

Dutch companies must prepare for extreme weather

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Dutch companies must prepare for extreme weather

- Climate change will bring increasingly extreme weather to the Netherlands. Heatwaves, droughts and heavy rainfall affect the day-to-day operations of companies across all sectors.
- Disruptions to business operations caused by extreme weather can lead to lower labour productivity, higher costs and lost revenue in some sectors. In other sectors, extreme weather may create opportunities to attract new customers.
- Dutch companies can use climate adaptation measures, provisions in collective labour agreements and insurance to limit these negative effects and strengthen their competitive position. The consequences of extreme weather, as well as the available responses, vary considerably by sector and are described in this report.

Extreme weather affects sectors

Heatwaves, drought and severe thunderstorms or rainfall affect the day-to-day operations of Dutch companies and are already being felt. Extreme weather often has direct and far-reaching effects that can result in significant damage. Examples include a failed harvest after a heavy rain shower or data centres temporarily scaling back operations because of water shortages. Extreme weather often makes companies vulnerable but can sometimes also create opportunities to attract new clients.

This report shows companies in different sectors the immediate consequences of current extreme weather in the Netherlands, such as heatwaves, drought and heavy rainfall, and offers solutions for adapting to these new conditions. The consequences of extreme weather, and therefore the solutions, vary greatly by sector.

Extreme weather has far-reaching effects on companies

The summer of 2026 demonstrated the extent to which Dutch companies are vulnerable to extreme weather and face lost revenue, higher costs and lower labour productivity. In June 2026, the Royal Netherlands Meteorological Institute (KNMI) issued a [red](#) warning for extreme heat for the first time in history. This led, for example, to the cancellation of several festivals. Organisers of large festivals had to refund tickets for tens of thousands of visitors and therefore lost revenue while still incurring costs. Heat and drought also create logistical [challenges](#), for example when water levels are low, meaning inland vessels can carry less freight. Businesses that depend on these supplies, such as animal feed producers or construction companies, may face delays in the delivery of raw materials.

At the same time, some sectors benefit from heat and drought. Sales of fans, garden furniture and paddling pools at DIY stores [increased](#). According to ABN AMRO [research](#), supermarket spending also rose during the June 2026 heatwave. Cinemas also proved to be [attractive](#), cool places where people sought refuge from the heat. Cinemas scheduled extra screenings in the summer of 2026, partly to accommodate children whose schools had closed. The market for climate-adaptive solutions may also grow for installation companies because of increasing demand for air conditioning and heat pumps. Companies in certain sectors therefore see opportunities to attract new clients or generate additional revenue during extreme weather.

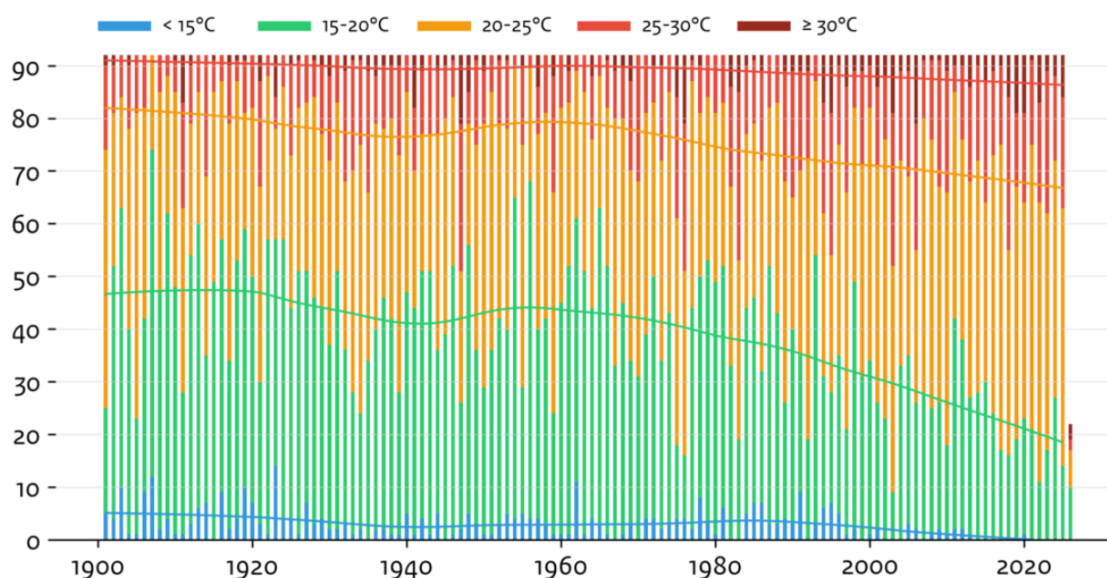
Extreme weather also affects the deployment of labour. Extreme heat can lead to work being partly or completely cancelled or to lower labour productivity. A commonly used rule of thumb is that from 25 degrees Celsius, labour productivity [falls](#) by around 2 per cent for every one-degree rise in temperature. Heat may also cause health problems for employees, especially those who work outdoors, perform strenuous work or work in poorly insulated environments. According to [TNO](#), more than 350,000 Dutch employees are exposed to heat stress at work. Under the Working Conditions Act, employers must provide a safe working environment at certain temperatures, with adequate ventilation, work breaks and sun protection. However, the Act does not specify when it is too hot to work.

Many collective labour agreements could be strengthened in relation to hot weather. The collective labour agreement for greenhouse horticulture is a rare exception: it includes agreements on the temperatures at which conditions are declared unworkable. For example, it states that at 35 degrees Celsius or above, an employee cannot perform their usual work. Construction and infrastructure have a special collective labour agreement on unworkable weather, but it only covers when it is too cold to work, not when it is too hot.

