

Netherlands

# Dutch CCUS/CDR Business Community



Intern gebruik



# Agenda

11:00-11:15

Update Business platform and feedback market survey

11:15-11:30

Discuss Path forward and role ICEP/RVO

11:30-12:00

Value Proposition NL CCUS/CDR Business Platform

# Summary of Market Study

# Management summary: introduction

## Introduction

- This report presents the results of a study mapping the Dutch carbon capture and storage (CCS) ecosystem and international opportunities for CCS

## Project background and goal

- The Netherlands is a frontrunner in CCS development and there might be opportunities to build a new Dutch industry aimed at the export of CCS technology, services, and knowledge
- The goal of the project is to explore these opportunities for CCS as a new Dutch export industry

## Approach

- An overview was created of organisations in the CCS space that are either Dutch or non-Dutch with an active presence in the Netherlands
- A literature review was done for the mapping of international opportunities. Four criteria and a regional approach were used for the assessment (see on the right). Within regions, individual countries were also considered
- Conclusions and recommendations are based on the mapping of the (Dutch) organisations and the international opportunities

## Criteria for evaluation of international opportunities

1. Subsurface knowledge and CO<sub>2</sub> storage potential
2. Available CO<sub>2</sub> sources (point-sources, heavy industry, power sector, BECCS, and DAC)
3. CCS policy and regulation
4. Market development & public perception

## Regions

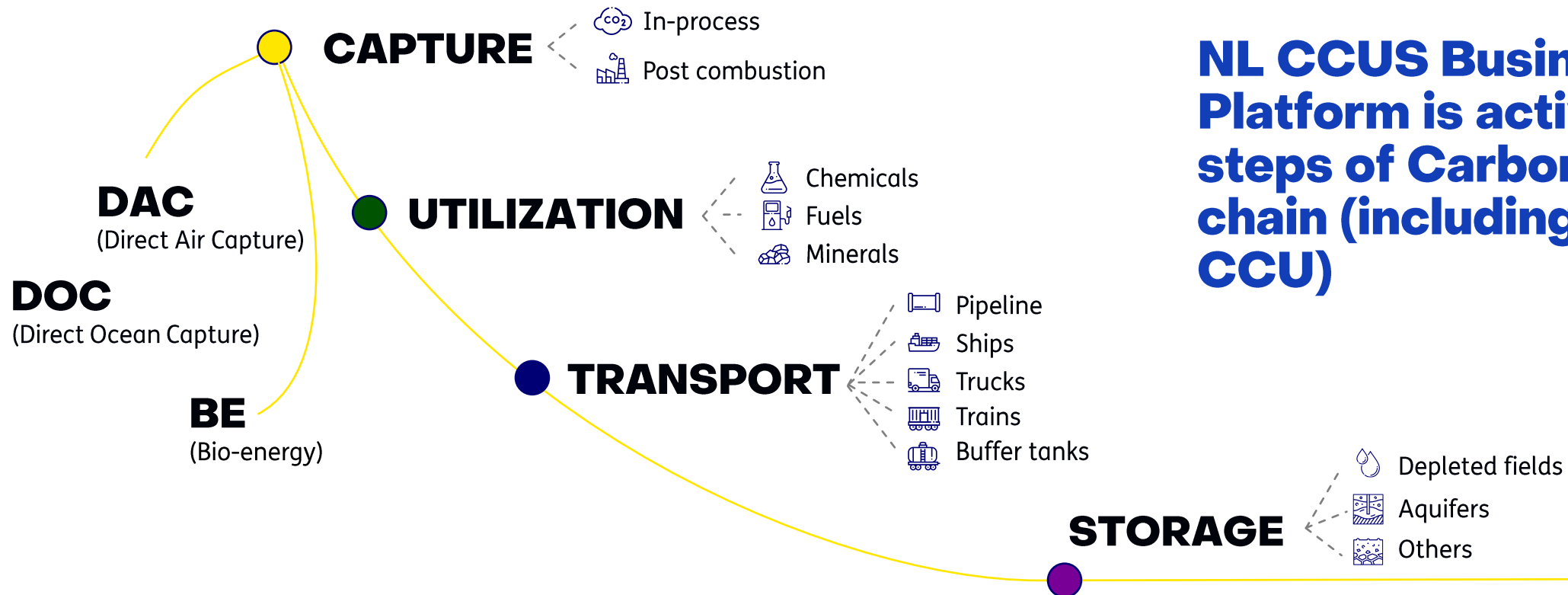
- Europe (Western, Central and Eastern, and Southern)
- Asia
- Middle east
- Northern Africa
- Southwestern Africa
- Australia
- Americas

