Hydrogen policy framework in Europe

Daniel Fraile

Hydrogen Europe

Hydrogen Europe in numbers

Hydrogen Europe

600+ Members

We encompass the entire value chain of the hydrogen ecosystem: from production, distribution to end uses, including Industry, Non-Profits, EU regions, H2 National Associations and Global Partners.

45+ Employees

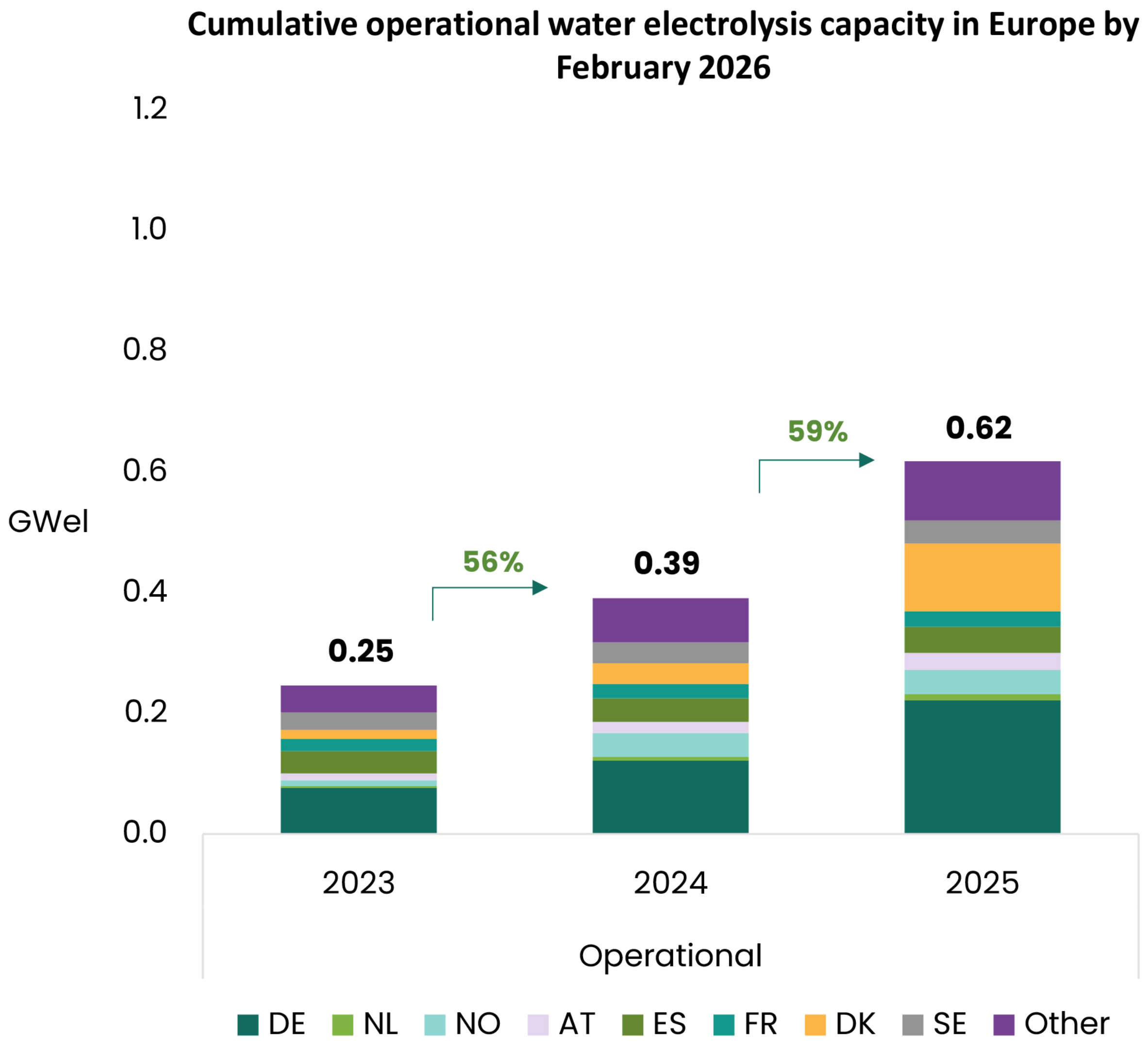
40 Countries from Europe and beyond

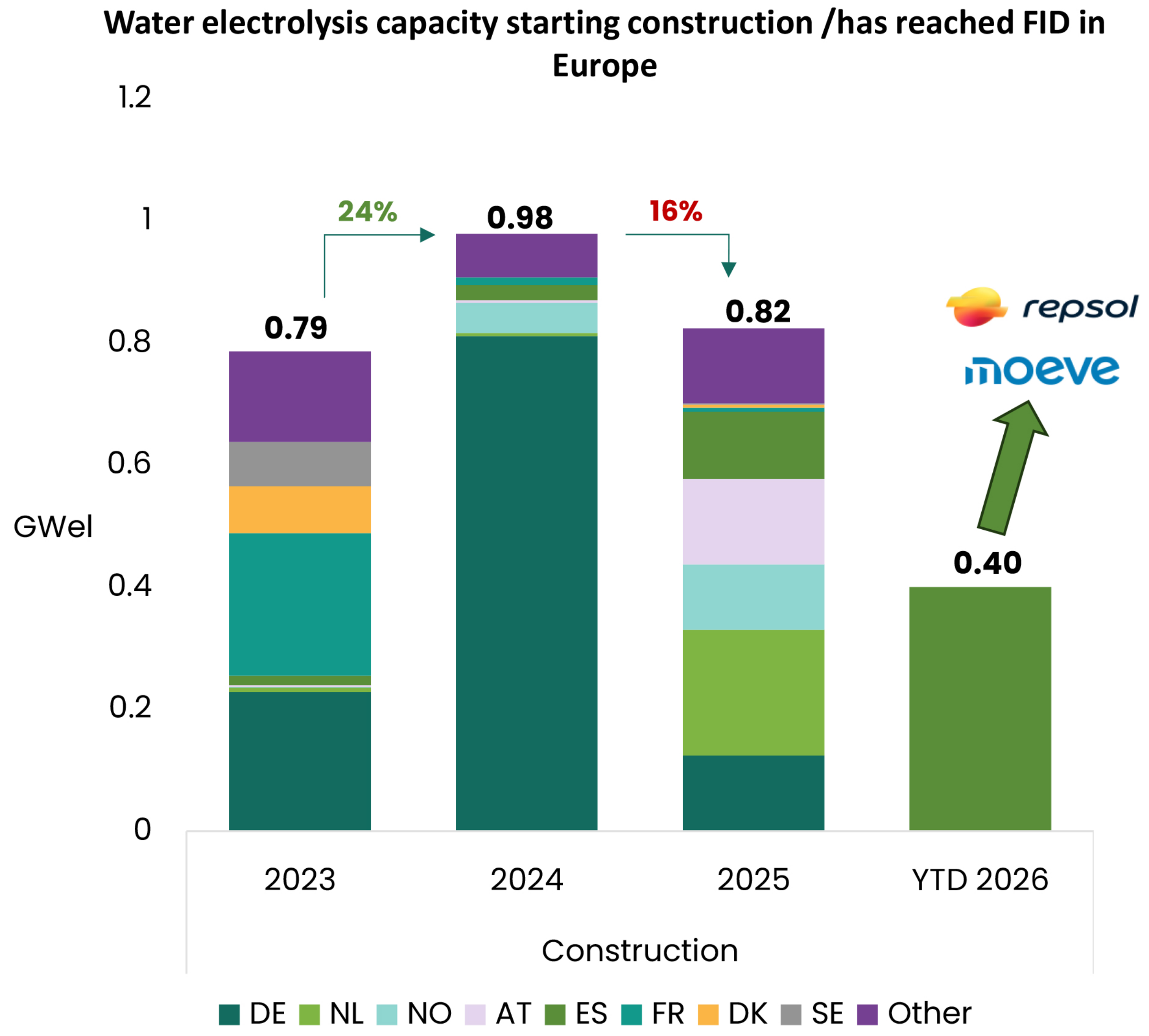
Follow us on:

communications@hydrogeneurope.eu

Rapid installations growth. FIDs happening in a growing number of countries

In 2026, Spain alone had already reached FID for half of the total FID capacity reached in 2025





There are over 600 MW_{el} of operational water electrolysis in Europe

23 new projects came into operation in 2025, totalling new 225 MW_{el}

Project bigger than 5 MW_{el} that started operation in 2025.