Weather is becoming more extreme, and sectors are still poorly prepared

The common factor in various [climate scenarios](#) is that summers in the Netherlands are expected to become increasingly hotter and drier over time. The figure below shows that the number of summer days with high temperatures is increasing, while the number of days with low temperatures is falling. June 2026 broke a record with a temperature of 39.4 degrees Celsius in the Netherlands, followed by a very dry and warm July. Average rainfall in July was 12 millimetres, compared with the long-term monthly average of 79 millimetres.

Figure 1: Number of summer days with a given maximum temperature in De Bilt. Y-axis: number of days. Data: homogenised version 2.0. Source: [KNMI](#).



August also began with high temperatures, for which the KNMI issued a yellow warning. The wildfires in Limburg in August, caused by persistent drought, show the enormous impact of extreme weather on nature and businesses such as [campsites](#). According to the European climate service Copernicus, the oceans are also exceptionally warm. Warm oceans increase the likelihood of very heavy rain, and therefore flooding, in the autumn.

However, 2022 [research](#) published in Nature Communications Earth & Environment shows that, although investment in climate-adaptive measures is generally increasing, major European sectors such as industry and retail are investing too little to be prepared for extreme weather.

[Researchers](#) Usman, Parker and Vallat estimate that extreme weather causes billions of euros in losses across various European regions. Their research focuses on floods, drought and heat. Extreme weather led to an estimated EUR 43 billion decline in gross value added in 2025. Gross value added is broadly comparable to gross domestic product, but in this case uses a different geographical scope.

Dutch companies operating in long international supply chains may also be affected by extreme weather in other parts of the world. These companies often depend on production processes and raw materials from other countries. Heat, drought or flooding on the other side of the world can therefore be felt by Dutch companies. Persistent drought in Ghana and Côte d'Ivoire up to February 2024 caused the global cocoa price to [rise](#) by 280 per cent in April 2024 compared to April 2023. Although the global effects of extreme weather may be substantial for some Dutch companies, this report focuses only on the consequences of extreme weather in the Netherlands.

Supply-chain effects of extreme weather are also felt within the Netherlands, particularly by companies that operate more centrally in the production chain. The Climate Adaptation Knowledge Portal [mapped](#) the supply-chain dependencies of several critical companies in the Amsterdam region. It found that if electricity, telecommunications or water management companies fail because of extreme weather, very large knock-on effects may follow. Critical sectors such as hospitals depend on electricity and telecommunications to provide emergency care. Industry is also vulnerable to supply-chain effects during extreme weather, partly because of its strong dependence on other sectors. Companies therefore need clear insight into their value chains and the risks associated with different suppliers.

Chronic and acute effects affect sectors

Climate risks are divided into acute and chronic effects of climate change. Acute effects are short-lived, sudden events. Examples include extreme weather such as heavy rainfall or extreme heat. Chronic effects, by contrast, are often far-reaching, structural and develop gradually over time. One example is prolonged low river levels, which negatively affect inland shipping. Land subsidence, salinization and sea-level rise also fall into this category. Chronic changes cause a structural, far-reaching change in demand or supply. Their consequences are therefore usually outside the scope of insurance, because they do not involve an unforeseen event but a gradual change.

Although acute and chronic effects each require different responses, they are closely linked. Chronic effects such as a rising average temperature make acute effects such as extreme heat more frequent, resulting, for example, in more forest fires. It is also important to consider regional differences. The effects of climate change are highly location dependent. In some regions of the Netherlands, the likelihood of hail may increase, while other regions are more vulnerable to flooding. The flooding of the River Geul in Valkenburg five years ago is one example.

Differences in heat can also be substantial. Depending on how green the surroundings are, temperatures within a city can sometimes differ by almost 20 degrees Celsius, [satellite imagery](#) shows. Extreme weather therefore increases inequality between people who can and cannot create a cooling environment for themselves. In addition, the lower the CO₂ emissions from companies and society, the less severe the long-term effects of climate change are likely to be. Despite the relevance of chronic effects, this report mainly discusses the extreme weather conditions of heatwaves, drought and heavy rainfall.

Preparing through adaptation, collective labour agreements and insurance

Extreme weather can lead to sudden shifts in consumer behaviour, logistics or production. Companies therefore need to become resilient to extreme weather by investing in climate-adaptation measures. [Eurostar](#), for example, will design its new high-speed trains to withstand heat of up to 55 degrees Celsius. The old model could withstand up to 45 degrees Celsius. The company is preparing for more extreme weather and must do so well in advance because new trains typically remain in service for decades. Eurostar also has heat plans to resolve faults more quickly and keep passengers better informed.

Climate-adaptation measures differ by sector, as the sector analyses below show. Examples include making buildings and sites climate-resilient by using green roofs, constructing water buffers for extreme rain and drought, and adapting work processes during extreme heat. Companies that invest in adaptation can respond quickly to changing demand or limit the effects of extreme weather so that business processes do not fail. Companies that take adaptation measures early can strengthen their competitive position.

As noted above, many collective labour agreements still do not specify when it is too hot to work. Employers whose collective labour agreements define which extreme weather conditions make work impossible can apply to the Employee Insurance Agency (UWV). Based on sound justification and subject to certain conditions, these employers may receive a temporary [benefit](#) from the UWV for their employees. Without provisions in a collective labour agreement, the employer bears the cost of work stoppages.

Organisations can also develop an extreme-weather plan setting out the steps to take during severe storms or heatwaves. Such a plan includes a description of who is responsible for what, special communication channels, emergency procedures and further measures to safeguard continuity as much as possible. Companies with such a plan can respond more quickly to extreme weather and limit the potential damage.

As an entrepreneur, it is important to know the risks posed by extreme weather and how to limit damage. Insurance can help absorb some of the financial consequences of unforeseen weather damage, such as flood damage. At the same time, when extreme weather is forecast in advance, it may be sensible to take preventive measures where possible to prevent or limit damage.

