2019-09-25

PRESS RELEASE

The economic importance of the Belgian ports - Flash estimate 2018

Belgian ports post employment growth for third consecutive year, in contrast value added contracted

An initial estimate shows that employment in the Belgian ports grew by 1.2 % in 2018, thanks to a significant rise recorded in the branches of the ports themselves. All of the ports except for Brussels generated new jobs last year. Value added at the Belgian ports contracted by 2.7 % in 2018, compared to the record year 2017. This decline was particularly noticeable in the non-maritime branches.

To meet the demand for rapidly available indicators signalling developments in value added and employment at Belgian ports, the National Bank of Belgium has published a yearly flash estimate since 2006.

The figures for 2018 are estimates produced by means of statistical techniques – pending the final figures to be published in the spring of 2020 in the annual port monitor.

TABLE 1 DIRECT VALUE ADDED AT FLEMISH PORTS, THE LIEGE PORT COMPLEX AND THE PORT OF BRUSSELS

(millions of euros - current prices)

	Maritime cluster[1]		Non-maritime cluster		**Total**	
	2017 *	*2018 e*	2017 *	*2018 e*	**2017 ***	***2018 e***
Antwerp	3 572	*3 482*	7 925	*7 628*	**11 497**	***11 110***
Ghent	355	*351*	4 076	*4 126*	**4 431**	***4 477***
Zeebrugge	600	*606*	449	*445*	**1 049**	***1 050***
Ostend	161	*164*	375	*393*	**536**	***557***
Liège port complex	26	*26*	1 120	*962*	**1 146**	***987***
Brussels	20	*22*	833	*790*	**853**	***812***
DIRECT VALUE ADDED	4 734	*4 651*	14 778	*14 342*	**19 512**	***18 993***

Source: NBB.

[1] Two clusters are considered: the maritime cluster and the non-maritime cluster. The maritime cluster, which includes branches of the ports themselves, and whose existence is essential to them (management and maintenance, shipping, transhipment, affreightment, storage, dredging, fishing, maritime services, etc.). The segments that do not have an immediate economic link with port activity which exhibit a close interdependence with it are known as "non-maritime" and include the segments of industry, wholesale trade, transport and logistic services.

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TABLE 2 DIRECT EMPLOYMENT AT FLEMISH PORTS, THE LIEGE PORT COMPLEX AND THE PORT OF BRUSSELS

(full-time equivalents)

	Maritime cluster		Non-maritime cluster		**Total**	
	2017 *	*2018 e*	2017 *	*2018 e*	**2017 ***	***2018 e***
Antwerp	27 972	*28 476*	33 664	*33 916*	**61 636**	***62 392***
Ghent	2 924	*3 128*	25 621	*25 824*	**28 546**	***28 953***
Zeebrugge	6 274	*6 381*	3 482	*3 515*	**9 756**	***9 896***
Ostend	1 756	*1 737*	3 159	*3 248*	**4 914**	***4 986***
Liège port complex	332	*344*	7 555	*7 601*	**7 887**	***7 945***
Brussels	313	*309*	3 655	*3 600*	**3 968**	***3 908***
DIRECT EMPLOYMENT	39 571	*40 376*	77 136	*77 704*	**116 707**	***118 080***

Source: NBB.

e = estimates
* the minor differences compared with the figures previously published are, on the one hand, due to additional improvements, and on the other hand, to an adapted calculation method for companies belonging to the Belgian National Railway Company and Lineas groups.

Explanatory note

Value added

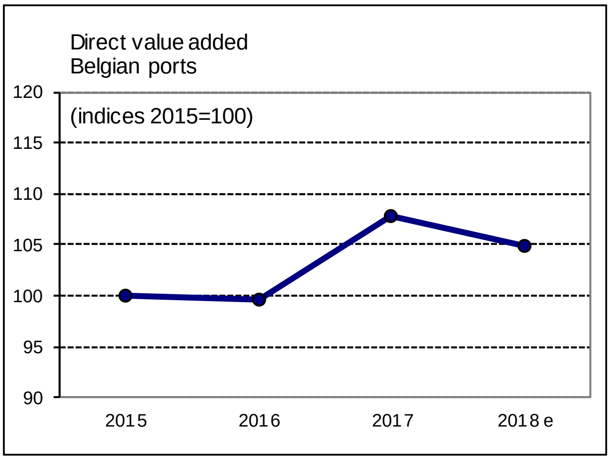
Value added at the Belgian ports contracted by 2.7 % in 2018, compared to the record year 2017. The fall was particularly visible in the non-maritime cluster of the ports of Liège and Antwerp. In both ports, the energy sector was affected by reduced capacity at nuclear power plants. Refineries in the port of Antwerp faced lower margins too. Value added in the non-maritime cluster contracted mainly in the 'other logistic services' branch in the inland port of Brussels. By contrast, the port of Ghent and Ostend generated more value added. The increase in the port of Ghent was due to the trade and car manufacturing branches. Growth in the port of Ostend was driven by the dredging sector and the metalworking industry. Value added at the port of Zeebrugge stabilised.

