

RECHARGE ROTTERDAM

CREATING THE CONDITIONS FOR TOMORROW'S INDUSTRY

JUNE 2026



RECHARGE ROTTERDAM

Recharge Rotterdam is an action programme for sustaining critical industry to enable the transition to and further development of innovative, new and clean industry.

The Port Industrial Cluster has an **investment potential of at least €20 billion** in projects related to the energy and raw materials transition, the feasibility of which is currently **under pressure due to various obstacles**.

The investment projects contribute to **reducing approximately 14 MTPA of CO₂ emissions**, while promoting **innovation, strategic autonomy** and sustaining **employment**.

Recharge Rotterdam focuses on customised short-term and area-specific solutions to **remove obstacles that stand in the way of business investments**.

Recharge Rotterdam is **a collaboration between the Port of Rotterdam Industrial Complex** and the government, aimed at creating the right preconditions and taking action to enable investments.

The implementation of Recharge Rotterdam focuses on competitiveness, sustainability and resilience. This will make a significant contribution to the **earning capacity of the Netherlands and Northwest Europe**.

THE IMPORTANCE OF THE ROTTERDAM PORT AND INDUSTRY

For The Netherlands and Northwestern Europe

3,000 COMPANIES

42 KM
PORT AREA



4 CRUDE OIL
REFINERIES



45 PETROCHEMICAL
COMPANIES



4 VEGETABLE OIL
REFINERIES



3 BIOFUEL PLANTS



€23.3 BILLION
ADDED VALUE
2.2% OF DUTCH GDP



40% OF EUROPE'S
PETROCHEMICAL INDUSTRY IS
BASED IN THE ARRA CLUSTER



LARGEST
EUROPEAN PORT



NR. 1 BIOPORT



13% OF TOTAL
EU ENERGY CONSUMPTION
PASSES ROTTERDAM



~85% OF EUROPE'S IMPORTS
PASS VIA THE ARRA CLUSTER
(ANTWERP-ROTTERDAM-RHINE-RUHR)



CA. 182,000
DIRECT & INDIRECT JOBS

THE PORT INDUSTRIAL COMPLEX (PIC) IS UNDER PRESSURE

Chemical giant LyondellBasell closes plant in Rotterdam 160 jobs lost

New blow for the port of Rotterdam: Finnish UPM halts development of biofuel plant.

Urgent appeal to the government: 'The port of Rotterdam is at risk of losing its leading position; the situation is dramatic'

More bad news from the port: 'How many more wake-up calls do we need?'

The troubles for the port of Rotterdam are far from over.

1

Uneven playing field within Europe

Structurally higher costs than in neighbouring countries cause the Netherlands to lose competitiveness in comparison.

2

Uncertain investment climate

Dutch regulations create investment uncertainty, causing projects to stall.

3

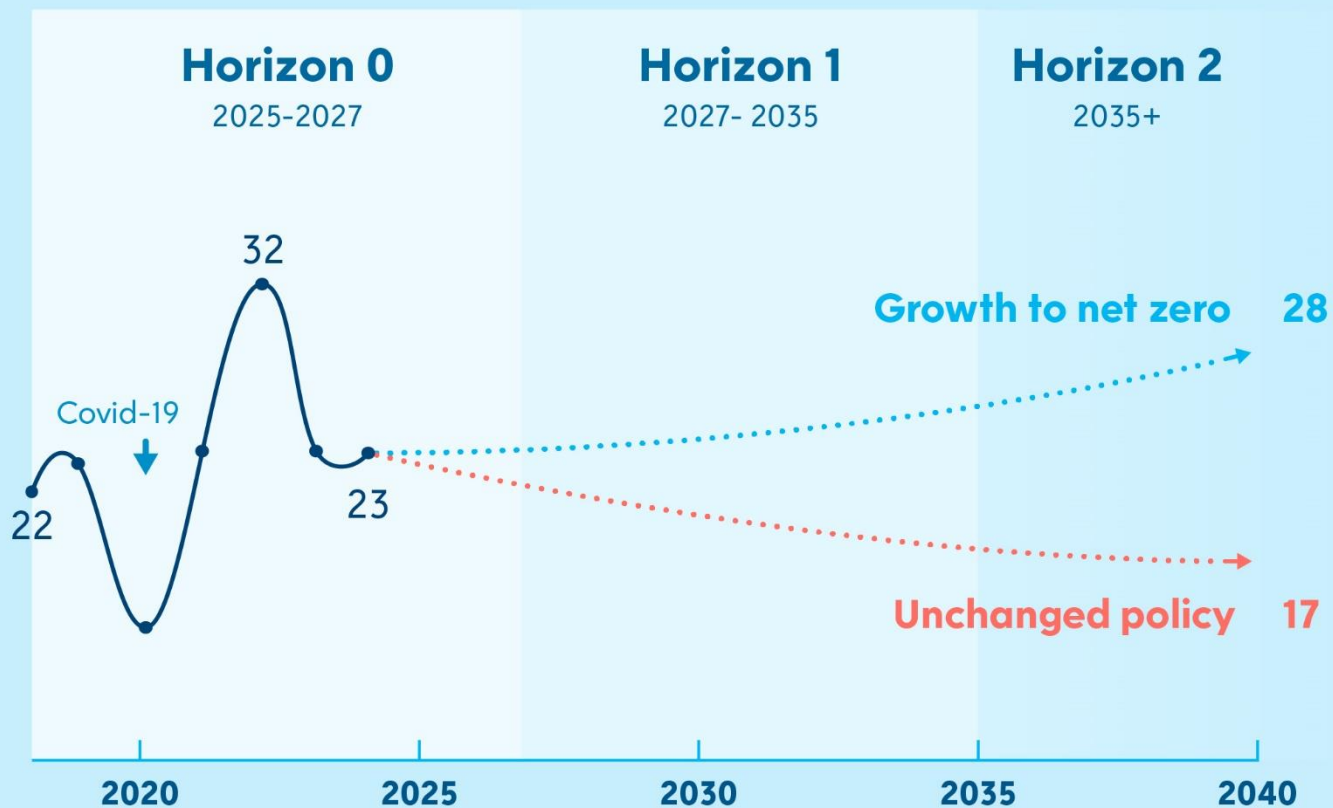
Increasing international competition in chemical production