Barriers for companies

Companies' ability to adapt to extreme weather may be restricted by financial and economic barriers. A recent [analysis](#) by the Dutch association of accountants, SRA, covering the financial statements of 7,000 small and medium-sized enterprises, shows that this group remains cautious about investment because of rising costs and geopolitical uncertainty.

Infrastructure constraints may also limit companies' ability to invest. Grid congestion may, for example, hinder investment in measures that increase electricity demand, such as additional cooling during extreme heat. Earlier ABN AMRO [research](#) shows that available grid capacity may generally limit companies' ability to adapt. Regulation, lengthy permit procedures or a lack of awareness of subsidies may also limit companies' options and incentives. The government can play a major role by reducing barriers for companies that want to invest in adaptive measures.

Read more about the consequences of extreme weather for the sectors

This report examines how extreme heat, drought and heavy rainfall in the Netherlands affect companies in different sectors. It provides examples and solutions for each sector.

Agri

Drought puts harvests under pressure, but may strengthen the relative competitive position of Dutch arable farming

Long periods of heat and drought are testing European agriculture this year. Higher rates of evaporation, reduced inflows of freshwater, irrigation bans, soil salinisation and a greater risk of disease and pests increase the likelihood of crop failures and quality losses.

The European crop and harvest monitor sharply reduced its harvest estimates because of the drought in July 2026, as shown in Table 1. Given the continuing drought in August, we expect the harvest estimate to be revised down further.

Table 1: European harvest estimate revised down in July 2026 because of drought

Change in harvest estimate (compared with one month earlier)	EU	Netherlands
Cereals	-4%	n/a
Maize	-6%	-2%
Potatoes	-3%	-2%
Sugar beet	-2%	0%

Note: the harvest estimate is updated month on month. The effect is therefore entirely attributable to weather conditions and not to changes in area. Source: JRC MARS Bulletin.

Harvest declines caused by drought are not distributed evenly across crops and regions. Lower yields due to drought are currently occurring all across Europe. A fall in supply generally leads to higher market prices. These price increases compensate for part of the income lost through lower yields. Growers who suffer relatively little drought damage may even benefit from higher selling prices. The Netherlands has a more favourable position than Southern Europe in terms of water availability. Because drought-related harvest losses are expected to be greater in Southern Europe than in the Netherlands, the relative competitive position of Dutch growers may improve over time.

Arable farmers can protect themselves against water scarcity by innovating in irrigation, water storage and cultivation systems, and by exploring [salt- and drought-tolerant varieties and crops](#) such as pulses. These adaptations contribute to climate-resilient arable farming and also offer opportunities in the search for new high-margin crops.

Entrepreneurs are not the only ones who need to act. The government has an important role to play: retaining more water for longer requires changes to our landscape and water management. This keeps more freshwater available during dry periods, which the agricultural industry can also use. Climate risks remain despite adaptive measures. Growers must therefore accept or mitigate some of these risks, for example through [broad weather insurance](#).

Food

Water availability, rather than price, poses a risk to the food industry

Water availability is crucial to the food and beverage industry. Tap water is used as an ingredient in products, in preparation processes such as cooking or steaming, and to clean products, packaging and machinery.

The sector generally uses groundwater and surface water for cooling. Water is relatively inexpensive and accounts for only a few tenths of a per cent of the cost price. Even if prices rise sharply because of water scarcity, the sector will remain highly dependent on water and demand will remain stable.

However, drinking water companies have [warned](#) that dry periods may cause a drinking water shortage from 2035 unless the government intervenes. This could mean companies have less access to water at peak times or that expansion plans with high water demand cannot be approved. For now, large-scale production restrictions caused by drinking water shortages are exceptional, but the risk is increasing as dry periods become more frequent and severe.

Companies in the food sector would therefore be wise to begin investing in solutions that reduce water consumption. [Beer brewers](#) and [dairy companies](#), among others, have been working to reduce their water use for some time. They do this by making production processes more efficient, for example through shorter cleaning cycles, reusing water through filtration methods and collecting residual water. The business case for such technical investments can be challenging water-saving technologies are expensive, while the financial return from saving water is limited because water costs are low. Investment in water-saving technology therefore has a long payback period.

Construction

Extreme weather drives demand for climate-adaptive solutions in construction

The construction sector plays a key role in the development and implementation of solutions to combat the negative impacts of climate change. Extreme weather events such as heatwaves, flooding and droughts have a significant impact on the built environment. Solutions such as rooftop vegetation and heating, ventilation and air conditioning (HVAC) systems are implemented by the construction sector and place additional pressure on an already strained labour market.

The [Netherlands Environmental Assessment Agency \(PBL\)](#) assesses the impact of climate risks on the Dutch built environment as “major”. This means that more than 100,000 people could be affected by extreme weather and that the damage could be national and/or irreversible. One example is the breach of the dyke at Wilnis in 2003, which damaged dozens of homes. The PBL estimates that this type of impact will occur once a year between now and 2050. The built environment must adapt to the effects of climate change so that people can continue to live and work safely and comfortably.

The construction sector has two types of measures available to address the effects of climate change: passive and active measures. Passive measures include green roofs, sun protection and biobased construction materials. These solutions require no energy but help reduce the impact of extreme weather, for example, heat stress. This type of measure is increasingly being used in the construction of residential buildings. In contrast to this, active measures such as HVAC systems and heat pumps do require energy. These measures drive demand for installation work and increase pressure on the already congested Dutch electricity grid.

Residential construction

The market for climate-adaptation solutions in residential construction will grow. These solutions are often passive measures to reduce heat stress. One such example is a “green roof”, where vegetation on the roof allows water to evaporate, cooling the building. As a result, less active cooling is needed. Over time, a green roof is potentially more cost effective than a conventional roof without vegetation due to the lower cooling costs. Furthermore, the increasing frequency of extreme rainfall will lead to greater demand for solutions to prevent flooding, such as permeable paving and urban water collection systems. These measures can prevent damage to buildings and infrastructure caused by overloaded sewers and flooding. Unfortunately, extreme weather also affects business operations. Excessively high temperatures can create unsafe working conditions, while drought may put the supply of construction materials at risk.