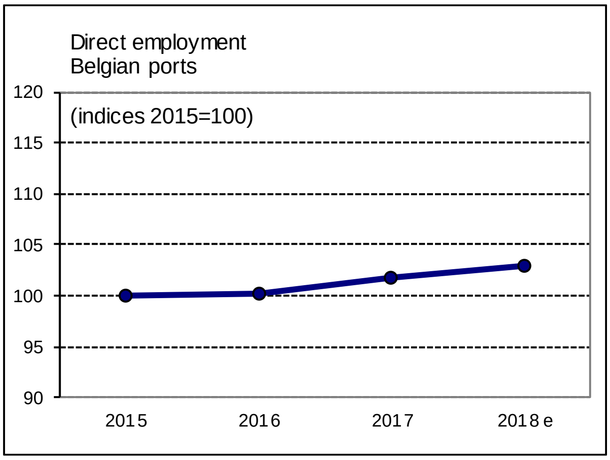
Employment

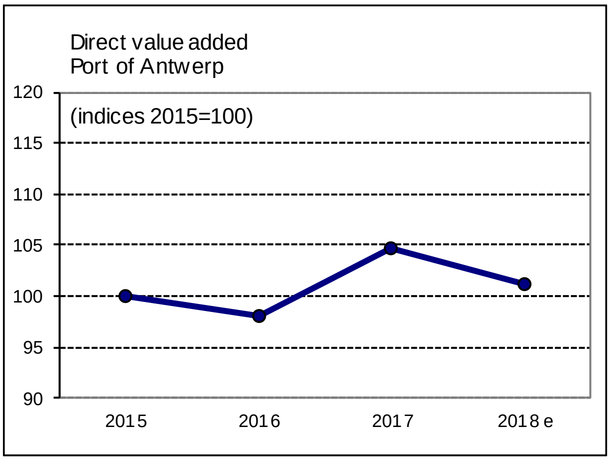
Employment at the Belgian ports grew by 1.2 % in 2018 on the back of a significant rise in the number of jobs registered in the cargo handling sector, part of the maritime cluster. With the exception of Brussels, all the ports generated additional jobs. At the port of Antwerp, employment also expanded in the chemical industry and the 'other logistic services' branch. At the port of Ghent, employment grew in the car manufacturing sector, while in Zeebrugge, this was the case in the 'shipping agents and forwarders' branch and road transport. At the Liège port complex, the number of jobs increased in the metalworking industry. The latter and also the 'other logistic services' branch created new jobs at the port of Ostend.

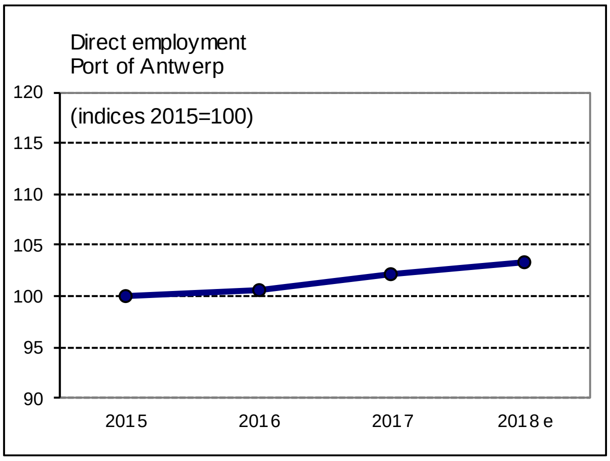
Cargo traffic

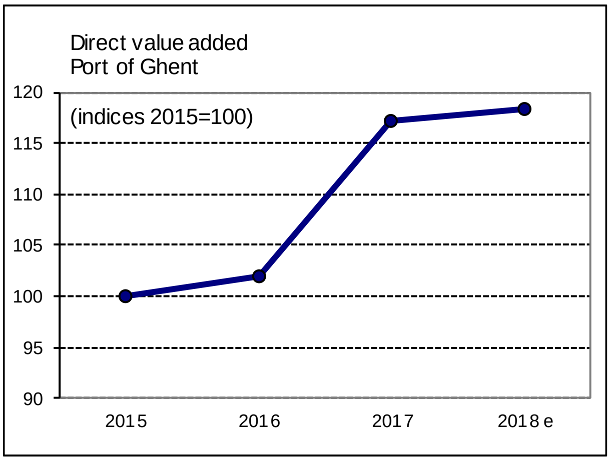
Cargo traffic at the Belgian ports grew by 4.8 % in 2018. Every port contributed to total growth. The port of Antwerp achieved a record volume of traffic for the sixth year running. Containers and liquid bulk (petroleum products and chemicals) were the main drivers. The transshipment of cargo at the port of Zeebrugge rebounded as a result of a meaningful recovery of LNG traffic, while ro-ro traffic continued to expand in this coastal port. Growth of dry bulk – the main category of cargo – was responsible for the highest cargo turnover in five years at the port of Ostend. The port of Brussels posted an all-time record as a result of the modal shift of earthmoving operations from road to the waterway and more containers being handled. Growth of cargo traffic at the ports of Ghent and Liège was rather limited.

