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The Global Green Hydrogen Market 2026-2036

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Abstracts

The green hydrogen market in 2026 bears little resemblance to the projections that characterised it just three years ago. What was once heralded as an imminent energy revolution has instead entered a period of painful but necessary rationalisation — one that is separating credible industrial decarbonisation pathways from speculative pipeline that was never commercially viable.

The numbers tell an unambiguous story. The IEA's most recent assessment estimates that only 4–6 million tonnes of the 37 million tonnes of green hydrogen announced in project pipelines will actually materialise by 2030. Manufacturing capacity for electrolysers has reached 25 GW per year globally, yet utilisation across Western producers runs at 10–20%. The cost of producing green hydrogen remains stubbornly high at $3.00–6.00 per kilogram in most geographies, against grey hydrogen at $1.00–2.00 per kilogram — a gap that has not closed as quickly as optimists anticipated, and one that has been widened in the United States by the rollback of the Section 45V tax credit under the One Big Beautiful Bill Act, eliminating up to $3 per kilogram of production support for projects that had been designed around it.

The resulting shakeout has been severe. Major cancellations — Air Products' $500 million Massena plant and its full exit from green hydrogen production, bp's withdrawal from the $36 billion Australian Renewable Energy Hub, ?rsted's discontinuation of FlagshipONE, ScottishPower's pause of all UK green hydrogen activity — have eliminated tens of billions of dollars in planned investment. Companies including Plug Power, FuelCell Energy, ITM Power, Nel, and thyssenkrupp nucera have all undergone significant financial distress, restructuring, or strategic review. Several smaller players — Green Hydrogen Systems, Heliogen, Universal Hydrogen, Nikola — have been delisted, dissolved, or liquidated entirely.

Yet beneath this correction, the structural logic of green hydrogen remains intact for a

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defined and realistic set of applications. Industrial decarbonisation is leading the way. Refineries across the EU are now legally required to replace grey hydrogen with renewable alternatives under the Renewable Energy Directive, creating genuine, contracted demand. Green ammonia for fertiliser production is advancing steadily, with NEOM's 4 GW electrolyser complex in Saudi Arabia — now approximately 80% complete — representing the world's first infrastructure-scale demonstration that the economics are achievable at the right location. Green steel, led by Stegra (formerly H2 Green Steel) in Sweden, is proving that the hydrogen-based direct reduction iron route can secure binding offtake from premium manufacturers willing to pay the green premium. The European Hydrogen Bank's second auction cleared at a record low bid of €0.37 per kilogram of subsidy, suggesting that in optimal renewable resource locations, the cost gap to fossil hydrogen is narrowing faster than headline figures suggest.

Geographically, China continues to dominate installed capacity — accounting for approximately 60% of all operational green hydrogen output — while the Middle East and Australia are emerging as the export-oriented production regions of the future, exploiting low-cost solar and wind resources that place their best-in-class levelised cost of hydrogen at $2.50–3.00 per kilogram today and on a trajectory toward $2.00 per kilogram before 2030. India represents the most dynamic emerging market, with Hygenco, ACME, ReNew, and others advancing genuine commercial projects backed by government support and a rapidly maturing financing ecosystem.

The decade to 2036 will be defined not by the volume of announcements but by the depth of offtake. The projects that survive and scale will be those anchored by binding long-term purchase agreements with creditworthy industrial buyers — steel producers, ammonia manufacturers, refineries — willing to commit to hydrogen prices above current fossil benchmarks in exchange for regulatory compliance, supply security, and carbon cost avoidance as CBAM, now fully operational from January 2026, begins imposing real financial costs on carbon-intensive imports. The market is not dead. It is, at last, becoming real.

The Global Market for Green Hydrogen 2026–2036 provides the most detailed and up-to-date analysis of the global green hydrogen sector available, covering the full value chain from production technologies and electrolyser manufacturing through storage, transport, and end-use applications, against the backdrop of a market undergoing significant rationalisation following years of speculative overexpansion.

