

Global Hydrogen Infrastructure Market Size Study and Forecast by Infrastructure Type (Compression & Distribution, Pipelines, Ports & Terminals, Storage, Refueling), By Application (Energy Storage, Mobility, Industrial, Others), By End User (Port Authorities & Logistics, Utilities, Transportation, Oil & Gas, Manufacturing, Others), and Regional Forecasts 2026–2036

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Abstracts

The Global Hydrogen Infrastructure Market, valued at USD 9.28 Billion in 2025, is projected to reach USD 27.34 Billion by 2036, expanding at a CAGR of 10.01% during the forecast period. The market consists of the physical infrastructure and the supporting systems required for the production, compression, transportation, storage, distribution and dispensing of hydrogen for industrial, mobility and energy applications. Hydrogen infrastructure is the backbone of the emerging hydrogen economy, enabling the efficient transport and utilization of green and low-carbon hydrogen, and underpinning decarbonization efforts across multiple sectors. The market is segmented into Compression & Distribution, Pipelines, Ports & Terminals, Storage, and Refueling infrastructure for applications including Energy Storage, Mobility, Industrial, and Others. Major end users are Port Authorities & Logistics, Utilities, Transportation, Oil & Gas, Manufacturing, and other industrial sectors using hydrogen to lower carbon emissions and enhance energy security.

The market is experiencing significant growth supported by increasing investments in clean hydrogen projects, government decarbonization policies, expansion of hydrogen refueling networks and increasing adoption of hydrogen across transportation, industrial

manufacturing and power generation. Countries around the world are developing national hydrogen strategies and investing in hydrogen corridors, export terminals, pipeline networks and large scale storage facilities to establish secure hydrogen supply chains. Advances in technology in hydrogen compression, liquefaction, storage systems, pipeline materials, cryogenic technologies and digital infrastructure management are improving operational efficiency, safety and cost-effectiveness. Rising investments in renewable energy integration, green hydrogen production, fuel cell mobility, industrial decarbonization and cross-border hydrogen trade are propelling the market demand further. Moreover, strategic alliances between energy companies, industrial gas suppliers, utilities, infrastructure developers, and governments will help to enhance the growth of the global hydrogen infrastructure market in the coming years.

Global Hydrogen Infrastructure Market: Key Highlights

The global hydrogen infrastructure market is valued at USD 9.28 billion in 2025, driven by rising investments in clean hydrogen production, industrial decarbonization initiatives, expansion of hydrogen transportation networks, and government hydrogen strategies worldwide.

The market is projected to reach USD 27.34 Billion by 2036, at a CAGR of 10.01% during the forecast period 2026 – 2036. Growth is being supported by the increasing deployment of green hydrogen projects, the expansion of hydrogen refuelling stations, the growth in cross-border hydrogen trade, and investments in large-scale storage and pipeline infrastructure.

Europe is the leading player in the global market, holding an estimated 37.4% share in 2025. Europe benefits from ambitious net-zero targets, strong government funding for hydrogen infrastructure, increasing renewable energy capacity, and comprehensive hydrogen roadmaps in Germany, the Netherlands, France, Spain and other European countries.

Asia Pacific is expected to register the fastest CAGR of 11.2% between 2026 and 2036, due to increased hydrogen investments in China, Japan, South Korea, Australia and India, coupled with rising fuel cell mobility, industrial decarbonization projects and large-scale green hydrogen production projects.

The Compression & Distribution segment is estimated to hold the largest market share of 32.8% in 2025. The segment is attributed to the growing demand for efficient transportation of hydrogen, compression technology and distribution

systems for industrial and mobility applications.

Refueling infrastructure is expected to register the highest CAGR of 12.4% during the forecast period owing to rapid deployment of hydrogen fuel cell vehicles, commercial transportation fleets, and expansion programs of national hydrogen refueling stations.

Industrial applications are the dominant segment in the application segment, which is expected to hold a share of around 46.1% in 2025 owing to the high usage of hydrogen in refining, chemicals, steel manufacturing, ammonia manufacturing, and other energy-intensive industries that are undergoing decarbonization.

Mobility is expected to register the fastest CAGR of 12.8% during 2026-2036, supported by increasing adoption of hydrogen fuel cell buses, trucks, trains, marine vessels, and heavy-duty transportation requiring zero-emission energy solutions.

Utilities are the largest end-user segment with a projected 29.3% share in 2025, driven by growing investments in hydrogen storage, grid balancing, renewable energy integration and power generation infrastructure to support energy transition strategies.

