



The European Clean Hydrogen Alliance: Overview of projects collected

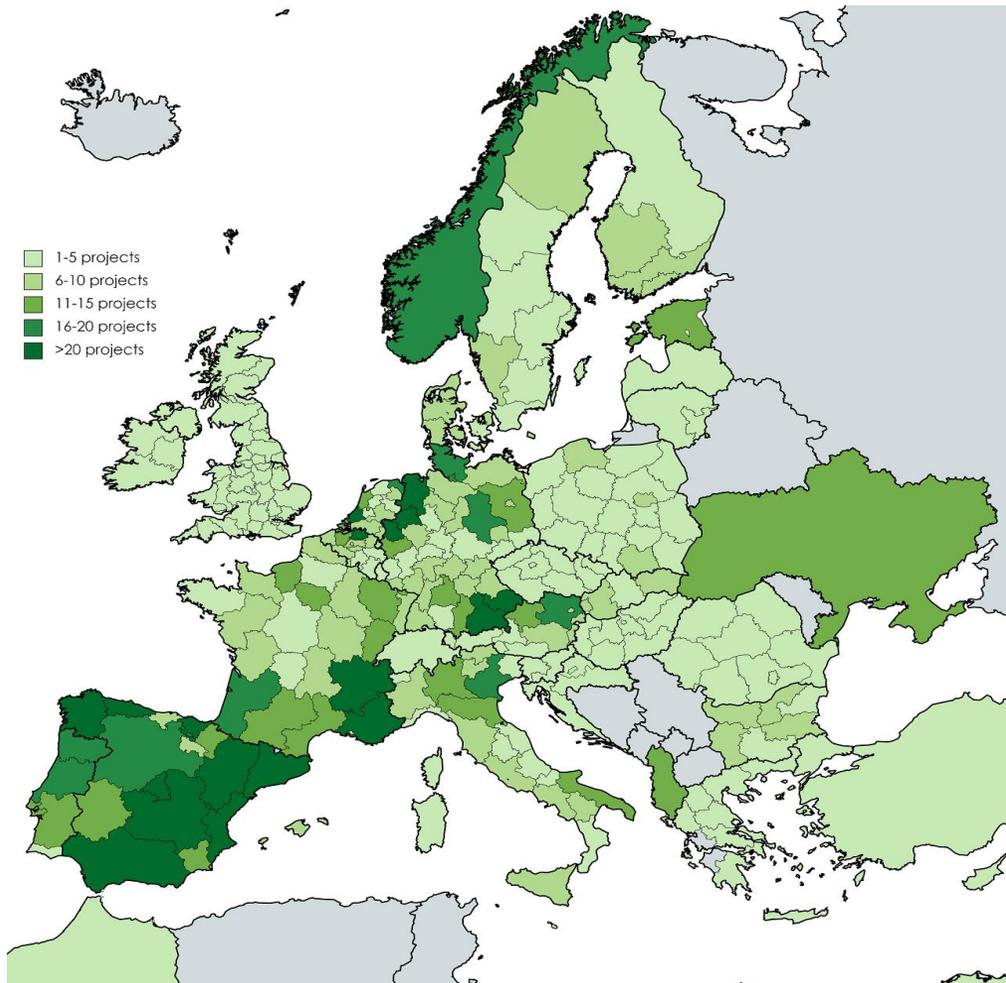
Hydrogen Forum 17-18 June 2021

Objective & context

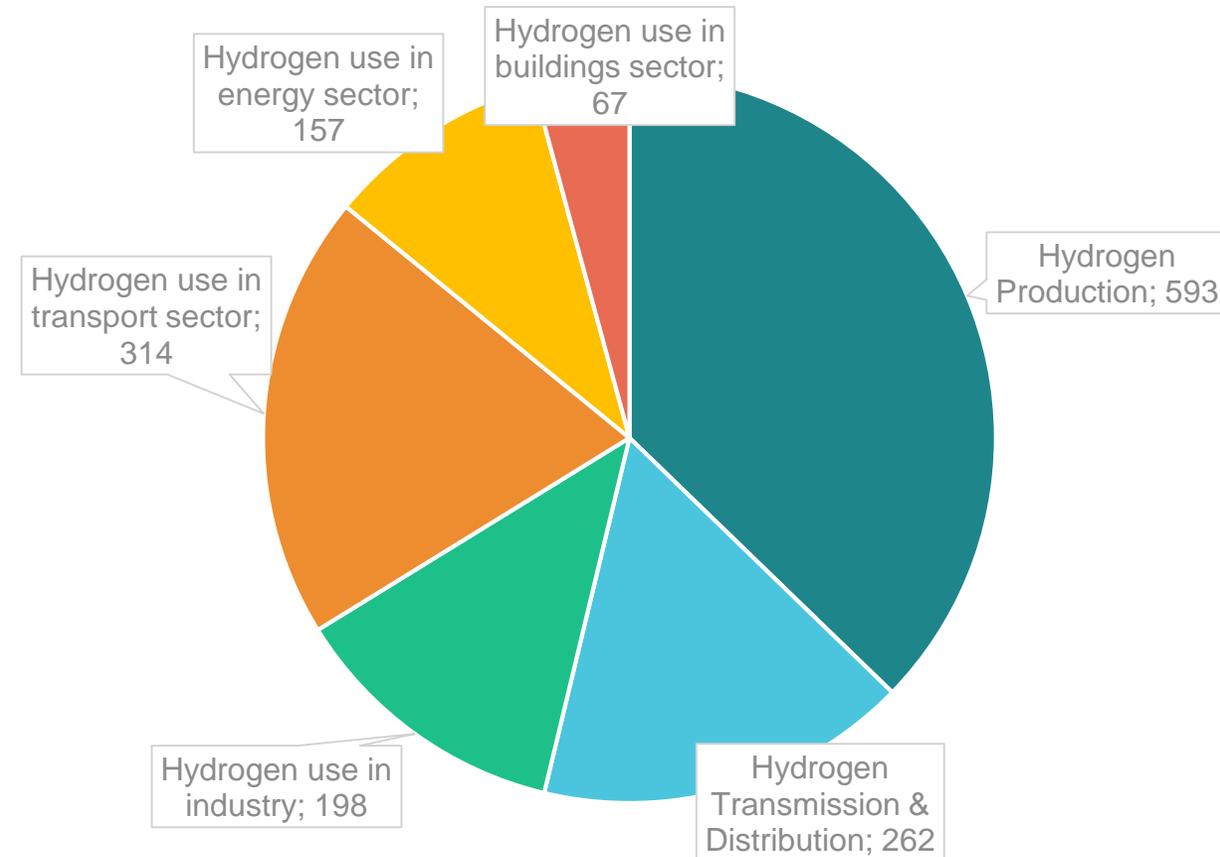
- Alliance objective: Build a pipeline of viable investment projects for the large-scale deployment of renewable and low-carbon hydrogen in Europe, in line with the EU hydrogen and industrial policy strategies
- In total, 1052 projects collected in April/May
- Following screening by European Commission against set of eligibility criteria*: 997 projects retained
- Next steps:
 - Match-making for Alliance members to exchange, discuss projects and explore joining forces
 - Further project assessment by European Commission
 - Presentation of project pipeline

* Alliance membership, geographic location, project maturity, CO2 emission threshold