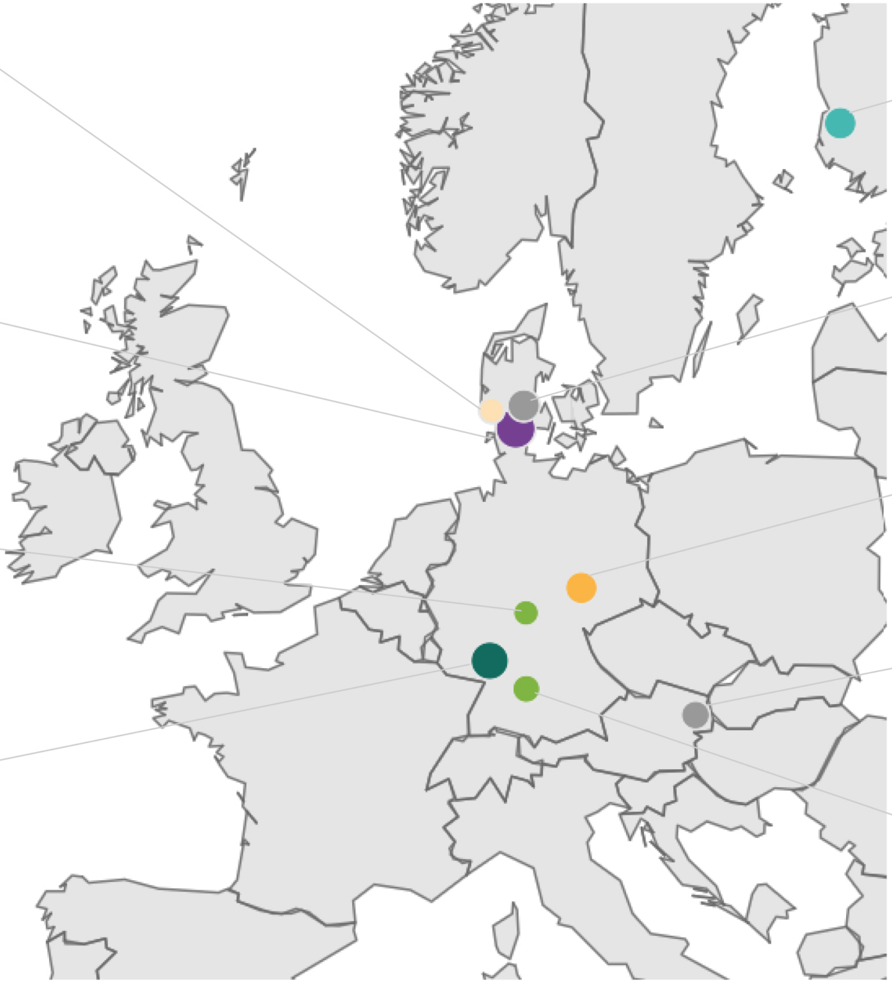
● Methanol ● Ammonia ● Refining ● E-fuels ● Other industry ● Mobility ● N/A

E-methanol Kasso | European Energy
52.5 MW_{el}
Methanol
Support: National DGIF

Made phase 2 | European Energy
3+5 MW_{el}
N/A
Support: National PtX tender

Hunfeld-Michelsrombach | ABO Energy
5 MW_{el}
Mobility
Support: National

Hy4Chem | BASF
54 MW_{el}
Ammonia & other industry
Support: National



P2X Harjavalta | P2X Solutions
20 MW_{el}
E-fuels
Support: National

HySynergy | Everfuel
20 MW_{el}
Refining
Support: National PtX tender

Leuna Chemical Complex | Linde
24 MW_{el}
Other industry
Support: National

Up Hy I and II | OMV
10 MW_{el}
Refining
Support: National

Schwäbisch Gmünd (HyFive) | Lhyfe
10 MW_{el}
Mobility
Support: N/A

Average project size increased from 3.5 MWel in 2024 to 9.8 MWel in 2025.