Greater investments in green hydrogen production, hydrogen pipelines, liquefaction facilities, storage terminals, export infrastructure, hydrogen corridors and fuel cell mobility are expected to generate significant long-term opportunities for energy companies, industrial gas suppliers, infrastructure developers, utilities and technology providers.

Research Scope & Methodology

This study provides a detailed strategic assessment of the Global Hydrogen Infrastructure Market for the forecast period 2026-2036. The report covers market size, revenue projections, competitive landscape, infrastructure development trends, technological innovations, and emerging investment opportunities that are shaping the global hydrogen economy. The assessment addresses the entire value chain for hydrogen infrastructure, including compression, transportation and storage, distribution pipeline networks and port and terminal facilities, refueling systems and end-use

deployment in industrial, mobility and energy applications. The study includes market analysis By Infrastructure Type (Compression & Distribution, Pipelines, Ports & Terminals, Storage, Refueling), Application (Energy Storage, Mobility, Industrial, Others) and End User (Port Authorities & Logistics, Utilities, Transportation, Oil & Gas, Manufacturing, Others). The regional analysis covers North America, Europe, Asia Pacific, and LAMEA, assessing hydrogen production capacity, renewable energy integration, government policy support, infrastructure investments, industrial decarbonization initiatives, and hydrogen trade developments that drive regional market growth. The report also covers innovation in hydrogen compression systems, liquefaction technologies, cryogenic storage, pipeline materials, digital infrastructure management, hydrogen refueling technologies, and large-scale export terminal development that continue to shape the competitive landscape of the global hydrogen infrastructure market.

The research methodology incorporates detailed primary and secondary research to provide reliable market intelligence and robust long-term forecasting. The primary research consists of structured interviews with hydrogen producers, industrial gas companies, infrastructure developers, utilities, energy companies, equipment manufacturers, government agencies, port authorities, technology providers and industry experts in key global markets. Secondary research includes data from hydrogen associations, energy organizations, government bodies, company annual reports, investor presentations, scientific journals, policy documents, infrastructure roadmaps, and verified market intelligence. Market estimates are developed using top-down and bottom-up approaches and validated through data triangulation that includes various data points to reconcile estimates at all levels of the product and regional segments. Forecast models consider such variables as historical hydrogen demand, clean energy investments, infrastructure deployment trends, regulatory developments, technology advancements, and macroeconomic indicators. Competitive benchmarking is a comprehensive analysis of the infrastructure portfolios, geographic presence, project pipelines, investments in research and development, strategic collaborations, and innovation capabilities of the key players in the market to give an overall competitive landscape of the Global Hydrogen Infrastructure Market.

Key Market Segments

By Infrastructure Type:

Compression & Distribution

Pipelines

Ports & Terminals

Storage

Refueling

By Application:

Energy Storage

Mobility

Industrial

Others

By End User

Port Authorities & Logistics

Utilities

Transportation

Oil & Gas

Manufacturing

Others

Key Market Players

Air Liquide S.A.

Linde plc

Air Products and Chemicals, Inc.

Nel ASA

Plug Power Inc.

Cummins Inc.

Siemens Energy AG

Shell plc

TotalEnergies SE

Mitsubishi Heavy Industries, Ltd.

Industry Trends

Governments around the world are ramping up investments in national hydrogen strategies with large-scale hydrogen production plants, pipeline networks, storage infrastructure and export terminals to support long-term decarbonization and energy security goals.

Falling renewable costs and increasing electrolyzer deployment are leading to rapid growth in green hydrogen production, making it possible for hydrogen to be widely used in industrial processes and transportation and power systems.

The hydrogen pipeline infrastructure is beginning to take off as countries are building dedicated hydrogen transmission networks and converting existing natural gas pipelines to allow for cheap transport of hydrogen in bulk between industrial clusters and international corridors.

The deployment of hydrogen refuelling networks is accelerating, in particular for heavy-duty trucks, buses, trains, maritime vessels and commercial fleets, enabling broad adoption of fuel cell electric vehicles (FCEVs) and zero-emission modes of transportation.

Ports and terminals are becoming strategic hydrogen hubs with increasing investments in liquefied hydrogen handling and ammonia export facilities, hydrogen bunkering infrastructure and international hydrogen trade logistics connecting key production and consumption regions.

Improvements in hydrogen storage technologies, including compressed gas, cryogenic liquid hydrogen, underground salt caverns, and liquid organic hydrogen carriers (LOHCs), are enhancing storage efficiency, transport flexibility, and long-term energy storage.