Technical services

Technical services will also see the market for climate-adaptive solutions grow. More frequent periods of heat stress are driving demand for HVAC systems and heat pumps, which are examples of active measures. This growing demand for climate-control systems creates opportunities for the technical services sector. At the same time, the sector faces major labour shortages, so it is uncertain whether companies can meet rising demand quickly enough. Electricity grid congestion in the Netherlands also affects the adoption of air conditioning and heat pumps. These systems run on electricity and place heavy demands on the already overloaded grid. TNO [expects](#) the amount of electricity used for cooling in 2030 to be almost three times higher than in 2022.

Real estate

Heat-resistant rental homes are more attractive to investors

Rental homes

As heatwaves become more frequent, more Dutch homes are overheating. More than [800,000 people](#) in the Netherlands live in heavily paved neighbourhoods with limited greenery and are therefore particularly vulnerable to the urban heat-island effect.

In these areas, buildings, asphalt and paving retain heat for a long time, keeping temperatures high, even at night. This increases the risk of health problems and reduces residential comfort.

Rental homes with low energy bills will be more popular with private and institutional property investors. The risk of high indoor temperatures in summer is [explicitly included](#) when determining a home's energy label. Investors in rental homes with features such as external sun protection, energy-efficient ventilation and green or white roofs can demonstrably benefit. According to an analysis by estate agents' association NVM, the average price difference between homes with energy label A and energy label G was approximately [EUR 55,000](#) at the end of 2024, or about 15 per cent.

Since 2021, all new-build homes must meet strict design and construction requirements to limit the risk of overheating. This requirement, known as [Temperature Exceedance](#) July (TO July), is part of the Nearly Energy-Neutral Buildings standard (BENG). Investors in rental homes permitted before 2021 that face an increased risk of high indoor temperatures in summer must decide whether investing in heat-resistant measures is profitable within their investment horizon.

Depending on the characteristics of the home, investments such as better insulation or improved ventilation may be profitable over the longer term. It is advisable to obtain technical and financial advice. Subsidy schemes such as [SVOH](#) may offset part of the investment costs. For investors with a shorter investment horizon, however, selling may be the most feasible option. In practice, many private investors have chosen in recent years to sell their Box 3 property. Although the peak of that sales wave appears to have passed, we expect sales of rental homes, often sales to owner-occupiers, to continue in 2026 and 2027. This is partly driven by the growing need for investment in heat adaptation, which not every residential property investor is willing to make.

Offices

Investors are increasingly focusing on future-proof office properties. This is reflected in growing valuation differences between buildings that are better prepared for climate change and those that are less well prepared.

Although stricter sustainability regulations, such as the European EPBD IV Directive, are an important factor, this trend is increasingly being driven by occupiers' economic considerations.

The consequences of climate risks are becoming increasingly tangible. Extreme heat and heavy rainfall can directly affect tenants' business operations. Office buildings that provide insufficient protection against high temperatures can reduce employee productivity. Now that working in the office three or more days a week has once again become the norm, the importance of a comfortable and well-conditioned indoor climate continues to grow. In an increasingly tight labour market, occupiers are also willing to pay higher rents for offices that contribute to employee well-being, comfort and productivity. This translates into higher rental levels and property valuations for climate-resilient buildings, while less climate-resilient buildings are more likely to remain vacant, and for longer periods.

Operating costs are also playing an increasingly important role in companies' accommodation decisions. The quality of insulation, climate-control systems and the availability of on-site energy generation, for example through solar panels, largely determine energy costs. Climate-resilient buildings also often benefit from lower financing and insurance costs because climate-related risks are easier to manage. This further strengthens the appeal of climate-resilient and sustainable offices.

Retail

Food refrigeration is more prone to failure during warm weather

Shopping behaviour

Heat affects consumer shopping behaviour. Earlier ABN AMRO [research](#) based on anonymised transaction data shows that the June 2026 heatwave temporarily influenced consumer behaviour. During the heatwave, spending was on average 4 per cent lower than normal. It then recovered quickly and even rose above typical levels. Four days after the heatwave, the decline in consumption had been fully offset. This suggests that households mainly postponed purchases and made up for them afterwards. Behaviour during the heatwave differed by segment: supermarket spending increased throughout the country, while debit card spending at other shops fell.

Research by consultancy [RMC](#) showed that in the June week when a red warning was issued, footfall in shopping streets was 13 per cent lower than in the same week in 2025. Covered shopping centres benefited, however. Mall of the Netherlands [reported](#) that the heat attracted many visitors, particularly on 26 June, the hottest day, when many schools were closed. Besides shops, covered shopping centres often have food and beverage outlets, making them an attractive place for consumers to cool down.

Supermarkets

Supermarkets generally perform well during hot periods. Consumers want convenience and do not want to spend too long in the kitchen. They buy light, easy meals such as ready-made meal kits, fresh products, salads and barbecue packs. These products have high margins.

The challenge for supermarkets during hot periods is keeping these products properly refrigerated. In the summer of 2026, the refrigeration systems of some Dutch supermarkets came under severe pressure. High outdoor temperatures made it harder for systems to release heat, while open refrigerated displays, high visitor numbers and intensive use increased the load further. This caused faults or made temperatures in refrigerated displays rise too high, forcing products to be withdrawn from sale as a precaution and leaving empty shelves.

The problems show that older or poorly maintained refrigeration systems are particularly vulnerable during prolonged periods of extreme heat. It is therefore important to have the refrigeration system properly maintained by an engineer and to regularly clean the condenser, which removes heat. If the condenser is situated on the roof, it is also advisable to install sprinklers to prevent overheating.

