ELECTROLYTIC HYDROGEN PROJECT DEVELOPMENTS

An overview as of Q3/2025

Hydrogen Europe

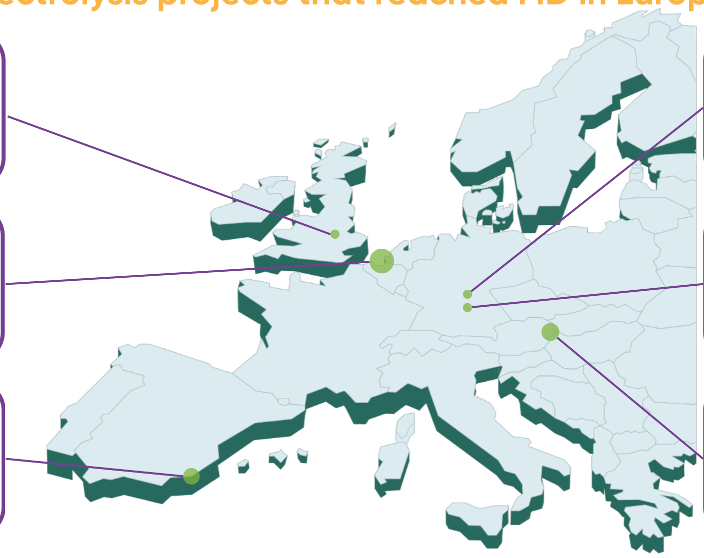
465 MW OF ELECTROLYTIC HYDROGEN PROJECTS REACHED FID IN Q3 2025, RAISING EUROPE'S TOTAL CAPACITY UNDER CONSTRUCTION TO 3.1 GW

Water electrolysis projects that reached FID in Europe in Q3 2025

HyMarnham* (JGP Group)
- 15 MWel
- COD 2025
- Industrial heat
- Support: HAR1

ELYgator (Air Liquide)
- 200 MWel
- COD 2027
- Refining & other industry
- Support: IF, IPCEI & OWE

Cartagena refinery (repsol)
- 100 MWel
- COD 2028
- Refining
- Support: IPCEI



H2-Dettelbach (Guttroff GRÜNER WASSERSTOFF)
- 5 MWel
- COD 2026
- Mobility
- Support: National (BayFELI)

Tyczka Schweinfurt (Tyczka)
- 5 MWel
- COD 2026
- Mobility
- Support: National

UpHy Large (OMV)
- 140 MWel
- COD 2027
- Refining
- Support: H2 Bank

Note: COD means commercial operational date, that refers to the start date announced by the developers.
*HyMarnham project earliest news of construction/FID are from July 2025, but FID likely took place before this date

Europe has 235 operational electrolytic projects accounting for 64 kt/y (582 MW)

Operational and under construction water electrolysis projects in Europe by end-use

Source: Hydrogen Europe Project Tracker (Oct 2025)

REFINERIES

Operation: 10% (60 MWel)
- UpHY OMV, 10 MWel
- MOL Szazhalombatta, 10 MWel
- REFHYNE, 20 MWel
- HySynergy, 20 MWel

Construction: 45% (1,404 MWel)
- GET H2 Nukleus, 300 MWel
- Holland Hydrogen, 200 MWel
- Normand'Hy, 200 MWel
- UpHy Large, 140 MWel
- Galp Sines, 100 MWel
- Lingen H2, 100 MWel
- REFHYNE 2, 100 MWel
- Repsol Cartagen, 100 MWel
- Petrobazi, 35+20 MWel
- Blue Med, 30+20 MWel
- Castellon Gh2, 25 MWel

STEEL

Operation 0%

Construction: 27% (850 MWel)
- Stegra, 740 MWel
- SALCOS Salzgitter, 100 MWel
- HyBit, 10 MWel

AMMONIA

Operation: 19% (108 MWel)
- Hy4Chem, 54 MWel
- SKREI/HEGRA, 24 MWel
- H2F, 20 MWel
- Reddap, 10 MWel

Construction: 1% (20 MWel)
- Neptun Glomfjord, 20 MWel

METHANOL

Construction 0%

Operation: 12% (71 MWel)
- European Energy – Kassø, 52 MWel
- George Olah, 6 MWel
- GreenHy Scale, 6 MWel
- Nature Energy Glansanger, 6 MWel

10% OF OPERATIONAL AND 45% of UNDER CONSTRUCTION CAPACITY ARE FOR REFINING. STEEL IS THE SECOND LARGEST INTENDED END-USE WITH 27% OF CONSTRUCTION PROJECTS.