



**Gemeente
Amsterdam**

**provincie
Gelderland**



Rijkswaterstaat
Ministerie van Infrastructuur en Waterstaat

RWS INFORMATION

Market Consultation “Electrically Produced Asphalt ”

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1 Introduction

1.1 Background

In the coming years, asphalt producers will face increasingly stringent regulations around circularity and the emissions of harmful substances and CO₂. Asphalt producers will need to reorganise their production processes if they are to meet these requirements. However, competitive pressure is intense and, under such conditions, offering the lowest price is given the highest priority. For this reason, there has been a lack of large-scale investment in recent years.

The Sustainable Road Surfacing Transition Pathway was therefore established to develop an approach to make asphalt production in the Netherlands more sustainable. This includes examining the role that the Dutch government can play in kick-starting the investments needed to drive that transition.

In March 2025, a market consultation was completed in which a draft approach was put forward. This market consultation has yielded important insights. One of the key insights is that there are overlaps with topics that were not sufficiently addressed in the draft approach, and that making asphalt production more sustainable cannot be viewed in isolation from efforts to make the supply chain as a whole more sustainable. It has also become clear that the joint commissioning parties will have to play a significant role in this.

For this reason, the Ministry of Infrastructure and Water Management, Rijkswaterstaat and the Ministry of Climate Policy and Green Growth have worked on a strategy to make the entire sector more sustainable. Together with several other public commissioning parties, the 'Future-Proof Asphalt Supply Chain Approach' was presented on 4 December 2025. The approach to making asphalt production more sustainable has been developed within that overarching strategy and is the subject of this market consultation.

Through a series of market discussions, the organisers wish to inform you and involve you at an early stage of this process, with the aim of accelerating the introduction and roll-out of electrically produced asphalt in the Netherlands.

Approach to a future-proof asphalt supply chain (4 December 2025)

The current asphalt sector faces major challenges:

- The quality of asphalt is declining, due to the deteriorating quality of raw materials (particularly bitumen), but also because of processing methods and an insufficient focus on preventive maintenance techniques.
- The transition to sustainability is not gaining sufficient momentum. Emissions from processing plants (CO₂ and Substances of Very High Concern – SVHCs) are not decreasing, recycling remains stuck at around 40% despite much better results in pilot projects, and no major breakthroughs are in sight in new technology. The sector is investing primarily in optimising current technologies.

- The number of actors in the asphalt sector is declining. The fall in the number of asphalt plants (currently 24) appears set to continue, with a limited number of major players expected to remain. New entrants face significant barriers.
- The tightening labour market is continuing to worsen. The shortage of skilled workers is increasingly causing delays to projects. Productivity is consequently stagnating.

Based on these challenges, four development tracks have been defined

1. Quality in design and maintenance
2. Clean asphalt production
3. Security of raw materials
4. Smart collaboration within the supply chain

This market consultation focuses on the implementation of the vision for the future as outlined under the 'clean asphalt production' track and is set out below.

We aim for sustainable and electric asphalt production without emissions of SVHCs, CO₂ and nitrogen. These plants produce a limited range of sustainable asphalt mixes. There is sufficient time to do this properly. Mobile production complements the fixed production sites and ensures that supply and demand are aligned.

The following has been specified as a concrete implementation of this:
An 'electric demonstration plant' will pave the way for electric production from 2030 onwards and enable us to manage substances of very high concern.

Through a series of market discussions, the organisers wish to inform you and involve you at an early stage of this process, with the aim of accelerating the introduction and roll-out of electrically produced asphalt in the Netherlands.

1.2 Working model for the market consultation on the introduction and roll-out of electrically produced asphalt

To accelerate the commercial application of zero-emission asphalt production as much as possible, it is proposed to adopt a two-phase approach. This two-phase approach consists of a demonstration and learning phase as the first step, followed by a second phase in which the roll-out can take place based on the lessons learnt.

Phase 1: Demonstration and learning (2027-2030)

In this phase, following a tender process by commissioning parties, the market will establish the first commercially operating zero-emission asphalt plant in the Netherlands, and electrically produced asphalt will be supplied. During the demonstration phase, a learning programme for the entire sector will be launched, focused on developing and sharing knowledge regarding the logistical and economic aspects of the production and processing of electrically produced asphalt.