3.7 GW_{el} FIDs in Europe, of which 822 MW_{el} during 2025, a similar pace than previous year

Hydrogen Europe

Normand'Hy
- 200 MW_{el}
- COD 2026
- Refining

Air Liquide

Basque Hydrogen Corridor
- 100 MW_{el}
- COD 2029
- Refining

Cartagena
- 100 MW_{el}
- COD 2029
- Refining

repsol

Andalusian Hydrogen Hub
- 300 MW_{el}
- COD 2029
- Refining

moeve

Grey2Green
- 100 MW_{el}
- COD 2026
- Refining

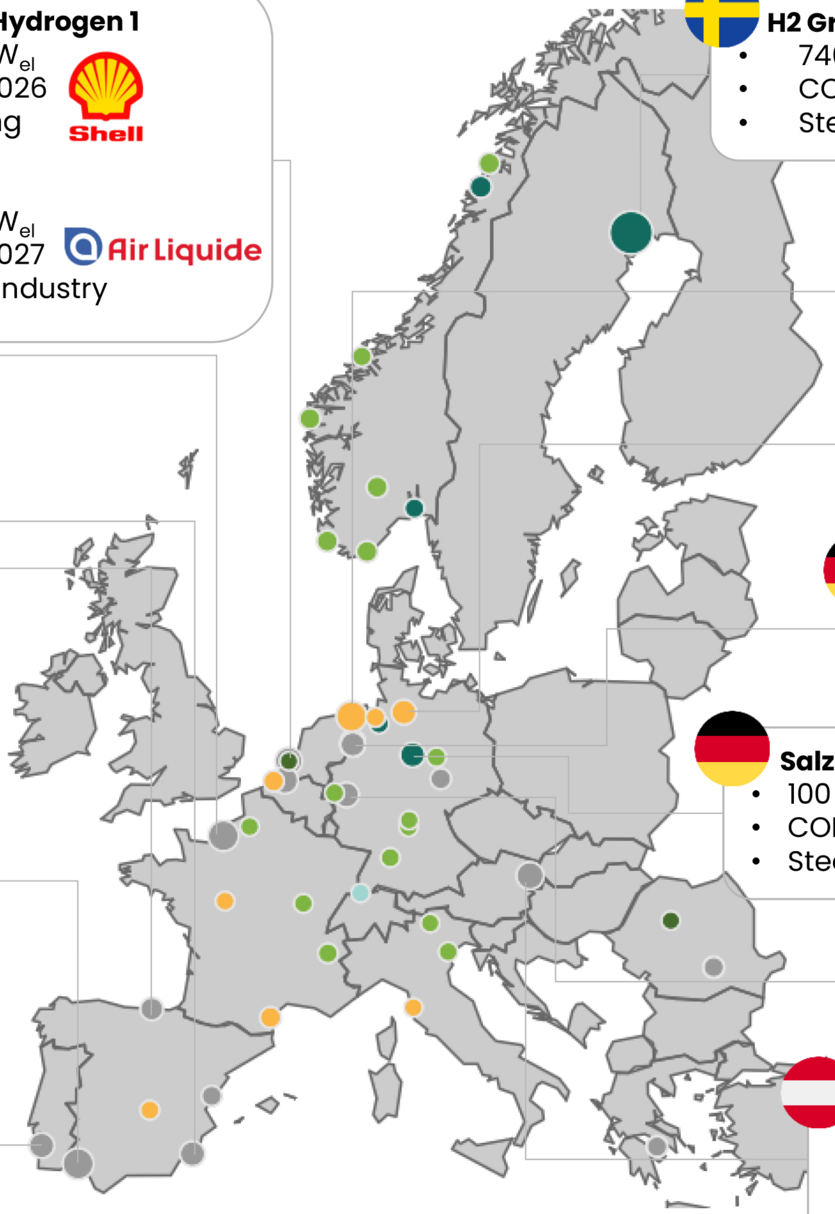
galp

Holland Hydrogen 1
- 200 MW_{el}
- COD 2026
- Refining

Shell

ELYgator
- 200 MW_{el}
- COD 2027
- Other industry

Air Liquide



H2 Green Steel
- 740 MW_{el}
- COD 2026
- Steel

Stegra

Clean Hydrogen Coastline
- 280 MW_{el}
- COD 2027
- Other industry

EWE

Lingen
- 100 MW_{el}
- COD 2027
- Refining

bp