Report contents include:

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Executive Summary — A candid market overview assessing the transition from optimistic projections to commercial reality, including the 2024–2025 project cancellation wave, diverging global policy trajectories (US IRA rollback, EU mandate framework, China's state-directed scale-up), cost competitiveness challenges, and a revised market forecast to 2036

Introduction — Hydrogen classification and colour spectrum; global energy demand context; the economics of green hydrogen including levelised cost of hydrogen (LCOH) by technology and region; hard-to-abate sector analysis (steel, ammonia, refining, chemicals); electrolyser technology overview and manufacturing market reality; national hydrogen strategies and policy comparison across 15+ countries; carbon pricing mechanisms including CBAM implementation; market challenges and industry developments timeline 2020–2026; global production data; demand forecasts, market size and investment flow analysis to 2036

Green Hydrogen Production — Project landscape and operational status; renewable energy sources and integration; decarbonisation pathways; SWOT analysis; top project rankings with current construction and cancellation status

Electrolyser Technologies — Deep technical and commercial analysis of all four primary electrolyser types: alkaline water electrolysis (AWE), proton exchange membrane (PEM/PEMEL), solid oxide (SOEC), and anion exchange membrane (AEM); next-generation technologies including seawater electrolysis, protonic ceramic, photoelectrochemical cells, and microbial electrolysis; component materials, costs and LCOH by technology; manufacturing capacity and utilisation data; Chinese manufacturing dominance; cost reduction pathways to 2050; electrolyser market revenues and investment outlook

Hydrogen Storage and Transport — Pipeline, road, rail, maritime and on-board vehicle transport; compression, liquefaction, solid, underground and subsea storage; ammonia vs. liquid hydrogen shipping competition; ammonia cracking bottlenecks; infrastructure investment requirements and the $80–120 billion gap

Hydrogen Utilisation — Fuel cells and the collapse of the light-duty FCEV market; heavy-duty trucks; aviation (post-2040 outlook); ammonia production and green ammonia economics including maritime fuel opportunity and IMO regulatory drivers; methanol and e-fuels production; green steel and H-DRI process economics; power and heat generation; maritime shipping; fuel cell trains

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The report profiles 167 companies across the full green hydrogen value chain including Adani Green Energy, Advanced Ionics, Aemetis, Agfa-Gevaert, Air Products, Aker Horizons, Alchemr, Alleima, Alleo Energy, Arcadia eFuels, AREVA H2Gen, Asahi Kasei, Atmonia, Atome, Avantium, AvCarb, Avoxt, BASF, Battolyser Systems, Blastr Green Steel, Bloom Energy, Boson Energy, BP, Brineworks, Caplyzer, Carbon280, Carbon Sink, Cavendish Renewable Technology, CellMo, Ceres Power, Chevron, CHARBONE Hydrogen, Chiyoda, Cockerill Jingli Hydrogen, Convion, Cummins, C-Zero, Cipher Neutron, De Nora, Dimensional Energy, Domsj? Fabriker, Dynelectro, Elcogen, Electric Hydrogen, Elogen H2, Enapter, Energy B, ENEOS, Equatic, Ergosup, Everfuel, EvolOH, Evonik, Flexens, FuelCell Energy, FuelPositive, Fumatech, Fusion Fuel, Genvia, Graforce, GeoPura, Gold Hydrogen, Greenlyte Carbon Technologies, Green Fuel, GreenGo Energy Group, Green Hydrogen Systems, Guofu Hydrogen Energy, Heliogen, Heraeus, Hitachi Zosen, Hoeller Electrolyzer, Honda, H2 Carbon Zero, H2B2, H2Electro, H2Greem, H2Pro, H2U Technologies, H2Vector, HGenium, Hybitat, Hycamite, HYDGEN, HydroLite, HydrogenPro, Hygenco and more.....

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