

# Hydrogen Storage and Transportation Market - A Global and Regional Analysis: Focus on Product, Application, and Country Analysis - Analysis and Forecast, 2023-2033

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## Abstracts

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### Global Hydrogen Storage and Transportation Market Overview

The global hydrogen storage and transportation market, valued at \$950.9 million in 2023, is expected to reach \$5,298.3 million by 2033, exhibiting a robust CAGR of 18.74% during the forecast period 2023-2033. The hydrogen storage and transportation market is spurred by the urgent need for decarbonization, driving hydrogen's appeal as a clean energy source for various sectors. Technological advancements have made hydrogen solutions more efficient, safe, and cost-effective. Investments in renewable energies for green hydrogen production, coupled with supportive government policies, further fuel the market. The expansion of hydrogen fueling infrastructure and the rise in fuel cell vehicles and industrial uses boost demand for robust storage and transport systems, marking a significant step toward a sustainable, low-carbon future.

### Introduction to the Hydrogen Storage and Transportation Market

The hydrogen storage and transportation market is at the forefront of a significant shift in energy storage and logistics, vital for the burgeoning hydrogen economy. As the demand for clean energy sources such as hydrogen escalates, propelled by global initiatives toward decarbonization and sustainable energy, this market is seeing a pivotal transformation. Hydrogen's role as a clean, flexible energy carrier necessitates efficient storage and transportation solutions to bridge the gap between production sites

and end users, including fuel stations and industrial consumers.

Projected to experience substantial growth from 2023 to 2033, the market's expansion is fueled by the necessity for efficient energy storage and transport mechanisms that can support the seamless integration of hydrogen into the energy mix. Enhanced storage solutions and transportation methods are crucial for minimizing energy losses and ensuring the safe, reliable delivery of hydrogen. The advancement of technologies, alongside the integration of digital and physical infrastructures, plays a critical role in optimizing the hydrogen supply chain.

Moreover, the deployment of cutting-edge technologies and the development of infrastructure capable of handling hydrogen's unique properties are accelerating market growth. The synergy between innovative storage materials and modalities, such as liquid and solid-state hydrogen, with modern transportation technologies, underscores the market's evolution. As the hydrogen economy grows, powered by policies favoring clean energy and advancement of hydrogen as a key player in energy transition, the hydrogen storage and transportation market is set to redefine energy logistics, offering a pathway toward a sustainable and low-carbon future.

The hydrogen storage and transportation market is growing fast because people want cleaner energy, technology is getting better, and governments are supporting it. More people are using hydrogen for things such as cars and buses, and there's more investment in making and moving hydrogen. This market is important for using less oil and gas and helping the environment.

Market Segmentation:

Segmentation 1: by Application

Compressed Hydrogen

Liquid Hydrogen

Others

Compressed Hydrogen to Dominate the Global Hydrogen Storage and Transportation Market (by Application)

In 2022, the compressed hydrogen segment of the global hydrogen storage and transportation market was valued at \$566.4 million. Projected to dominate this market, it is expected to soar to an impressive \$4,000.2 million by 2033. This significant growth underscores the pivotal role of compressed hydrogen as a leading solution in the hydrogen economy. Its dominance is attributed to its efficiency in storage and transportation, catering to the increasing demand for clean and sustainable energy solutions across various industries.

### Segmentation 2: by Product

Storage

Distribution

### Segmentation 3: by Region

North America - U.S., Canada, and Mexico

Europe - France, Germany, U.K., Italy, and Rest-of Europe

Asia-Pacific - China, Japan, South Korea, India, and Rest-of-Asia-Pacific

Rest-of-the-World - Brazil and U.A.E.

The Asia-Pacific region holds a leading position in the hydrogen storage and transportation market, a trend that's expected to continue from 2023 to 2033, with the region anticipated to experience the highest compound annual growth rate (CAGR). This growth trajectory can be attributed to several factors. There is strong governmental support in the region, which often translates into subsidies, investments, and favorable policies that stimulate market expansion. Efforts to minimize reliance on imported energy, coupled with initiatives aimed at improving urban air quality and embracing urbanization, contribute to the burgeoning demand for hydrogen as a clean energy source.

The region is also focused on fostering technological innovation within the sector, which improves efficiency and reduces costs. There's a concerted effort to establish integrated supply chains and to engage in international collaborations, which enhance

both the regional and global footprint of the hydrogen market. Lastly, Asia-Pacific's commitment to renewable energy aligns with the hydrogen market's growth, as hydrogen can be produced sustainably and is seen as a cornerstone for a future clean energy landscape. This strategic emphasis on renewable energy underlines the region's potential to drive innovation and integration within the hydrogen economy.

## Recent Developments in the Global Hydrogen Storage and Transportation Market

In November 2023, BayoTech Inc., an innovator in hydrogen production, transportation, and storage solutions, announced the availability of sustainable hydrogen fuel from its recently completed hub in Wentzville, Missouri. The BayoGaaS Hydrogen Hub generates 350 tons of hydrogen annually to serve a wide range of customers operating zero-emission fuel cell equipment and hydrogen-intensive industrial processes. BayoTech's fleet of high-pressure gas transport trailers, designed for enhanced gas utilization, ensures reliable and efficient delivery of hydrogen to customers across the U.S.

On April 21, 2022, Hexagon Composites ASA, a world-leading designer and manufacturer of clean fuel solutions for commercial vehicles, signed an agreement to acquire a 40% stake in Cryoshelter GmbH, an Austria-based company specialized in the development of cryogenic tank technology for liquid (renewable) natural gas (LNG) and liquid hydrogen (LH2).