Overview of all eligible projects collected*

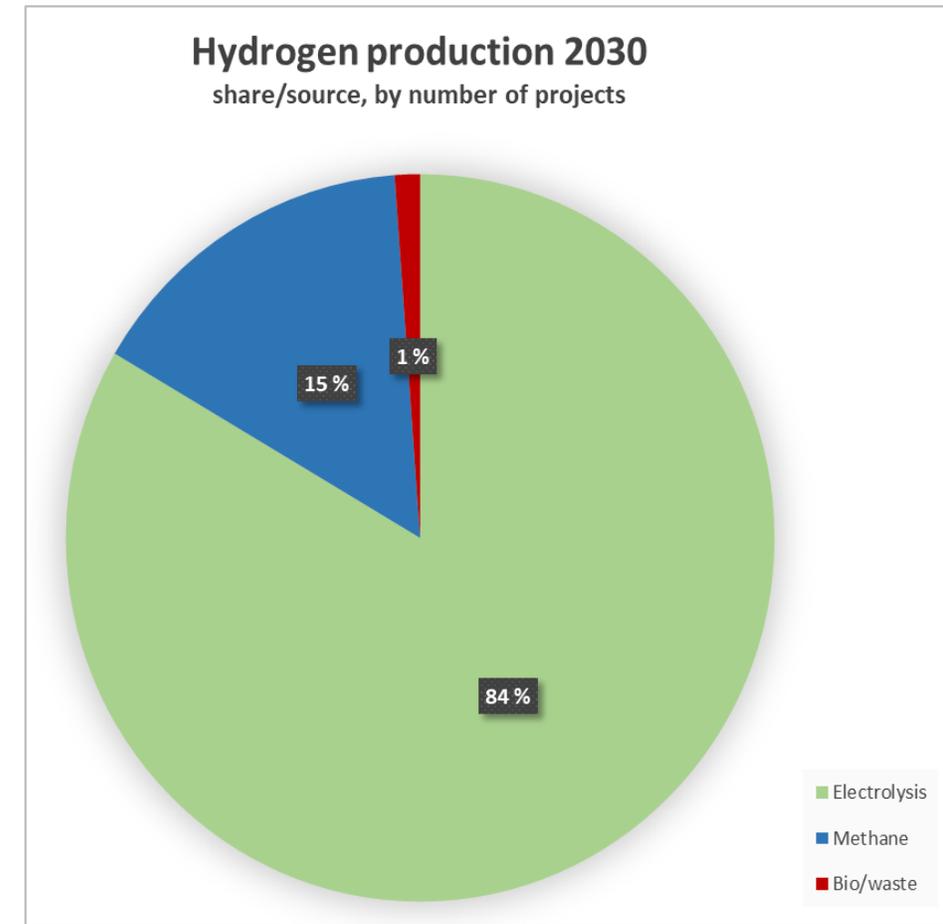
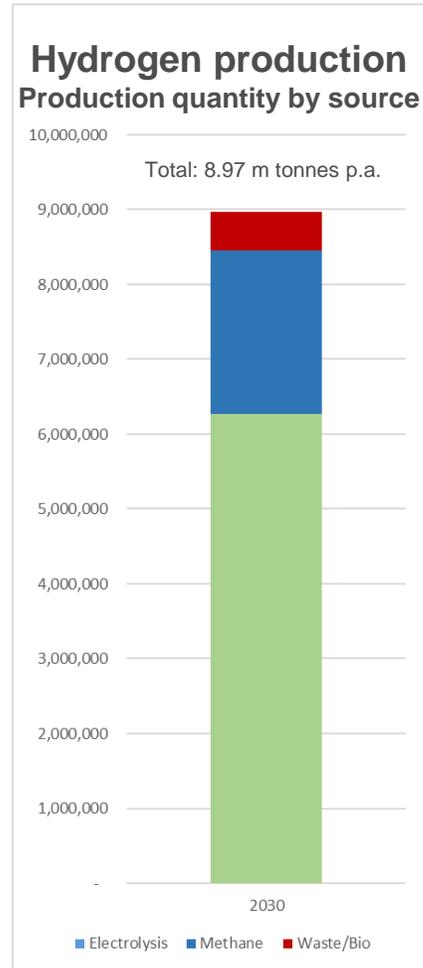
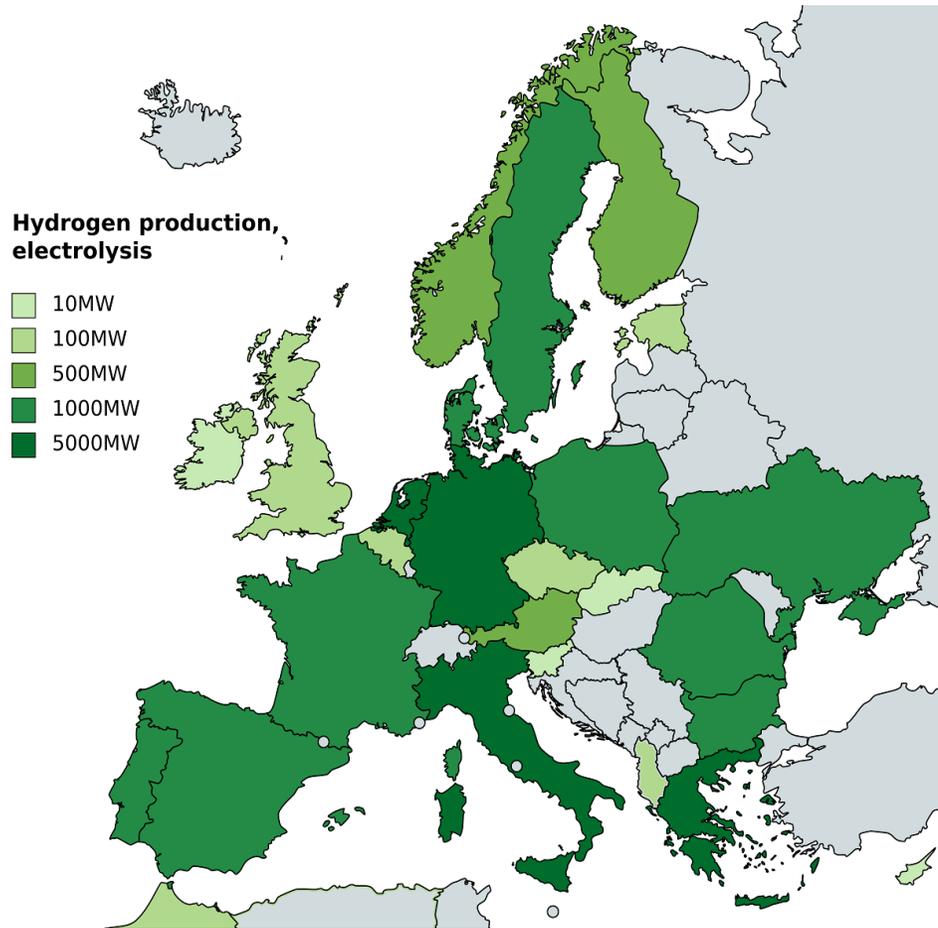


