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Global Liquid Organic Hydrogen Carrier Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GB6BB5619D31EN.html
Date: September 2026
Pages: 140
Price: US$ 4,480.00 (Single User License)
ID: GB6BB5619D31EN

Abstracts

The global Liquid Organic Hydrogen Carrier market size is expected to reach $ 2429 million by 2032, rising at a market growth of 26.6% CAGR during the forecast period (2026-2032).

Liquid Organic Hydrogen Carrier is a reversible chemical hydrogen-storage platform designed to convert gaseous hydrogen into a pumpable organic liquid for storage, transportation and subsequent release. Its commercial significance lies in the ability to use parts of the existing liquid-chemical infrastructure, including atmospheric or low-pressure tanks, tanker trucks, railcars, barges and chemical tankers. Major carrier families include toluene/methylcyclohexane, benzyltoluene or dibenzyltoluene systems, and selected heterocyclic compounds. Typical gravimetric hydrogen capacity is approximately 5.5%–6.2%, while volumetric storage density is generally around 45–60 kilograms of hydrogen per cubic metre of carrier. Hydrogenation commonly operates at approximately 100–200°C and 20–50 bar, whereas dehydrogenation typically requires approximately 250–320°C at atmospheric to several-bar pressure. Actual economics depend on carrier stability, catalyst life, heat integration, purification requirements and the availability of a closed return loop.

Competition combines specialized LOHC technology companies with large engineering, energy, catalyst and specialty-chemical groups. Hydrogenious LOHC Technologies generated an estimated US$56.33 million of LOHC-related revenue in 2025, followed by Chiyoda Corporation, Wuhan Hynertech, Honeywell and Eastman. The five largest suppliers represented 40.79% of the global market, while the three largest accounted for approximately 30.22%. Unlisted and other suppliers represented 31.18%, indicating that the industry remains fragmented and open to regional system integrators, engineering contractors, catalyst developers and material suppliers. Competitive

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positions are not directly comparable because some companies sell complete systems, while others generate revenue from technology licensing, carrier liquids, catalysts, instrumentation or engineering services.

LOHC Process Equipment and Packaged Systems remained the largest offering category in 2025, with revenue of US$203.93 million and a 47.06% market share. The category includes hydrogenation and dehydrogenation reactors, heat exchangers, heating systems, hydrogen purification, carrier storage, pumps, valves, instrumentation and modular skids. LOHC Carrier Materials and Catalysts represented 30.15%, supported by initial carrier loading, catalyst supply, replacement demand, regeneration and material-management services. LOHC Solutions and Services accounted for 22.80%, covering licensing, feasibility studies, FEED, engineering integration, commissioning, operation, maintenance and carrier-loop management.

The value pool is gradually shifting toward services and intellectual property. LOHC Solutions and Services is projected to grow at a 29.63% CAGR during 2026–2032, compared with 27.91% for Carrier Materials and Catalysts and 25.49% for Process Equipment and Packaged Systems. Equipment will remain essential, but system suppliers increasingly compete through guaranteed hydrogen purity, carrier-loss limits, catalyst life, thermal efficiency, plant availability and lifecycle support. Companies able to retain responsibility for operating performance and carrier circulation are positioned to capture a larger share of recurring revenue than suppliers focused solely on hardware fabrication.

Hydrogen Logistics and Transportation was the largest application in 2025, accounting for US$162.99 million, or 37.61% of market revenue. The segment includes hydrogenation at the production location, terminal storage, marine and land transportation, dehydrogenation at the destination and return logistics for the hydrogen-lean carrier. Industrial Hydrogen Supply and Process represented 24.88%, driven by refinery, chemical, steel, electronics and industrial-cluster demand. Hydrogen Refueling and Distributed Mobility Supply accounted for 16.30%, while Stationary Energy Storage and Power Generation represented 14.71%. Other applications, including maritime onboard systems, remote power and research platforms, accounted for 6.50%.

Application growth is increasingly differentiated by system value rather than current market size. Stationary Energy Storage and Power Generation is projected to expand at a 29.49% CAGR during 2026–2032, supported by long-duration storage, renewable-energy balancing and resilient backup power. Hydrogen Logistics and Transportation is expected to grow at 28.14%, reflecting interest in international hydrogen corridors and

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liquid-terminal infrastructure. Industrial Hydrogen Supply and Process is projected to grow at 25.19%, benefiting from identifiable demand and access to industrial heat and utilities. Refueling applications require a more selective deployment strategy because dehydrogenation, purification, compression and peak dispensing must be integrated within a relatively compact site.

