



MARKET CONSULTATION FOR CLEAN HYDROGEN (DERIVATIVES) IMPORT TERMINALS AT THE PORT OF ROTTERDAM

1. Context

The Port of Rotterdam Authority (hereinafter the Port Authority) aims to maintain the port's position as an international energy port. The hydrogen vision of the Port Authority estimates that a total throughput of 20 million tonnes of hydrogen equivalent is expected by 2050, and imports will account for 90% of these flows. These imports will arrive in Rotterdam via various hydrogen carriers, including ammonia, LOHC, methanol as well as liquefied hydrogen.

The important role of hydrogen imports is recognised by the business community and industry associations in the Netherlands. In May 2025, a broad coalition represented by NL Hydrogen handed over the Hydrogen Import Manifesto to Minister Hermans (KGG) during the World Hydrogen Summit in Rotterdam. This Manifesto emphasises the importance of policy in enabling large-scale import of hydrogen and hydrogen carriers for the energy transition and energy security. Since then, the Government has been engaged in studying possible policy measures to support the realisation of hydrogen import chains.

Promoting clean (low carbon and renewable) hydrogen to flow through the port of Rotterdam is intrinsically linked to the strategic goals of the Port Authority. It contributes towards resilience, security of supply and strategic autonomy, as well as stimulating the business climate by contributing to the availability of affordable (sustainable) energy.

2. Aim of the market consultation

The port of Rotterdam aims to accelerate the import of clean hydrogen through Rotterdam. The timely realisation of a large-scale import terminal can facilitate future growth in the hydrogen market, ultimately supporting the transition from fossil fuels to sustainable alternatives.

However, progress is currently hindered. Off-take contracts are struggling to materialise. At the same time, producers are expected to demonstrate that they are ready to deliver clean hydrogen at the gate of the off-taker. Even when off-take contracts are discussed, producers indicate they cannot guarantee timely delivery due to the lack of available

midstream infrastructure. In addition, non-financial hurdles — such as power availability and limited environmental space — further complicate development.

The purpose of this market consultation is to learn from market parties what the key bottlenecks are in the development of a hydrogen (derivatives) import terminal. The objective is to better understand market dynamics, including identifying de-risking mechanisms that are needed to accelerate development. For this, the Port Authority seeks input on what non-financial and financial support instruments could help accelerate hydrogen imports through Rotterdam.

Market participation is highly encouraged. Based on the insights gained through this consultation, the Port Authority will determine what role it can take to accelerate developments.

3. Eligibility for participating in the market consultation

Through a public market consultation, the Port Authority aims to offer relevant stakeholders the opportunity to participate and share insights. The target audience for this market consultation is:

- Any party that develops or considers developing a hydrogen (derivative) import terminal or an expansion thereof at the port of Rotterdam. Development shall consider hydrogen receipt by ship, storage, possible conversion (for example through a cracker or dehydrogenation plant) and transport to off-takers via pipeline, barge or train. Developers of all types of hydrogen carriers (e.g., ammonia, methanol, LOHC etc) are invited to take part in this market consultation;
- Parties must have secured a site or be in an advanced stage of securing a site at the port of Rotterdam (by the developer or by a partner of the developer).

4. Assumptions about scope from hydrogen import terminal developers

This section gives a brief overview of the main assumptions regarding the scope for a hydrogen (derivative) import terminal developer to be taken into account when providing the input. Scope of the developer:

- Design the facility and conduct all necessary studies, including FEED;
- Obtain all necessary permits;
- Construct the facility;
- Invest in the connection to the hydrogen pipeline network in the port area (Hynetwork), if applicable;
- Finance the development and construction of the facility in a bankable manner;
- Establish contracts with terminal users (suppliers, off-takers and/or aggregators);
- Operate and maintain the terminal throughout its lifecycle;
- At the end of the contract, the developer is responsible for delivering the plot back to the Port Authority in the condition in which it was received.

5. Market consultation questions

The Port Authority seeks input from developers regarding the risks they foresee, taking into account the developers' scope (as described in Chapter 4). Your input will help the Port Authority evaluate potential acceleration instruments that could help mitigate those risks. We kindly ask you to answer the questions below in an [online environment](#) . Only responses submitted through this online environment will be included in the further processing of the market consultation.

A. Questions about respondents' project developments

The Port Authority has an ambitious hydrogen vision, a total of 0.7–1.7 million tonnes of

hydrogen equivalent is estimated to be imported by 2030.

The Port Authority is keen on understanding how respondents can contribute to the realisation of this ambition. We are therefore interested in your input on the following topics:

1. In what form will hydrogen be imported, stored and transported? Will hydrogen derivatives be converted on site?
2. What is the capacity of the project in hydrogen-equivalent kilotonnes per annum (KTPA) and its potential scale up in the next phases?
3. Will the terminal operate on an independent basis? For the purpose of this market consultation, an independent terminal is defined as a facility for products operated by a third-party company that does not own such products and offers storage and logistics services to multiple clients.
4. If the terminal does not operate independently, what portion of the terminal's capacity will be made available to third parties under open access conditions?
5. What is the project planning timeline, including pre-FEED, FEED and FID? When is the planned Commercial Operation Date (COD)? What key project milestones have already been achieved?
6. What are the funding requirements and sources considered for each stage of the project?