Hamburg Green Hydrogen Hub
- 100 MW_{el}
- COD 2027
- Industry

Luxcara

GET H2 Nukleus
- 300 MW_{el}
- COD 2025-27
- Refining

RWE

Salzgitter (SALCOS)
- 100 MW_{el}
- COD 2027
- Steel

SALZGITTER AG Stahl und Technologie

REFHYNE
- 100 MW_{el}
- COD 2027
- Refining

Shell

UpHy Large
- 140 MW_{el}
- COD 2027
- Refining

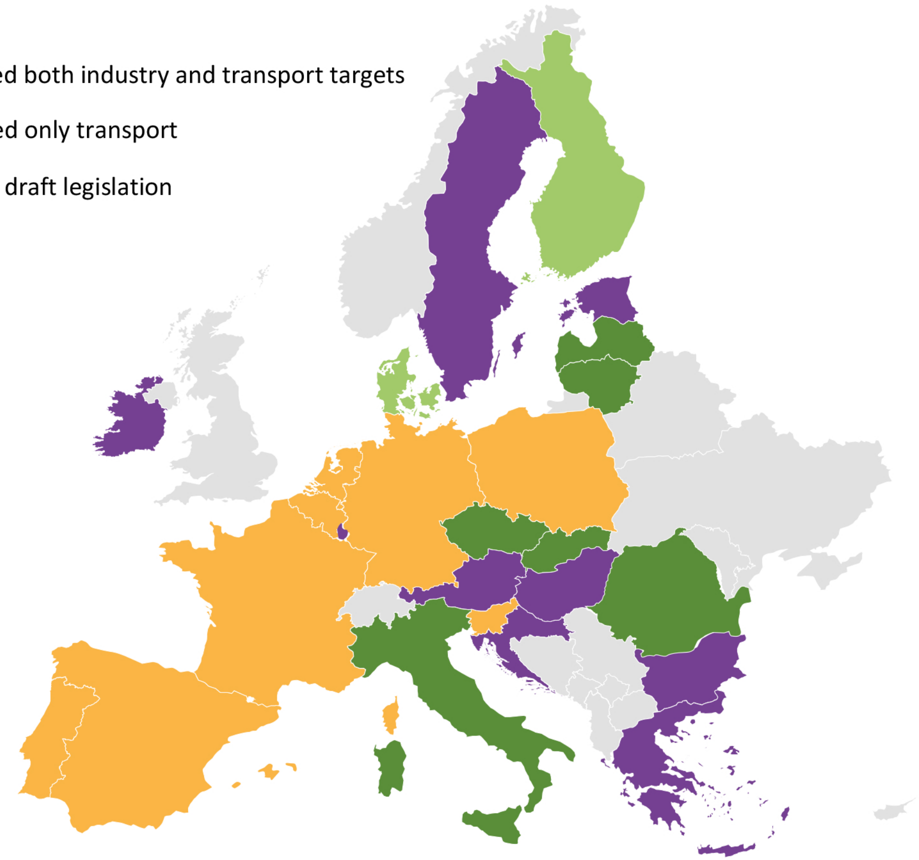
OMV

Notes: Map shows only 5+ MW projects which are currently under construction

Regulation could drive a potential demand of 2.8 Mt of RFNBO by 2030, but depends on national transposition, penalties, and enforcement

Status of the transposition of the RED III regarding H_2 objectives, by February 2026

- Transposed both industry and transport targets
- Transposed only transport
- Published draft legislation
- Nothing