Digital technologies are increasingly integrated into the infrastructure for hydrogen, with AI-driven asset monitoring, predictive maintenance, digital twins, remote pipeline inspection and real-time infrastructure management, to improve operational efficiency, safety and reliability.

Investments in hydrogen infrastructure are being driven by industrial decarbonization as steel, chemicals, refining, cement, fertilizers and other energy intensive industries increasingly shift to low-carbon hydrogen for greenhouse gas emissions reductions.

We are witnessing the global spread of public-private partnerships, with governments, utilities, industrial gas companies, infrastructure developers and energy producers collaborating to build integrated hydrogen ecosystems, hydrogen valleys and cross-border transportation corridors.”

Commercialization and long-term growth of the global hydrogen infrastructure market through 2036 are expected to be driven by strategic investments in electrolyzer manufacturing, hydrogen storage facilities, compression technologies, export terminals, pipeline infrastructure, refueling stations, and renewable-powered hydrogen production.

Market Determinants

Growing Government Support for the Hydrogen Economy: National hydrogen strategies, decarbonization policies, carbon reduction targets, and public funding programs are significantly driving investments in hydrogen infrastructure. Governments across major economies are supporting the development of

hydrogen production facilities, pipelines, storage systems, refueling stations, and export terminals to accelerate the transition toward low-carbon energy systems.

Increasing Industrial Decarbonization Initiatives: Energy-intensive industries such as steel, chemicals, refining, cement, and fertilizer production are increasingly adopting low-carbon hydrogen to reduce greenhouse gas emissions. This growing industrial demand is driving investments in hydrogen transportation, storage, and distribution infrastructure.

Expansion of Hydrogen Mobility and Clean Transportation: Rising adoption of hydrogen fuel cell buses, trucks, trains, marine vessels, and other commercial vehicles is increasing demand for hydrogen refueling stations, compression systems, and distribution networks. Governments and private companies continue to invest in hydrogen mobility corridors to support zero-emission transportation.

Advancements in Hydrogen Storage and Transportation Technologies: Continuous innovation in hydrogen compression, liquefaction, cryogenic storage, pipeline materials, underground storage, and digital infrastructure management is improving the efficiency, safety, and economic viability of hydrogen infrastructure, supporting broader market expansion.

High Capital Investment and Infrastructure Development Costs: Establishing hydrogen production, storage, transportation, and refueling infrastructure requires substantial capital investment, specialized engineering, and long project development timelines. High upfront costs remain a major challenge for widespread infrastructure deployment.

Technical and Regulatory Challenges Across the Hydrogen Value Chain: Hydrogen infrastructure development faces challenges related to material compatibility, hydrogen leakage, storage efficiency, transportation safety, permitting processes, and the absence of harmonized technical standards across regions. These factors can delay project implementation and increase operational complexity.

Opportunity Mapping Based on Market Trends

Expansion of Green Hydrogen Production and Export Infrastructure: Rapid

investments in renewable-powered electrolysis projects are creating significant opportunities for developing hydrogen compression facilities, storage terminals, dedicated pipelines, liquefaction plants, and export ports. Countries investing in large-scale green hydrogen production are expected to require extensive supporting infrastructure to facilitate domestic distribution and international hydrogen trade.

Growth of Hydrogen Mobility and Refueling Networks: Increasing deployment of hydrogen fuel cell trucks, buses, trains, ships, and other heavy-duty transportation systems is creating substantial opportunities for hydrogen refueling stations, distribution networks, compression technologies, and integrated mobility infrastructure capable of supporting commercial-scale zero-emission transportation.

Rising Demand for Industrial Hydrogen Distribution and Energy Storage: Expanding adoption of low-carbon hydrogen across steel manufacturing, chemicals, refining, fertilizers, and power generation is creating opportunities for pipeline infrastructure, bulk hydrogen storage, underground storage facilities, and integrated hydrogen energy storage systems that improve energy security and support industrial decarbonization.

Expansion of Global Hydrogen Corridors and Cross-Border Energy Trade: Increasing collaboration among governments, utilities, industrial gas companies, infrastructure developers, and energy producers is driving investments in international hydrogen corridors, import-export terminals, port infrastructure, and regional hydrogen hubs. Companies investing in advanced storage technologies, digital infrastructure management, pipeline modernization, and integrated hydrogen logistics solutions will be well positioned to capitalize on the accelerating global demand for hydrogen infrastructure through 2036.