Projects collected per type

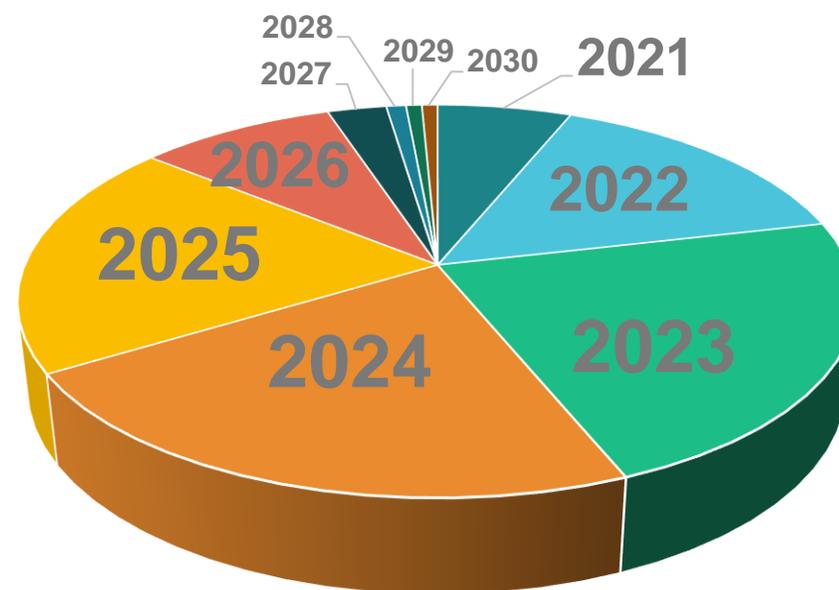
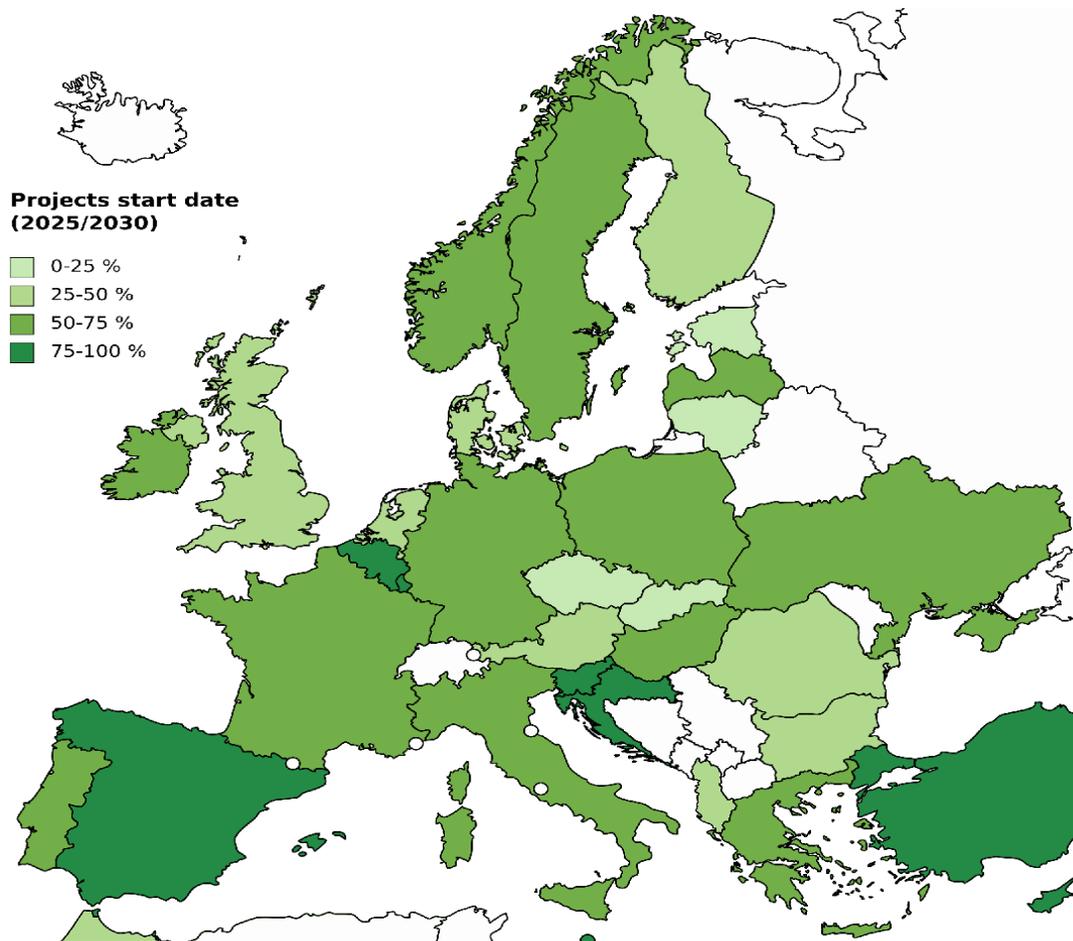