Supermarket chains also restricted their delivery services to protect their staff and products from the heat. This reduced delivery capacity and increased operating costs. Albert Heijn, for example, stopped home deliveries after 3.00 pm on 26 June, while Picnic did not deliver between 1.00 pm and 6.00 pm that day. On other warm days, delivery workers were allowed to take longer breaks and adjust their pace, and they were advised to drink plenty of water.

Leisure

Extreme heat puts outdoor recreation under pressure, but draws visitors to cool locations

Tourism

Climate change creates opportunities for tourism in the Netherlands, particularly through warmer and longer summers. This may extend the tourist season into spring and autumn and make outdoor activities such as cycling, swimming, sunbathing and water sports more attractive. The Netherlands may also become more attractive to foreign visitors as Southern Europe faces extreme heat and drought more frequently. At the same time, increasing heat stress and heavy rain in the Netherlands may negatively affect tourism.

Prolonged high temperatures alternating with extreme rain and thunderstorms reduce campers' comfort, particularly at campsites with little shade and shelter. Images of tents and caravans almost being washed away by extreme rainfall because dry soil barely absorbs the water have become familiar. Campsites would be wise to invest in additional shade, better drainage and covered, well-ventilated areas where guests can eat and enjoy leisure activities.

Low water levels are making water sports more challenging than usual this summer, according to trade association HISWA Recron. For water-sports companies, this may lead to lost revenue and higher costs. Marinas, for example, may face cancellations or shortened boating holidays, higher operating costs for dredging and other work, and planning disruptions because berths are less accessible.

Hospitality

Warm summer weather generally brings additional visitors to restaurants. Cool indoor locations, ice-cream parlours, beach pavilions and shaded terraces may benefit. But extreme heat also presents challenges. During the hottest hours of the day, sitting outside becomes less attractive. Restaurants close for lunch and only reopen once it cools down. Restaurant venues also adapt their menus towards lighter meals, such as salads, and ingredients that do not need to be heated.

Temperatures in many kitchens rise well above outdoor levels because of ovens, cookers and deep-fat fryers. This increases the physical burden on staff. [Entree Magazine](#) gives examples of restaurants that temporarily closed their businesses in June 2026 because of the extreme heat, as they did not want to expose employees to such conditions. Other entrepreneurs tried to attract guests with promotions, such as a second ice cream for free or discounts based on the temperature: at 30 degrees Celsius, you receive a 30 per cent discount. Finally, heat increases the risk of food spoilage, making adequate refrigeration essential. More intensive use of refrigeration and air conditioning increases electricity consumption and therefore operating costs. As heat is expected to become more frequent, entrepreneurs would be wise to invest in structural solutions such as air conditioning and sun protection. Misting systems can also provide cooling.

Cinemas

Sunny weather is often said to have a negative effect on cinema attendance. But extreme heat may actually attract additional visitors to cinemas, because air-conditioned rooms offer an appealing alternative to outdoor activities or warm homes. During the heat in June 2026, Dutch cinemas saw visitors deliberately seeking cool surroundings, and some locations scheduled additional screenings. Pathé reported that around 65,000 tickets were sold on 26 June, almost twice the usual number. The

company responded to school closures by scheduling additional matinee screenings. Cinemas may therefore gain an additional role during heatwaves as cool places to stay. At the same time, this requires reliable climate control and sufficient capacity, because demand for cooling and energy consumption increases during extreme heat.

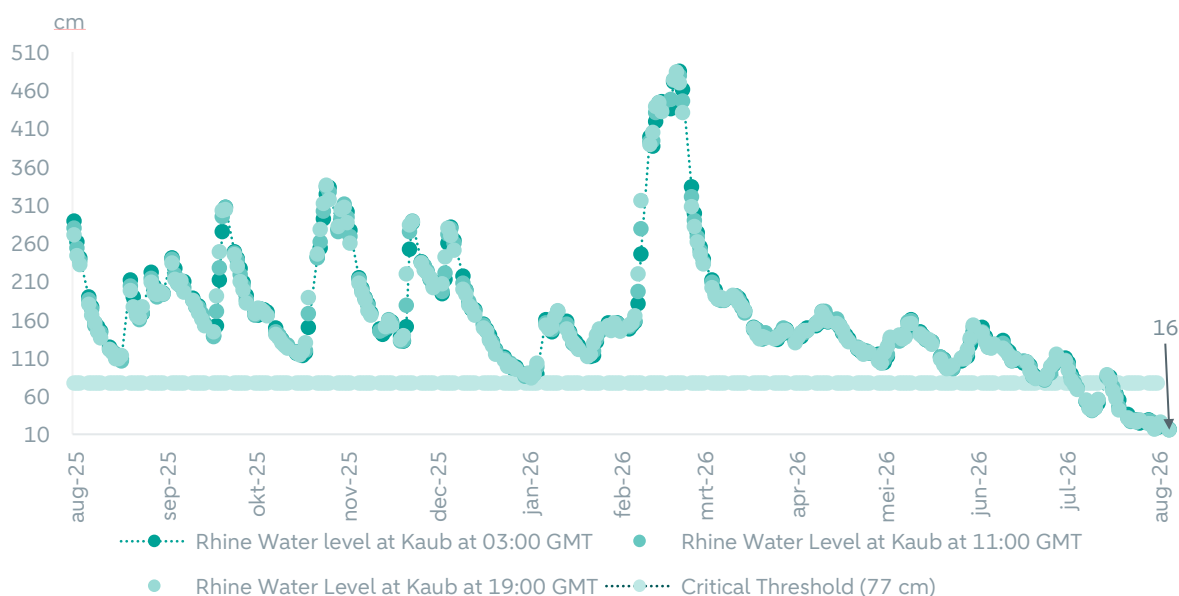
Transport & logistics

Inland shipping grinds to a halt at extremely low water levels

Extreme drought is putting inland shipping under increasing pressure. Low water levels mean vessels can carry less cargo, and some waterways even become temporarily unnavigable, such as the Twente Canal and the port of Deventer in the summer of 2026.