Value-Creating Segments and Growth Pockets

Compression & Distribution Dominates the Market While Refueling Registers the Fastest Growth

The Compression & Distribution segment accounted for the largest market share of an estimated 32.8% in 2025, driven by the growing demand for efficient hydrogen transportation, pressure management, and distribution systems that support industrial

facilities, hydrogen refueling stations, and large-scale hydrogen supply chains. As global hydrogen production expands, robust compression and distribution infrastructure is becoming essential for ensuring safe, reliable, and cost-effective delivery across multiple end-use sectors. Increasing investments in hydrogen hubs, pipeline connectivity, and decentralized distribution networks continue to strengthen the segment's market leadership. Technological advancements in high-pressure compressors, storage systems, and transportation equipment are further improving operational efficiency and supporting widespread hydrogen deployment.

The Refueling segment is projected to register the highest CAGR of 12.4% during 2026–2036, supported by increasing deployment of hydrogen fuel cell vehicles, commercial transportation fleets, government-backed hydrogen mobility programs, and expanding investments in hydrogen refueling station infrastructure worldwide.

Industrial Applications Generate the Highest Demand While Mobility Witnesses the Fastest Expansion

The Industrial segment represented the largest market share of approximately 46.1% in 2025, driven by extensive hydrogen consumption across petroleum refining, chemical manufacturing, ammonia production, methanol production, steelmaking, and other energy-intensive industries pursuing decarbonization strategies. Growing adoption of low-carbon and green hydrogen to reduce industrial emissions, improve sustainability, and comply with environmental regulations continues to accelerate infrastructure investments. Increasing government support for industrial decarbonization and clean hydrogen production further reinforces the segment's leadership.

The Mobility segment is projected to register the highest CAGR of 12.8% during 2026–2036, driven by rising adoption of hydrogen fuel cell buses, trucks, trains, marine vessels, and other heavy-duty transportation applications requiring extensive hydrogen production, storage, and refueling infrastructure.

Utilities Lead the Market While Transportation Emerges as the Fastest-Growing End User

The Utilities segment accounted for the largest market share of approximately 29.3% in 2025, driven by increasing investments in hydrogen-based energy storage, renewable energy integration, power generation, and grid balancing applications that improve energy system flexibility, reliability, and resilience. Utilities are increasingly utilizing hydrogen infrastructure to store surplus renewable electricity, support long-duration

energy storage, and facilitate the transition toward low-carbon energy systems. Growing investments in green hydrogen production and hydrogen-ready power infrastructure continue to strengthen the segment's market leadership.

The Transportation segment is projected to register the highest CAGR of 12.2% during 2026–2036, supported by increasing commercialization of hydrogen-powered mobility solutions, expansion of hydrogen corridors, and rising investments in zero-emission transportation infrastructure for freight, public transit, logistics, and commercial fleet operations.

Regional Market Assessment

Europe

Europe is projected to dominate the global hydrogen infrastructure market, accounting for an estimated 37.4% market share in 2025. The region's leadership is driven by ambitious climate neutrality targets, comprehensive hydrogen strategies, supportive regulatory frameworks, and substantial investments in green hydrogen production, pipeline networks, storage facilities, and refueling infrastructure. Countries including Germany, the Netherlands, France, Spain, and Denmark are actively developing hydrogen corridors, cross-border hydrogen transportation systems, and integrated hydrogen value chains to accelerate the transition toward a low-carbon economy. Strong collaboration between governments, utilities, industrial companies, and energy developers is further supporting large-scale infrastructure deployment. In addition, increasing investments in renewable energy integration, electrolyzer capacity expansion, hydrogen import and export terminals, and industrial decarbonization initiatives continue to strengthen Europe's position as the global leader in hydrogen infrastructure development throughout the forecast period.

Asia Pacific

The Asia Pacific region is projected to register the highest CAGR of 11.2% during 2026–2036, driven by increasing investments in green hydrogen projects, expanding industrial decarbonization initiatives, growing hydrogen fuel cell mobility, and strong government support through national hydrogen roadmaps across China, Japan, South Korea, Australia, and India. Rapid expansion of renewable energy capacity, large-scale electrolyzer deployment, and increasing hydrogen production investments are accelerating regional infrastructure development. Countries are also strengthening hydrogen export capabilities by investing in dedicated ports, storage facilities,

transportation networks, and international supply chain partnerships. Rising adoption of hydrogen across power generation, heavy industries, and transportation, combined with supportive public policies and private-sector investments, is expected to create significant long-term growth opportunities across the Asia Pacific hydrogen infrastructure market.