In June 2023, Chart Industries, Inc., a leading global engineering design and manufacturer of highly engineered equipment servicing multiple applications in the clean energy and industrial gas markets, announced that Energy Vault Holdings, Inc., a leader in sustainable grid-scale energy storage solutions, selected Chart Industries Inc. as the supplier of an integrated liquid hydrogen storage and fuel delivery system for a green hydrogen long-duration energy storage system used in conjunction with a utility-scale battery to provide back-up power to the city of Calistoga, California.

## Demand - Drivers, Challenges, and Opportunities

### Market Driver: Decarbonization and Climate Change Initiatives

The hydrogen storage and transportation market is fueled by several significant factors. Firstly, the increasing global focus on reducing carbon emissions and transitioning

toward sustainable energy sources is a major driver. Hydrogen, as a clean fuel alternative, is gaining traction across various industries and transportation sectors. Technological advancements in storage and transportation solutions are also driving market growth, enhancing the efficiency and safety of hydrogen handling. Additionally, the rising investment in renewable energy sources, particularly for green hydrogen production, further stimulates market expansion. Moreover, supportive government policies and incentives aimed at promoting clean energy adoption contribute to the momentum of the hydrogen storage and transportation market.

### Market Challenge: Safety Concerns Regarding High Flammability of Hydrogen

Despite its promising prospects, the hydrogen storage and transportation market faces several challenges. One significant hurdle is the high initial capital investment required for infrastructure development, including hydrogen production, storage facilities, and transportation networks. Moreover, the lack of a widespread hydrogen infrastructure poses a challenge to market scalability. Safety concerns associated with hydrogen handling and storage also present obstacles, requiring stringent regulatory frameworks and technological innovations to address. Furthermore, the intermittency of renewable energy sources, which are often used in hydrogen production, can affect the reliability and availability of hydrogen supply, posing challenges to market stability.

### Market Opportunity: Rising Investments in Hydrogen Fueling Stations

The increasing investment in hydrogen fueling stations worldwide is driving the demand for hydrogen storage and transportation infrastructure. Governments and private companies recognize the fundamental role of hydrogen as a clean energy carrier, particularly in sectors such as transportation, where electrification alone may not be sufficient. Substantial funding is being provided for the development of hydrogen refueling infrastructure to support the growing fleet of hydrogen fuel cell electric vehicles (FCEVs) and other sectors. Due to this, hydrogen refueling stations have seen a substantial increase in number, from 330 stations in 2017 to 540 stations in 2020. This investment encompasses the construction of hydrogen production facilities, storage depots (such as bulk industrial tanks), and a network of refueling stations, all of which require strong and efficient transportation systems (tank types 3 and 4 are being used for the transportation of hydrogen) to ensure the reliable supply of hydrogen fuel to end users making a great opportunity for stakeholders and new investors to enter the hydrogen storage and transportation market...

### How Can This Report Add Value to an Organization?

**Product/Innovation Strategy:** The product segment helps the reader understand the different application and product segments of hydrogen storage and transportation and their potential globally. Moreover, the study gives the reader a detailed understanding of the end-use industries and different products offered with different regulations, consortiums and associations, and government programs impacting the hydrogen storage and transportation manufacturers for various purposes.

**Growth/Marketing Strategy:** The global hydrogen storage and transportation market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnership, collaboration, and joint venture activities to strengthen their position in the global hydrogen storage and transportation market.

**Competitive Strategy:** Key players in the global hydrogen storage and transportation market analyzed and profiled in the study involve hydrogen storage and transportation manufacturers, including market segments covered by distinct product kinds, applications served, and regional presence, as well as the influence of important market tactics employed. Moreover, a detailed competitive benchmarking of the players operating in the global hydrogen storage and transportation market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

## Data Sources

### Primary Data Sources

The primary sources involve industry experts from the hydrogen storage and transportation industry and various stakeholders such as raw material suppliers, equipment manufacturers, distributors, and end users. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of reports segmentation and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for market type

percentage split of individual markets for regional analysis

## Secondary Data Sources

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as ITU, Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global hydrogen storage and transportation market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, including the International Energy Agency (IEA), Hydrogen Tools, and others.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

segmentations and percentage shares

data for market value

key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

## Key Market Players and Competition Synopsis

The hydrogen storage and transportation market is strengthened by key companies facilitating the safe transfer and storage of hydrogen from production to utilization points, such as fuel stations and industrial sites. Air Liquide, a leader in gas technologies, along with CALVERA HYDROGEN S.A., known for high-pressure gas systems, are pivotal in the hydrogen supply chain. Chart Industries and CIMC Enric Holdings focus on equipment for gas storage and transport, particularly for liquid hydrogen. Innovators such as Composite Advanced Technologies and Luxfer Holdings PLC excel in creating lightweight storage solutions and high-pressure cylinders, respectively. NPROXX and Worthington Enterprises provide advanced storage technologies and equipment, which are essential for the hydrogen storage and transportation market infrastructure and the shift toward sustainable energy solutions.

Some prominent names established in the hydrogen storage and transportation market are:

Advanced Structural Technologies

Air Liquide

BayoTech

CALVERA HYDROGEN S.A.

Chart Industries

CIMC Enric Holdings Limited

Composite Advanced Technologies, LLC

Hexagon Composites ASA

Tremcar

INFINITE COMPOSITES

INOX India Limited

Linde plc



Luxfer Holdings PLC

NPROXX

Worthington Enterprises, Inc.

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Table 65: Market Share, 2022

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