As a result, transport capacity falls, detours are sometimes necessary and fees continue to rise. The water level at Kaub, an important indicator of navigability on the Rhine, fell well below the critical threshold of 77 centimeters in July 2026. This water level does not show the actual depth of the Rhine, but the water level is relative to a fixed reference point at the measuring station. At its lowest point, only 16 centimeters remained, see Figure 2. ABN AMRO research shows that water levels are reaching critical levels more often and that periods of low water are lasting longer.

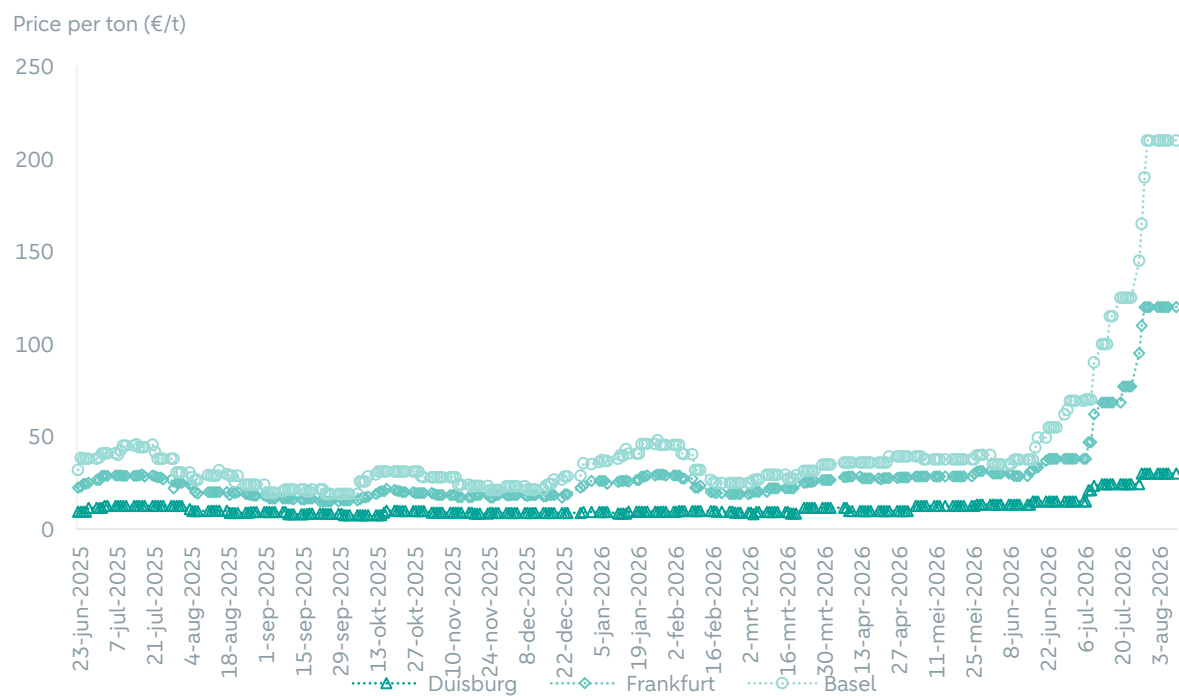
Figure 2: Rhine water level at Kaub falls to a critical level in July. Water level at three measurements per day over the past year (cm). Year to date: 10 August 2026. Source: LSEG Datastream.



Dry bulk is not the only segment currently facing problems; tanker shipping is also affected. Tanker shipping carries liquid cargo such as oil and chemicals, while dry bulk consists of loose dry goods such as grain, coal and ores. Tankers are more sensitive to low water levels than other bulk vessels because they are relatively heavy even when empty. Geopolitical tensions also create uncertainty. Disruptions around the Strait of Hormuz are driving oil and gas prices further upwards. The combination of strong demand for oil products and limited vessel supply because of low water is putting upward pressure on tanker freight rates, see Figure 3.

In periods of low water, a flexible fleet containing both small and large vessels remains essential. Smaller vessels can continue sailing in low water because of their lower weight and can also reach inland terminals more easily. Even so, this segment is under pressure. ABN AMRO [research](#) shows that the inland shipping fleet increasingly consists of larger vessels. Small vessels offer greater flexibility but benefit less from [economies of scale](#). More skippers are also needed for the same transport capacity, while the sector faces a persistent staff shortage.

Figure 3: Low water levels cause freight rates for tankers on the Rhine to surge. Daily freight rates for transporting diesel by inland tanker on the Rhine to Duisburg, Frankfurt and Basel. Year to date: 10 August 2026. Source: LSEG Datastream.