# Dutch CCUS/CDR Business Platform

- The Dutch CCUS/CDR ecosystem considered includes both Dutch organisations and international organisations active in the Netherlands
- Almost 150 organisations currently active in the Dutch ecosystem are identified, covering the entire CCS value chain NB: the list of companies is not exhaustive
- The CCUS ecosystem is dynamic. There are (new) players entering the market and other players exiting the market
- Some organisations act in several parts of the value chain (e.g. both capture and storage provider)
- These organisations are a mix of SMEs (~45%), governmental and non-governmental organisations (~5%), and large multinational corporations (~50%). They include established players and newcomers



# Developing Carbon value chain



**NL CCUS Business Platform is active in all steps of Carbon value chain (including CDR and CCU)**

# Management summary: International opportunities

## International market opportunities

- 1. CO<sub>2</sub> storage potential** is large in almost all regions. The potential is more limited (but still significant) in Southern Europe, more uncertain in Northern Africa (Egypt) and public information is limited in the Middle East
- All regions have large **potential for CO<sub>2</sub> capture** from point-sources, such as hard-to abate sectors (cement, lime, etc.) and heavy industries (e.g. steel, (petro-)chemical, etc.). Power and energy sector opportunities are less well documented. Short term opportunities for BECCS and DACCS development projects are largest in more developed markets (Western Europe, Canada, US, Australia, MENA for DACCS). On the longer-term, opportunities for BECCS and DACCS implementation projects could be large on a global scale. Opportunities for more niche applications such as capture from ships and DOC are less certain based on available literature
- 3. CCS policy and regulations** are well-developed in the more developed markets (Western Europe, Canada, US, Australia). Regulatory frameworks for CCS are in development in the rest of Europe, Asia, MENA, and Brazil. Only Mexico and Southwestern Africa lack development in this area
- 4. CCS markets are most developed** in regions with the most developed regulatory frameworks, including China. This includes the presence of more developed market projects for BECCS and DACCS. In many of the other regions there is significant activity in terms of the development of new (pilot and commercial) projects

## The regions are grouped in three categories:

- 1. Developed markets** with well-developed policy frameworks and operational CCS projects (Western Europe, Canada, US, and Australia), with high quantity of opportunities but also competition due to established local ecosystems. These markets also demonstrate best opportunities for BECCS and DACCS developments on the short term
- 2. Developing markets** (Central, Eastern, and Southern Europe, Asia, MENA, and Brazil), with lower competition than in developed markets but with higher policy uncertainty
- 3. Markets with long-term opportunities** (Southwestern Africa and Mexico) and higher uncertainty on the short term

# Update Activities

# Past Activities

## Small scale market events 2025

- IEA GHG ExCo event at Rotterdam (May 20<sup>th</sup>) with CATO/TKI Networking event and participation of 6 companies from Dutch CCS business platform pitching their products, services & know-how in CCUS developments.
- MEA trade Mission at Rijswijk (June 20<sup>th</sup>) with CATO/TKI Networking event and participation of 5 companies from Dutch CCS business platform pitching their products, services & know-how in CCUS developments.