Phase 2: Introduction to the sector (2031-2040)

Based on the lessons learnt during the demonstration phase, the roll-out of electrically produced asphalt will be mapped out. In this roll-out phase, zero-emission asphalt production must be made possible alongside conventional production. This phase will last up to 2040. From then on, the emissions trading system (ETS) will no longer issue CO2 allowances, giving industrial companies a strong incentive to operate on a net climate-neutral basis.

These two phases will be preceded by an exploratory phase.

Exploratory phase (2026)

In this phase, it must be determined whether there is sufficient commitment from commissioning parties and contractors to the proposed approach.

A market consultation will be conducted to gauge support for the approach among contractors. In addition, support for the overall approach will be sought from co-commissioners via the demand alliance linked to the 'Future-Proof Asphalt Supply Chain Approach'.

The market consultation will be conducted by Rijkswaterstaat, the municipality of Amsterdam and the province of Gelderland.

The exploratory phase will conclude with a proposal for the next steps. This proposal will be drawn up by the commissioning parties involved in the market consultations and submitted to the Future-Proof Asphalt Supply Chain Steering Group.

The transition to electric asphalt production is a joint undertaking by contractors and commissioning parties, in which broad support for the chosen route is essential. The proposed two-phase approach should therefore be viewed as a working model. The information session and the market consultations are expressly intended to flesh this out or adjust it as necessary.

1.3 Purpose of the market consultation

The purpose of the market consultation is to gain a better understanding of developments in electric asphalt production and, from there, to accelerate its introduction as desired. Feedback from market parties will provide a clearer picture of the level of support for the outlined approach, the preconditions that must be included in a tender for electrically produced asphalt, and the learning objectives to be achieved during the demonstration phase.

Themes of the market consultation

- The approach outlined to achieve electrically produced, emission-free asphalt in the Netherlands in two phases.
- Scope of the term 'electric production' (see section 1.4)
- Preconditions that must be met by the government or specific commissioning parties in order to establish the first plant capable of producing asphalt using electricity.
- Learning objectives for the first phase in which asphalt is produced using electricity, with a view to accelerating its subsequent introduction.
- Gathering insights into the roll-out of electric asphalt production in phase two.

The approach and opportunities for reflection will be discussed during the general information session. Individual market consultations will then be organised for parties/consortia to address the five themes mentioned above in detail.

The outcome of the market consultation and the assessment of support for the approach among contractors will be used to formulate a proposal for the next steps. Should a positive decision be taken, this proposal will concern the organisation of phase 1. This proposal will be drawn up by the commissioning parties involved in the market consultations and submitted to the Future-Proof Asphalt Supply Chain Steering Group, which comprises the Ministry of Infrastructure and Water Management, Rijkswaterstaat and the Ministry of Economic Affairs and Climate Policy.

1.4 Scope of electrical production during the demonstration phase

Our aim is to establish an electrical asphalt production plant during the demonstration phase with the following characteristics:

- Very low emissions of substances of very high concern (SVHC) per tonne of product. We envisage a maximum of 2.5 mg/tonne of PAH-16, 50 mg/tonne of benzene and 50 mg/tonne of formaldehyde.
- A maximum electrical connection capacity of 5 MW.
- An annual production of at least 100 ktonnes/year.

We consider various forms of demonstration installations to be feasible and desirable:

- A. An independently operating electric asphalt plant;
- B. An electric production unit on the site of an existing asphalt plant;
- C. A hybrid electric/gas demonstration installation;
- D. A mobile electric production unit.

During the market consultations, we would like to hear your views on the requirements and implementation options outlined above.

1.5 Target audience

This market consultation is aimed at companies in the market that supply services and products for asphalt production in the Netherlands. In particular, parties that are involved, either alone or in collaboration with others, in the development of electric production facilities are asked to share their insights, as are market players who can contribute to the themes outlined in section 1.3.

1.6 About the collaborating commissioning parties

Without the active involvement of and support for the approach from commissioning parties as buyers of the produced asphalt, the transition to electrically produced asphalt will not be accelerated.

During the exploratory phase, efforts will be made to align stakeholders and build support for the entire approach amongst both commissioning parties and contractors.

Discussions with the market regarding the approach are being conducted not only by Rijkswaterstaat but also by the municipality of Amsterdam and the province of Gelderland. These parties will also formulate the proposal for the next phase.

2 Procedure

The market consultation consists of a plenary information session and one-to-one market discussions.