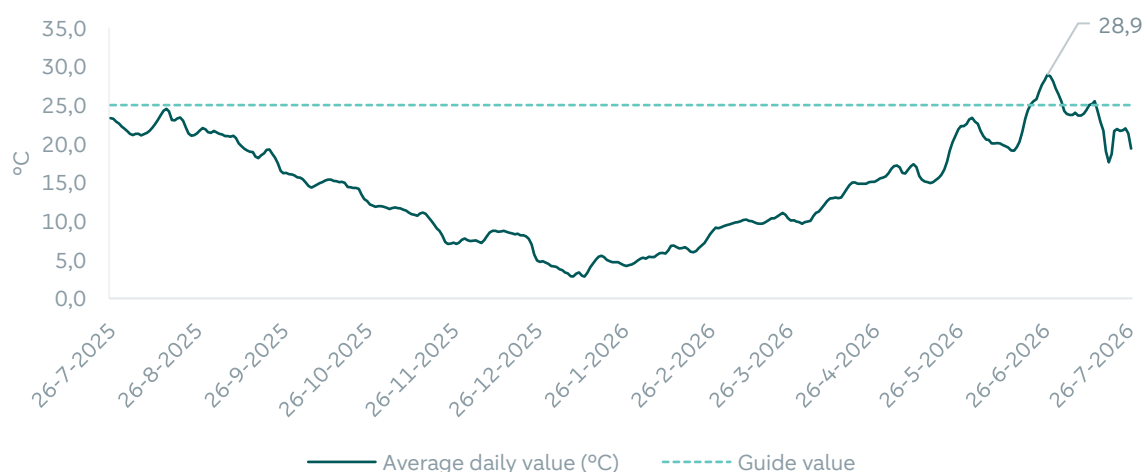
Industry

Warm water: a cold shower for industry

Many factories use river water for cooling. Prolonged drought and high temperatures place industrial cooling systems under pressure. Low water levels mean less water is available to cool factories. At the same time, the options for discharging cooling water are decreasing. Maximum temperatures apply to the water that companies discharge back into rivers to prevent damage to the ecosystem. Higher water temperatures reduce oxygen levels in the water and may harm fish and other aquatic organisms.

When the water temperature becomes too high, the Directorate-General for Public Works and Water Management (Rijkswaterstaat, RWS) may [impose restrictions](#) on heat discharges under previously issued permits. This happens when temperature limits are reached or are at risk of being exceeded. The ecological guideline value of [25 degrees Celsius](#) for major rivers plays an important role. This may result in lower production, temporary shutdowns of facilities and higher costs.

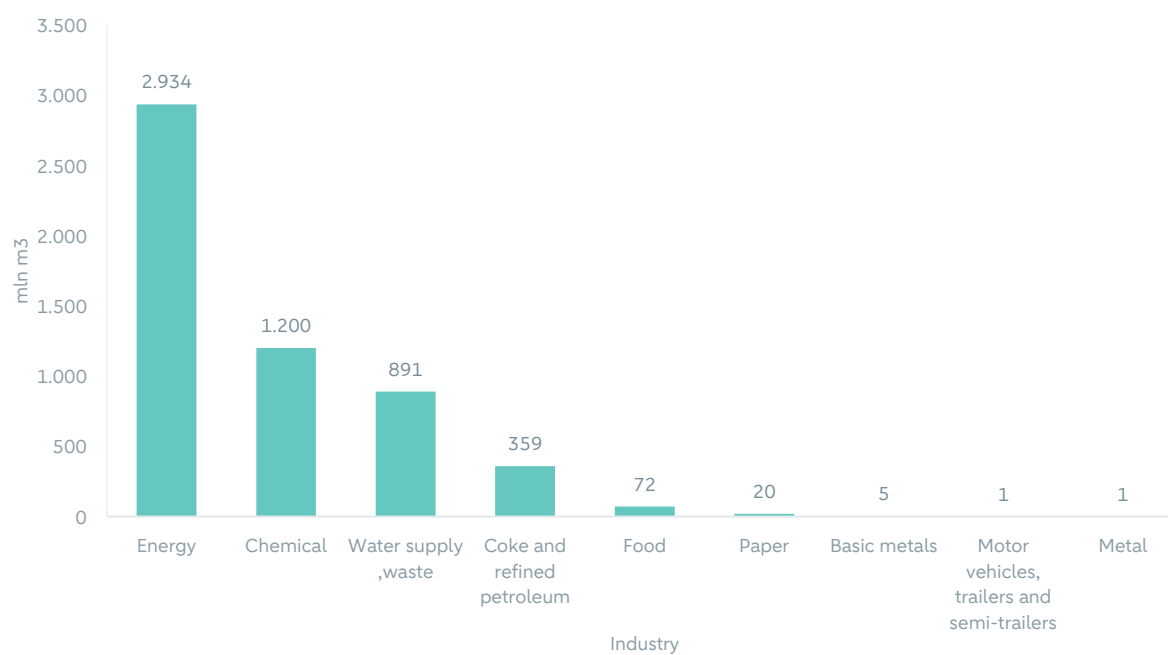
Figure 4: In the summer of 2026, water temperatures regularly exceed the ecological guideline value of 25 degrees Celsius. Average daily temperature of Rhine water at Lobith between the summer of 2025 and summer of 2026. Year to date: 26 July 2026. Source: Directorate-General for Public Works and Water Management (Rijkswaterstaat, RWS), adapted by ABN AMRO.



Heavy industries, particularly the chemicals, energy and metals sectors, depend on cooling-water discharges and are therefore highly vulnerable to restrictions on water use, as shown in Figure 5. The impact on the chemical industry remains limited for now. [Dutch chemical industry association VNCI](#) reports that companies in the Netherlands had not yet experienced problems from water shortages in the summer of 2026, despite the ecological guideline value being exceeded. The consequences are already more visible in other European countries. [Reuters](#) reported that power plants in Hungary and Romania reduced production in the summer of 2026 because of low water levels. According to the [KNMI's 23 climate scenarios](#), the Netherlands will face heatwaves and drought more often in summer. Vulnerable sectors may therefore be affected more severely in the future.

Heavy industries can reduce their vulnerability by increasing the reuse of cooling water. Closed cooling-water systems can do this. Heated water is cooled with air in cooling towers and can then be reused in the production process. This means companies need to extract less water from rivers and lakes and discharge less heat into surface water. Metals companies can also increase recycling to save water. Producing secondary, recycled metal requires much less energy than producing primary metal, so the need for cooling water generally falls as well.

Figure 5: The energy sector and chemical industry in particular use large volumes of cooling water. Freshwater use for cooling by industry in 2023 (million m³). Source: Statistics Netherlands (CBS).



Technology, Media & Telecom

Heat and drought pose risks to data centres

Data centres are an important link in the digital economy. Applications used at home and in the office, from streaming services to AI assistants, often run on servers in remote data-centre halls.

Behind digital cloud services lies a physical infrastructure of buildings, servers, cooling, power supply and network connections. As the Netherlands becomes more digital, this infrastructure becomes increasingly important.