## Large scale market events 2025

- Carbon Capture Technology Summit Hamburg (21-23 October)
- Organization of a Dutch Pavillion whereby interested Dutch companies/organizations showcased their products, services and expertise in the field of CCUS/CDR developments. Roundtable and discussion with SG Ministry Foreign Affairs.

Work completed on developing a Value Proposition for NL CCUS/CDR Business and Innovation Platform

# Evenementen en activiteiten 2026

- March, presentation of market study Golf region
- 19-21 May 2026- **WHS**: side event CCUS,
- 9-10 June 2026- **CCS Technology Expo MENA**, Abu Dhabi, pavilion and possibly fact finding mission to KSA and Qatar
- 20-22 October 2026- **CCS Technology Expo Hamburg**, Hydrogen and CCUS Pavilion. FME, TKI, CATO
- 27-28 October- **EU Hydrogen Week**: to be determined
- Database of Dutch companies and organisations in the CCUS sector: TKI, TNO/CATO and RVO



International opportunities for Dutch organisations in the CCS value chain

# Netherlands Enterprise Agency's RVO/ ICEP



# RVO's ICEP

## *International Clean Energy Partnership*

**Supporting trade promotion & positioning of Dutch renewable energy businesses:**

- **Contact with businesses, trade organisations and export groups**
- **Organising Trade missions**
- **Sector export guides and market studies**
- **Conferences, trade exhibitions, NL Pavilions**
- **World Hydrogen Summit**
- **Embassy network and foreign companies**
- **Support for RVOs Trade Programs (e.g. PPS, PIB, SMM, DHI, SDE)**
- **2026: include CCUS into the ICEP program**

# Excelling in Hydrogen

Solutions for a sustainable world



# NL

Netherlands



## Netherlands Enterprise Agency (RVO) CCUS and International Clean Energy Partnership (ICEP)

### 2025 Exploration phase of CCUS:

- Growing inquiries of CCUS by our Embassy network, Topsector Energy, TNO/CATO, Incoming trade mission from Gulf Region
- Clear demand for trade support from Topsector Energy/CATO
- CCS part of Low-Carbon Hydrogen → independent sector
- Establishing a CCS export group (including support for missions)?
- CCU also interesting to explore further (horticulture), but trade opportunities still unclear
- Survey for participating businesses about their international view on trade for CCUS.





Survey results from participants of the CCUS/  
CDR pavilion @ Hamburg Tech Expo 2025

# Summary of Survey CCS/CCU-sector Netherlands

## Purpose & Respondents

- Survey conducted by RVO among technology providers, engineering firms, knowledge institutes and private companies.

## Activities & Objectives

- CO<sub>2</sub>-capture, storage, transport, DAC, innovation, consultancy. Participation in trade fairs for networking and visibility.

## International Ambitions

- Focus on EU, especially neighboring countries and the North Sea region, UK, North-America, Asia. Motivations: market potential, collaboration, regulations, climate goals.

## Dutch Strengths

- Strong CO<sub>2</sub>-infrastructure, offshore experience, innovative ecosystem. Major projects include Porthos & Aramis.

## Challenges

- Financing, technological scaling, complex regulations, finding partners, market information.