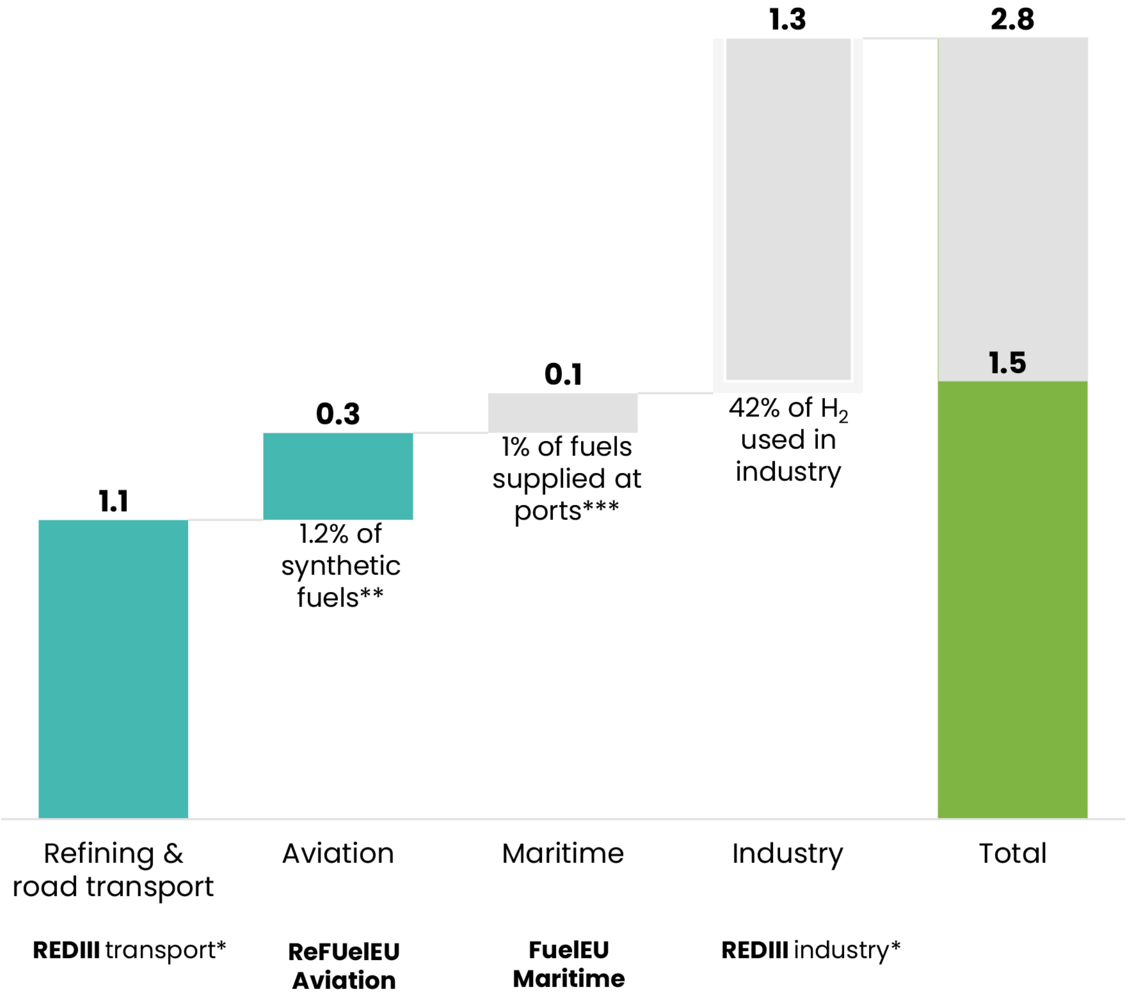


Only 6 out of 27 EU members have transposed it fully or partially by February 2026

Regulation could drive a potential demand of 2.8 Mt of RFNBO by 2030, but depends on national transposition, penalties, and enforcement