North America

North America represents a significant market for hydrogen infrastructure, supported by increasing investments in clean hydrogen hubs, carbon reduction initiatives, renewable energy integration, and industrial decarbonization projects. The United States and Canada continue expanding hydrogen production capacity, refueling networks, pipeline infrastructure, storage facilities, and distribution systems through strong government incentives and substantial private-sector investments. Growing deployment of hydrogen in heavy transportation, power generation, manufacturing, and chemical industries is driving demand for advanced hydrogen infrastructure. In addition, supportive policy frameworks, tax incentives, and public-private partnerships are accelerating commercialization of hydrogen technologies across the region. Continuous investments in green hydrogen production, carbon capture integration, and large-scale clean energy projects are expected to reinforce North America's long-term growth potential throughout the forecast period.

LAMEA

The LAMEA region is emerging as a promising market for hydrogen infrastructure, driven by abundant renewable energy resources, increasing focus on green hydrogen exports, expanding industrial development, and growing government initiatives supporting the clean energy transition. Countries across Latin America, the Middle East, and Africa are investing heavily in hydrogen production facilities, export terminals, port infrastructure, storage systems, and logistics networks to establish themselves as key suppliers in the global hydrogen economy. Favorable solar and wind energy resources provide strong advantages for cost-effective green hydrogen production, while rising international partnerships are supporting infrastructure development and export capacity expansion. Increasing investments in industrial decarbonization, clean transportation, and renewable energy integration are expected to generate substantial long-term opportunities for hydrogen infrastructure providers across the LAMEA region.

Recent Developments

June 2025: Air Liquide S.A. announced the expansion of hydrogen production and distribution infrastructure in Europe to support industrial decarbonization and the growing demand for low-carbon hydrogen across mobility and manufacturing sectors.

April 2025: Linde plc strengthened its global hydrogen infrastructure portfolio by expanding hydrogen production, storage, and distribution projects supporting clean energy, industrial customers, and transportation applications.

November 2024: Nel ASA introduced advanced hydrogen refueling technologies and expanded electrolyzer-related infrastructure solutions designed to improve the efficiency and scalability of hydrogen fueling networks.

September 2024: Siemens Energy AG expanded its hydrogen infrastructure capabilities through new projects focused on hydrogen transmission, storage integration, and renewable-powered hydrogen production supporting the global energy transition.

Critical Business Questions Addressed

How will the Global Hydrogen Infrastructure Market evolve through 2036?

The report evaluates long-term market growth driven by expanding hydrogen production, industrial decarbonization, hydrogen mobility, renewable energy integration, and increasing investments in hydrogen infrastructure worldwide.

Which infrastructure type, application, and end-user segments will generate the greatest commercial opportunities?

The study identifies the dominant and fastest-growing market segments, enabling infrastructure developers, industrial gas companies, utilities, energy providers, equipment manufacturers, and investors to prioritize strategic investments.

What are the primary factors driving market expansion?

The report analyzes the influence of government hydrogen strategies, clean energy investments, green hydrogen production, hydrogen transportation networks, fuel cell mobility, and industrial decarbonization on future market development.

Which regional markets present the strongest long-term investment potential?

The assessment compares hydrogen policy support, renewable energy capacity, infrastructure investments, industrial demand, and export capabilities across major regions to identify the most attractive growth opportunities.

How can hydrogen infrastructure companies strengthen their competitive position in the evolving industry?

The report examines strategic priorities including pipeline expansion, hydrogen storage innovation, refueling network development, digital infrastructure management, strategic partnerships, and integrated hydrogen ecosystem development to support long-term competitive advantage.

Beyond the Forecast

The hydrogen infrastructure market will continue to evolve through advancements in high-capacity electrolyzers, hydrogen pipelines, cryogenic storage systems, liquefaction technologies, underground hydrogen storage, digital asset management, and integrated hydrogen logistics, enabling more efficient and scalable hydrogen supply chains.

Rising investments in green hydrogen production, hydrogen export terminals, industrial decarbonization, fuel cell transportation, renewable energy integration, and international hydrogen trade corridors will continue creating substantial opportunities for industrial gas companies, infrastructure developers, utilities, equipment manufacturers, and energy providers worldwide.

As governments and industries increasingly prioritize carbon neutrality, energy security, low-carbon industrial processes, and zero-emission transportation, companies investing in advanced hydrogen infrastructure, large-scale storage solutions, smart distribution networks, and strategic global partnerships will be well positioned to capitalize on long-term growth opportunities in the global hydrogen infrastructure market through 2036.

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