* Actual project location by NUTS2 region; a project covering more than one region appears more than once

Hydrogen production: Location, size, composition

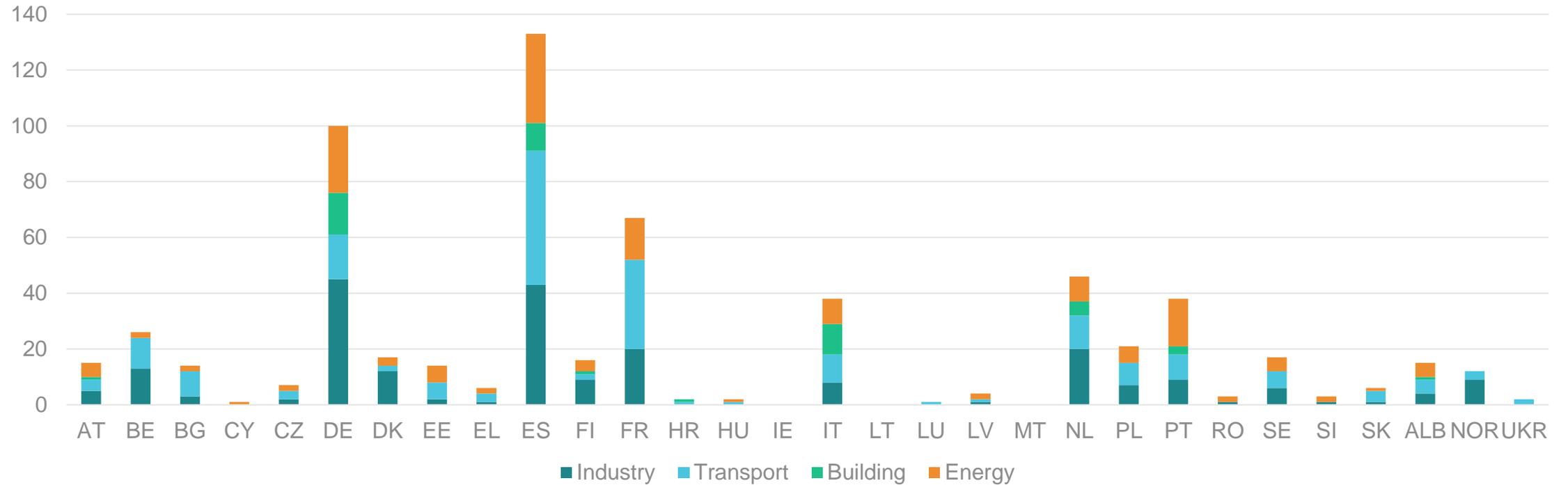