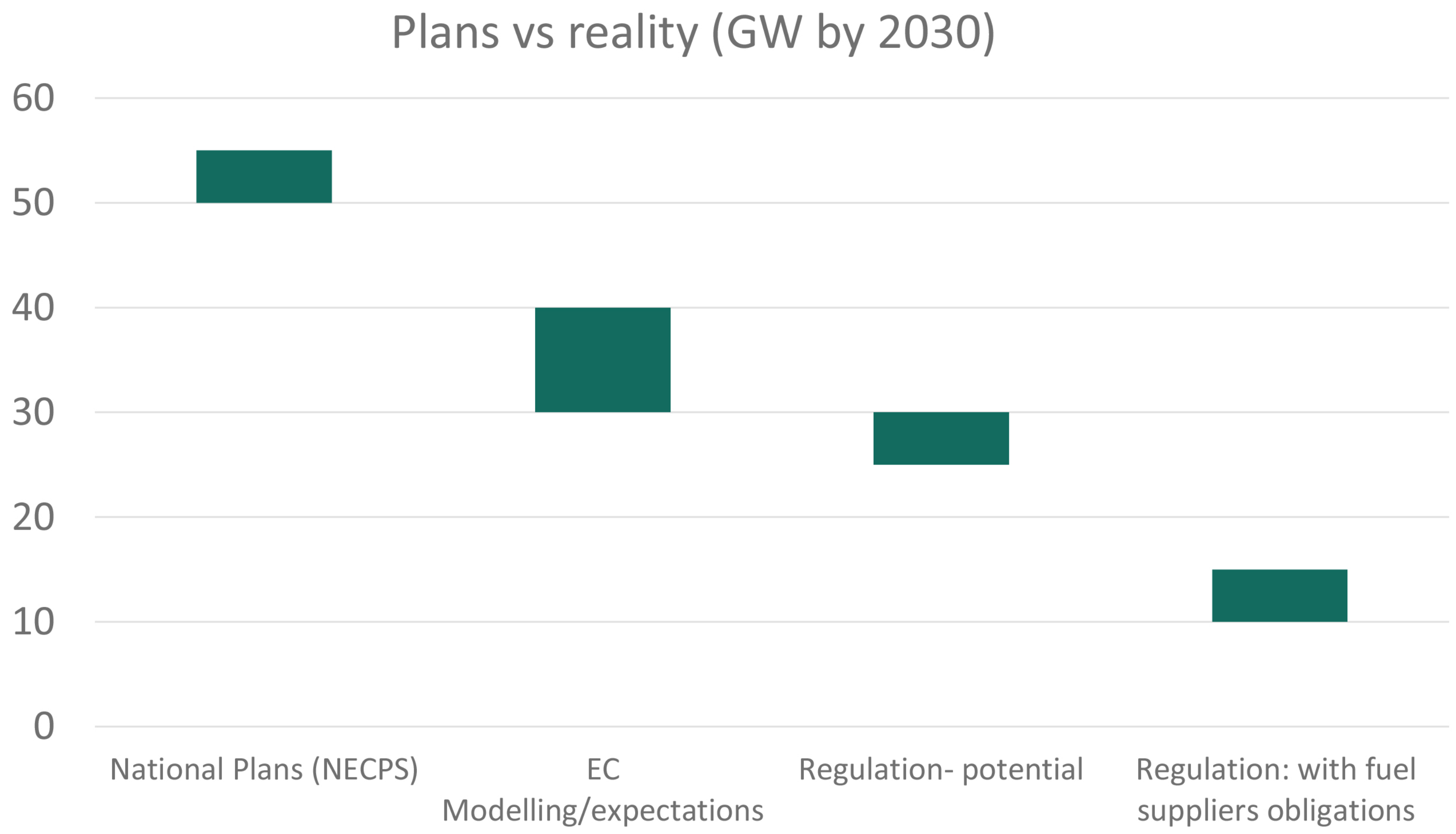
Hydrogen Europe

Estimated regulatory demand for RFNBO hydrogen in the EU by 2030 (Mt/year)



Notes: * Use of RFNBOs in refining and other transport estimated based on adopted or proposed REDIII transposition for countries that have done so and assuming 1% RFNBO share in road transport in countries that haven't.** ReFuelEU Aviation requires aviation fuel suppliers to supply at least 1.2% as synthetic aviation fuels, based on renewable and low carbon electrolytic hydrogen.*** The FuelEU Maritime 1% RFNBO share target is non-binding, however as REDIII required MS to take action to reach at least 1.2% share, it is assumed that the FuelEU Maritime objective will be reached.**** The 42% RFNBO share in industry covers both existing hydrogen use in industries such as ammonia or methanol, but also new emerging industrial application for hydrogen i.e., primary steel-making.