Asia-Pacific was the largest regional market in 2025, with US$179.08 million of revenue and a 41.32% share. The region combines hydrogen-import strategies, refinery and chemical demand, equipment-manufacturing capacity and government-supported demonstration programmes. Europe represented 30.22%, supported by specialized technology companies, catalyst suppliers, engineering contractors, ports and industrial clusters. North America accounted for 22.19%, with strengths in specialty chemicals, catalysts, industrial energy and liquid logistics. Latin America and the Middle East and Africa remained relatively small in 2025, but both regions can participate as low-carbon hydrogen production and export locations.

The upstream value chain is defined by carrier purity, catalyst performance and specialty-material security. Trace water, sulfur, nitrogen compounds, metals and degradation products can reduce catalyst activity and affect released-hydrogen quality. Carrier suppliers therefore compete through formulation consistency, analytical control, logistics and reprocessing capability. Catalyst suppliers compete through activity, selectivity, lower release temperature, resistance to coking and longer replacement intervals. Eastman, Arkema and ENEOS participate through carrier materials, while Clariant, Umicore and Evonik provide or develop catalyst-related capabilities.

The midstream value chain is shifting from equipment procurement toward integrated process guarantees. Dehydrogenation remains a central economic constraint because it requires thermal energy and can generate carrier degradation or hydrogen-purity challenges. Chiyoda Corporation, Hydrogenious LOHC Technologies, Honeywell and Axens differentiate through proprietary process design, catalysts, heat integration and engineering execution. Wuhan Hynertech, SLOHC, HydroTransformer and Beijing Hywin Hydrogen Technology reflect the emergence of Chinese integrated suppliers covering carrier materials, catalysts and modular equipment. Bronkhorst occupies a supporting role through precision flow, pressure and liquid-control components.

Commercial development is increasingly focused on replicable supply chains rather than isolated demonstration units. Project structures are expanding from equipment sales to technology licensing, EPC integration, carrier leasing, catalyst management, terminal services, long-term operation and hydrogen-as-a-service contracts. The next

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stage of competition will be determined by delivered hydrogen cost, financing readiness, operating references, system availability and the ability to manage a closed carrier loop across jurisdictions. Lower dehydrogenation temperature, higher heat recovery, longer carrier life and digital operating control remain key development priorities.

Report Scope

This report studies the global Liquid Organic Hydrogen Carrier demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Liquid Organic Hydrogen Carrier, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Liquid Organic Hydrogen Carrier that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Liquid Organic Hydrogen Carrier total market, 2021-2032, (USD Million)

Global Liquid Organic Hydrogen Carrier total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Liquid Organic Hydrogen Carrier total market, key domestic companies, and share, (USD Million)

Global Liquid Organic Hydrogen Carrier revenue by player, revenue and market share 2021-2026, (USD Million)

Global Liquid Organic Hydrogen Carrier total market by Product, CAGR, 2021-2032, (USD Million)

Global Liquid Organic Hydrogen Carrier total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Liquid Organic Hydrogen Carrier market

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based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hydrogenious LOHC Technologies, Chiyoda Corporation, Wuhan Hynertech, Honeywell, Eastman, Clariant, ENEOS, Axens, HydroTransformer, H2-Enterprises, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Liquid Organic Hydrogen Carrier market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Product, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Liquid Organic Hydrogen Carrier Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Liquid Organic Hydrogen Carrier Market, Segmentation by Product:

LOHC Process Equipment and Packaged System

LOHC Carrier Material and Catalyst

LOHC Solution and Service

Global Liquid Organic Hydrogen Carrier Market, Segmentation by Carrier Chemistry:

MCH/Toluene

Benzyltoluene/Dibenzyltoluene

N-Ethylcarbazole

Others

Global Liquid Organic Hydrogen Carrier Market, Segmentation by Dehydrogenation Temperature:

<220°C

220-280°C

>280°C

Global Liquid Organic Hydrogen Carrier Market, Segmentation by Application:

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Hydrogen Logistics and Transportation

Industrial Hydrogen Supply and Process

Hydrogen Refueling and Distributed Mobility Supply

Stationary Energy Storage and Power Generation

Others

Companies Profiled:

Hydrogenious LOHC Technologies

Chiyoda Corporation

Wuhan Hynertech

Honeywell

Eastman

Clariant

ENEOS

Axens

HydroTransformer

H2-Enterprises

Arkema

Umicore

Evonik

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SLOHC

Beijing Hywin Hydrogen Technology

Bronkhorst

Key Questions Answered

1. How big is the global Liquid Organic Hydrogen Carrier market?
2. What is the demand of the global Liquid Organic Hydrogen Carrier market?
3. What is the year over year growth of the global Liquid Organic Hydrogen Carrier market?
4. What is the total value of the global Liquid Organic Hydrogen Carrier market?
5. Who are the Major Players in the global Liquid Organic Hydrogen Carrier market?
6. What are the growth factors driving the market demand?

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