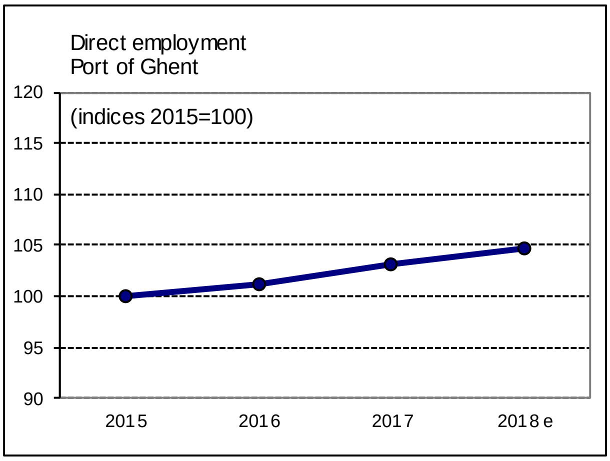


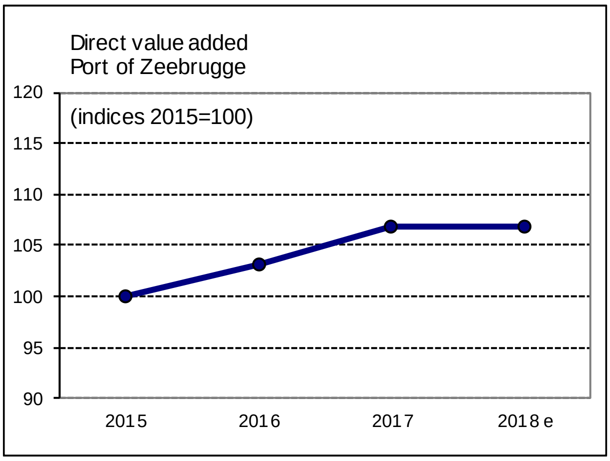


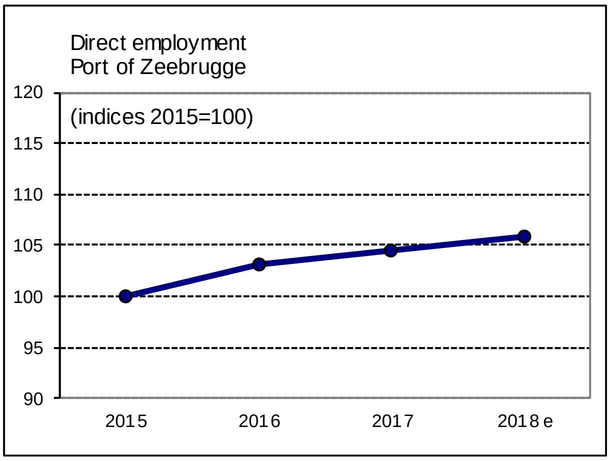












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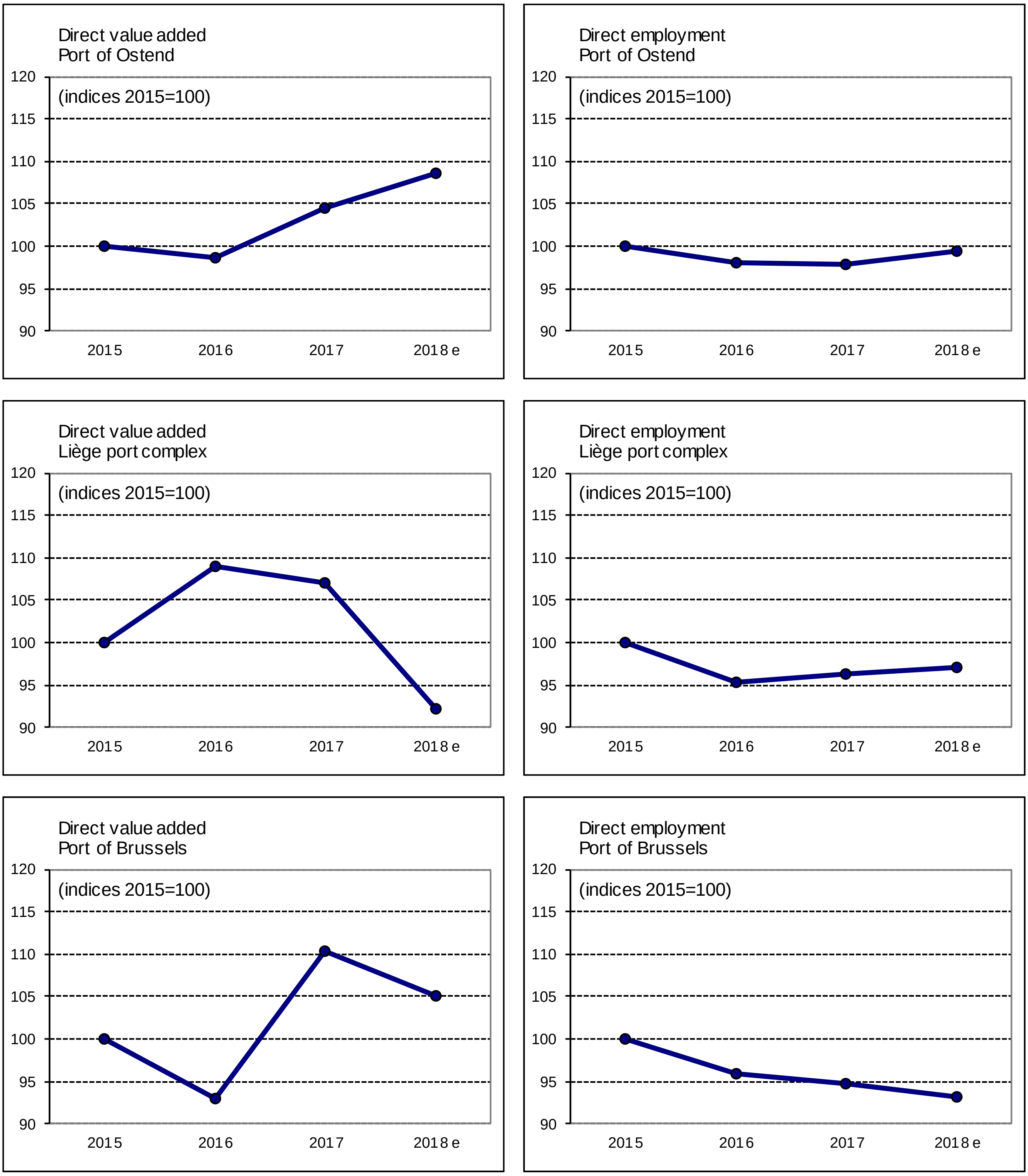
Direct value added
Port of Ostend
(indices 2015=100)
Direct employment
Port of Ostend
(indices 2015=100)
Direct value added
Liège port complex
(indices 2015=100)
Direct employment
Liège port complex
(indices 2015=100)
Direct value added
Port of Brussels
(indices 2015=100)
Direct employment
Port of Brussels
(indices 2015=100)
120
115
110
105
100
95
90
2015
2016
2017
2018 e

Source: NBB

TABLE 3 CARGO TRAFFIC IN THE BELGIAN PORTS

(in thousands of tonnes; change is expressed as a percentage)

	Antwerp		Ghent		Zeebrugge		Ostend		**Flemish ports**		**Change from**
	2017	2018	2017	2018	2017	2018	2017	2018	**2017**	**2018**	**2017 - 2018**
Containers	122 969	130 858	138	210	15 379	15 174	0	0	138 486	146 242	+5.6
Roll-on/roll-off	5 053	5 326	2 355	2 337	14 963	15 919	0	0	22 371	23 582	+5.4
Conventional general cargo	10 273	10 159	3 608	3 777	1 326	1 037	34	80	15 241	15 053	-1.2
Liquid bulk	73 168	75 781	5 335	5 421	4 134	6 739	29	27	82 666	87 968	+6.4
Dry bulk	12 192	13 064	21 073	20 841	1 312	1 232	1 311	1 402	35 888	36 539	+1.8
CARGO TRAFFIC	**223 655**	**235 188**	**32 509**	**32 586**	**37 114**	**40 101**	**1 374**	**1 509**	**294 652**	**309 384**	**+5.0**
Change from 2017 - 2018		+5.2		+0.2		+8.0		+9.8		+5.0	

	2017	2018	Change
Liège port complex	15 950	15 959	+0.1
Brussels	4 848	5 223	+7.7
Belgian ports	**315 450**	**330 566**	**+4.8**

Source: Mora Mobiliteitsraad *“De Vlaamse havens – Feiten, statistieken en indicatoren voor 2018”* and port authorities