Cheaper supply from Asia is putting pressure on production. This exerts structural pressure on production volume (and capacity utilisation) in the Netherlands and Europe.

URGENCY: WITHOUT POLICY CHANGE, INDUSTRY DECLINES FAST

Shifting growth towards net-zero requires urgent intervention

GDP contribution, per year, € billion



What is needed to turn the shrinkage into growth heading towards net zero?

Resolving main obstacles to making investment decisions.

NB: forecasts are real-term (2024=100%), i.e. already take into account 2% per annum inflation.
Source: Port of Rotterdam, Port Monitor — UPT Erasmus commissioned by the Ministry of Infrastructure and Water Management.

HOW DO WE MAKE INVESTMENT POSSIBLE AGAIN?

Organising preconditions to enable progress on three areas simultaneously



Competitiveness

- A strong and investable industrial cluster
- Lasting contribution to employment, innovation and the Dutch economy
- Attractive investment climate thanks to an integrated and productive cluster



Sustainability

- Accelerating the industrial transition
- Investments in circular chemistry, electrification, hydrogen and sustainable fuels
- Structural reduction of CO₂ emissions in the port and industrial cluster








Resilience

- Strengthening critical value chains
- Sustaining and strengthening production chains for energy, fuels, logistics and basic chemicals
- Less dependence on fossil energy and raw materials from third countries

RECHARGE ROTTERDAM WORKS STEP BY STEP

Investment obstacles have been identified per cluster. Subsequently, targeted solutions are being developed that can accelerate multiple investments.

1. Clusters

-  Salt chemistry
-  Circular industry
-  Fuels
-  Electrons and heat
-  Infrastructure and growth sectors






2. Obstacles

-  Laws & regulations, permits
-  Access to H₂ / CO₂
-  Availability of electricity and steam
-  Market: Level Playing Field & demand certainty
-  Other

3. Solutions

-  Experimental space
-  Government funding
-  Working groups
-  Local power generation, steam
-  Demand creation

4. Investments

-  Investments > €20 billion
-  Reduction of 14 MTPA CO₂ emissions
-  ≥ Employment
-  Innovation
-  Strategic autonomy

EXAMPLE PROJECTS PER CLUSTER

65 investment projects with an estimated value of at least €20 billion

Clusters



Salt chemistry

Making the existing salt chemical industry within this closely connected cluster sustainable through *electrification*.



Circular industry

Scaling up the circular industry:

- Circular *plastic cluster* such as chemical recycling
- Development of circular *feedstock* for the chemical industry
- Production of circular building materials and *low - carbon cement*



Fuels

- *CO₂ capture from* residual gases
- Blue *hydrogen production-* related projects
- Scaling up the production of *sustainable fuels*



Electrons and heat

Conversion and sustainability of existing *power plants*, including through the use of *sustainable feedstock*.



Infrastructure and growth sectors

Investments in infrastructure for *CO₂ capture and hydrogen pipelines*, as well as related new economic activities such as green hydrogen production and ammonia terminals.

FOR MORE INFORMATION:



Fennet van de Wetering

Programme Director Recharge Rotterdam
Port of Rotterdam Authority

f.wetering@portofrotterdam.com



Simone van Tongeren

Climate Project Manager
Deltalinqs

vantongeren@deltalinqs.nl