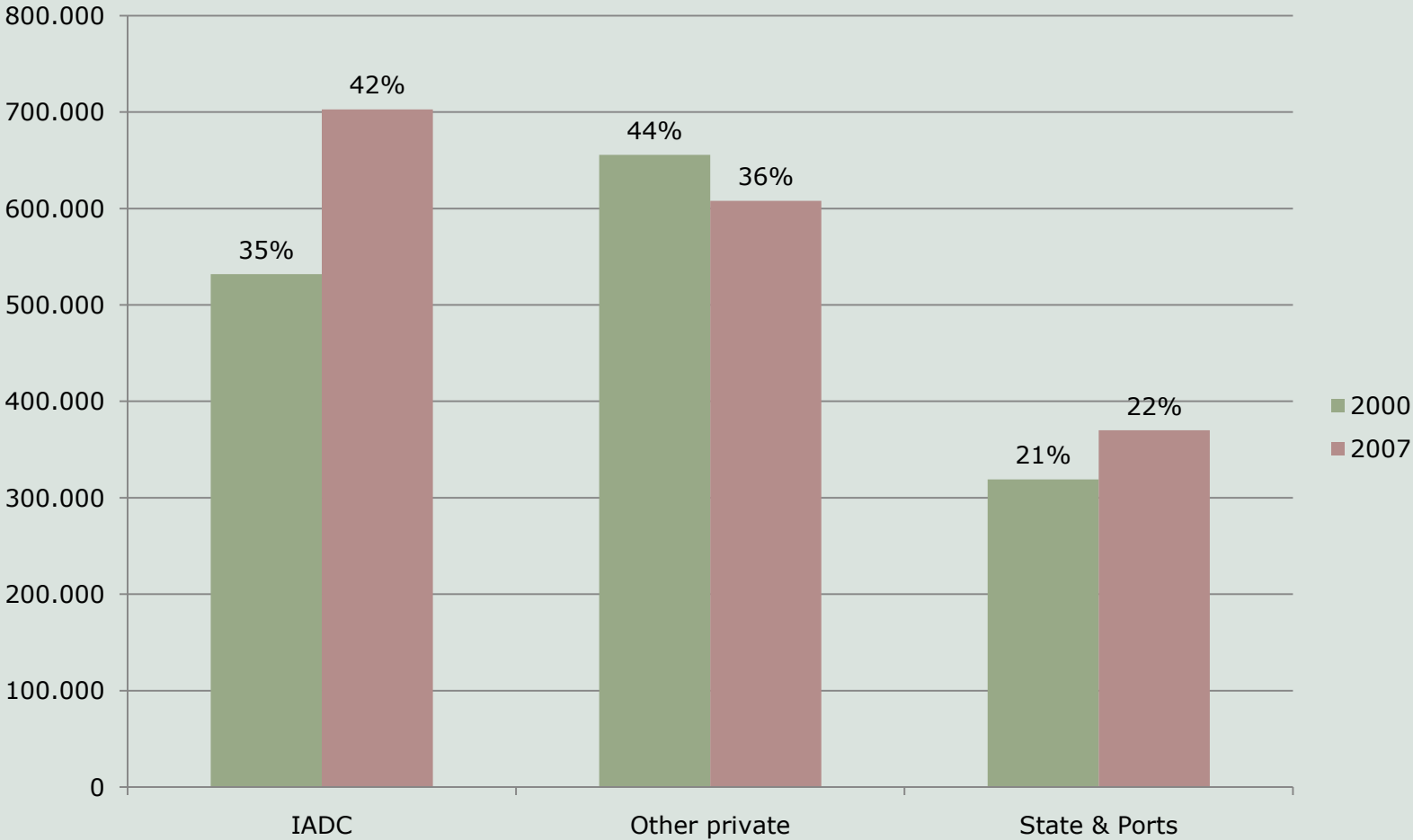
- Seaborn trade keeps growing
- More people with more wealth living in coastal areas
- Growing public concern regarding sea level rise
- Energy demand (and supply) keeps growing
- Tourism increasing as well
- Innovation in dredging industry supported in creating (new) markets