Even if smaller than anticipated, delivering 15GW for 2030 is a big challenge ahead



Having 10-15GW by 2030 implies:

a X10 increase rate on annual commissioning (From 200MW/y to around 2000MW/y)

European Industry Summit

Copyright France24

“Few years ago we started framing the hydrogen market. But what did we do?
We decided to fragment the market by design. We did a crazy thing!”

“We took a series of RED regulations and created something super complicated.
We need to simplify the hydrogen regulation.”

European Industry Summit

Copyright Die Welt

"We will reassess the whole EU regulation. It's a question of mindset. Not of details.
Stop bureaucracy, simplify!"

"We are fighting against a machinery which is working and working and working and producing producing new regulation.
I with my government and together with others, we are decided to change that."

Hydrogen Strategy 2.0 *A renewed Hydrogen Strategy based on resilience, competitiveness and diversification*

Hydrogen Europe

Pillars

1.
Consolidate **Demand** and develop lead markets

2.
Enable competitive clean H2 **Production**

3.
Enable competitive clean H2 **Infrastructure**

4.
Activate EU **Funding** and increase effectiveness

Policy landscape and opportunities

European Hydrogen Week 2026

Expo+Conference

26 - 30 October 2026
Brussels Expo, Belgium
euhydrogenweek.eu

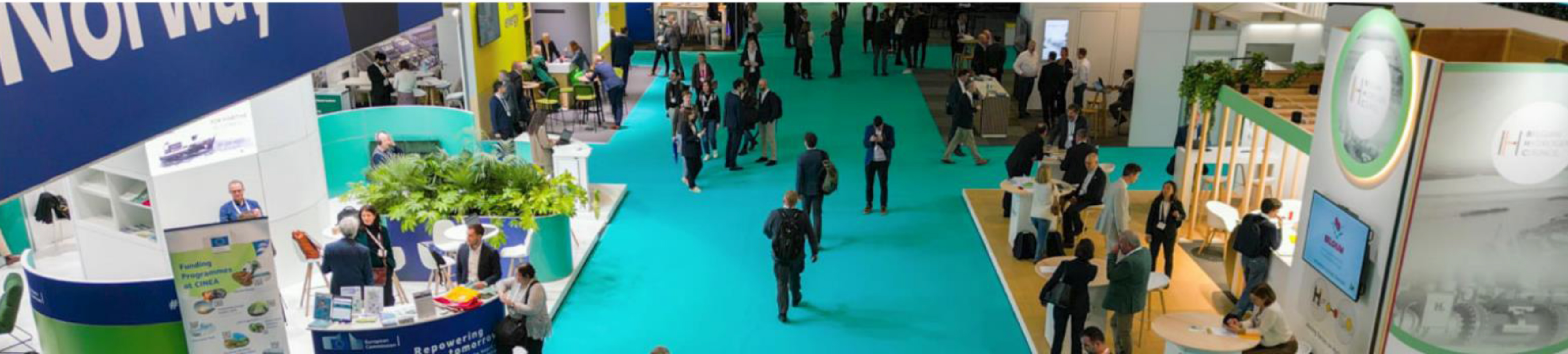
BOOK YOUR PRESENCE!

BE AN EXHIBITOR OR SPONSOR OF THE #EUH2WEEK

*Early bird rates apply until **1st August**.*
Hydrogen Europe members benefit from an additional discount.

Hydrogen Europe

Clean Hydrogen Partnership



Thank You

Avenue Marnix 23
1000, Brussels / Belgium

secretariat@hydrogeneurope.eu
hydrogeneurope.eu