2.1 Schedule

The table below outlines the schedule for this market consultation:

Activity	Date
Announcement of market consultation on TenderNed and other media	Thursday 7 May
Deadline for registering for the information session and submitting the questionnaire	Wednesday 20 May
Information session	Wednesday 3 June 3.00-5.00 pm
Deadline for registering for market discussions	Friday 12 June
Market discussions	22 June-3 July
Publication of market consultation report	Thursday 3 September

2.2 Questions about the market consultation

If you have any questions about this market consultation, please direct them to Riane Barf (riane.barf@rws.nl). Any substantive answers will be included in the market consultation report.

2.3 TenderNed

Information about this market consultation will be posted on TenderNed. By using TenderNed, all interested market parties will be notified simultaneously of relevant information.

2.4 Information session

As mentioned, a plenary information session will be organised during which the team organising the market consultation will explain the proposed two-phase approach. This session will also provide an opportunity to discuss this approach.

The information session will take place on Wednesday 3 June 2026 in Lelystad from 3.00 pm to 5.00 pm.

If you wish to participate in the market consultation, please register by Wednesday 20 May at the latest using the registration form:

<https://forms.gle/EpMEgWE4TnKczxuq5>

PLEASE NOTE: for this market consultation, we will not be using the Tendered registration options. When registering, please state your name, organisation and position, and answer a few questions. For your information, the questions are also included as an appendix to this document. A maximum of two participants per market party may register. The organisers reserve the right to make a selection based on the registrations received, subject to the available space. You will receive a response to your registration by Friday 22 May at the latest.

2.5 Market discussions

Following the information session, you can register for the individual market discussions. You may also register with multiple companies, for example if you are working together on an initiative. The market discussions are in-depth discussions focused on the five themes mentioned in section 1.3 (proposed approach, scope, preconditions, learning objectives and roll-out). During the information session, details will be provided on how to register for these market consultations. The consultations will take place in Utrecht, between 22 June and 3 July.

2.6 Report on the market consultation

A comprehensive report on the market consultation will be produced, published on TenderNed and shared with the market parties that took part. The report will contain the key conclusions. Publishing this report publicly ensures a level playing field and allows all interested market parties to access the information. The findings in this report will be anonymised and commercially confidential information will not be included. The presentation from the information session and a list of participating market parties will also be shared on TenderNed. The list of participating market parties will mention the names of organisations; names and contact details of individuals will not be included.

2.7 Terms and conditions of the market consultation

The market consultation is conducted under the following terms and conditions:

- Given the non-binding nature of the market consultation, no rights may be derived from any information provided in the context of this market consultation.
- Participation is entirely voluntary and non-binding.
- The organisers will not reimburse any costs incurred or to be incurred in connection with this market consultation.
- The report of this market consultation will be included in any subsequent tender procedure. Participation in the consultation will have no consequences with regard to any future tender procedure. Participation in the consultation does not create any preferential positions or grounds for exclusion.
- At the start of any tender procedure, the organisers will make the report of the market consultation available to all parties to ensure that any tender procedure can proceed objectively, transparently and in a non-discriminatory manner (to prevent any restriction of competition).
- Information from this market consultation may differ from information

- provided later in the context of any proposed tender.
- This market consultation does not constitute an invitation to tender for any future contract.
- The organisers reserve the right to amend the schedule, as outlined in this document, at their discretion and/or to suspend the market consultation process in whole or in part.
- The information provided to the organisers through this market consultation will be treated as confidential and will not be used for any purpose other than gaining (market) knowledge in order to develop higher-quality tender documents.
- By participating in this market consultation, the interested market party agrees to all the conditions set out herein.

3 Appendix: questionnaire

3.1 Explanatory notes

By including a questionnaire in the registration process, the organisers aim to incorporate as many market perspectives as possible into the information session and the subsequent market discussions.

The organisers request that market participants complete this questionnaire when registering for the information session and provide answers that are as clear and comprehensive as possible.

3.2 Questionnaire

1. What is the name of your company?
2. Could you briefly describe your company's role in relation to asphalt production?
3. Who will be attending the information session on behalf of your company?
(maximum of two people)
4. What is your position regarding the development of electric asphalt production?
 - I am currently involved, either alone or with partners, in the development of electric asphalt production and may wish to build a demonstration plant in the coming years;
 - I am not personally involved in the development of electric asphalt production but would like to learn from the initial experiences and get on board once the technology has progressed sufficiently.
 - I am following developments in electric asphalt production and would like to contribute ideas on an approach that will advance the sector as a whole.
 - Other, please specify...
5. What opportunities do you see for the electrification of asphalt production?
6. Could you indicate which topic should not be missing from the individual market discussions to be held, and why?