Hydrogen production: Project maturity



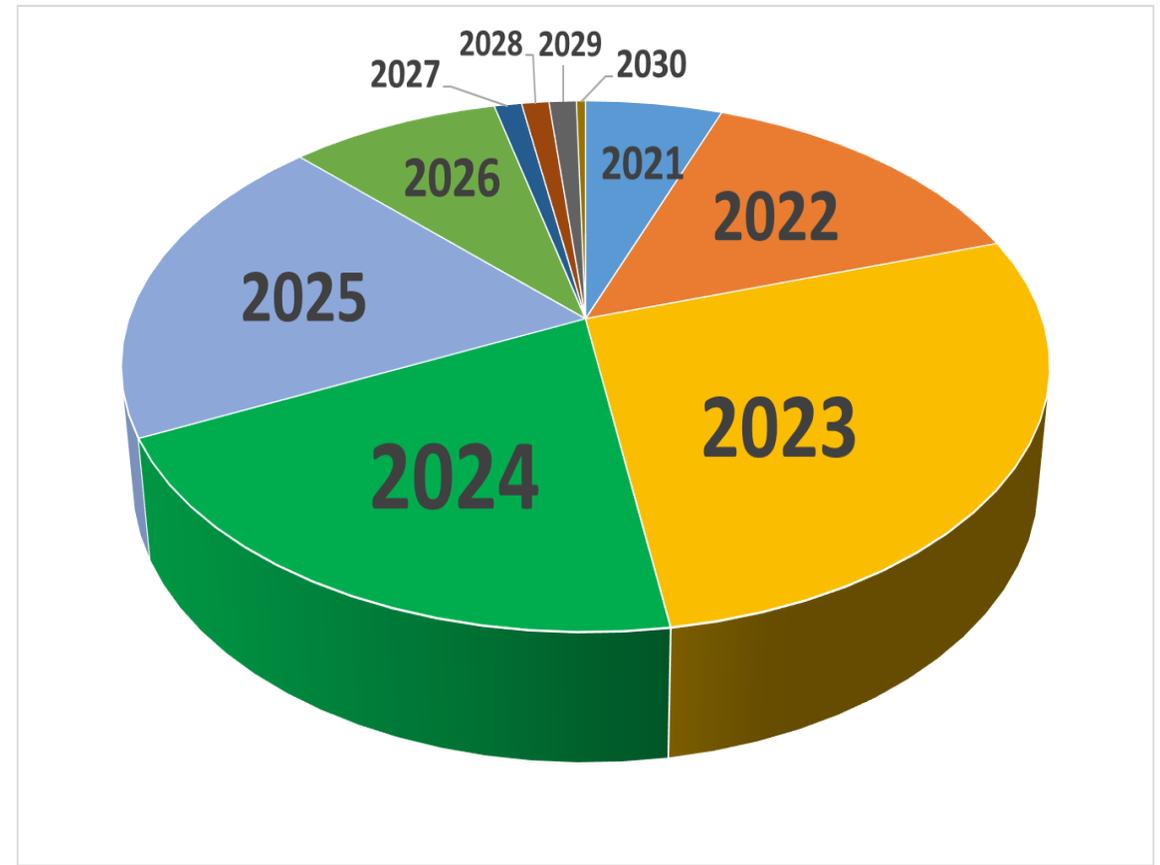
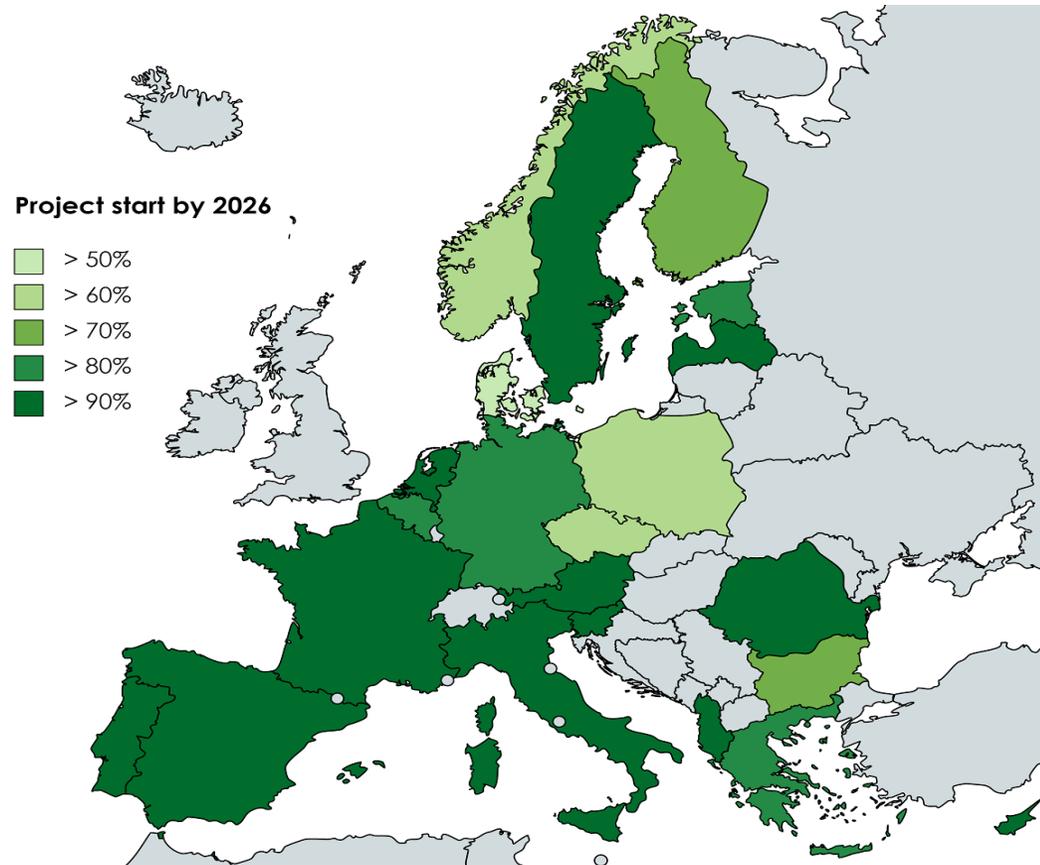
Hydrogen consumption: Projects per sector per country*