Demand for computing power, data storage and network capacity is expected to continue growing. This is partly due to new AI applications and initiatives such as a sovereign government cloud, which forms part of the [National Digitalisation Strategy](#). Some of that growth will be met locally by Dutch data centres. This is precisely why the vulnerability of data centres to heat, drought and extreme weather in the Netherlands deserves more attention.

Cooling represents a major risk during extreme weather. Higher outdoor temperatures increase the need for cooling. The KNMI climate scenarios indicate that summers are expected to become increasingly hot and dry. Many data centres are technically robust, but if cooling systems fail or have insufficient capacity, temperatures can rise and equipment may shut down as a precaution. The Google Cloud outage in the Netherlands in July 2026 shows how quickly power and cooling problems can have an impact. A voltage dip, failed backup systems and a cooling failure caused the temperature in a server hall to rise to 44 degrees Celsius, after which systems were shut down.

Drought increases this risk. On most days, data centres use little water because they can cool using Dutch outdoor air. On hot days, however, demand for cooling water may rise sharply. According to TNO's outlook on climate risks for digital infrastructure, a large proportion of Dutch data centres use drinking water for cooling on those days. This may become a problem during a severe drought.

When water is scarce, the Netherlands applies the water allocation hierarchy: a statutory order of priority for distributing scarce water resources. Flood protection, drinking water production and energy supply take precedence over less essential uses. Cooling water for data centres does not have an explicitly high priority. In extreme cases, restrictions on water use may force data centres to temporarily reduce capacity. Alternatives such as industrial water, rainwater, surface water, closed cooling systems and liquid cooling are therefore becoming strategically more important.

Extreme weather may also cause disruption outside of the data centre itself. Data centres often have emergency power, backup facilities and additional capacity, but they remain dependent on wider infrastructure. Problems with the electricity grid, flooding, reduced accessibility or failures in telecommunications connections may still affect digital services. According to TNO, large-scale power outages caused by climate-related incidents are the main indirect climate risk to digital infrastructure.

Climate adaptation is therefore becoming an integral part of risk management for the sector. Energy-efficient cooling, alternative water sources and the distribution of capacity across several locations increase the resilience of digital services.

Healthcare

Heat puts healthcare under pressure due to an influx of clients, while flooding may create logistical challenges

Nursing homes

Extreme weather, particularly high temperatures, poses a risk to people's health. Vulnerable older people are particularly affected by heat. During the heatwave between 22 June and 5 July 2026, 911 more people died than normal, according to an [assessment](#) by the National Institute for Public Health and the Environment (RIVM). Most of these individuals were aged 80 or over. Based on mortality figures during a heatwave in 2020, CBS [concluded](#) that deaths increased particularly among older people in long-term care. Their mortality rate was 37 per cent higher than the average in the preceding weeks, while excess mortality among the rest of the population was 9 per cent.

Excess mortality among older people in long-term care, which has historically occurred mainly during winter flu waves, has a major impact on care providers. Firstly, seeing older people die during flu waves and heatwaves places a significant emotional burden on care professionals. Workloads also increase because professionals are busy providing care around deaths and aftercare for families. In addition, excess mortality affects occupancy at care institutions if new residents do not arrive. Nursing homes already face [low bed occupation](#), and the additional empty beds caused by excess mortality in the summer of 2026 are expected to be even harder to fill.

The healthcare sector therefore needs to take measures to help mitigate against the consequences of extreme weather, particularly heat. Nursing homes can make their buildings, and therefore their clients, less vulnerable to heat by adapting buildings to the climate, improving insulation and installing air conditioning. ABN AMRO and Cobouw [research](#) shows that almost 64 per cent of nursing homes have no energy label. A lot of nursing-home properties are outdated and therefore more sensitive to temperature fluctuations. For older people, receiving home care in poorly cooled homes, where there is less direct oversight, vigilance and additional monitoring by care professionals and relatives are important. This includes additional check-ins through video care, extra visits, information on how to cool down, and closer attention to signs of overheating and dehydration among patients.

Hospital

According to the [RIVM](#), people in vulnerable health situations, such as older people, pregnant women, people with chronic illnesses and people experiencing homelessness, face a greater risk of serious health problems such as dehydration and heatstroke during hot weather. Heat affects not only physical health; mental health may also deteriorate during hot weather, according to international [research](#) published in Nature Health. Heatwaves may worsen psychological symptoms such as sleep problems, irritability and aggressive behaviour.

The effect of extreme heat is particularly noticeable in hospital emergency departments, which face peaks in demand for care. At some hospitals, the influx of vulnerable patients almost doubled, according to an [article](#) in the Algemeen Dagblad. During peak demand, staff come under great pressure and overloaded emergency departments may even have to close temporarily for new patients. This means they cannot receive new patients and ambulances must divert to other hospitals.

Increasing staffing during peak periods is desirable but difficult because emergency departments currently face staff shortages. Hospitals therefore need to develop summer peak-load protocols. More straightforward steps to prepare for heat include stocking extra water, salt, adjusted intravenous fluids

and plenty of ice, as an emergency physician explained in an article by [RTV Drenthe](#). Society also has a responsibility to pay additional attention to vulnerable people such as older people and those with chronic illnesses. Measures such as drinking enough water, avoiding strenuous activity and seeking cool public spaces may provide relief.

Heavy rain may also cause problems for hospitals. According to [research](#) by Investico, almost a quarter of emergency departments in the Netherlands may become inaccessible during very heavy rain. Paving around hospitals means the water has nowhere to go. Heavy rainfall may create deep pools that obstruct access roads to hospitals or even flood emergency departments. Flooding may also damage critical equipment or generators. The emergency department of a Dutch hospital has already had to close temporarily twice because of flooding. To limit flooding, hospitals must protect essential equipment and adapt their infrastructure, including the construction and quality of access routes and the design of sewers and drainage. These infrastructure changes require cooperation with the municipality.

Colophon

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