B. Questions about (development) risks

7. What are the most critical risks for you (financial and non-financial)? Please distinguish between risks that are prohibitive to take a FID and risks that have an adverse effect on your business case but are not show stoppers.
8. If the most critical risks identified above are removed, when would be the earliest you would be able to take a final investment decision (FID) and have a COD?
9. What do you consider the minimum cost-efficient scale of the facility, expressed in KTPA (hydrogen equivalent)?
For which proportion of this volume do you expect to be able to secure capacity reservations/off-take contracts by the time of FID?
10. Based on your assessment of the market interest and potential demand, can you indicate the volume risk and financing gaps?
11. What are key risks in the value chain (supply and off-take) and how might these risks translate into a risk for the terminal project itself?
12. What non-financial support instrument could help mitigate the most critical non-financial risks and accelerate your development?

C. Questions about the preferred (financial) support instruments or changes to set-up

We strongly recommend involving financial stakeholders when responding to the following questions, as their input is crucial to assessing feasibility and identifying effective support mechanisms.

13. Which changes would you propose to the scope and risk allocation of the project development (as described above) in order to make it feasible from your perspective?
14. If your concerns cannot be resolved through changes to the project set-up or risk allocation, what type of support instrument would be most effective for you to receive and why? By 'effective' is meant: an instrument that would enable you to proceed to a positive FID.
15. Which specific risks would be mitigated by your proposed support instrument and how?
16. Please include other considerations that might be helpful for the Port Authority to take into account, including bottlenecks, opportunities, etc. related to starting the H2 import flows via Rotterdam.

6. Planning, procedure and communication

The market consultation process timeline is outlined below. If a terminal owner/developer would like to participate in the market consultation, they should reply with a written response to the questions outlined above by the date indicated below.

We are looking forward to better understand from terminal operators what they perceive to be the key bottlenecks and what de-risk mechanisms may help unlock hydrogen import flows. The Port Authority highly values the time and effort respondents give to this process and may invite respondents for a further discussion in individual meetings.

Based on the insights gained through the market consultation, the Port Authority will determine the next steps, assessing if and how it can offer potential support to stimulate the acceleration of hydrogen imports.

The table below shows the planning for this market consultation process:

Publication of market consultation document	10 November 2025
Deadline for submitting written response	16 January 2026
Individual meetings (optional, at the Port Authority's discretion)	12 February 2026
Communication about market consultation results	6 March 2026
Communication about the next steps	16 April 2026

If respondents have questions about the market consultation during the process, they can be submitted. All correspondence relating to this procedure should be addressed to the [support team](#)  available for this purpose.

Market Consultation or Market Dialogue General Conditions

A market consultation or market dialogue allows the Port Authority to gather and utilise the knowledge and experience of market parties in preparing for a potential follow-up process. In practice, this means that the Port Authority uses the expertise of market parties to test its own ideas and thereby improve the quality of any potential subsequent process. Based on the insights gained, the Port Authority will determine its next steps.

Conclusion and Confidentiality

At the end of the market consultation, the project team will share the anonymised, non-confidential, general findings of the market consultation with participants. We will not disclose the numbers/data of parties or any commercially sensitive information, provided that such information is clearly marked as confidential by the respondent.

Market participants grant the project team permission to use their generic responses to conclude if further steps are needed in this process. Furthermore, the Port Authority will not include specific references to individual participants or, where applicable, any commercially sensitive information in any future procurement documents.

All information provided by parties will be treated confidentially by the Port Authority. The Port Authority will refrain from disclosing such information to third parties unless prior written consent has been obtained from the submitting party.

Additional Provisions Regarding the Market Consultation

- The entire market consultation can be conducted in Dutch or English, both orally and in writing.
- No rights can be derived by participating in this market consultation, and there is no guarantee that there will be a future procedure such as a tender process or any other further follow-up.
- The market consultation is not part of a procurement procedure. In the event that the outcome of the consultation leads to a subsequent tender, the Port Authority will publish the general results of the consultation in the relevant tender documents to ensure that participants in the consultation are not placed in a privileged position. Furthermore, all information shared by the Port Authority during the consultation will be included in the tender documents.
- Participation in the market consultation will not affect eligibility in any future procurement. There will be no distinction between parties that did or did not participate.
- Information provided during this market consultation may differ from information provided later (e.g., in a procurement or acquisition process). No rights can be derived from the information shared during the consultation. It is indicative and intended solely to improve the quality of the consultation. In case of discrepancies, the information provided in the later process will prevail.
- The Port Authority will not provide any compensation to participants in the market consultation.