## Desired Support

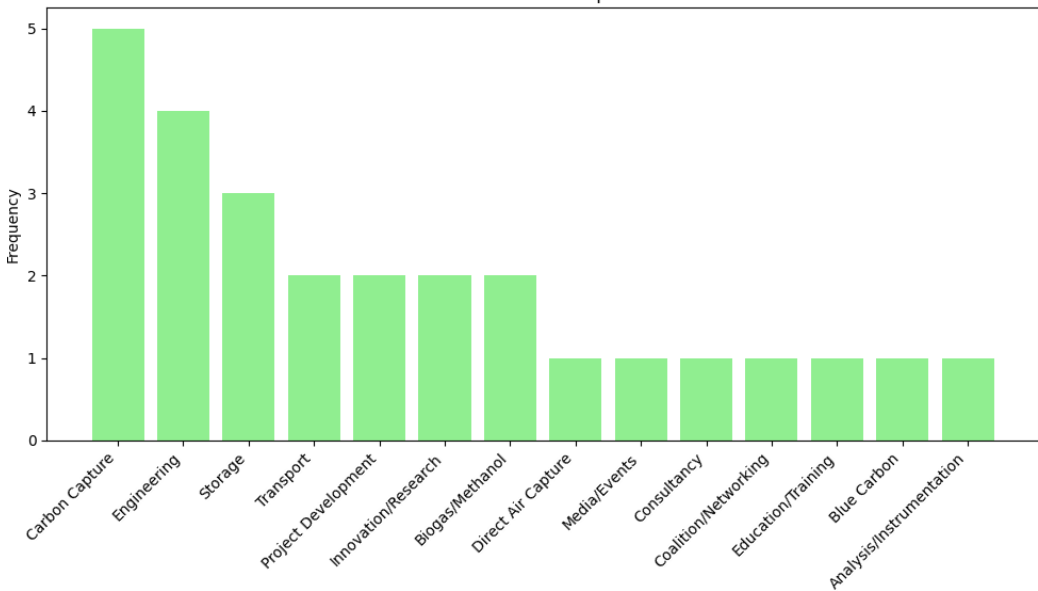
- Matchmaking, trade missions, subsidies (SDE++, DHI, EU), assistance with regulations.

## Cooperation & Network

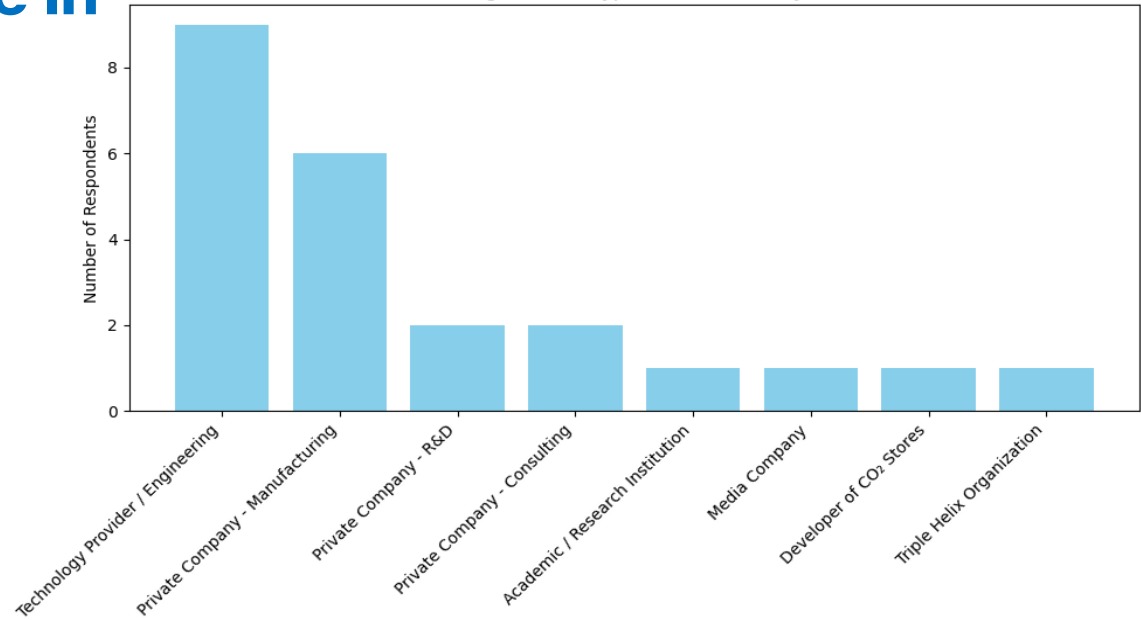
- Chain-wide cooperation with industry, government, knowledge institutes en international consortia.

