



NEW ZEALAND
FOREIGN AFFAIRS & TRADE
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Dutch Port Sector: Going Green by Popular Demand

MARKET INTELLIGENCE REPORT



Summary

- The Dutch port sector—anchored by the Port of Rotterdam—remains Europe’s most significant logistics and energy gateway.
- Rotterdam is rapidly digitalising and transitioning toward green fuels, hydrogen and low-emission logistics.
- EU regulatory shifts (CBAM, RFNBO) will affect NZ exporters; early compliance preparation is critical.
- New Zealand companies can take advantage of green supply chains, automation partnerships, digital port systems and hydrogen-related trade.

Report

Trends in the Dutch Port Sector

The Netherlands hosts Europe's largest port cluster, with Rotterdam as its anchor. In the first nine months of 2025, throughput at the Port of Rotterdam was 320 million tonnes, with the container segment increasing by 3% to 10.7 million TEUs in the same period – ten times the annual throughput of Tauranga. The port authority oversees long-term planning, while private operators—including APM Terminals—run individual container terminals.

Rotterdam's deep-water access, automated terminals and multimodal hinterland network maintain its competitive advantage in Europe. Freight moves from sea to inland waterways, then onto roads and trains. Nearby ports like Antwerp-Bruges can be cheaper, however. Rotterdam tends to have higher port costs and occasional congestion due to its very high traffic volumes.

The Port of Rotterdam is not just Europe's largest seaport by throughput – it is a central pillar of the Dutch economy, supporting hundreds of thousands of jobs, enabling export competitiveness and anchoring key industrial sectors. The direct and indirect added value of the port is estimated at around €29.6 billion annually, equating to about 2.9–3.2% of Dutch GDP.

Beyond shipping, Rotterdam's port area functions as a major industrial complex, hosting refineries, petrochemical plants, storage terminals and increasingly energy-transition infrastructure (e.g., hydrogen pipelines, carbon capture projects). This industrial activity adds strategic value beyond basic cargo handling.

Sustainability and hydrogen development are central to Rotterdam's growth strategy, with the port positioning itself as Europe's primary hub for renewable and low-emission fuels. Rotterdam is developing an integrated hydrogen import, production and distribution ecosystem that includes electrolyzers, CO₂ transport and storage networks, ammonia-to-hydrogen facilities and wider green-energy infrastructure.

In parallel, through close collaboration with shipping companies, governments and research institutions, Rotterdam is driving innovation in sustainable maritime operations. For example, port call optimisation makes port calls as efficient as possible. Container ships can reduce their CO₂ emissions by 14% on average by utilising just-in-time sailing.

Moreover, the port provides infrastructure for alternative fuels and invests in technologies like shore power that allow vessels to connect to the electricity grid while berthed.

Automation and digitalisation are enablers of efficiency. Maasvlakte II—operated by APM Terminals—is one of the most advanced container terminals globally, featuring fully-automated guided vehicles, automated cranes and AI-enhanced planning systems. The terminal itself is free from CO₂ emissions.

The regulatory environment is complex, however. The EU's Carbon Border Adjustment Mechanism (CBAM), a carbon border tariff that charges importers based on the greenhouse-gas emissions embedded in certain goods, and evolving EU hydrogen certification create compliance overhead and potential market access barriers for exporters who cannot evidence low emissions.

To participate in Europe's emerging low-carbon value chains and avoid CBAM-related penalties, exporters must measure and document supply-chain emissions, prepare accurate CBAM dossiers, secure Guarantees of Origin or other certification, and seek buyers or partners in Europe who demand or can pay premiums for low-carbon certificates. Rotterdam's green-logistics ecosystem, including providers capable of tracing low-carbon fuels and supplying certified green corridors, offers a practical pathway for exporters seeking to lower embodied emissions.

Opportunities for New Zealand Companies

With its strategic market access and ease of doing business, the Netherlands is an attractive option as a European base for business.

In the context of growing demand in Europe for low-carbon goods, New Zealand exporters can leverage the Netherlands' expanding green logistics ecosystem to reduce their supply-chain footprint, strengthening their competitive position. Rotterdam offers a range of low-emission logistics services, such as electric trucking, green fuels, barge networks and low-carbon warehousing. Some New Zealand companies, such as Mainfreight, are already using these to meet strict EU emissions regulations and rising customer expectations. There may also be opportunities for green aluminium from New Zealand, which has a significantly lower carbon footprint compared to aluminium produced within the EU.

At the system level, the Port Authority coordinates broad coalitions to establish 'Green & Digital Corridors', bringing together fuel suppliers, ports, shipping companies and technology providers to ensure the right fuels, bunkering options, data and visibility are available along key routes. For New Zealand exporters - particularly in food and agriculture - partnering with Dutch green-logistics providers or utilising these emerging

corridors offers a practical pathway to reduce embodied emissions (essential for meeting EU CBAM requirements). Such actions also offer improved market access and meet the growing European preference for low-carbon products.

There is strong potential for New Zealand port and logistics firms to partner with global terminal operators to trial automation, digital booking systems and improved hinterland-connectivity solutions, with companies like APMT/Maersk actively sharing expertise and seeking investment. Greater technology adoption would help address efficiency and fragmentation issues in New Zealand. A more resilient and productive container-handling ecosystem is vital for long-term economic growth and cost-of-living outcomes. Strategic partnerships can be the key to lifting port performance.

EU regulatory settings - particularly CBAM and growing demands for full supply-chain emissions disclosure - are creating both compliance requirements but also new commercial opportunities for New Zealand firms engaging with the Port of Rotterdam. The CBAM definitive period started on 1 January 2026. Dutch businesses aimed to be ready ahead of EU regulations entering into force, seeing a first-mover advantage. Similarly, while such regulations pose administrative challenges for some New Zealand exporters, particularly SMEs, investments in compliance systems can allow companies a first-mover advantage in a high-value market that values provenance and sustainability attributes. At the same time, these regulatory changes create opportunities for New Zealand consultancies, laboratories and service providers to deliver emissions-measurement, certification and compliance support to exporters entering EU markets.

Finally, longer term, New Zealand firms with capabilities in low-carbon hydrogen, ammonia or related green fuels could explore offtake, verification or supply arrangements linked to Rotterdam's emerging hydrogen hub, which is set to become a major import and distribution centre for Europe. Participation in this value chain offers opportunities across production, technology, and certification services, but will require New Zealand producers to meet EU renewable fuel standards (RFNBO) and demonstrate full compatibility with European verification frameworks.

External links

The following links may provide useful information to businesses:

- [Our Terminal - APM Terminals](#)
 - [Port of Rotterdam | Rotterdam Port Authority](#)
 - [Carbon Border Adjustment Mechanism - Taxation and Customs Union](#)
 - [Hydrogen Certification - Clean Hydrogen Partnership - European Union](#)
 - [Green and digital corridors | Port of Rotterdam](#)
 - [Hydrogen in Rotterdam | Port of Rotterdam](#)
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