

## Hydrogen 2030: Lead. Build. Deliver.

### Communiqué from Hydrogen Council Global CEO Summit 2025

More than 200 CEOs and Senior Executives from 100 member companies of the Hydrogen Council gathered in Seoul, South Korea, from 2-4 December 2025. Halfway through to 2030, they came together to take stock of global hydrogen progress and align on joint action to significantly accelerate hydrogen deployment within this decade.

Sending a strong, united message on behalf of the industry, global leaders:

1. **Reaffirm their steadfast commitment to clean hydrogen solutions** as an opportunity to simultaneously address global priorities spanning decarbonization, energy security, strategic resilience, and economic prosperity.
2. **Note a clear shift from ambition to delivery** as global capital commitments to clean hydrogen surpass \$110 billion across 510 projects past Final Investment Decision (FID), in construction or operation. This represents a \$35 billion increase compared to last year and a 10-times growth since 2020 – an impressive trajectory reminiscent of the early days of solar, wind and battery industries.\*
3. **Acknowledge the inevitable natural attrition** that accompanies the maturation process of the project pipeline, resulting in a more focused and ultimately healthy foundation for growth. In this context, they also recognize the importance of fact-based decision-making, sharing examples of progress as well as lessons learnt.
4. **Take note of global dynamics as China takes the lead** on total volume of investment (\$33 billion) and renewable hydrogen, followed by North America (\$23 billion) with a focus on low-carbon hydrogen, and Europe (\$19 billion) with the potential to become the world's number one demand center by 2030. Invited the global hydrogen sector to explore growth drivers and best practice in other quickly evolving markets such as Japan, Korea, India and the Gulf.

5. **Highlight a message of clarity, confidence and urgency** from global CEOs: 8 out of 10 expect the sector to continue to grow, and 7 out of 10 indicate their stable - or increased - investment appetite. However, all CEOs agree that further growth hinges on urgent and decisive government action.
6. **Recognize demand as the next big test** for the sector, noting that 8 mtpa of demand with policy-supported business cases can be unlocked by 2030 through full and timely implementation of enabling policies in key markets, e.g. energy and carbon regulation in Europe such as the Renewable Energy Directive III, tax credits in the US and “contracts for difference” schemes in Japan and Korea.
7. In addition, **call for urgent action on policy, standards and infrastructure**, highlighting the need for clear, stable and practical rules, a common language based on a robust set of internationally recognized standards, and swift infrastructure build-out as conditions for hydrogen scale-up at speed.
8. **Applaud focused market activation initiatives** that have mobilized Hydrogen Council members and partners – especially the Global Hydrogen Mobility Alliance (GHMA) and the Low Emissions Ammonia for Fertilizer (LEAF) Initiative – and invite further member-led efforts on other key issues (e.g. shipping, infrastructure).
9. **Appreciate the continued strong partnerships with key governments** – particularly those involved in the International Hydrogen Trade Forum – and highlight the need for strong public-private collaboration to lead through the next chapter, to build strong projects and deliver on hydrogen’s full potential for the energy transition.
10. **Reaffirm Hydrogen Council’s key role in leading the industry.** As the world’s largest and only CEO-led global business initiative on hydrogen, the Council is recognized as a knowledge partner and strategic advisor to governments uniquely capable of providing a comprehensive global perspective and a powerful global marketplace catalyzing some of the sector’s defining deals and partnerships.

\* Global Hydrogen Compass 2025: <https://compass.hydrogencouncil.com/>.