# Executive Summary: Main Activities Respondents, reasons for joining pavilion, and countries they are active in

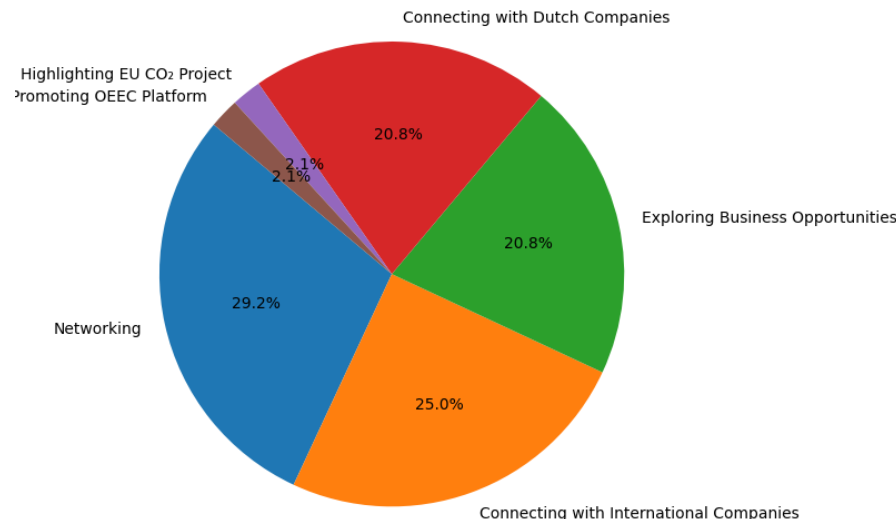
Main Activities of Respondents



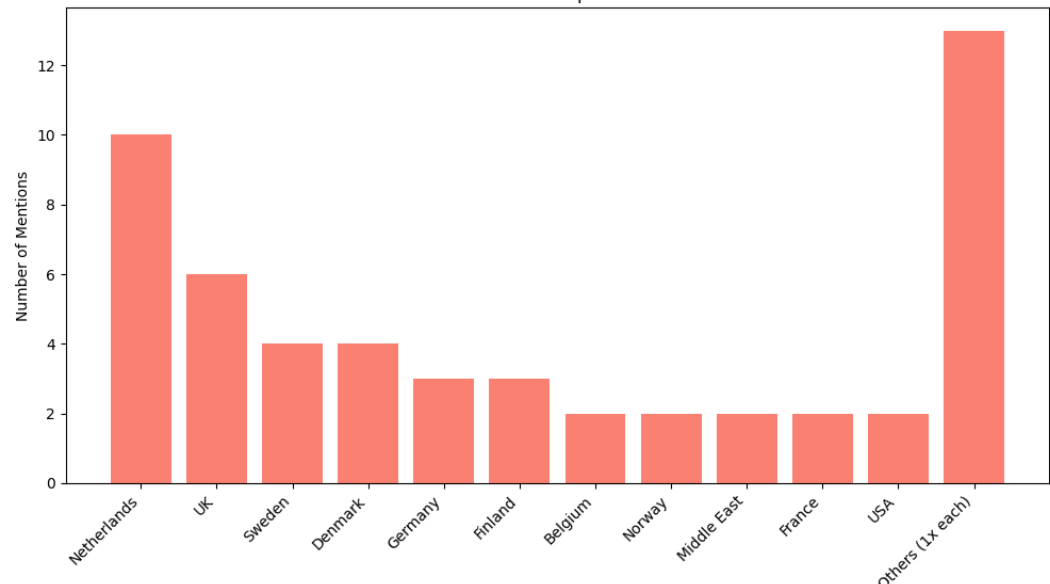
Organization Types in CCUS Survey



Objectives for Attending CCS Expo

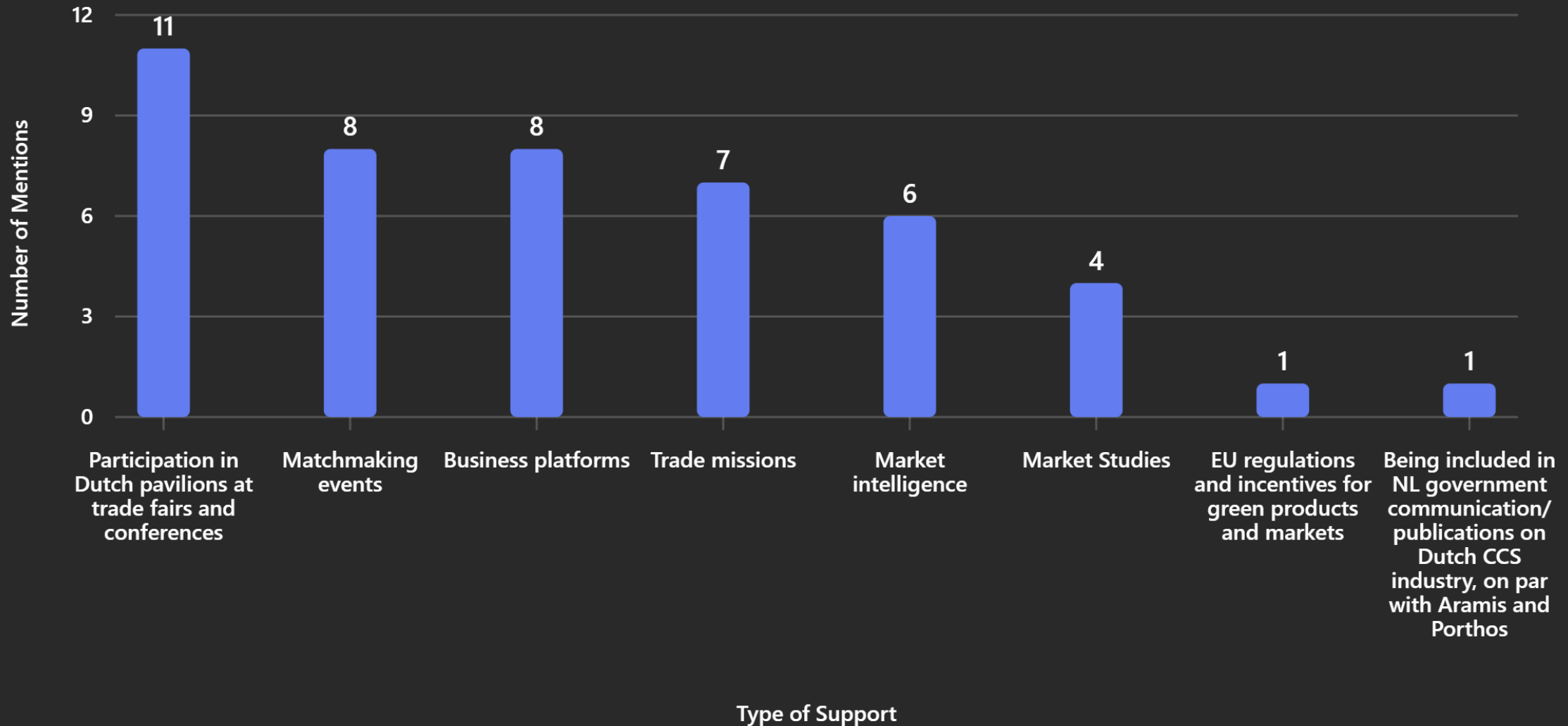


Countries Where Companies Are Active



# Executive Summary:

## Which support would help your international growth?



# Executive Summary: Conclusion

*The Dutch CCUS sector is innovative, pragmatic, and internationally oriented. The sector leverages existing infrastructure and knowledge but requires targeted support in the areas of financing, regulation, networking, and market access to accelerate in international growth and increase impact.*





Thank you for your attention

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