Number of projects by location



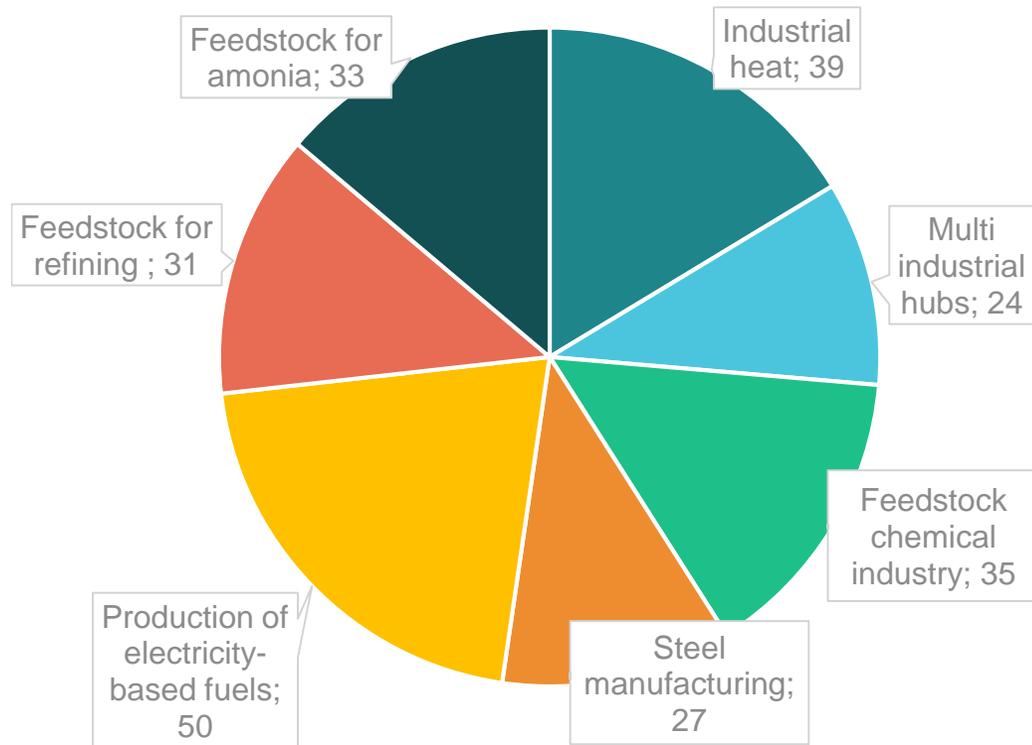
* By location of project; a project covering more than one sector appears more than once

Hydrogen consumption: Project maturity



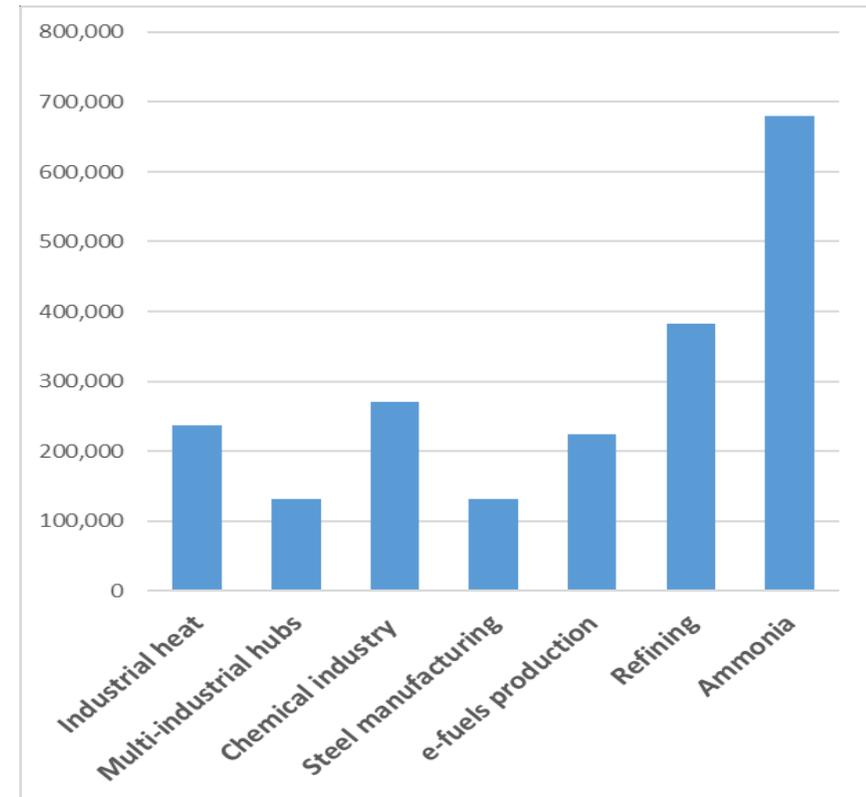
Hydrogen consumption: Industry applications

239 projects per industry application (all EU)