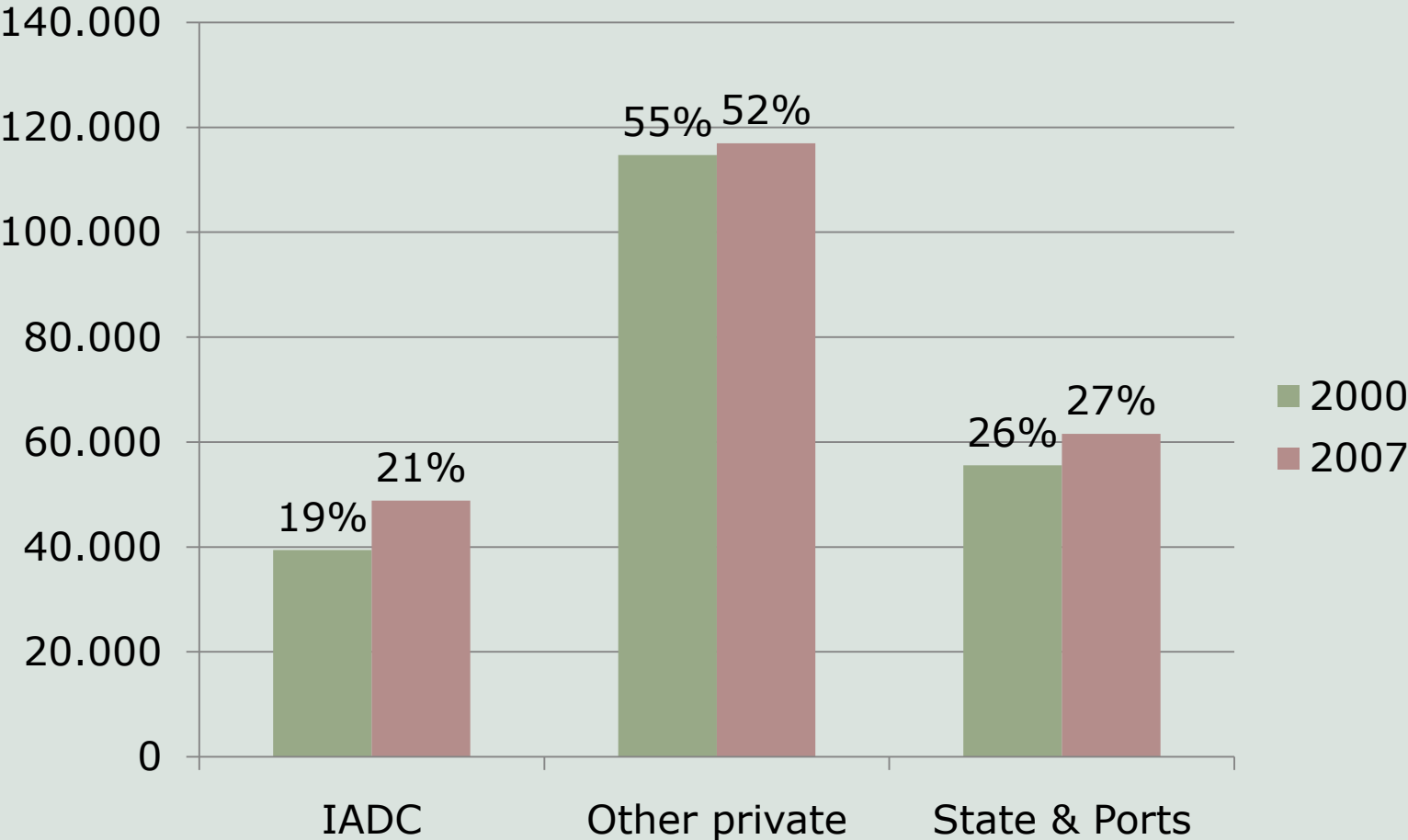
Capacity TSHDs (in DWT)



Capacity Cutters (in kW)



Capacity Backhoes/Grabs (in kW)



Top – 10 owners TSHD

Owners Trailing Suction Hopper Dredgers

1	CHEC <i>Consolidated</i> (China)	13%
2	Van Oord NV (Netherlands)	12%
3	Jan de Nul NV (Belgium)	10%
4	Royal Boskalis Westminster (Netherlands)	9%
4	DEME NV (Belgium)	9%
6	Dredging Corporation of India (India)	3%
6	Indonesian State	3%
6	Hyundai E&C (Korea)	3%
9	Hanson Aggregates (UK)	2%
9	Inai Kiara (Malaysia)	2%
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% of global capacity - top 10		65%

Top – 10 owners CSD

Owners Cutter Suction Dredgers

1	Royal Boskalis Westminster (Netherlands)	8%
2	Van Oord NV (Netherlands)	7%
2	CHEC Consolidated (China)	7%
4	DEME NV (Belgium)	6%
4	Jan de Nul NV (Belgium)	6%
6	Great Lakes Dredge & Dock (USA)	5%
6	National Marine Dredging Company (UAE)	5%
6	Suez Canal Authority (Egypt)	5%
9	Penta Ocean Construction (Japan)	4%
9	Mike Hooks Inc (USA)	4%
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% of global capacity - top 10		56%



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International Association of Dredging Companies