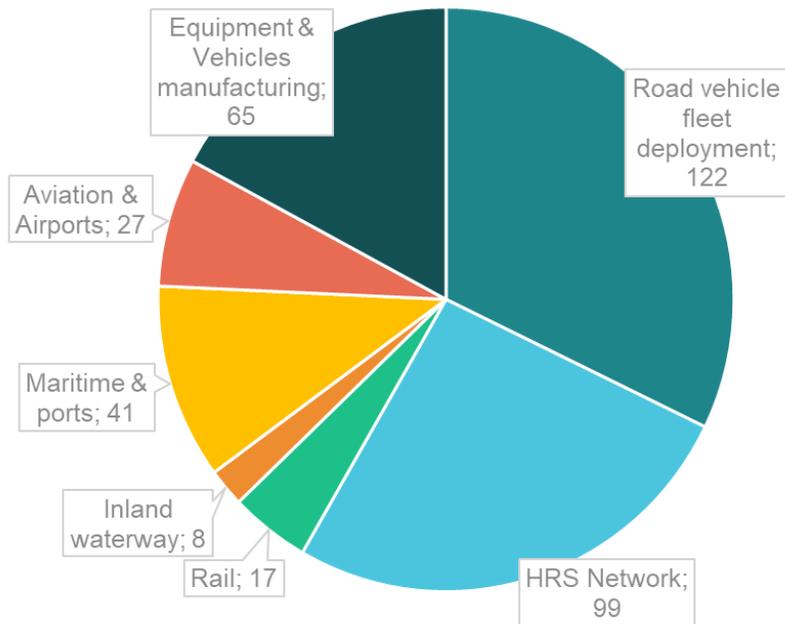
Hydrogen demand in industry applications

- Around 2 million tonnes/year by 2026



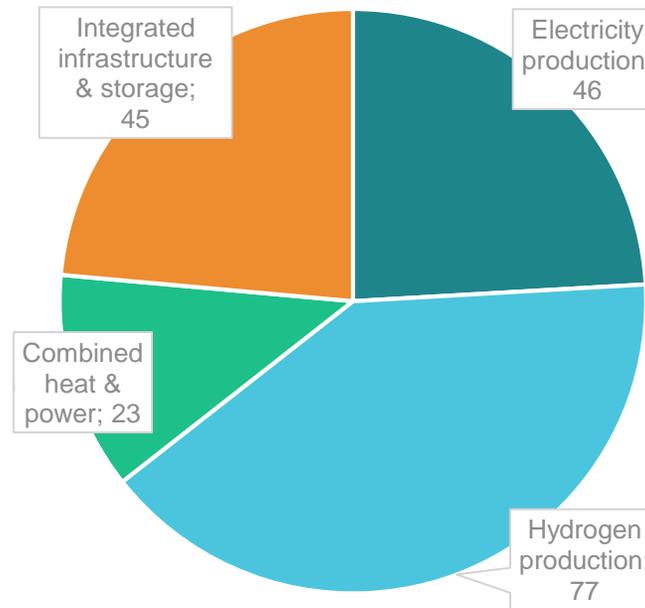
Hydrogen consumption: Transport, energy, buildings applications

379 projects per transport application (all EU)

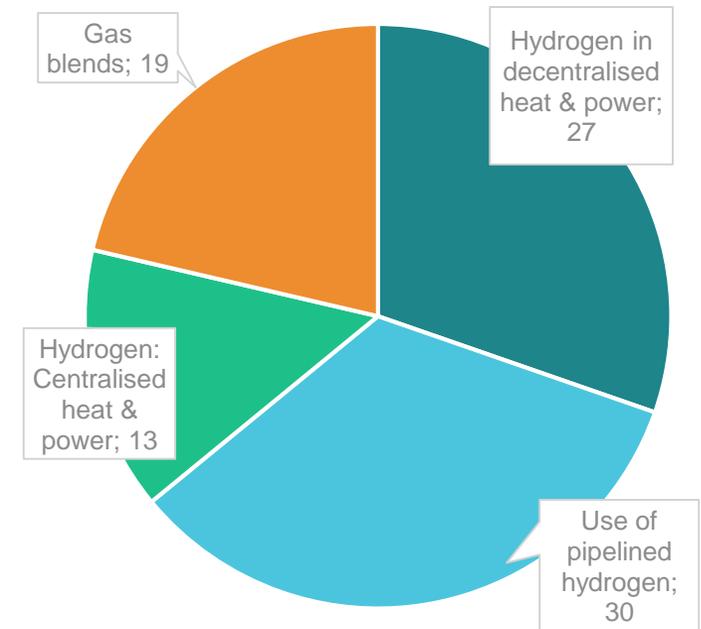


[HRS = Hydrogen refuelling stations]

191 projects in energy sector (all EU)



89 projects in building sector (all EU)



Five main take-aways

- ✓ Large-scale deployment planned: 997 eligible projects collected
- ✓ Deployment starting now: two thirds of hydrogen production and consumption projects scheduled for deployment within 3 1/2 years
- ✓ Strong focus on renewable hydrogen: 84% of hydrogen production projects are on electrolysers that can produce renewable hydrogen if renewable electricity is available
- ✓ Hydrogen consumption set to take off across relevant sectors: significant number projects in all identified sectors and sub-sectors
- ✓ Geographic clusters emerging for hydrogen production and consumption: will require transmission & distribution infrastructure to match the two

Thank you



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